

Printed Documentation IC

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Getting Started

InventoryControl is easy-to-use software that allows you to quickly setup the system. We recommend that you read the Glossary topic before beginning so you are familiar with a few key terms that are used through the system and this help file. While setup is quick and easy, we have made it even faster by providing you the steps, in order, you should take to begin entering information into the software.

Please read the printed manual and view the video tutorials prior to beginning setup of your system. These materials provide valuable information to make the setup process smooth and simple.

Follow the steps below to begin populating your database. Click on the links below to go to that topic for detail information completing each step.

1. **Add Users** - When you first logon to InventoryControl, you will use Admin as the user name and leave the password blank. This default user profile gives you access to everything in the system. The first step you should take upon logging in is to create additional users (Administration > Security). You should enter all users who will be using the system and you can assign specific rights to each user that limit their activities to certain functions. You should also setup at least one additional admin user who has rights to all areas of the system.
2. **Enter Company Information** - Next you should enter your company's information (Administration > Company Info). On the Company Information screen you will enter your company's name and any addresses needed for receiving, shipping, corporate correspondence, etc. The company name you enter on this screen will appear on all reports and in the title bar of InventoryControl. In addition, if you have the Pro or Enterprise version of InventoryControl, the company name and addresses you enter will appear on Pick Orders and Purchase Orders created in the system.
3. **Define Sites and Define Locations** - Now you are ready to begin entering sites and locations into the database. Locations are the areas into which you will be assigning inventory, while Sites contain the various locations. In other words, a Site is a collection of Locations. We suggest creating one site for each building that contains inventory.

A location is typically shorthand for a physical place such as a shelf in your warehouse. Commonly used conventions include Location codes like this:

01 02 05 (for Row #, Shelf #, Bin #)

A distribution business, for example, typically places inventory at a specific location in one or more warehouses. InventoryControl requires that you define at least one Site containing at least one Location. If you have multiple warehouses, you can set each one up as a Site, then create multiple locations within each site to represent the specific areas where you will be storing inventory. For instance, you might setup a Site as Warehouse 1 containing Locations Shelf 1, Shelf 2 and Shelf 3.

A fleet business might define each vehicle as a Site with multiple Locations (bins, for example) within each vehicle. In this case you could setup a Site as Vehicle 1 with Locations of Bin1, Bin2 and Bin3. Or each vehicle could be a single Location operating out of one or more Sites. For example, the Site might be Docking 1 with locations of Vehicle 1, Vehicle 2, etc.

A retail business might have multiple Locations at one Site or multiple Locations within

each of several Sites. InventoryControl has the flexibility to be configured however it best suits your business needs. Remember that though you must have at least one site containing one location, you could have multiple sites that contain multiple locations.

There is no limit to the number of locations you can assign to a site.

It is important to note that you can have the same Location code defined at more than one Site - for instance, Warehouse 1 and Warehouse 2 may each have Location codes of Shelf 1 - so always pay attention to which Site you are working with when performing Inventory transactions.

Setting up your locations now will allow you to just pick a Location from a list when you begin adding inventory later. It is possible, however, to define Locations as you add inventory. If you would prefer to do this, skip to Step 5 - Defining Suppliers.

If you already have location information contained in another database, you may want to use InventoryControl's Import function rather than manually entering in this information.

For more information on importing locations, please refer to the topic **Importing Into the Database.**

4. **Creating Location Labels** - If you have defined more than one Location, at this point you can use the integrated Wasp Labeler to print barcode Location labels for each Location and affix them to each warehouse bin, fleet vehicle, etc.
5. **Defining Suppliers** - Suppliers are those businesses or individuals from which you will be obtaining your inventory. Your business might require that each Item in your inventory have an associated supplier. You can have one supplier or many providing you with inventory.

If you already have supplier information contained in another database, you may want to use InventoryControl's Import function rather than manually entering in this information.

For more information on importing locations, please refer to the topic **Importing Into the Database.**

6. **Printing the Supplier Report** - Now that you have entered all of your Suppliers, you might want to print and review the Supplier Report to make sure all the information was entered correctly.
7. **Defining Items** - All inventory is based on an Item that contains general information about the item, such as manufacturer, suppliers, a description and unit of measure information. Items are created by you and represent the actual material or good that you will have in your inventory. The item is not part of your inventory until you add quantity to it and specify a location for it. For example, you might create an Item entry for Mouse - Wireless. Then you can add inventory, or quantity, to that item at a specific location.

On the Create New Item screen, you can assign the item to multiple locations and even designate one location as the primary location for this item. The primary location will pre-populate the screen when removing, adding, receiving (Pro and Enterprise Version Only) and picking (Pro and Enterprise Version Only) this item.

If you are using the Enterprise or Professional version of InventoryControl, you can also create items that are non-inventory. This is useful if you need to create an item for marketing pamphlets, counter displays or anything you need to have on-hand but don't necessarily want to include in your inventory amounts. In addition, you can create Kit or Assembly Items. Please refer to the topics **Assembly Overview** and **Kitting Overview** for more information.

If you already have item information contained in another database, you may want to use InventoryControl's Import function rather than manually entering in this information. For more information on importing locations, please refer to the topic **Importing Into the Database**.

8. **Creating Item Labels** - You can use the integrated Wasp Labeler to print your Item labels. Labels can be printed directly from InventoryControl, or you can access Wasp Labeler to edit or create new labels.

9. **Adding Inventory** - Now that your items have been created, you are ready to add inventory, or quantity to those items. Adding inventory is often referred to as receiving inventory. You can think of this step as stocking the InventoryControl program with the inventory that is in your warehouse.

When you are adding inventory, you will complete fields specific to your inventory such as Location, Quantity, and Cost. Each time you add inventory for an Item, the transaction is stored separately in InventoryControl allowing for multiple Locations and cost averaging.

If you already have inventory information contained in another database, you may want to use InventoryControl's Import function rather than manually entering in this information.

For more information on importing locations, please refer to the topic **Importing Into the Database**.

Congratulations! You are now on your way to populating your inventory database. To add more Items to your database, just return to Step 4 to setup your new Item, then Add your inventory for that Item.

10. **Printing the Inventory Location Report** - Printing the Inventory Location Report will allow you to check that your inventory has been entered correctly.
11. After you have added your inventory you are ready to begin using InventoryControl. Now you can setup your mobile devices, if needed, and begin keeping track of your inventory.

Glossary

Adjust - This term refers to adjusting the quantity of inventory at a specified location. **Adjust** is like a "mini" Audit and will update the quantity using FIFO (First In First Out) to make the total equal to the quantity you enter here. The **Adjust** function is useful if too much or too little quantity is accidentally entered for an item (on a mobile device, for example), inventory is lost, found, broken, etc. and you need to quickly correct the quantity for that item. Adjusting is different from an Audit in that the Audit function makes other functions of the software, such as adding inventory, unavailable to ensure inventory is not added or removed while you are doing the counts. All features are still available when adjusting inventory.

Archive - The **Archive Transaction** feature allows you to archive inactive transactions prior to a specified date. Archiving old information keeps your database running quickly and efficiently.

Assembly Item - (Pro and Enterprise versions only.) Assembly items are created when you combine two or more existing items to create a new item. You will use the Assembly item type when you want to "build" several of the new items to have on hand in your inventory.

Audit - Auditing your inventory means you are counting the inventory you actually have on hand and comparing that number with what is listed in the software. This allows you to ensure you have actual counts in the system. **Audit Mode** allows you to check the counts of all your inventory while disabling the Add, Remove, Move, Adjust, Check-In and Check-Out features to make sure inventory counts in the system do not change while you are performing the audit. If you are using mobile devices, you can use them simultaneously with the PC to perform an audit by downloading the database in audit mode to each device. **Audit Mode** features a simple **Audit** screen that allows you to enter your counts for inventory in each location and compares these to the counts already in the system. You can then view the **Complete Audit** screen to review any discrepancies between your counts and what was in the system. At the click of a button you can reconcile the counts or you can select certain transactions to accept or reject. This software also comes equipped with several **Audit Reports** that allow you to review a variety of information at-a-glance.

Build Assembly - (Pro and Enterprise versions only.) The function that allows you to build your assembly item. **Building** Assembly Items can be thought of as the "manufacturing" portion of the Assembly Item feature. When you **Build** an Assembly Item, the on hand amounts for the sub-items are reduced by the number needed to make the Assembly Item, and the on hand amount for the Assembly Item is increased. **Assembling/Building** Assembly Items increases inventory for the Assembly Item in the same way that Adding increases inventory for other item types.

Check-In - Check-in inventory means you are returning inventory that has been "checked-out", or assigned, to customer back into your on-hand inventory.

Check-Out - InventoryControl gives you the ability to check-out, or assign, inventory to a customer for a specified (or open-ended) amount of time. This removes the inventory from your on-hand amounts until it is checked back in. Items that are checked-out cannot be permanently removed from your inventory until they are checked back in.

Disassemble - (Pro and Enterprise versions only.) The process of **Disassembling Assembly Items** will reduce your inventory for the Assembly Item and increase your inventory of the associated sub-items. You will be **Removing** inventory for the Assembly Item and **Adding** inventory to the sub-items, unless the sub-item has been marked to be *scrapped*.

FIFO - An abbreviation for first-in, first-out, FIFO is a method employed in accounting for the identification and valuation of the inventory of a business. This is the inventory method the system uses when adjusting or removing inventory. FIFO assumes that the first goods added are the first removed.

Inventory - Inventory is the amount or quantity you have of a particular item.

Item - Items represent the actual material or good that you will have in your inventory. For example, you might create an Item entry for Mouse - Wireless. Then you can add inventory, or quantity, to that item. If you are using the Enterprise or Professional version of this software, you can also create items that are non-inventory. This is useful if you need to create an item for marketing pamphlets, counter displays or anything you need to have, but for which you don't need to track quantity.

Kit Item - (Pro and Enterprise versions only.) **Kit items** are a group of items that are sold together, but are still considered separate inventory items. As opposed to Assembly Items, you cannot add inventory, move or check out/in **Kit Items**. While Assembly Items can be created in advance (pre-assembled) and kept in inventory, **Kit Items** are created at pick or sale time.

Location - Locations are contained with a Site and represent the place where inventory is kept. A location is typically shorthand for a physical place such as a shelf in your warehouse. Commonly used conventions include Location codes like this:

01 02 05 (for Row #, Shelf #, Bin #)

Another example would be to create Site labeled Warehouse 1 containing a Locations labeled Bin1 and Bin 2.

Move - The Move function allows you to move inventory from one location to another.

Order Unit - This is the supplier's unit of measure used when ordering an item. This may be box, pallet, etc. This is different from the "Eaches" stocking unit. For example, "jar" may be the stocking unit, but the supplier may ship the item in boxes containing 10 jars.

Site - The Site is a broad term containing one or more Locations. Inventory is assigned to the locations within the site. For example, you might create a Site labeled Warehouse 1 containing a Locations labeled Bin 1 and Bin 2.

Stocking Unit - This is the portion by which an item's quantity will be tracked. This unit represents "Eaches", meaning how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle, box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.) You can designate a different stocking unit for each item in your system, if desired.

Track By - This software allows you to track your inventory by several fields, if desired. Track By options are: Serial Numbers, Lot, Date Code and/or Pallet. Tracking allows you to follow the movements of inventory from receiving, adjusting, moving, checking out, etc.

It is important that you determine how you want to track each Item. Typically, small Items that are all the same may not need to have any Tracked Bys selected. Items such as printers may need to be tracked by Serial Number, so returns and maintenance can be properly tracked. Medical supplies or food may need to be tracked by Date Code and/or Lot.

Transaction Code (TransCode) - Transaction Codes can be any code your business assigns to certain types of Adjustment transactions. Assigning these codes can help you with reporting as each type of adjustment (breakage, return, etc.) can be given it's own code. This software does not contain any preset codes to give you the opportunity to assign a code that best suits your needs, and to allow the entry of codes you already use in your business for these types of transactions. Transaction codes are entered on the **Adjust** screen.

System Administrator Information

Knowledge Base Available to Provide Answers and Solutions

The **Wasp Bar Code Knowledge Base** is available to help you troubleshoot database issues. To access the Knowledge Base, go to www.waspbarcode.com/support, then select **Knowledge Base**.

Video Tutorials and Printed Manual

The video tutorials can be found in the How to Videos folder and a PDF version of the printed manual can be found in the Quick Start Guides folder on your installation CD.

Changing the System Administrator Password Can Affect Repair Installs

The System Administrator database password must be blank. If you change the System Administrator database password, you will not be able to replace database files.

PC Operation

User Log On

The **Log On** screen appears when InventoryControl is first started and when you select **File > Log Out**.



Complete both fields, then click **OK** to logon to the system.

The **User Name** field is not case sensitive.

The **Password** field is case sensitive. Asterisks will be displayed as you type the **Password**.

The first time you open InventoryControl you can enter the following information:

User Name: Admin

Password: (blank)

After log on, the password can be changed via **File > Change Password**.

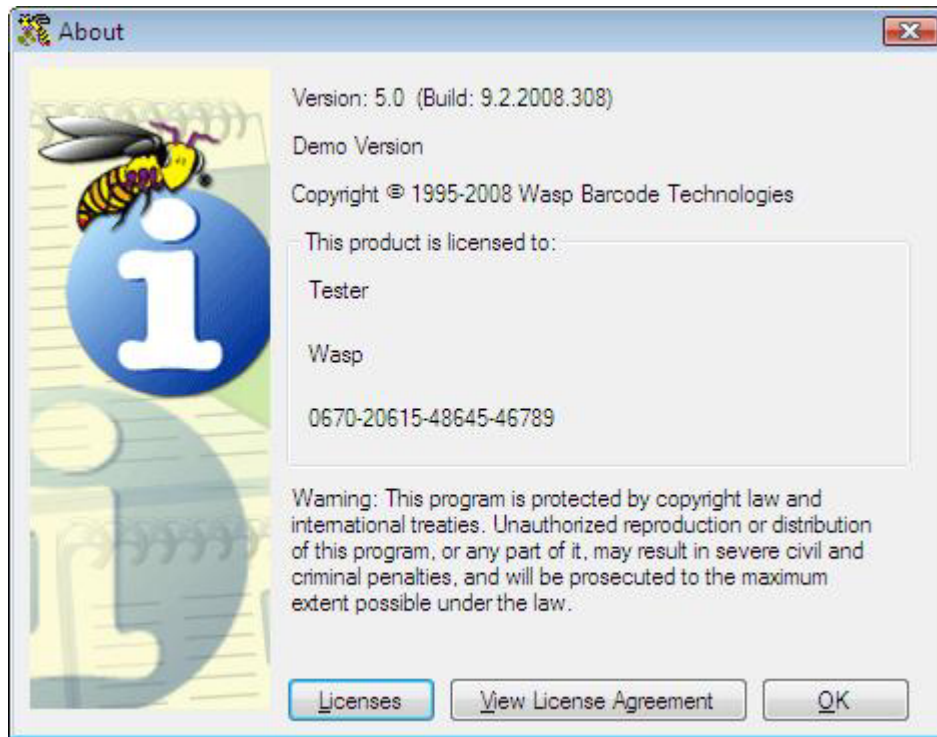
The Admin account, or any other account with Administration Privilege, can use the **Security Privileges** screen to add Users and set their privileges and reset their passwords. For more information on adding users, please refer to the **Adding Users/Editing Security Privileges** topic.

About the About Screen

The **About Screen** allows you to view and manage licenses and provides program version details

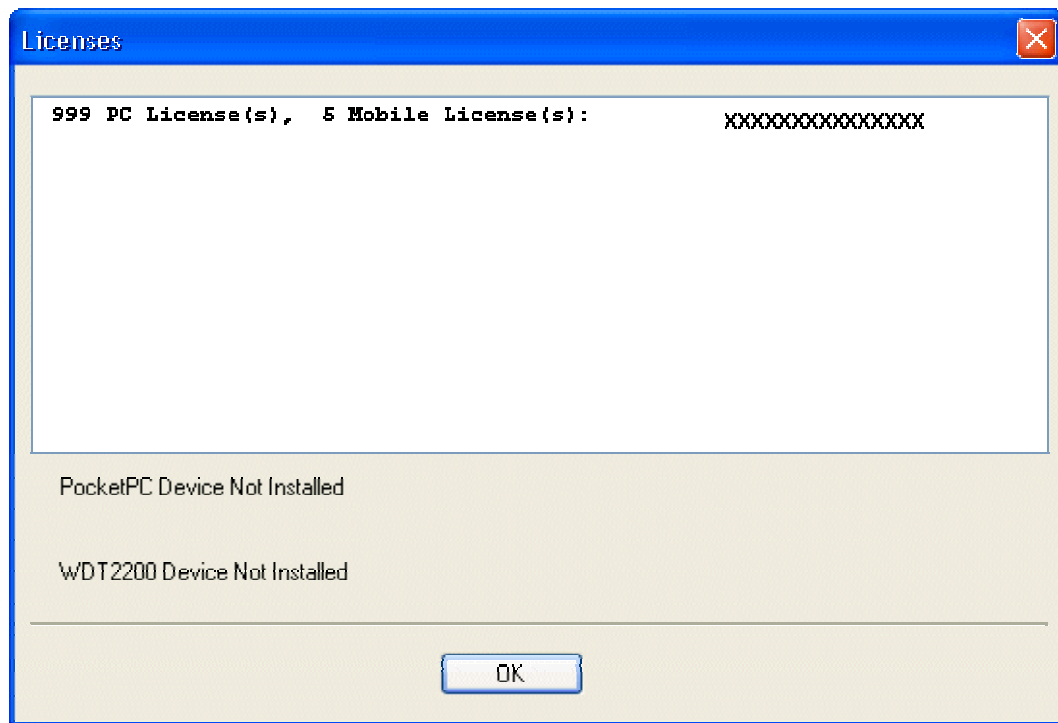
Using/Viewing the About Screen:

1. From the **Main Window**, click **Help > About**. The **About** screen appears.



This screen displays your version and basic license information.

2. Click the **Licenses** button to view additional licenses and your mobile device licenses. On the next page is an example of the **Licenses** screen:



3. Click **OK** to return to the **About** screen.
 4. Click **OK** to close the **About** screen.
-

Main Window

The **Main Window** is divided into four sections:

Section A: Toolbar

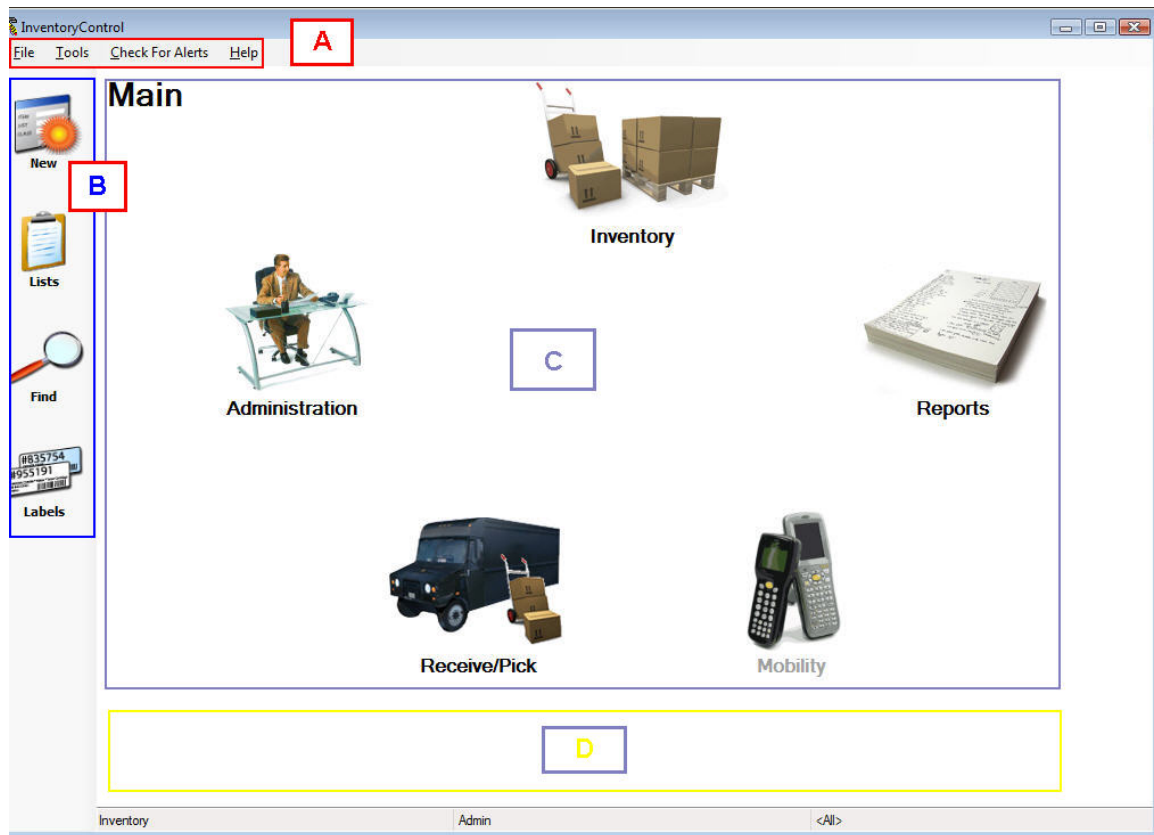
Section B: Left-Hand Navigation

Section C: Main Functions

Section D: Context-Sensitive Menu

Below is an example of the **Main Window**:

Note: *The Receive/Pick icon only appears on Pro and Enterprise Versions.*



Section A: Toolbar

The toolbar provides access to the following functions:

File Menu:

- **Change Password** - Allows the user currently logged in to change his/her password.
- **Log Off** - Logs the current user off of the system.
- **Exit** - Exits the system.

Tools Menu:

- **Options** - Accesses the Options screen where you can customize how certain aspects of the software behave.
- **Select Site** - Accesses the Select Site screen. InventoryControl allows you to work with more than one Site and multiple Locations within each Site.
- **Archive Transactions** - Allows you to store older data in an archive.
- **Reset All Field Names** - This option resets any field names you have customized through the Edit Field Names function.
- **Reset All Grid Settings** - This option resets all settings (sorting, grouping, hidden columns) you may have made to your list screens to their default settings.

Check For Alerts:

When selected an **Alerts drop down list** will appear displaying any alerts, such as overdue items.

Help Menu:

- **Contents/Index/Search** - Accesses this help file.
- **Update Licenses** - Allows you to update your existing license(s).
- **Check for Updates** - When this option is selected, the system will search for updates to the software and alert you if any exist. You can then download the updates at your convenience. the software automatically searches for updates at start up. This option allows you to manually search for updates at other times. Checking for Updates requires internet access.

Section B: Left-Hand Navigation

This software contains a menu on the left side of the **Main Window** that provides access to the following features:

- **New** - Displays a menu of all **Create New** screens (Customer, Locations, Items, etc.). Select which type of data you want to create from the menu.
 - **Lists** - Displays a menu of all **Lists** in the system. Select which List you want to view from the menu. For detailed information on using the list screens, please refer to the topic **Working with Lists**.
 - **Find** - Displays a menu of data options from which to search (Customer, Locations, etc.) Select which type of data you want to search. A **Find** screen appears allowing you to quickly search for information.
 - **Labels** - Displays a menu of labels you can print. Printing Labels utilizes the Labeler software that come bundled with your program. For detailed instructions on using the Labeler software, please refer to the Labeler help file (accessible through the Labeler software).
-

Section C: Main Functions

This section displays the primary functions of this software. To access any of these functions:

1. Click on an icon. A menu of options for that function appears at the bottom of the screen (section D - described below).
2. Click on an icon in the menu to access that function.

Available menu options are:

Administration - This option provides access to basic administrative functions such as adding users to the system, maintaining user security profiles, backing up and/or restoring the database, importing/exporting information and maintaining your company information.

Inventory - This option provides access to the inventory features of the software. From this menu you can add or remove inventory, move inventory from one location to another, adjust inventory amounts and audit all inventory in your system.

Reports - This option opens the Reports window allowing you to select from a wide range of available reports.

Mobility - This option provides access to your mobile device options.

Pick/Receive (Pro and Enterprise Versions Only) - This options provides access to the pick/receive features of the software.

Section D: Context-Sensitive Menus

The bottom of the **Main Window** will display a menu based on the selection you make from the **Main Functions** icons.

Examples:

Administration Menu



Inventory Menu



Receive/Pick Menu



Mobility Menu

This example is of the WDT2200 menu. The icons in this menu will look different if you are using a Windows Mobile®/CE™ mobile device, but the options will be the same.



Reports Menu

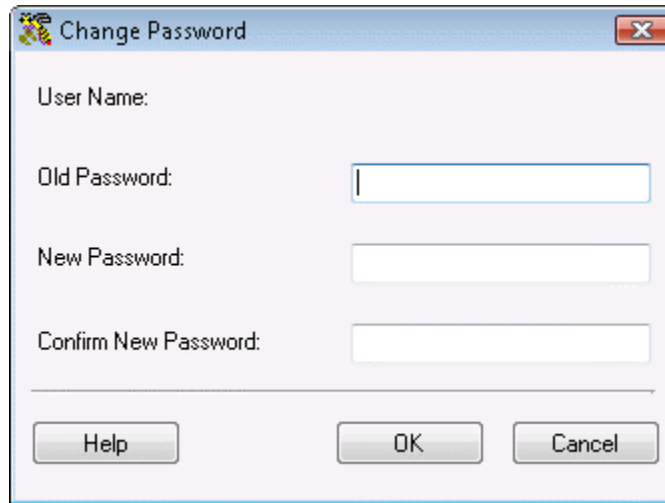
This icon opens the **Select Report** screen. For more information on the **Select Report** screen, please refer to the topic [Selecting Reports](#).

Changing Your Password

This feature allows the user currently logged in to change his or her password.

Changing Your Password:

1. From the Main Window, click **File > Change Password**. The **Change Password** screen appears.

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with a standard Windows icon and a close button. Inside, there are four labels with corresponding input fields: 'User Name:' (no input field visible), 'Old Password:' (with a text box), 'New Password:' (with a text box), and 'Confirm New Password:' (with a text box). At the bottom, there are three buttons: 'Help', 'OK', and 'Cancel'.

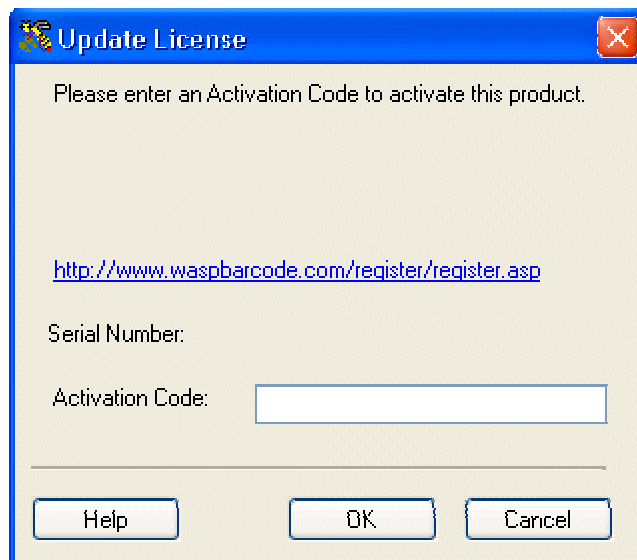
2. Enter your old password, your new password, then confirm your new password. As passwords are typed, asterisks will be displayed. Passwords are case sensitive.
 3. Click **OK** to save your changes.
-

Update License Screen

The **Update License** screen allows you to enter a regular License Key to upgrade from the Demo version, or an Update License Key to increase the number of Mobile Devices InventoryControl will support. You can also view the install serial number and activation code information.

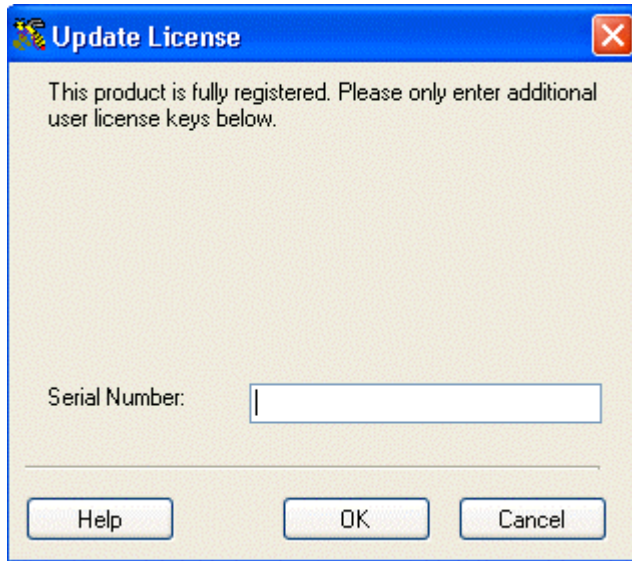
Updating License(s):

1. From the **Main Window**, click **Help > Update License**. The **Update License** screen appears.
2. If the program has not yet been activated, you will be prompted to enter an Activation Code now.



Click on the registration link that appears above the serial number and then complete the information on the Wasp support page. An email will be sent back to you that contains the Activation Code. Type this code back into the **Activation Code** field, then click **OK** to activate the program.

If the program has been activated, the following screen appears:



3. Enter a new Serial Number to add additional features such as additional mobile device licenses.
4. Click **OK** or click **Cancel** to exit without updating. Exit and restart the software to use the new key.

If you use this form to upgrade from the Demo version to a Licensed version of this software, the License Key you enter here will be displayed on the **About** screen.

If you use this form to increase the number of Mobile Devices InventoryControl will support, your original License Key will continue to be displayed in Help About, but it will display the new number of mobile devices permitted.

Selecting Sites

InventoryControl allows you to work with more than one **Site** and multiple **Locations** within each **Site**. At any time, you can limit all your transactions to a specified **Source**, a specified **Destination**, or allow transactions at **All Sites**. These are chosen on the **Select Site** screen.

Keep in mind that you can only select sites to which you have been given access in **Security**.

Selecting a **Source** on the **Select Site** screen determines the locations available in the **Location** field of the **Add**, **Remove**, **Check-In**, **Check-Out**, **Adjust** and **Audit** functions. It will also determine the locations available in the **From Location** field of the **Move** function. Only locations within the **Site** selected in the **Source** field will be available for these functions.

Destination determines the locations available in the **Move** function's **To Location** field.

Remember, you are selecting **Sites** on this screen. When you select a site, you are limiting the inventory functions to locations within that site.

For information on adding new sites, please refer to the **Creating a New Site** topic. For information on adding new locations, please refer to the **Creating New Locations** topic.

A Note on Importing: The site specified in the **Destination** field of the **Select Site** screen can impact the **Locations** into which imported inventory will be recorded. When something other than **<all>** is specified as your **Source** site, imported inventory will be put into **Locations** at the specified **Source**. If you have varying site information you wish to import along with the location and quantity data for each Item Number, you must make sure the **Source** is set to **<all>** before importing data into the Inventory table.

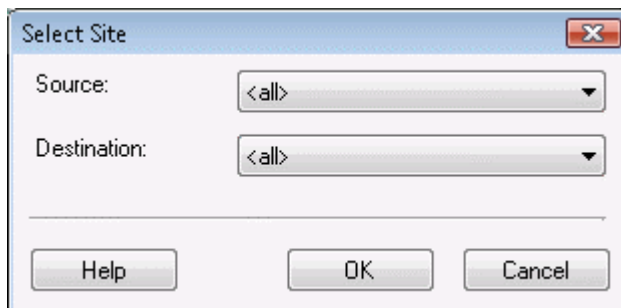
This topic discusses:

Selecting Sites

Source and Destination Examples

Selecting Sites:

1. From the **Main Window**, select **Tools > Select Site**. The **Select Site** screen appears:



By default, all locations are allowed in all functions. This is designated by choosing **<all>**

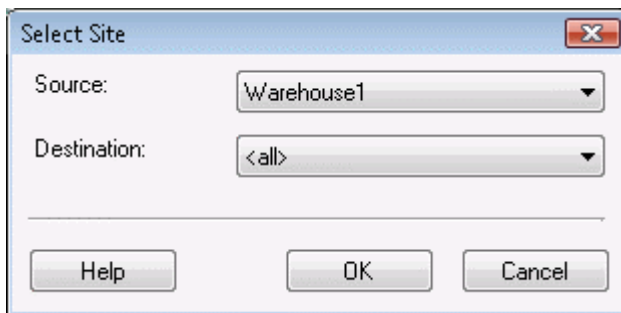
in both the **Source** and **Destination** fields, as shown above.

2. Select the **Source** and **Destination Site** to which you want to limit transactions. All locations you have entered in the system will appear in the drop down lists.
3. Select **OK** to save your changes.

Source and Destination Examples:

Example 1:

If you want to limit the available locations for adding, removing, checking in/out, adjust and auditing inventory to one location (in this example, Warehouse1), you would select that location in the Source field as shown below:

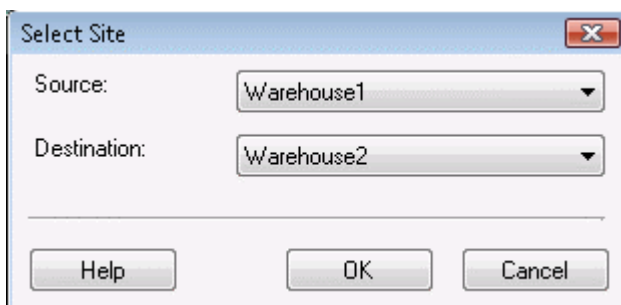


The screenshot shows a dialog box titled "Select Site". It has two dropdown menus: "Source:" and "Destination:". The "Source:" dropdown is set to "Warehouse1" and the "Destination:" dropdown is set to "<all>". At the bottom of the dialog box, there are three buttons: "Help", "OK", and "Cancel".

In the above example, inventory can be moved from a location within Warehouse 1 to any other location at another site..

Example 2:

If you want to limit the available locations for adding, removing, checking in/out, adjust and auditing inventory to one location (in this example, Warehouse1), and you want to limit move destinations to one site (in this example, Warehouse2), you would select Warehouse1 in the **Source** field and Warehouse2 in the **Destination** field as shown below:

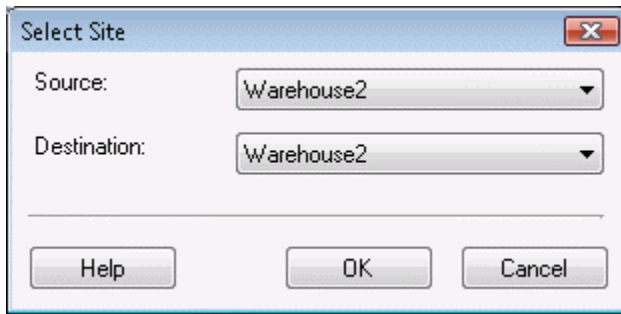


The screenshot shows a dialog box titled "Select Site". It has two dropdown menus: "Source:" and "Destination:". The "Source:" dropdown is set to "Warehouse1" and the "Destination:" dropdown is set to "Warehouse2". At the bottom of the dialog box, there are three buttons: "Help", "OK", and "Cancel".

Example 3:

If you want to limit the available locations for adding, removing, checking in/out, adjust and auditing inventory to one location (in this example, Warehouse2), and you want to limit move

destinations to locations in the same site, you would select Warehouse2 in the **Source** field and Warehouse2 in the **Destination** field as shown below:



The image shows a Windows-style dialog box titled "Select Site". It contains two dropdown menus. The first is labeled "Source:" and the second is labeled "Destination:". Both dropdown menus have "Warehouse2" selected and a small downward arrow on the right side. Below the dropdowns are three buttons: "Help", "OK", and "Cancel". The dialog box has a standard Windows title bar with a close button (X) in the top right corner.

Logging Out

Logging Out allows the current user to log out of the system so another user can login, if needed.

1. From the **Main Window**, click **File > Log Out**. The **Log On** screen appears allowing another user to log in.



2. Enter a valid **User Name** and **Password** and press **OK** to log on again or click **Cancel** to exit.

Note: You can also login as a different user by going to **Administration > Security > Login as Different User**.

Checking for Software Updates

By default, the software will check for updates to the application and notify you if a more recent version is available when you login to the system. You can then access the **Updates** website and download the latest version. This ensures you are always working with the most up-to-date version available to you. **This feature is turned on by default.**

InventoryControl must be installed on a machine with Internet access to check for updates.

You can turn off the automatic check and perform periodic manual checks, or leave the option on and perform a manual check, if desired.

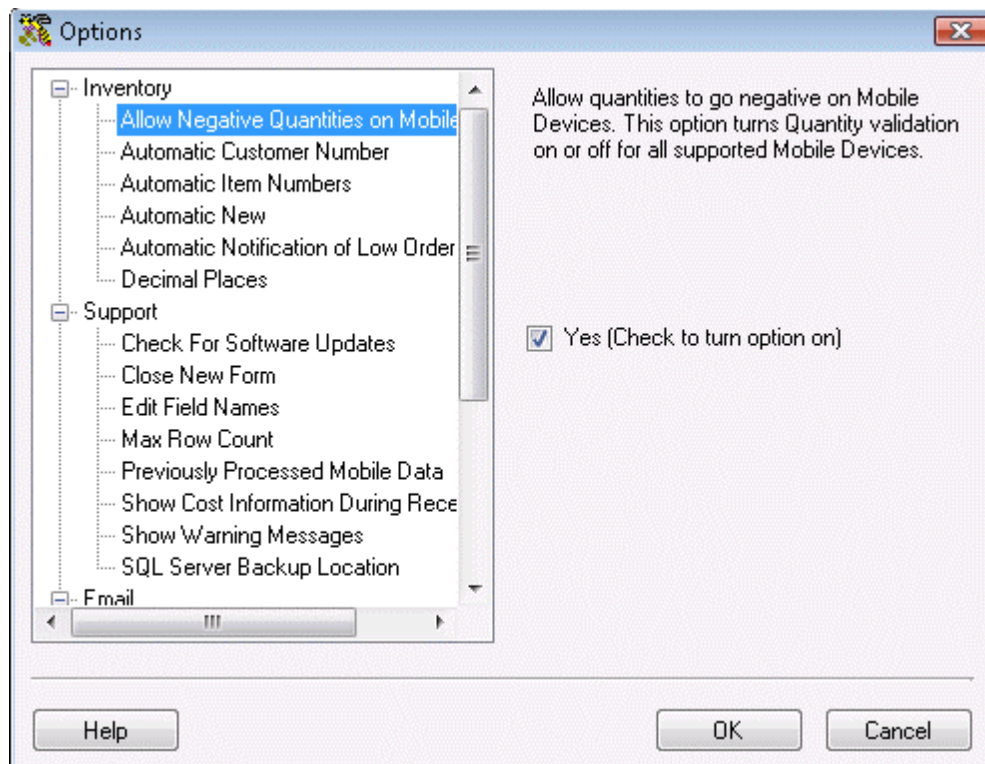
This topic discusses:

Disabling the Automatic Version Check Feature

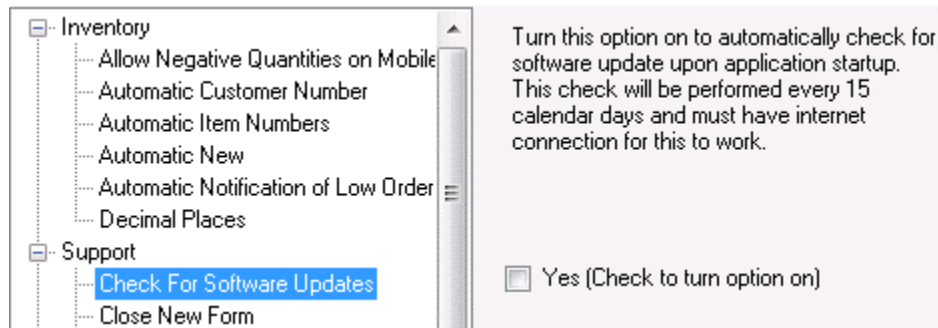
Performing a Manual Check

Disabling the Automatic Version Check Feature:

1. From the **Main Window**, select **Tools > Options**. The **Options** screen appears:



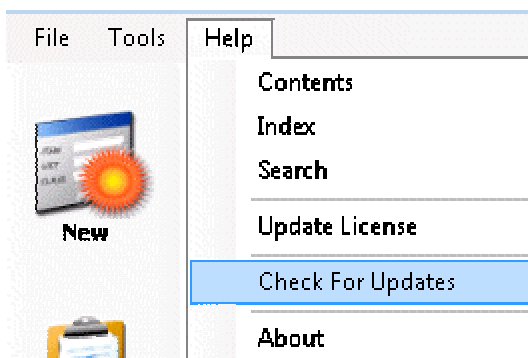
2. Highlight the **Check for Software Updates** option and deselect the **Yes** checkbox.



3. Click **OK** to save your changes and to **Close** the **Options** screen. The option is now disabled. You can manually check for updates as needed.

Performing a Manual Check:

From the **Main Window**, click **Help > Check for Updates**.



The system will automatically check for a newer version and notify you if one is available. This procedure can be performed at any time.

Item Stock Level List Screen

The software can automatically notify you of under-stocked items, broken down by location. By enabling the **Automatic Notification of Low Order Item** on the **Options** screen, the software will display the **Item Stock Level List** when you first start up the system. This screen contains items that have a **Quantity** value equal to or less than the **Reorder Quantity** value set for that item and location on the **Location** tab of the **Create New** or **Edit Item** screen. For more information on enabling and disabling this options, please refer to the **Options Screen** topic.

In order for items to appear on this screen, a **Reorder Quantity** must be entered on the **Location** tab of the **Create New Item** screen or, after the item is created, on the **Edit Item** screen.

Below is an example of the Item Stock Level List:

Item Number	Location	Quantity	Min. Stock Level	Max. Stock Level	Reorder Level	Description
1 No Trackby	Site 1, LOC4	0.0000	10.0000	50.0000	10.0000	1 No Trackby
1 No Trackby	Site 1, LOC5	0.0000	10.0000	50.0000	10.0000	1 No Trackby
1 No Trackby	Site 2, Loc 1	0.0000	10.0000	50.0000	10.0000	1 No Trackby
2 No Trackby/Req	Site 1, Loc 1	7.0000	10.0000	50.0000	10.0000	2 No Trackby/Req
2 No Trackby/Req	Site 1, LOC4	0.0000	10.0000	50.0000	10.0000	2 No Trackby/Req
2 No Trackby/Req	Site 1, LOC5	0.0000	10.0000	50.0000	10.0000	2 No Trackby/Req
2 No Trackby/Req	Site 2, Loc 1	0.0000	10.0000	50.0000	10.0000	2 No Trackby/Req
3 All/All	Site 1, Loc 1	1.0000	10.0000	50.0000	10.0000	3 All/All
3 All/All	Site 1, LOC4	0.0000	10.0000	50.0000	10.0000	3 All/All
3 All/All	Site 1, LOC5	0.0000	10.0000	50.0000	10.0000	3 All/All
3 All/All	Site 2, Loc 1	0.0000	10.0000	50.0000	10.0000	3 All/All
4 Serial	Site 1, Loc 1	-2.0000	10.0000	50.0000	10.0000	4 Trackby Serial

Click the **View Report** button at the bottom of the screen to display the **Reorder Report**.

Report Viewer

1 /3

BusinessObjects

Main Report

1 No Trackby
2 No Trackby/Req
3 All/All
4 Serial
5 Lot
6 DateCode
7 DateCode
8 No Track All
9 Pallet

Item Reorder by Location Report

Item Number:	1 No Trackby				
Description:	1 No Trackby				
Site Location		Total Available	Min Stock Level	Max Stock Level	Reorder Qty
Site 1: LOC4		0.00	10.00	50.00	10.00
Site 1: LOC5		0.00	10.00	50.00	10.00
Site 2: Loc 1		0.00	10.00	50.00	10.00
Total:		0.00			30.00

Item Number:	2 No Trackby/Req				
Description:	2 No Trackby/Req				
Site Location		Total Available	Min Stock Level	Max Stock Level	Reorder Qty
Site 1: Loc 1		7.00	10.00	50.00	10.00
Site 1: LOC4		0.00	10.00	50.00	10.00
Site 1: LOC5		0.00	10.00	50.00	10.00
Site 2: Loc 1		0.00	10.00	50.00	10.00
Total:		7.00			40.00

Item Number:	3 All/All				
Description:	3 All/All				
Site Location		Total Available	Min Stock Level	Max Stock Level	Reorder Qty
Site 1: Loc 1		1.00	10.00	50.00	10.00
Site 1: LOC4		0.00	10.00	50.00	10.00
Site 1: LOC5		0.00	10.00	50.00	10.00
Site 2: Loc 1		0.00	10.00	50.00	10.00
Total:		1.00			40.00

Item Number:	4 Serial				
Description:	4 Trackby Serial				
Site Location		Total Available	Min Stock Level	Max Stock Level	Reorder Qty
Site 1: Loc 1		-2.00	10.00	50.00	10.00
Site 1: LOC4		1.00	10.00	50.00	10.00
Site 1: LOC5		0.00	10.00	50.00	10.00
Site 2: Loc 1		0.00	10.00	50.00	10.00
Total:		-1.00			40.00

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Current Page No.: 1 Total Page No.: 3 Zoom Factor: 75%

You can use this report to aid you in creating purchase orders for the under-stocked items.

Searching for Information

Searching for Information

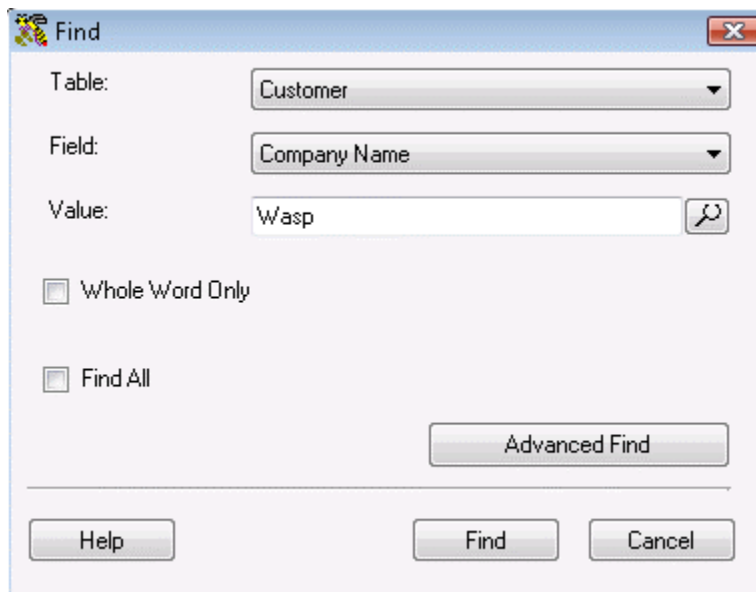
The **Find** screen allows you to easily search for information within the Inventory Control database. You can limit your search to a specific *table* in the database, field or even a value within a field on the **Find** screen.

Searching for Information:

1. From the **Main Window**, select the **Find** icon. A menu of tables from which to search appears.
2. Select what you want to search for by clicking on an option in the **Find** menu. In this example we are going to search for **Customers**.

You can also access this screen by clicking the **Filter** button at the top of the **List** screens.

Note: If the table you select (**Customers**, **Manufacturers**, **Items**, etc.) contains over 1000 pieces of data, you will automatically be taken to the Advanced Find screen. For further information on the **Advanced Find** screen, please refer to the [Advanced Find](#) topic.



The screenshot shows a 'Find' dialog box with the following fields and controls:

- Table:** A dropdown menu currently showing 'Customer'.
- Field:** A dropdown menu currently showing 'Company Name'.
- Value:** A text input field containing 'Wasp'.
- ☐ Whole Word Only
- ☐ Find All
- Advanced Find** button
- Help**, **Find**, and **Cancel** buttons at the bottom.

3. The **Find** screen contains three fields:
 - **Table** is used to select the table you want to search.
 - **Field** is used to select the field in the listed table to be searched.
 - **Value** is the information for which you are searching.

Selecting the **Whole Word Only** checkbox will search the selected table based upon the your entire entry in the **Value** field. Partial matches will be excluded from the search results.

Selecting the **Find All** checkbox disables the **Field** and **Value** fields. The search results will display all of the records from the table selected in Search.

You can click the **Advanced** button to go to the **Advanced Find** screen which provides you with more search options.

4. Click the **Find** button to start the search. When the search is complete, a list will appear displaying all the records that match your criteria.



All searches are case insensitive.



Your most recent **Find** criteria are saved and will automatically be loaded the next time you access the **Find** screen.

Examples:

For these examples, assume that the Customer table is made up of three records containing one field, called FirstName. The values in this field are Fred, Frederick, and Sam.

Example	Table	Field	Value	Whole Word Only Option	Find All Option	Search Result
1	Customer	FirstName	Fred	Off	Off	2 records: Fred; Frederick
2	Customer	FirstName	Fred	On	Off	1 record: Fred
3	Customer	FirstName	Mike	Off	On	3 records: Fred; Frederick; Sam

Advanced Find

The **Advanced Find** screen allows you to search a table in the database using multiple values and logical expressions. This screen is useful when the table you are searching contains a lot of data by allowing you to enter several parameters by which to filter your search.

When you use this screen, you will construct a filter, which limits the information you are searching for to certain parameters.

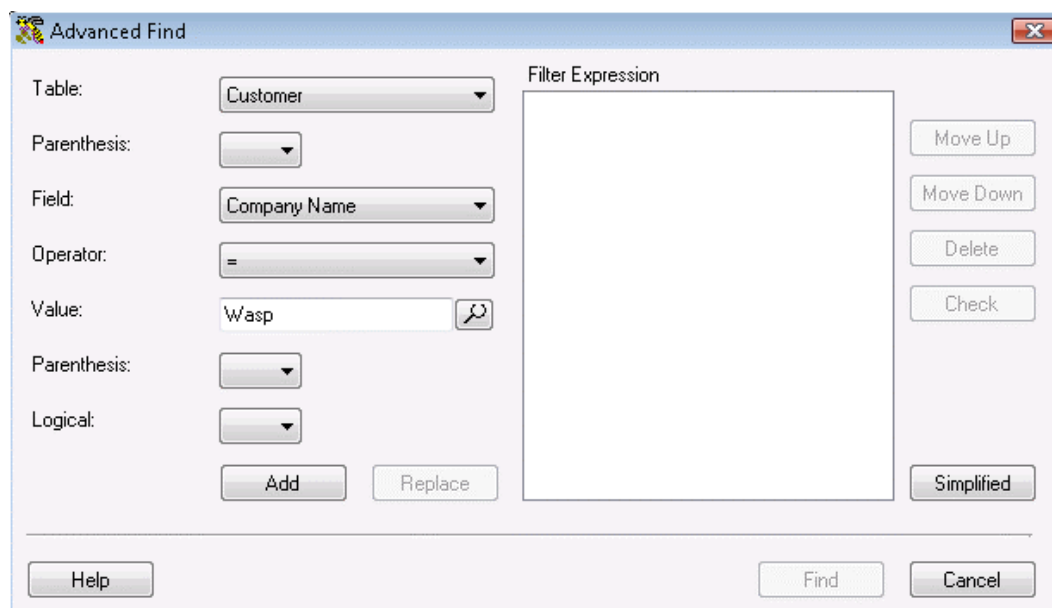
Using the Advanced Find Screen:

1. From the **Main Window**, click the **Find** icon. A menu of tables from which to search appears.
2. Select what you want to search for by clicking on an option in the **Find** menu. In this example we are going to search for **Customers**.

Note: If the table you select (**Customers**, **Manufacturers**, **Items**, etc.) contains over 1000 pieces of data, you will automatically be taken to the Advanced Find screen. For further information on the **Advanced Find** screen, please refer to the **Advanced Find** topic.

If you are not automatically taken to the **Advanced Find** screen, the **Find** screen will appear.

3. Select the **Advanced** button on the **Find** screen. The **Advanced Find** screen appears.



The **Advanced Find** screen consists of seven input fields and a **Filter Expression** panel that displays the resulting filter as you build it. These fields are described below:

- **Table** is used to select the table you want to search.

- **Parenthesis** (open and close) can be used to control the order in which criteria will be processed. The inner most pair of parentheses in any filter expression are evaluated first.
- **Field** is used to select the field in the listed table to be searched.
- **Operator** is a comparison operator used to evaluate an expression.

Comparison Operator	Meaning
=	equal
<>	not equal
>=	greater than or equal
>	greater than
<=	less than or equal
<	less than
Like	is similar to value
Not Like	is not similar to value
Is Null	no value
Is Not Null	any value

- **Like** and **Not Like** are used for text pattern matching. They can only be used with plain text fields, not with dates. The following characters, used within the text value, have a special meaning for the Like and Not Like operators:

LIKE Operator	Meaning	Examples
_ (underscore)	matches any single character	LIKE '_-inch' matches '2-inch', '3-inch', etc.
%	matches zero or more characters of any value	LIKE 'Eric W%' matches 'Eric White', 'Eric Williams', etc.
\	Escapes the special characters (gives them their normal meaning)	LIKE '\%' matches '%' LIKE '\\' matches a single '\'

- **Value** is the information you are searching for. (This may included special characters for the Like or Not Like operators).

- **Logical** is a Boolean operator that combines one or more filter expressions into a single logical group:

Boolean Operator	Meaning
AND	gives you the intersection of two conditions
OR	gives you the union of two conditions

4. Enter the desired values for the seven **Advanced Find** fields to construct a filter fragment. For example, assume you make the following selections:

Table - Customer

Field - Address 1

Operator - =

Value - 2205 Anywhere Road

The **Customer** table will be searched for any instance of **2205 Anywhere Road** appearing in the **Address 1** field.

5. Click the **Add** button after building each filter fragment. The filter will appear in the **Filter Expression** list as shown in the example below:

6. The **Move Up** and **Move Down** buttons allow you to move a filter fragment toward the top or toward the bottom of the list, respectively. To reposition a filter fragment in the **Filter Expression** panel, click on it, then click either the **Move Up** or **Move Down** button.

You may edit a filter fragment by first selecting the fragment in the **Filter Expression** list. The values of the filter fragment populate the seven input fields. Update any of these fields, then click **Replace** to update the selected filter fragment in the **Filter Expression** list.

7. Click the **Check** button to check the syntax of the **Filter Expression**.
8. Click the **Find** button to start the search process. When complete, a list will be displayed showing all the records that match your criteria.



All searches are case insensitive.



To search for a specific date, build your filter expression to include a time range of 12:00am to 11:59pm for the given date. For example, the filter expression Date >= 12/25/02 12:00am to 12/25/02 11:59pm will return all records that have the date 12/25/02.

9. Click the **Simplified** button to revert to the standard Find screen.
-

Administration

Administration Menu

The **Administration Menu** groups tasks such as creating/editing your company information, Importing/Exporting functions and maintaining security settings into one place.

To Access the Administration Menu:

1. From the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.



2. Click on any of the **Administration Menu** icons to go to that function. Detailed descriptions of the options found on the **Administration Menu** are provided below:
 - **Company Info** - The **Company Information** screen allows you to enter or update your company information such as address, phone and email. The Company Name you enter on this screen will be used as the "header" for InventoryControl and will appear on all reports and pre-defined labels. The information on the Company Information screen should be filled out first when you are initially setting up the software. For detailed information on this screen, please refer to the **Company Information Screen** topic.
 - **Security** - The **Security Privileges** screen allows users set up as Administrators to add users to the system, set user privileges, assign users to specific sites, and delete users. For detailed information on this screen, please refer to the **Security Privileges** topic.

- **Import/Export** - **Import/Export** allows you to import data into the database from an file or export data to an external file. Importing data from an external text or .csv file is a quick way to setup your software. For detailed information on Importing, please refer to **Importing Into the Database**. For detailed information on Exporting, please refer to **Exporting to a Text File**.
- **Backup/Restore** - The **Backup** and **Restore** functions allow you to quickly backup your entire inventory database or restore the database as of the last backup. Backing up your database regular is critical to maintaining your business continuity in the event of a system failure. If you backup regularly, you can easily restore the database and minimize disruption to your business. For detailed information on these functions please refer to the **Backup Database** topic or the **Restore Database** topic.

Note: **Backup** and **Restore** is not available in the Enterprise version of InventoryControl.

Company Information Screen

The **Company Information** screen allows you to enter or update information about your business. The name entered in the **Company Name** field on this screen is used as the application header as well as the header for all reports and pre-defined labels. The information on this screen should be completed first when setting up your software.

This topic covers:

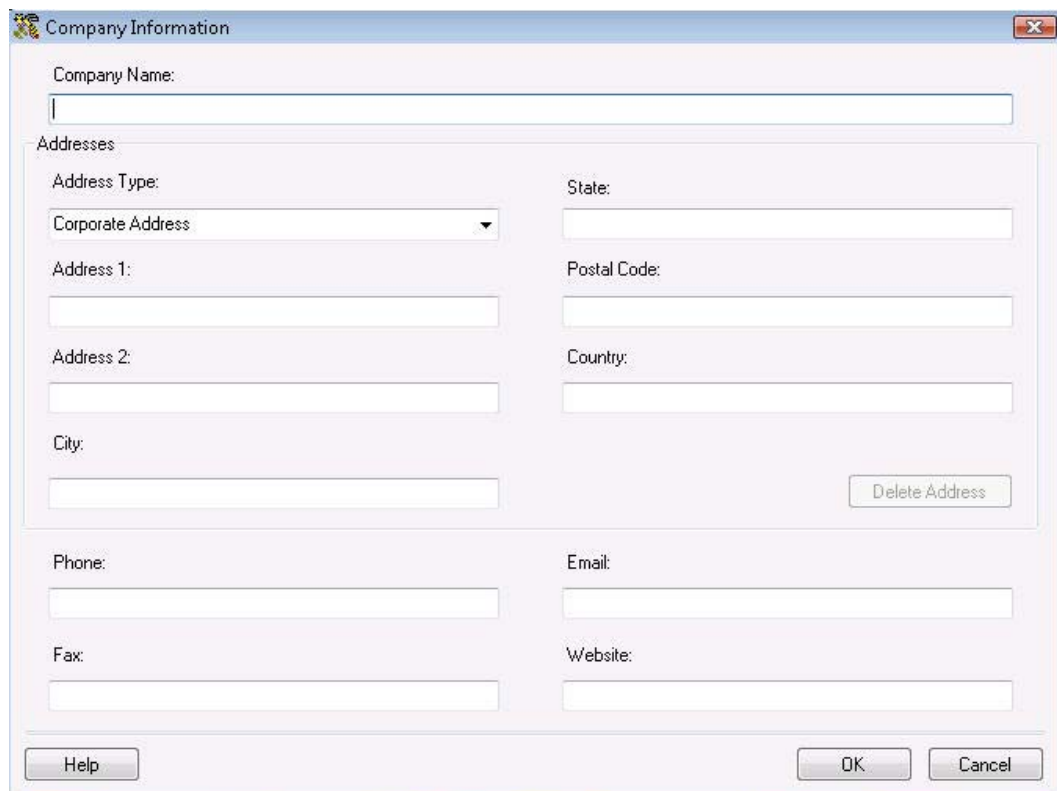
Entering Company Information

Entering Multiple Address Types

Deleting an Address Type

Entering Company Information:

1. From the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.
2. On the **Administration Menu**, click the **Company Info** icon. The **Company Information** screen appears.



The screenshot shows a Windows-style dialog box titled "Company Information". It contains several input fields and a dropdown menu. The fields are organized as follows:

- Company Name:** A single-line text input field at the top.
- Addresses:** A section containing:
 - Address Type:** A dropdown menu currently showing "Corporate Address".
 - State:** A single-line text input field.
 - Address 1:** A single-line text input field.
 - Postal Code:** A single-line text input field.
 - Address 2:** A single-line text input field.
 - Country:** A single-line text input field.
 - City:** A single-line text input field.
 - Delete Address:** A button located to the right of the City field.
- Phone:** A single-line text input field.
- Email:** A single-line text input field.
- Fax:** A single-line text input field.
- Website:** A single-line text input field.

At the bottom of the dialog box, there are three buttons: "Help", "OK", and "Cancel".

3. Type in the requested information. The **Company Name** field is mandatory; all other fields on this screen are optional.

4. Click **OK** to save your changes.

Entering Multiple Address Types:

This software provides you with the ability to enter a Billing Address, Receiving Address and/or Shipping Address for your company and to create new address types as well. You can enter an address for each site that might have inventory shipped to it from purchase orders. To enter multiple address, follow the steps below:

1. On the **Company Information** screen, enter your company name. Select what type of address you will be entering from the **Address Type** drop down menu, or type in a new address type. For example, you could enter Warehouse 1 in the **Address Type** field.

Addresses

Address Type: Corporate Address

State: Texas

Address 1: 123 Anywhere Road

Postal Code: 75028

Address 2:

Country:

City: Flower Mound

Delete Address

2. If you entered a new address type, a confirmation message will appear verifying that you want to add it to the database. Select **Yes** on this message to save the new address type. The new entry will now appear in the **Address Type** drop down menu on all screens on which you can enter multiple address types (Create/Edit Suppliers, Create/Edit Customers, Create/Edit Manufacturers).
3. Enter the remainder of the address information, then click **OK**. You will be returned to the **Administration Menu**.
4. Click the **Company Info** icon again. The **Company Information** screen will reappear populated with the information you just entered.
5. Select a different address type of the **Address Type** drop down menu, or enter a new one. The address lines (Address 1 and 2, City, State, Postal Code and Country) will clear while all other company information will remain on the screen.
6. Enter the new address information, then click **OK**. Repeat these steps for each address type.

Deleting an Address Type:

You can delete one or more addresses for your company by following the steps below. The delete button is only enabled when you have selected one of the address types you entered. It is not enabled when one of the standard address types (Corporate, Receiving, etc.) is selected.

1. On the **Company Information** screen, select the address type you want to delete by choosing from the **Address Type** drop down menu.
2. Click the **Delete** button. A confirmation screen will appear.
3. Select **Yes** on the confirmation screen to delete the information for the selected **Address Type**.

Note: You cannot delete addresses that are part of active Pick Orders.

Adding Users/Editing Security Privileges

The **Security Privileges** screen allows those users setup as Administrators in the system to add users, set privileges, and/or delete users.

A user with *Administration Privileges*, called an Admin User can add new users and make changes to existing users' security options. We recommend that at least one Admin user in addition to the default Admin user be added to the system soon after installation.

This topic covers:

Accessing the Security Privileges Screen

Adding Users on the Security Privileges Screen

Editing User Profiles on the Security Privileges Screen

Making Users Inactive

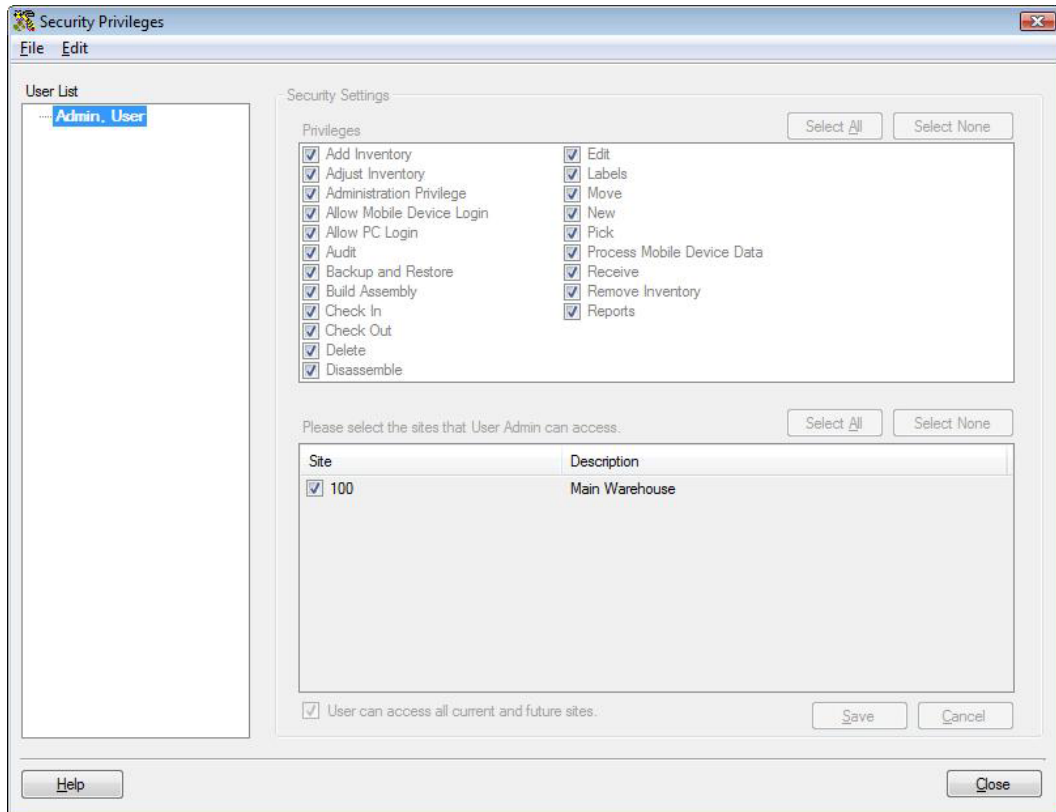
Copying User Security Profiles

Security Privileges Definitions

Accessing the Security Privileges Screen:

1. To access the screen, from the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.
2. Click the **Security** icon on the **Administration Menu**. The **Security Privileges** screen appears.

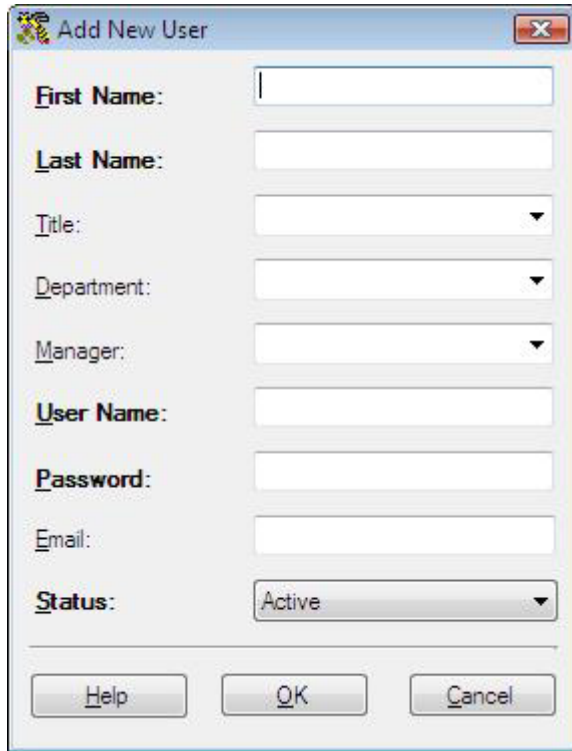
Note: The Receive, Pick, Build Assembly and Disassemble Privileges are only available to Pro and Enterprise Version Users.



When you first access this screen, you will see a user listed as Admin, User (as shown in the screen shot above). This is the default Admin User and this user cannot be changed or deleted. The Admin User profile allows you to access the system for the first time after installation and setup your system. The password for this user can be changed, if needed.

Adding Users to the Security Privileges Screen:

1. On the **Security Privileges** screen, click **File > Add User**. The **Add New User** screen appears.

A screenshot of a Windows-style dialog box titled "Add New User". The dialog box has a standard title bar with a close button (X) in the top right corner. Inside the dialog, there are several input fields and dropdown menus arranged vertically. The labels for these fields are: "First Name:", "Last Name:", "Title:", "Department:", "Manager:", "User Name:", "Password:", "Email:", and "Status:". The "Status:" dropdown menu is currently set to "Active". At the bottom of the dialog, there are three buttons: "Help", "OK", and "Cancel".

Add New User

First Name:

Last Name:

Title:

Department:

Manager:

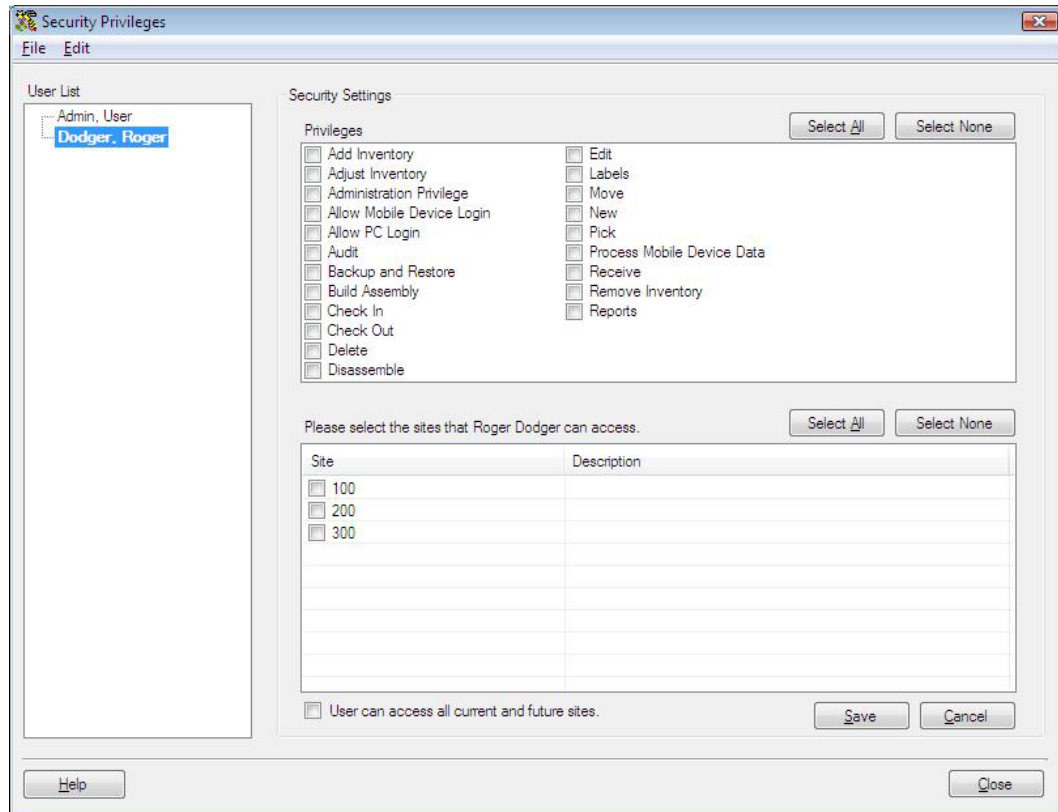
User Name:

Password:

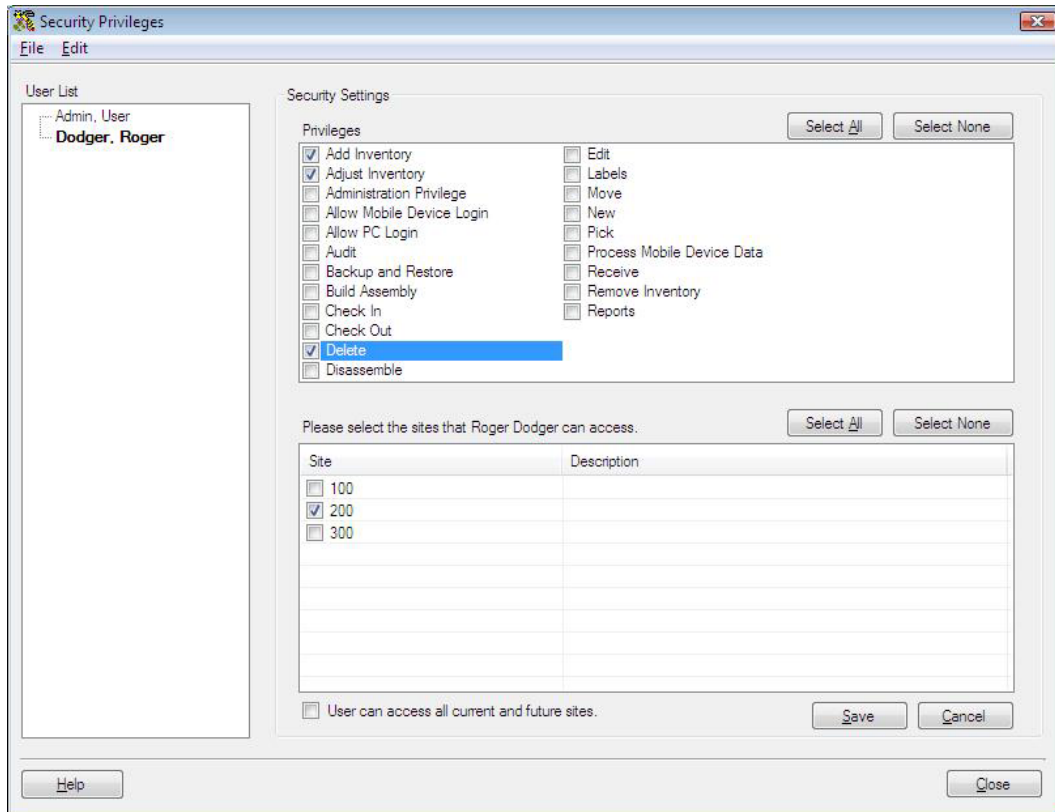
Email:

Status:

2. **First Name**, **Last Name**, a **User Name** (used when logging on to the system), a **Password** and **Status** (which is normally set to **Active**) are required. You can optionally enter a Title, Department, Manager and/or Email address. If you mark this employee as Inactive in the **Status** field, *Inactive* will appear next to his/her name in the **User List**.
3. Click **OK** to save the new user information. You will be returned to the **Security Privileges** screen which will now display the new user's profile.



4. All privileges and sites are initially disabled when you enter a new user. This means the user will not be able to access anything in the system. You must select which features you want the user to be able to access by selecting the desired checkboxes in the **Privileges** window. For example, in the screen shot below, the user Roger Dodger was given access to Add Inventory, Adjust Inventory and Delete and to Site 200.



5. Click **OK** when you have selected all privileges to which you want this user to have access. These selections can later be changed by any user who has **Administration Privilege**.
6. If you have more than one **Site**, you can limit this user's access to whichever sites you want. To do this, select the **Sites** to which you want this user to have access. Click **Select All** to quickly give the user access to all sites.

Click the "**User can access all current and future sites**" to automatically give this user access to any sites you may add in the future.


7. Click **Save** to save your changes to this user.

Editing User Profiles on the Security Privileges Screen:

1. On the **Security Privileges** screen, highlight the user name you want to edit in the **User List**. You can now change the selections in the **Privileges** window by selecting or de-selecting checkboxes. An existing user's information can be updated by any user with Administration Privilege. In addition to the ability to change other values, this is where an Administration user can reset a **Password** for a user that has forgotten it.
2. If you want to change the user name or personal information, highlight the user name in the **User List** and click **Edit > Update User**. The **Update Existing User** screen will appear populated with the selected user's information.

3. Type in new data as needed, then click the **OK** button. You will be returned to the **Security Privileges** screen.
4. Click **OK** on the **Security Privileges** screen to save your changes. *If you change your own security privileges the changes will not go into effect until the next time you log on.*

Note: If you select **Cancel**, you will exit the screen **without** saving changes made to the Privileges section on the currently selected user. Changes previously made to other users **will** be saved. A message will appear asking if you want to discard changes. Select **Yes** to close the screen without saving the changes, or **No** to save any changes.

 The **Admin,User** is unique in that its user name and privileges cannot be changed. Only the password can be changed for the Admin user.

Making Users Inactive:

Admin Users can mark users as Inactive, meaning all privileges are revoked and the user's login will be inactivated.

1. On the **Security Privileges** screen, highlight the user name you want to make inactive in the **User List**.
 2. Select **Edit > Update User**. The **Update Existing User** screen appears.
 3. Select **Inactive** from the **Status** drop down menu.
 4. Click **OK** on the **Update Existing User** screen. You will be returned to the **Security Privileges** screen.
 5. Select **OK** on the **Security Privileges** screen.
-

Copying User Security Profiles:

If you have multiple users who will have the same security privileges, you can create one profile, then copy it to other users, streamlining the setup process. To do this:

1. On the **Security Privileges** screen, highlight the user name you want to copy in the **User List**.
 2. Select **Edit > Copy User Settings**. The **Add New User** screen appears.
 - 3.
 4. Enter the name and personal information of the user you are adding, then click **OK** on the **Add New User** screen. You will be returned to the **Security Privileges** screen. The user name you just added will appear in the **User List** and the **Privileges** will be those that you copied.
-

Security Privileges Definitions:

Add Inventory: The user will be able to manually add inventory to the system.

Adjust Inventory: The user will be able to adjust inventory amounts.

Administration Privilege: The user will be able to modify existing users' Security Privileges and perform all functions in the system.

Allow PC Login: The user will be able to login to the program.

Audit: The user will be able to perform all audit functions.

Backup and Restore: The user will be able to backup and restore the inventory database.



Be aware that Restore can cause a loss of data added to the database since the date and time of the backup file chosen.

Build Assembly - The user will be able to use the Build Assembly function to add inventory to Assembly Items.

Check In: The user will be able to Check-In inventory.

Check Out: The user will be able to Check-Out inventory.

Delete: The user will be able to delete records.

Disassembly - The user will be able to disassemble Assembly items.

Edit: The user will be able to make changes to records.

Labels: The user will be able to create labels.

Move: The user will be able to Move inventory to another location.

New: The user will be able to create new items, suppliers, etc.

Pick: The user will be able to pick inventory from pick orders on the Pick screen.

Process Mobile Device Data: The user will be able to process and apply transactions that have been downloaded from a mobile device.

Receive Inventory: The user will be able to mark inventory as Received from purchase orders on the Receive screen.

Remove Inventory: The user will be able to manually Remove inventory.

WDT2200: The user will be able to use a WDT2200 mobile device to perform transactions.

Backing up the Database

Note for Enterprise Users: The Backup feature is not available in the Enterprise version. You must use SQL to perform backups.

Backing up your database is an important maintenance step that should be performed on a regular basis. Having a current backup helps to minimize data loss in the case of a system shut down or power failure. If you do experience a catastrophic system failure of some kind, having a current backup ensures you can quickly restore the most recent database. For information on restoring your database, please refer to the [Restoring the Database](#) topic.

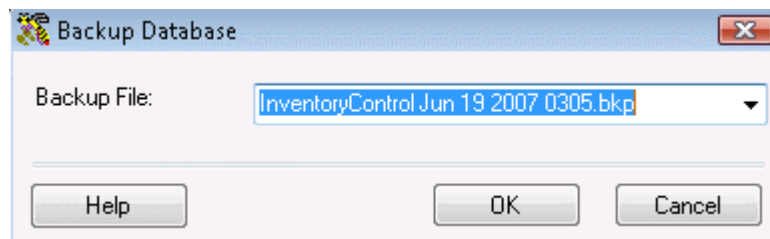
Note: Each time you **Audit** your inventory, a backup file is automatically created with the date/time included in the file name. For more information on performing an **Audit**, please refer to the [Auditing Your Inventory](#) topic.

Note for Remote Installations:

If you have installed your database on a remote PC/Server (a PC/Server other than the one where you are running InventoryControl), you can specify a folder on that PC/Server to which the backup file will be saved. This option is set on the Options screen. For more information on designating a backup folder, please refer to the [Options Screen](#) topic.

Backing Up Your Database:

1. From the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.
2. On the **Administration Menu**, click **Backup**. The **Backup Database** screen appears.



3. Enter a name for this backup in the **Backup File** field. It is a good idea to specify a name that will help you select the right backup file later if you need to restore the database. Adding the date in the file name is a good way to know which file is the latest.

By default, the backup file is written to:

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

Use the **Browse** button to select a different location.

4. Click **OK** to backup the database.

Important Note: The network version of the InventoryControl does NOT browse the file system on the local machine. Instead of the local file system the file system on the machine where the database is installed will be displayed.

Restore the Database

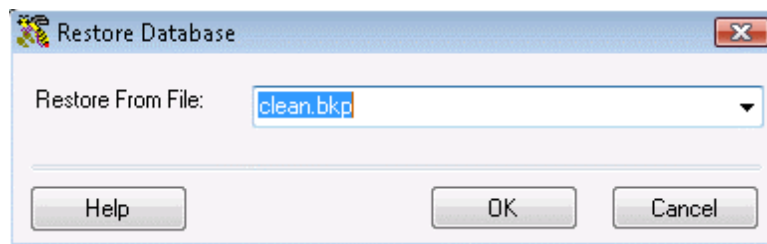
Then software allows you to quickly restore a backup database. This is usually used when there has been some type of catastrophic system loss and allows you to minimize downtime in your business by restoring the last saved database.

You can also restore over an existing database, but keep in mind that restoring erases all data currently in your database and replaces it with the data in the backup, including all inventory, users and items. If there is a chance you will want to recover transactions that have been entered since the backup was done, it is a good idea to backup again before restoring. Save the backup to a different file name than the one you are about to restore.

Note for Enterprise Users: The Backup feature is not available in the Enterprise version. You must use SQL to perform backups.

Restoring Your Database:

1. From the **Main Window**, click the **Administration** icon. The **Administration** menu appears at the bottom of the screen.
2. On the **Administration** menu, click **Restore**. The **Restore Database** screen appears.



3. Enter the location and name of the backup in the **Restore From File** field, or you can click **Browse** to search for a file

By default, backup files are located in:

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

4. Click **OK** to perform the database restore.

Important Notes:

The network version does **NOT** browse the file system on the local machine. Instead of the local machine file system, the file system on the machine where the database is installed will be displayed.

If you receive an error when trying to restore the database that states "not all connections to the database are closed", make sure no other users are logged in to the system. Close InventoryControl and try to restore again.

Options Screen

The **Options** screen is where you can turn off and on some automatic processes for inventory functions and control how the software performs in certain situations.

This topic covers the following:

Accessing the Options Screen

Inventory Options

Allow Negative Quantities on Mobile Devices

Automatic Customer Number

Automatic Item Numbers

Automatic New

Automatic Notification of Low Order Items

Decimal Places

Enforce Date Code as a True Date

Packing Slip for Session

Support Options

Check for Software Updates

Close New Form

Edit Field Names

Max Row Count

Previously Processed Mobile Data

Show Cost Information During Receiving *(applies to Pro and Enterprise Versions Only)*

Show Warning Messages

SQL Server Backup Location

Email Options

Always Show Email Destination List

Packing Slip CC Emails

Pick Order CC Emails

Purchase Order CC Emails

SMTP Password

SMTP Port

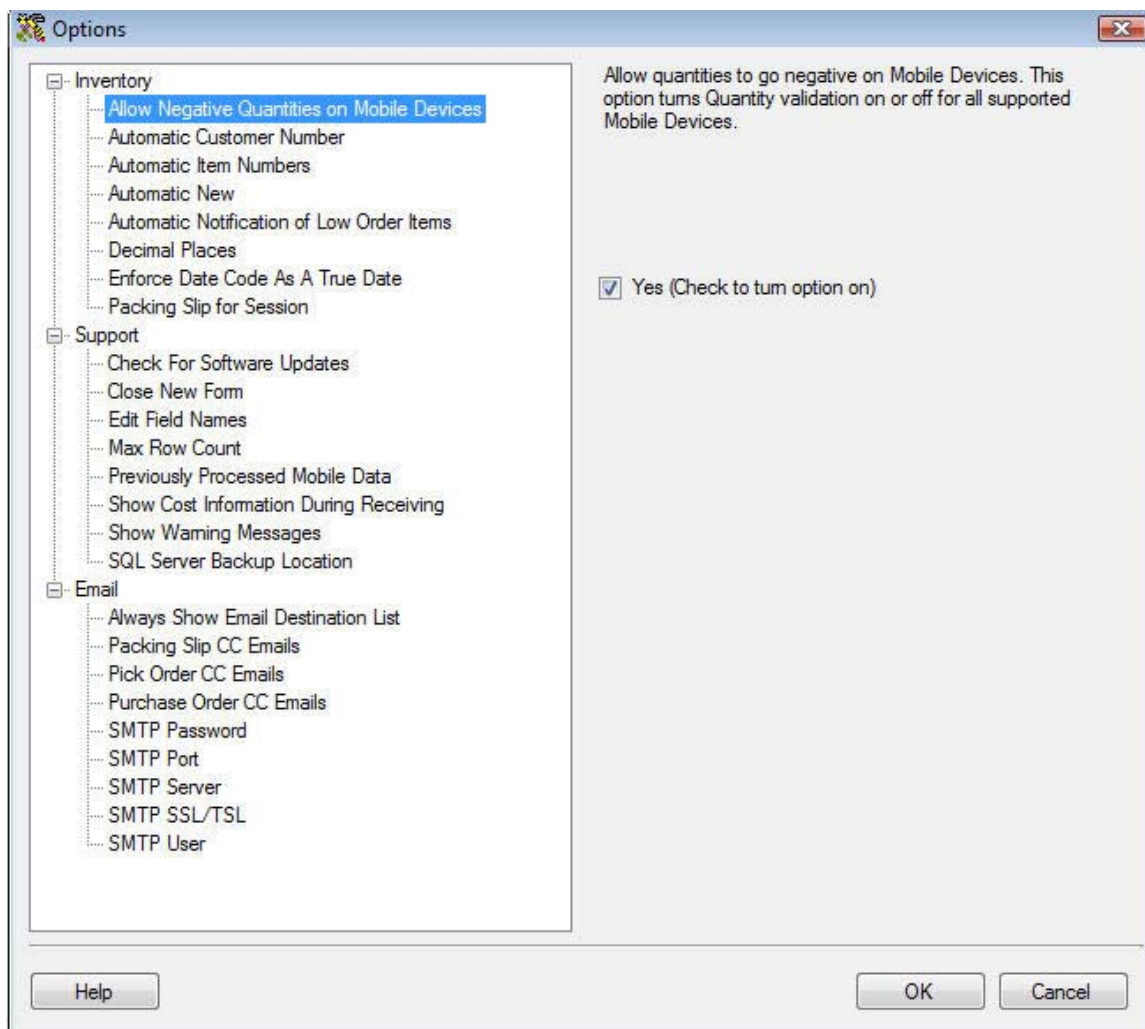
SMTP Server

SMTP SSL/TSL

SMTP User

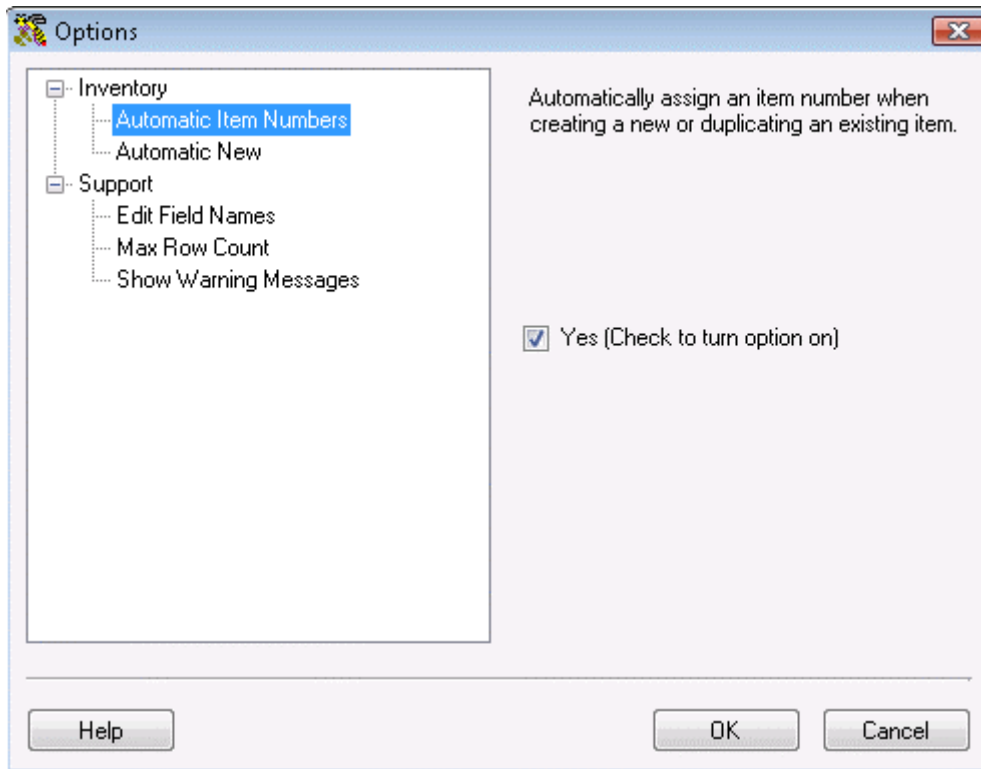
Accessing the Options Screen:

From the **Main Window**, select **Tools > Options**. The **Options** screen appears.



All of these options affect all users. Changes made by one user will affect other users who log in.

If the user accessing the **Options** screen does not have **Administration Privileges** (setup on the **Security** screen), the **Options** screen will look like the following:



Allow Negative Quantities on Mobile Devices:

This option allows you to remove or move items from inventory on the mobile device even though the quantity of those items may have been at zero, according to the database, the last time the mobile device was synchronized. This option is valuable in a batch processing environment.

If you have more than one mobile device, a situation might arise where some inventory is Added on one mobile device for a location. The next mobile device comes along and sees the inventory ready for Remove, but since both devices have not been synchronized to the PC, the second device does not show that inventory exists. In this case, if Allow Negative Quantities on Mobile Devices is turned off, mobile devices would have to synchronize before the item could be removed.

Leaving this option turned on allows mobile device users to do their job in the field but opens up the possibility of error. The responsibility for confirmation of batch processing on multiple mobile devices falls to the PC user. Many safeguards and methods of verifying the recurring data have been added to help facilitate this effort. See the Pending Uploads topic for more information.

To enable this option, select the **Yes** checkbox.

Automatic Customer Number:

This options allows you to enable automatic generation of a **Customer Number** when you are creating new customers.

An automatically generated **Customer Number** will always be 1 greater than the value of the largest customer number currently in your database.

If you are using alphabetic or alphanumeric values as **Customer Numbers**, the **Automatic Customer Number** option will still generate a numeric **Customer Number**, beginning with a value of 1, if it does not exist already.

Automatic Item Numbers:

This options allows you to enable automatic generation of an **Item Number** when you are creating a new item or when duplicating an existing item from the **Item List**.

An automatically generated **Item Number** will always be 1 greater than the value of the largest **Item Number** currently in your database.

If you are using alphabetic or alphanumeric values as **Item Numbers**, the **Automatic Item Number** option will still generate a numeric **Item Number**, beginning with a value of 1, if it does not exist already.

Automatic New:

This option enables the automatic opening the New screen when an entered value (Item Number, for example) is not in the database.

When the **Automatic New** option is enabled:

The **Create New Item** screen is opened if an unknown **Item Number** is entered on the **Add Inventory**, **Create New Purchase Order** or **Create New Pick Order** screen.

The **Create New Location** screen is opened if an unknown **Location** is entered on the **Add Inventory** screen or in the **To Location** field of the **Move Inventory** screen.

The **Create New Supplier** screen will be opened if an unknown **Supplier** is entered on the **Add Inventory** or **Create New Purchase Order** screen.

The **Create New Customer** screen will be opened if an unknown **Customer** is entered on the **Remove Inventory**, **Create New Pick Order** or **Check-Out Inventory** screens.

When the **Automatic New** option is disabled:

A prompt will ask you if you want to continue to the appropriate **Create New** screen. Sometimes, when data input has a high error rate, this is more desirable as it allows the user to verify the number entered.

Automatic Notification of Low Order Items:

When this option is enabled, the software will notify you if the **Item Stock Level List** contains items that have a **Quantity** value equal to or less than the **Min. Stock Level** value set for that item and location on the **Create New Item** or screen/**Location** tab. This notification appears for the location level only. This notification will appear immediately after logging in to the software.

Decimal Places:

This option allows you to set the number of decimal places to display in numeric fields where this is possible.

All values entered in numeric fields are stored to the number of **Decimal Places** allowed by this option at the time you entered the value, but screens and reports will always display numeric values to the number of Decimal Places *currently* allowed by this option.

If the number of decimal places currently allowed by this option is *greater than* the number of decimal places allowed when a value was stored, the value will be displayed with trailing zeros. For example, if a value of 25.5 was stored when Decimal Places was set to 1, it will be displayed as 25.500 if Decimal Places is later set to 3.

If the number of decimal places currently allowed is *less than* the number of decimal places allowed when a value was stored, the value, as displayed, will be rounded. For example, if a value of 25.5 was stored when Decimal Places was set to 1, it will be displayed as 26 if Decimal places is later set to 0. (Values rounded for display at the currently specified number of Decimal Places will retain their original number of decimal places as stored in the database.)

Enter a value within the range **0** through **4**.

Enforce Date Code as a True Date

When this option is selected, any dates entered into InventoryControl must be in the format mm/dd/yyyy.

Packing Slip for Session

The packing slip that can be printed and/or emailed upon saving by default displays only items picked in the current pick session. If you want to pick multiple times and print a packing slip that displays all the picks for this pick order, including items picked previously, you can select to do so on the Options screen.

For example:

Assume Pick Order 001 a quantity of 5 for item ABC and a quantity of 4 for item XYZ. Today I pick 2 of item ABC and 2 of item XYZ and ship them. The packing slip will display 2 ABC and 2 XYZ. Tomorrow I pick the other 3 of item ABC and 2 of item XYZ and ship them. The packing slip has 3 ABC and 2 XYZ.

This would also be exactly the same if both picks and ships were done on the same day.

If, however, I pick what I have in the morning and don't ship it and a shipment comes in that day or the next and I complete the order before shipping anything I will want all of the items picked throughout the day to display on one packing slip. To do this, select **Yes** for this option.

Check for Software Updates:

When this option is enabled, the system will automatically search for a newer version of the software when you log on to the system. If a new version is found, you will receive a notification and can then go to the Wasp website to download the new version.

This option is enabled when the **Yes** checkbox is selected. This option is enabled by default. You can disable the option by deselecting the checkbox. Manual checks can still be performed (via the **Help** menu). For more information on manually checking for updates, please refer to **Checking for Software Updates**.

Close New Form:

When this option is turned on, the **Create New** screen is automatically closed each time a new record is created.

When this option is disabled, upon clicking the **Save** button on the **Create New** screen, the entry will be saved, the screen will remain open with the fields cleared, ready for another entry.

Clicking the **Close** button will exit the **Create New** screen.

When this option is enabled, upon clicking the **OK** button on the **Create New** screen, the screen will close automatically. Clicking the **Cancel** button on the **Create New** screen will exit the form without saving any entry made.

It might be desirable to turn this option off when first entering data, for speed, then turn it on later to avoid confusion when using it infrequently.

Edit Field Names:

When this option is enabled, users setup with **Administrative Privileges** on the **Security** screen can edit the names of some labels and tool tips in the software. You might want to change a field name if your business calls one of the functions or fields something different than the default values. Or, you might want to change the tool tip if you want to give special instructions to your users.

For detailed instructions on how to edit fields once this option is enabled, please refer to the **Editing Field Names** topic.

Max Row Count:

This option allows you to specify the maximum number of rows to be displayed on most lists. The number of rows can be limited to improve performance. If you notice that it takes more than a few seconds for your list screens to appear you can reduce the number of rows to speed this up.

A value of **0** indicates all rows should be displayed.

Values between **1** and **99** are invalid.

100 is the smallest maximum that can be specified.

Previously Processed Mobile Data:

When this option is turned on, the software alerts you if you attempt to upload data from the mobile device to the PC when that data has previously been uploaded.

With this option turned on, if you upload and process data from the mobile device to the PC and then attempt to upload and process that same data again, in the **Pending Uploads** wizard, a symbol displays in the **Accept** column indicating this data will not be processed again because it has already been processed. Below is an example of the symbol that will appear:



When this option is turned off, you still will not be able to re-process data that has already been processed. The drop-down list in the first screen of the **Pending Uploads** wizard simply will not display the processed XML file.

Show Cost Information During Receiving:

(applies to Pro and Enterprise Versions Only)

When this option is enabled, cost information will display on the Receive screen when you are receiving inventory from a purchase order. This option is disabled by default. To enable this option, select the checkbox.

Show Warning Messages:

This options allows you to enable or disable the display of warning messages.

SQL Server Backup Location:

This option is useful if you have your database installed on a different PC/Server than where you are running the software.

Enter an existing directory on the PC/Server where the SQL database is installed (this is where you installed the database during the initial installation process). Make sure the user who will be performing the backups (Administration Menu > Backup) has permission to the database.

If a location is not entered, the Microsoft SQL Server backup directory will be used to store backups. This is where the system will look for backup files when you try to restore the database as well.

If you specify a folder and SQL Server does not have rights to write to that folder, you will receive an error message and the backup will fail. It is your responsibility to give SQL Server the proper rights to write the backup in the specified folder.

For information on how to give permissions to a folder, please refer to **Wasp Technical Support, Knowledge Base and Downloads** on the internet.

By default, if you do not have a remote connection to your database, the backup folder is:
C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

Always Show Email Destination List:

Select **Yes** to always have the list of email destinations appear when you select the **Send Emails Upon Save** on the **New Purchase Order** and **New Pick Order** or the **Pick** (to email the packing slip) screens. This list allows you to select the email addresses to which the order will be sent.

If you deselect the **Yes** checkbox, the list will not appear and the emails will automatically be sent to every address on the list.

Packing Slip CC Emails:

You can enter email address here to which a copy of the slip will automatically be sent if you have the **Email Packing Slip** checkbox selected on the **Pick** screen. The CC email addresses are in addition to any email addresses selected on the **Pick** screen - **Email Destination List** (see above).

Pick Order CC Emails:

You can enter email address here to which a copy of the order will automatically be sent if you have the **Email On Save** checkbox selected on the **Create New Pick Order** screen. The CC email addresses are in addition to any email addresses selected on the **Create New Pick Order** screen - **Email Destination List** (see above).

Purchase Order CC Emails:

You can enter email address here to which a copy of the order will automatically be sent if you have the **Email On Save** checkbox selected on the **Create New Purchase Order** screen. The CC email addresses are in addition to any email addresses selected on the **Create New Purchase Order** screen - **Email Destination List** (see above).

SMTP Password:

If your SMTP server requires authentication to send outgoing mail, enter the password here. If it does not require authentication, leave this field blank.

SMTP Port:

Enter the SMTP mail server listening port here. The default port is 25.

SMTP Server:

Enter the name of an outgoing mail server that supports SMTP for delivering notification emails.
Enter the name of the same outgoing mail server that is setup in your own email program. If you do not was InventoryControl to send notification emails, leave this field blank.

SMTP SSL/TSL:

Turn this option on for all SMTP servers that require SSL or TSL, including GMail SMTP servers.

Note on using GMail: To use a GMail SMTP server to send out mail from InventoryControl:

1. Go to www.gmail.com and setup your gmail account.
2. Have your IT department open port 587 and 465 on your computer.
3. Turn on the **SMTP SSL/TSL** option, and set up the other SMTP related options on the **Options** screen.

The GMail SMTP server address is smtp.gmail.com. The SMTP user should be 'yourgmailname@gmail.com' (don't forget @gmail.com). The SMTP Password is your Gmail account password.

Please be aware that you need to turn this option on for all SMTP servers that require SSL or TSL, not just for GMail SMTP servers.

SMTP User:

If your SMTP server requires authentication to send outgoing mail, enter the user name here. If it does not require authentication, leave this field blank.

Archiving Transactions

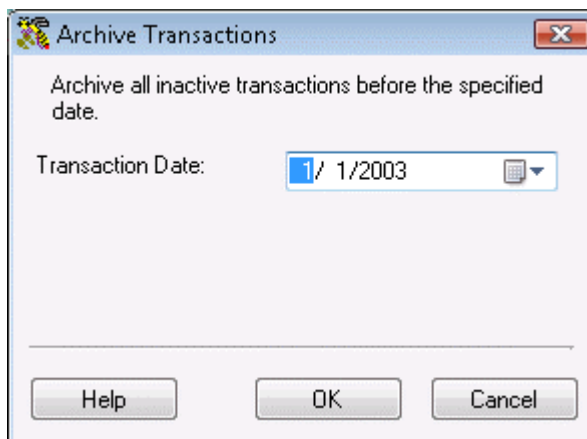
The **Archive Transaction** feature allows you to archive inactive transactions prior to a specified date. This date defaults to the value specified when you enabled this option on the **Options** screen. For more information on enabling this option, please refer to the [Options Screen](#) topic.

Only inactive transactions are eligible for archive. These are transactions that no longer impact the current inventory. For instance, if you added a quantity of 10 to a specific item number and all of those have since been removed, the initial add transaction is inactive and will be archived if it occurred before the date specified.

Archiving is useful to keep your database running quickly by storing unused information.

Archiving Transactions:

1. From the **Main Window**, click **Tools > Archive Transactions**. The **Archive Transactions** screen appears.



2. Set the **Transaction Date** to the date before which inactive transactions will be archived, or leave it at the default date.
 3. Click **OK** to archive the selected inactive transactions or click **Cancel** to close the screen without archiving any data.
 4. If desired, you can run the **Transaction History (Archived) Report** to review the archived transactions.
-

Editing Field Names

When the **Edit Field Names** option is enabled on the **Options** screen, users setup with **Administrative Privileges** on the **Security** screen can edit some field and function names. For more information on the **Options** screen, please refer to the [Options Screen](#) topic. For more information on the setting security privileges, please refer to the [Security Privileges](#) topic.

Editing Field Names is useful if your business calls one of the functions or fields something different than the default values, or you might want to change the **Tool Tip** (the text that appears when you hover the cursor over a field) if you want to give special instructions to your users.

Please see the [Using Custom Fields](#) topic for additional information about customizing this software.

This topic discusses

Editing Field Names

Resetting Field Names to their Default Values

Editing Field Names:

1. When this option is enabled several field names throughout the program will appear in recessed boxes, as seen below.



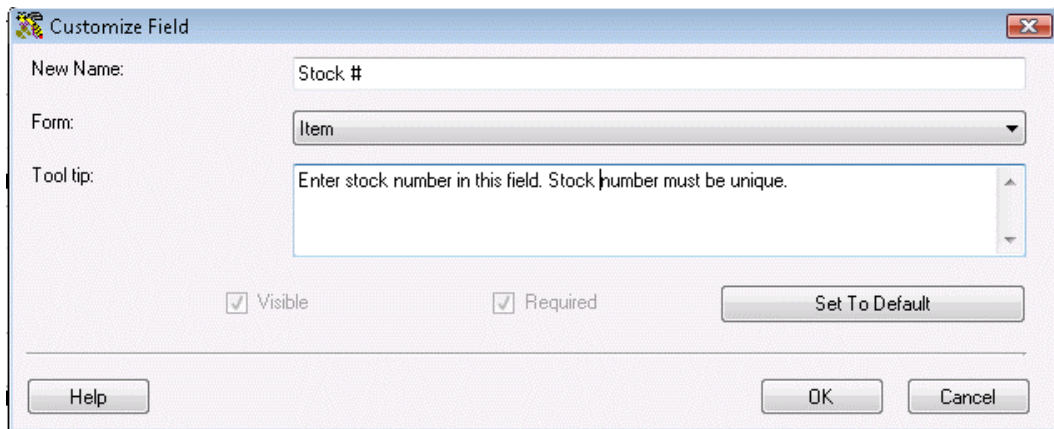
Click on a recessed label, such as **Add**. The **Customize Field** screen appears:

2. You can change the text of the **Label** (or field name) and that field's associated **Tool Tip** or click **Set to Default** to reset the field and tool tip to its original name.

Note: Some fields allow the you to edit the tool tip and not the label itself. This is because some label names must remain fixed due to internal constraints.

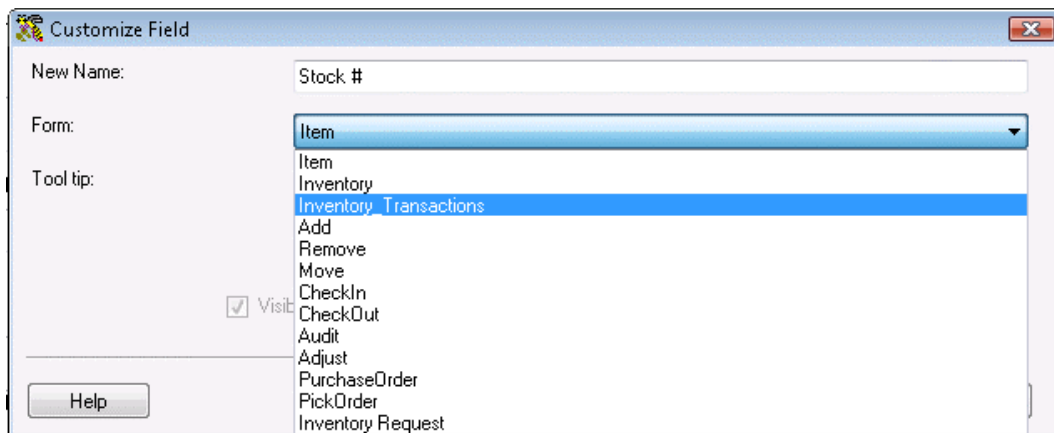
The **Form** field is disabled, as shown above, for labels throughout the program except for some of the labels on the **Create New Item** screen. The **Form** field for these few labels on the **Create New Item** screen permit you to specify different tool tips for different Inventory screens like Add, Remove, etc. The same label is used for each, but the tool tips can be unique.

For example, in the screen shot below, we are customizing the **Item Number** label on the **Create New Item** screen. Here, the **Form** field is enabled and **Item** has been selected from the drop down list.



The custom **Label** value, "Stock #:" that we entered will appear on all screens instead of the default **Label** value, "Item Number", and the custom **Tool Tip** value, "Enter Stock # in this field. Stock # must be unique.", will appear on all screens as well (instead of the original Tool tip).

Next we change the **Form** value from **Item** (the default Form value shown above) to **Inventory_Transactions**, as seen in the drop down list below.



Now the custom **Label**, "Stock #", will continue to appear on all screens instead of the default **Label** value, "Item Number", but the custom **Tool Tip** will only be displayed where this field occurs within all of the Inventory transactions.

The scope of the custom **Tool Tip** for this field could be narrowed further by selecting a single Inventory transaction, such as **Remove** from the **Form** drop down list.

3. Now select if you want this field to be **Visible** and/or **Required**.

De-selecting the **Visible** option completely removes the field from the forms where it occurs. This can be used to streamline data input operations by removing the distraction of unused fields. (The label will still be visible while the Edit Labels option is turned on.)

Selecting the **Required** option makes data entry mandatory for transactions that use the field being customized. The **Visible** option will be grayed-out when the **Required** option is selected (Required fields must be visible).

Some customizable fields must be both visible and required for the software to perform correctly. In this case, the **Visible** and **Required** checkboxes will be disabled.

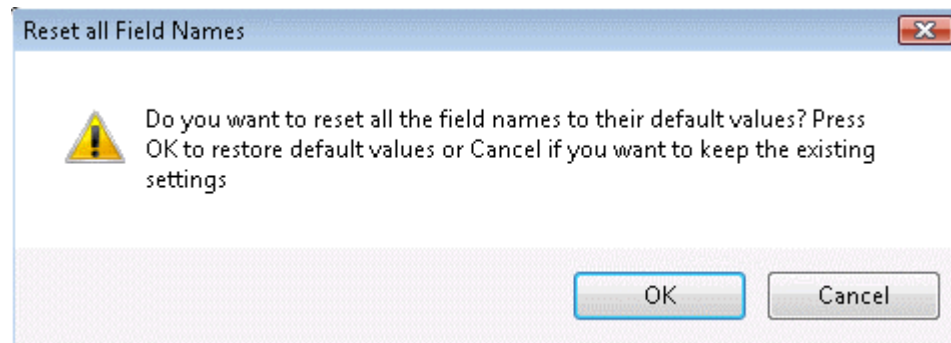
4. Click **OK** to save your changes.

Resetting Field Names to their Default Values:

You can quickly restore the default values for all editable fields by following the instructions below.

1. From the **Main Window**, click **Tools > Reset All Field Names**.

A message appears asking if you want to reset all field names to their default values.



2. Select **Yes** on the message. All field names you have changed will return to their original values.

Note: The **Reset All Field Names** option on the **Tools** menu is disabled if the **Edit Field Names** option is disabled on the **Options** screen or the user currently logged in does not have **Administrative Privileges**.

Using Custom Fields

The **Custom Texts** and **Custom Numbers and Dates** tabs can be found on each of the following screens:

Create New Customer

Create New Manufacturer

Create New Item

Create New Site

Create New Location

Create New Supplier.

Note: The **Edit Field Names** option on the **Options** screen must be enabled in order to enter custom text, numbers and dates. For more information on the Options screen, please refer to the **Options Screen** topic. Below is an example of the **Custom Texts** tab found on the screens mentioned above:

The screenshot shows a software window with four tabs: "General", "Additional", "Custom Texts", and "Custom Numbers and Dates". The "Custom Texts" tab is selected. Inside the window, there is a section titled "Texts" containing ten text input fields, each labeled "Custom Text 1:" through "Custom Text 10:". At the bottom of the window, there are three buttons: "Help", "Save", and "Close".

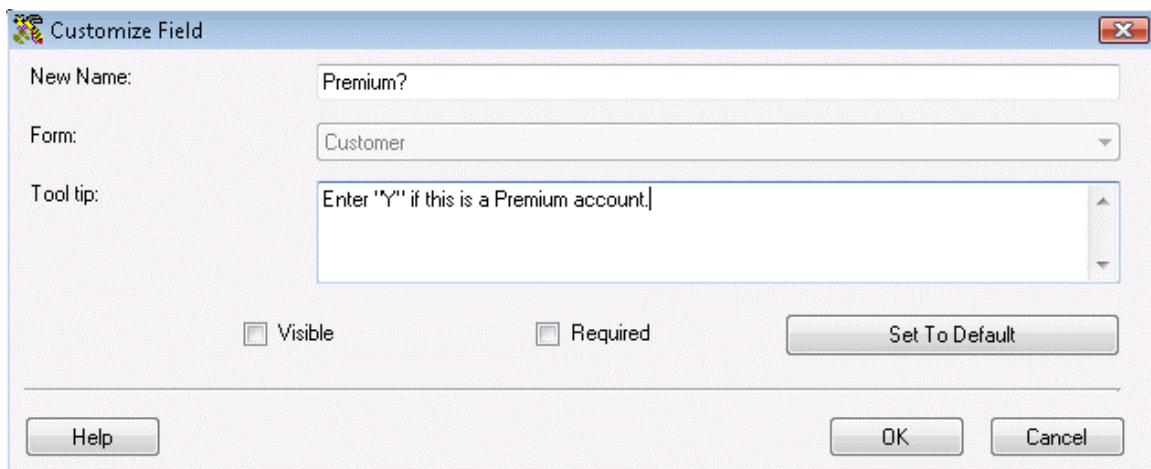
Note: The fields seen above are not visible when the **Edit Field Names** option is turned off and no customizations have been applied.

Custom Numbers fields will accept values ranging from -999999999999999.9999 to 999999999999999.9999.

Custom Dates will be displayed in the same format as found elsewhere in the product: "day of the week, month dd, ccyy"

Example:

Here, with the **Edit Field Names** option enabled, we have clicked on the **Custom Text 1** label (on the **Custom Texts** tab of the **Create New Customer** screen) to edit it. The **Form** field is grayed-out because this label only occurs on the **Customer** screen.



Customize Field

New Name: Premium?

Form: Customer

Tool tip: Enter "Y" if this is a Premium account.

☐ Visible ☐ Required Set To Default

Help OK Cancel

Click **OK** to save the customization or **Cancel** to abort.

When the **Edit Field Names** option is subsequently disabled, the **Customer Screen/Custom Texts** tab appear as shown below:

The image shows a software window titled "Create New Customer" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there are four tabs: "General", "Additional", "Custom Texts", and "Custom Numbers and Dates". The "Custom Texts" tab is currently selected. Within this tab, there is a section labeled "Texts" which contains a text label "Premium?:" followed by a rectangular text input field. At the bottom of the window, there are three buttons: "Help" on the left, and "Save" and "Close" on the right.

This field will also be seen in the **Edit Customer** screen.

Importing/Exporting

Importing Into the Database

Import allows you to bring data into the program's database from external sources such as .CSV or .TXT files. This allows you to quickly add information to your database rather than having to manually add it when you are initially setting up your software.

Data must be imported into the database in the following order:

1. **Site**
2. **Locations**
3. **Suppliers**
4. **Manufacturers**
5. **Customers**
6. **Items**
7. **Inventory**

Samples for each import type are installed in the InventoryControl/Import Samples folder. Use these samples to verify you have the correct data and format.

This topic covers:

Tips for Importing Data

How to Import Data

Required Fields

Handling Import Errors

Notes on Importing Inventory

Tips for Importing Data:

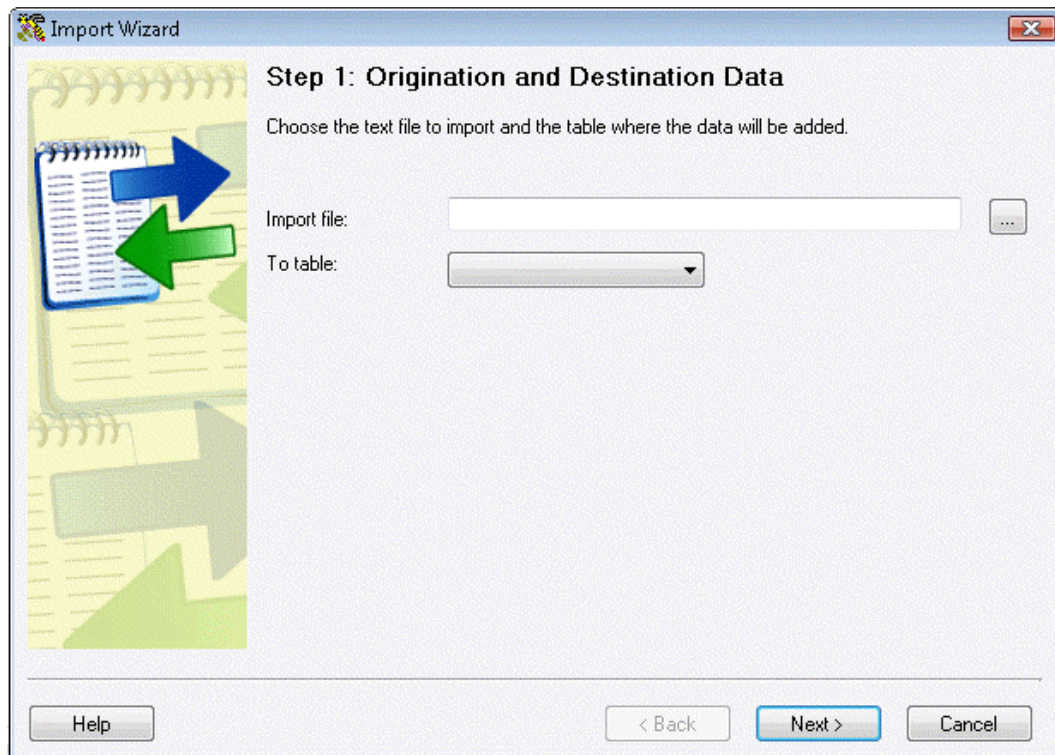
- Do not attempt to use **Import** to modify existing records.
- Imported data will be truncated if field lengths exceed those within the program's database. Data Types and Sizes for each Table that can receive data via Import are documented in the **Database Properties** topic.
- If your data normally resides in a different data format, you must first use your existing database software's **File > Export** or **File > Save As** function to translate the data to a .csv or .txt file.
- You must strip out all currency symbols, including (but not limited to) these examples: \$, ¢, ¥, £, §, or ¢, if you are about to import them into a numeric field, such as Cost, List Price, etc. They are permissible in text fields.
- Commas, sometimes used as "thousands" separators, should be removed from numeric fields.

- Commas are permissible in text fields only when residing within a pair of double quotes, which will cause them to be treated as normal text, not as field delimiters.
 - If you intend to import data to all available tables, make sure you import in the order specified above. It is also a good idea to review the information found in the **Related Data Fields** topic before proceeding with importing information.
-

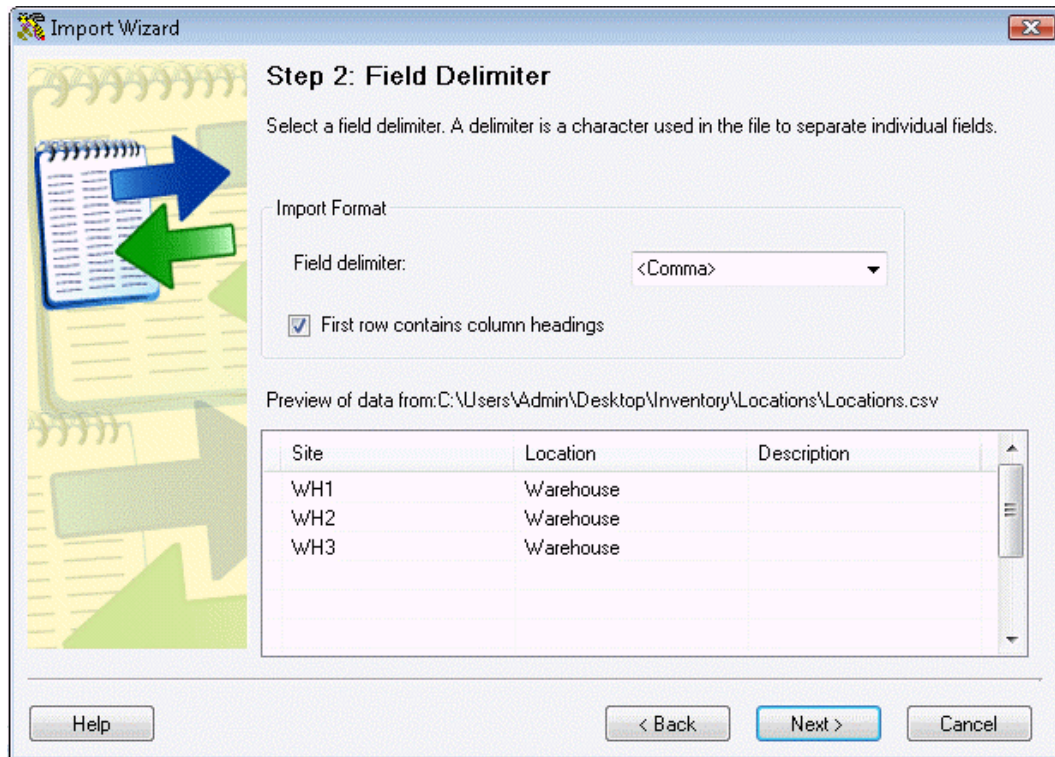
How to Import Data:

In the example below, we will show how to import *Locations*. The steps are the same for importing all other types of information.

1. From the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.
2. On the **Administration Menu**, click **Import**. The **Import Wizard/Step 1: Origination and Destination Data** screen will appear.



3. Enter the location and file name of the file you want to import, or click the ... button located to the right of the **Import File** field to search for a file. Then select the table to which you want to import data from the **To table** drop down menu.
4. Click **Next** when you are ready to proceed. The **Step 2: Field Delimiter** screen appears.



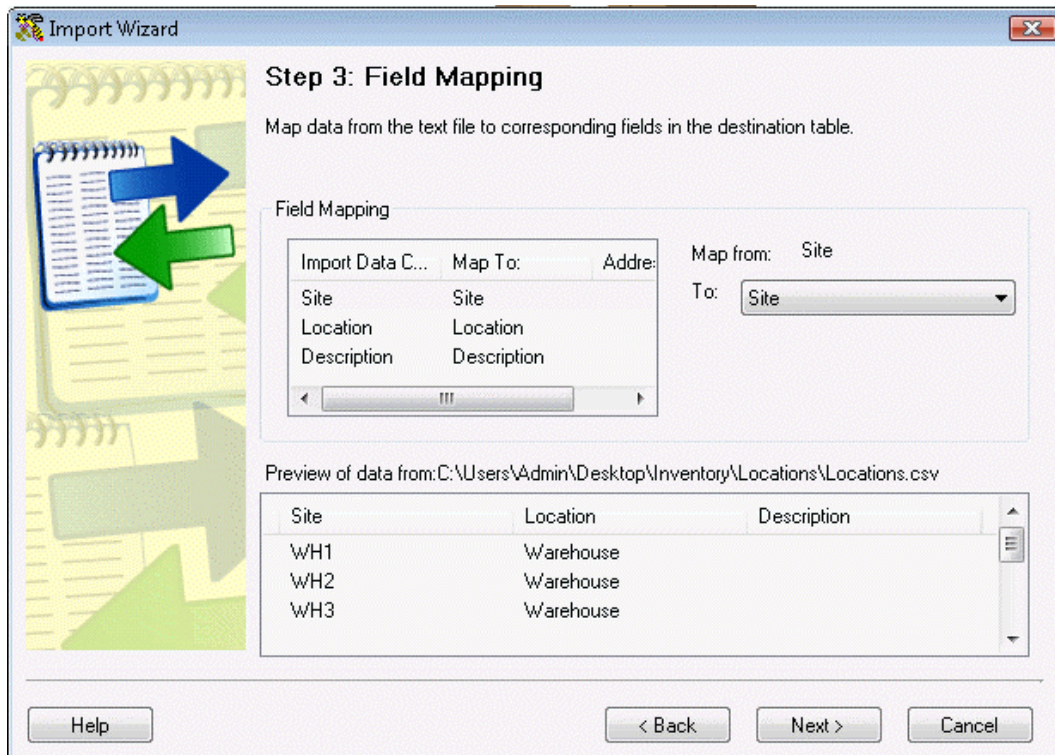
Delimiters are used to separate the data items in a database (the columns in the database table) when transporting the database to another application. For example, a comma-separated values file (CSV file) is one in which each value in the cells of a table row is delimited by and separated from the next value by a comma. The beginning of a row is indicated by a new line character.

5. Specify the field **Delimiter** used in the file from which you are importing data. This will always be a comma for .csv files, but any of the characters shown in the list box can be used with .txt files.

The preview window at the bottom of the screen will show you if your selected Delimiter is correct by displaying each column the system finds in your file when using that Delimiter. If all the data is in one column of the preview pane, you have not selected the right Delimiter.

Select the **First row contains column headings** option only if the first record of the file you are importing does not contain actual data. Import cannot remove subtotals, section headers, or any other records within the file that do not match the format of the actual data records. These must be removed before you attempt the import.

6. Click **Next** when you are ready to proceed. The **Step 3: Field Mapping** screen appears.



The **Field Mapping** screen allows you to associate columns which occur within your imported data file and corresponding fields within the table into which data will be written. Depending on the contents of your original database, not every column in your imported data needs to be mapped to a corresponding field in the program. The object is to bring over at least the required fields and any others that may be of use.

Note: If the **First Row Contains Column Heading** checkbox was checked in Step 2, the Import Wizard automatically compares the import file's **Import Data Column** heading to the **Map To** column heading. If a match is found, the Import Wizard populates the Field Mapping Import Data Column and Map To values. You may change the mapping for any column if necessary.

Special Note for Importing Items: When importing into the Item table, there are seven Map To fields which allow you to use the Import Data Columns for the purpose of enabling or disabling the *Item To Be Tracked By* or *Require the user to fill out* options found on the **Create New Item** and **Edit Item** screens. For more information on these options, please refer to the [Create New Item](#) topic.

Tracked By or Required Option is Enabled For This Record	Tracked By or Required Option is Disabled For This Record
True	False
T	F
Yes	No
0	1

These values are case-insensitive, but they are the only values allowed. Anything else will be rejected by Import. The default value is False.

The **Map To** fields, to which data columns containing these True/False values can be mapped, are named as follows in the Map To drop list:

- **Date Code (Track by?)**
- **Lot (Track by?)**
- **Pallet (Track by?)**
- **Serial Number (Track by?)**
- **Customer (Required ?)**
- **PO (Required ?)**
- **Supplier (Required ?)**

If, for example, you wanted every item being imported to be tracked by Serial Number, you could create a new column in your source data that contains the word "yes" in every cell of that column. If you chose to name this column TrackSer in your source data, you would then map from the TrackSer column to the Serial Number (Track by?) field.

You could just as easily edit this TrackSer column to turn on Serial Number tracking for some items and not others, by specifying values of "yes" or "no", as necessary.

In either case, when you import the items, mapping your TrackSer column to the Serial Number (Track by?) field will correctly set the Tracked By Serial Number option for each item being imported. This negates the need to manually edit each imported item's Item To Be Tracked By Serial Number option after importing the items.

True/False, T/F, Yes/No or 0/1 columns can be added to your source data for any or all of the seven Map To fields shown above, so that the Tracked By and Required options are set for each item at the time of import.

Each record added to an Auto Generated Number field takes the maximum number present in its column and increments this value by 1. For an import, if the Employee table already has an ID field value that is equal to 100 and the Import Wizard recognized that your import file contains a value in a mapped column that is equal to or less than 100, it will present you with a Default Value of the first import record.

All subsequent imported records will increment this value by 1. If this condition does not exist, the import will proceed with the values included in the import delimited text file.

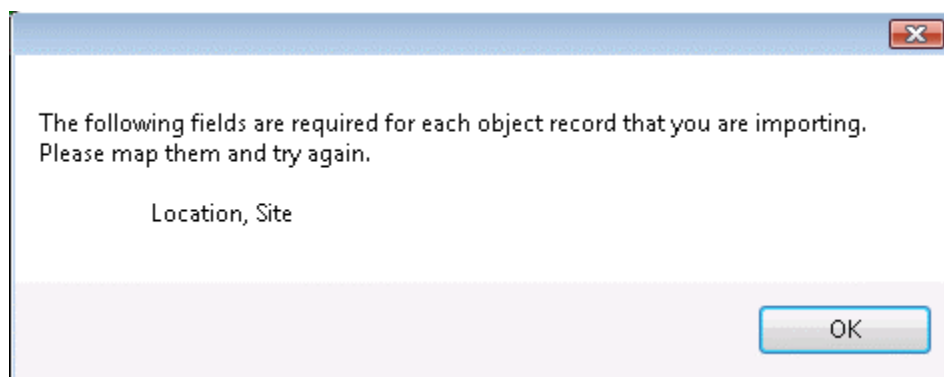
7. Click **Finish** when you are done mapping all the desired fields to the table. A confirmation screen will appear that the data has been imported. You can verify the import by going to the List screen (Main Window > Lists) and viewing the list for that type of information. For example, if you just imported Locations, view the Locations List to verify the new information is there.

Required Import Fields:

All tables have some required fields that must be mapped. These are listed below:

Table	Required Fields
Site	Site
Location	Location, Site
Supplier	Supplier Code
Manufacturer	Name
Customer	Customer Number
Item	Item Number, Item Type
Inventory	Item Number, Quantity, Site and Location

Example: Site and Location are required fields for importing Locations. If you fail to map columns for the Location table's required fields, you will receive this prompt:



Handling Import Errors:

If any of the information you just imported contains errors, a message will appear when you click the **Finish** button telling you to check the error report. Click **OK** on this message to view the Error report.

It is not uncommon to get an error like this when duplicates occur in your source data. Duplicate errors can be ignored and the Import can be considered to have completed successfully. For other error types, find the records that are in error; fix them; make a new import file (.txt or .csv) containing only these records and do another Import. Alternatively, you can enter these records manually.

Notes on Importing Inventory:

The steps for importing inventory are the same as those listed above; however, there is some important information to be aware of when you are importing inventory:

- Importing data into the Inventory table is optional. It is equivalent to manually adding inventory at the PC. Quantity and Location data, imported along with an Item Number, increases Item quantities in the database. You cannot remove inventory by importing negative quantities.
 - The value specified in the **Select Site** screen/**From Site** field can impact the Locations into which imported Inventory information will be recorded. When something other than <all> is specified as your From site, imported inventory will be put into Locations at the specified From Site. If you have varying Site information you wish to import along with the Location and Quantity data for each Item Number, you must make sure the From Site is set to <all> in Select Site before importing data into the Inventory table. For further information on the Select Site screen, please see the **Select Site** topic.
 - **Item Number, Quantity, Site and Location** are *all* required fields for Importing into the Inventory table. If, while importing Inventory data, a previously unknown value for either **Item Number, Site, Location, or Supplier Code** is read, a new Item Number, Site, Location or Supplier Code will *not* be created using the new value. Instead, the Inventory record being imported will be *rejected*. Negative values for **Quantity** can also cause an Inventory record to be rejected.
 - If one or more *Tracked By* or *Require the user to fill out* options are enabled for the Item Number specified in an Inventory record that fails to supply that information, the record will be rejected. For more information on these options, please refer to the **Create New Item** topic.
-

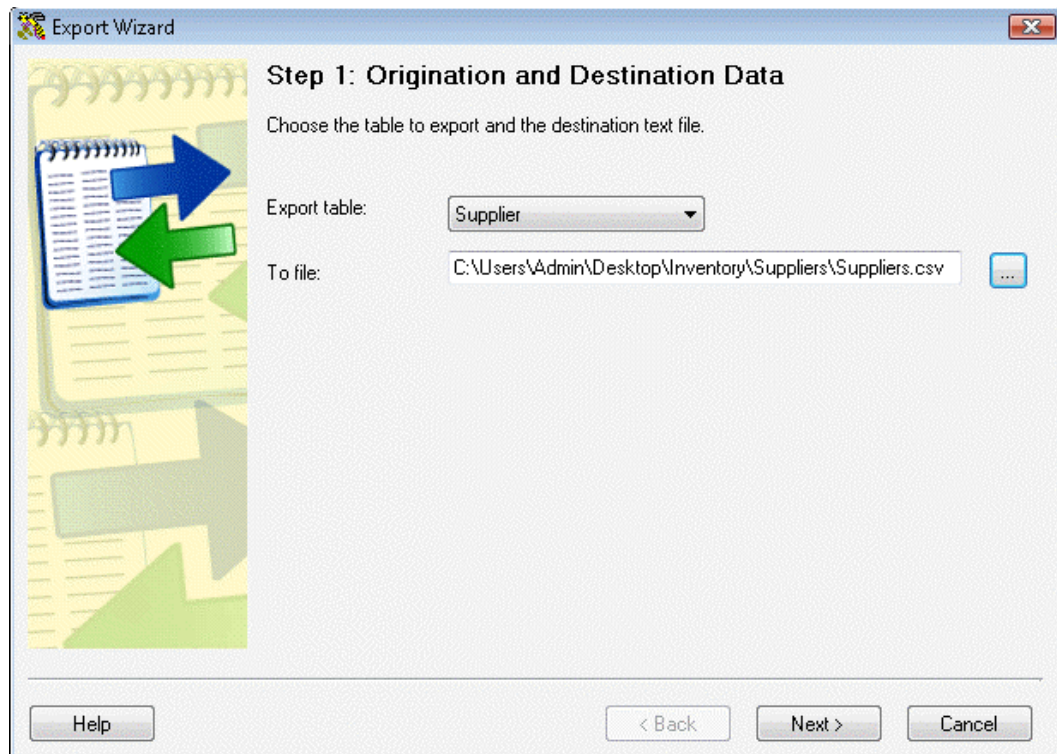
Exporting to a Text File

This software allows you to create text files containing data from one or more fields within each of the program's tables. For example, if you want to create a text file of all of the manufacturers in your database, the **Export** function allows you to quickly do this.

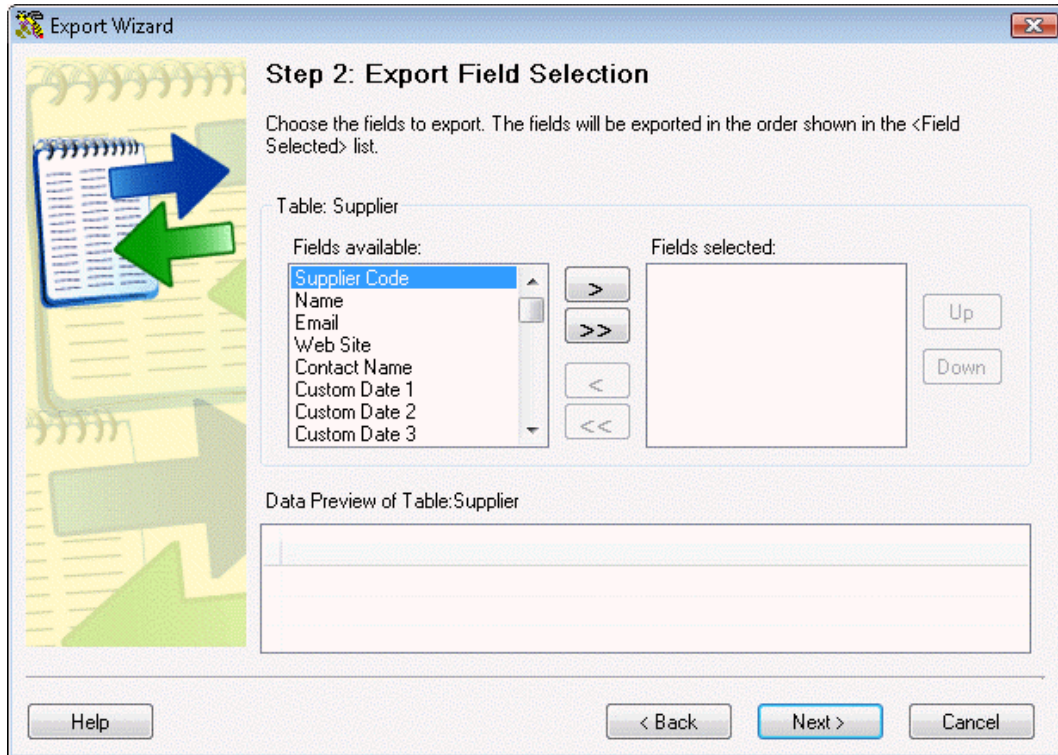
Data types and sizes for each table from which data can be exported are documented in the **Database Properties** topic.

How to Export Data:

1. From the **Main Window**, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.
2. On the **Administration Menu**, click **Export**. The **Export Wizard/Step 1: Origination and Destination Data** screen appears.





3. Select the table from which you want to export from the **Export Table** drop down menu. Then select the file to which you want to export the data. Here, the Supplier table has been selected for import to an external file named Suppliers.csv (a comma separated values file). Export also supports creation of .TXT files.
4. Click **Next** to continue. The **Step 2: Export Field Selection** screen appears.




The **Export Field Selection** screen allows you to select which of the **Fields available** in the table you have chosen to pull data from will be exported to the specified file.

To select a field, highlight a listing in the **Fields available** window, then click the

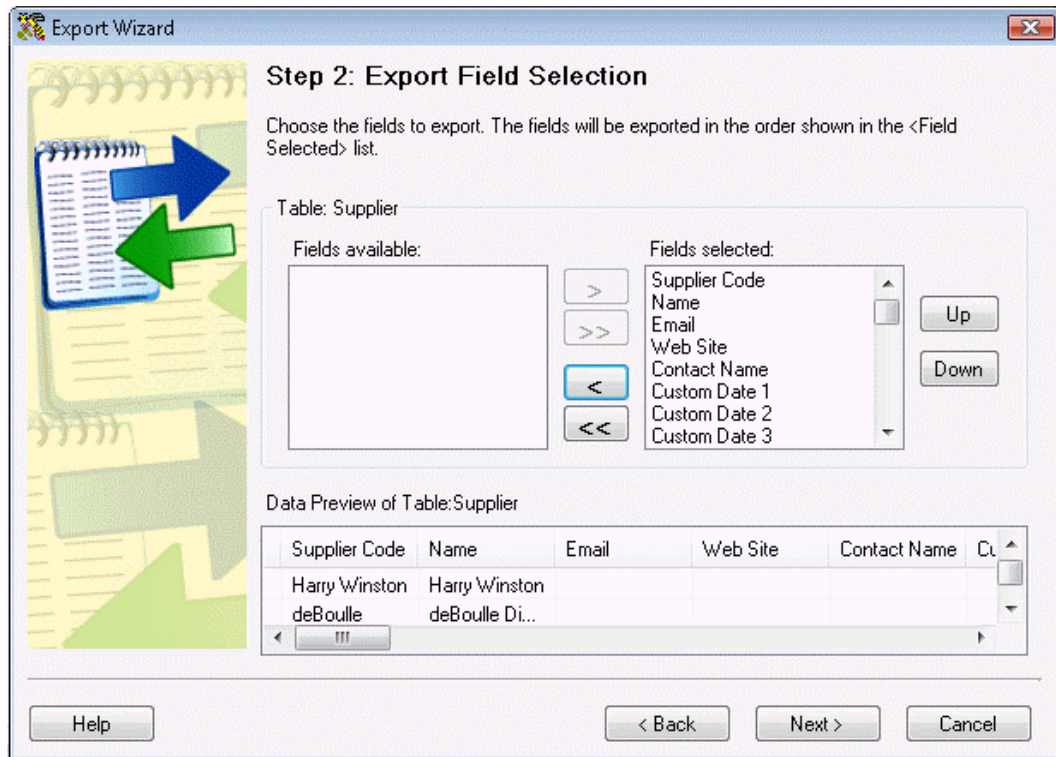
 button to add it to the **Fields selected** box.

Click the  button to add *all* of the available fields to the **Fields selected** box.

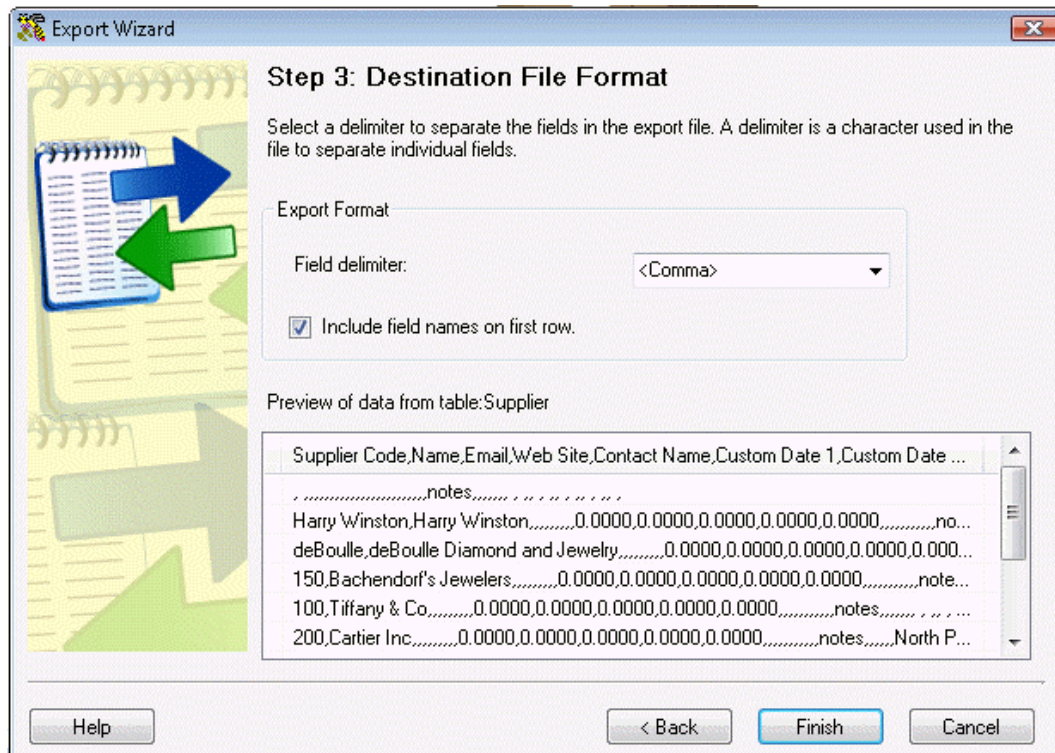
After adding one or more fields to the **Fields selected** box, you can use the  or

 buttons to return fields to the **Fields available** box.

The graphic below displays this screen with all **Fields** available selected.



- When you are finished selecting all the fields you want to use, click the **Up** or **Down** buttons to sequence the fields in the desired order. This is the order they will appear in your exported file. The **Preview** window at the bottom of the screen displays how your file will look.
- Click **Next** to continue. The **Step 3: Destination File Format** screen appears.



The **Destination File Format** screen allows you to specify the Field Delimiter of choice and whether or not to **Include field names on first row**.

Delimiters are used to separate the data items in a database (the columns in the database table) when transporting the database to another application. For example, a comma-separated values file(CSV file) is one in which each value in the cells of a table row is delimited by and separated from the next value by a comma. The beginning of a row is indicated by a new line character.

If the file name you specified in Step 1 uses the extension .CSV, you must specify **<Comma>** as your field delimiter (the default). If you specified a file name with the extension of .TXT in Step 1, you may use any of the field delimiters available in the drop list (as long as the chosen character does not occur within the data itself.)

7. Click the **Finish** button to perform the export. On completion, you'll receive a confirmation screen stating your export was successful.

You can confirm the export by opening and reviewing the .csv or .txt file you specified in Step 1.

Exports can be performed from any of the program's tables: Location, Supplier, Manufacturer, Item, Customer or Inventory.

Related Data Fields

Location Table	Supplier Table	Manufacturer Table	Item Table	Inventory Table
Site				Site
Location				Location
	Supplier Code		Supplier Code	Supplier Code
		Name	Manufacturer	
			Item Number	Item Number

The chart above shows the related data fields that exist within the database tables. The chart should be interpreted from left to right:

- If you will be importing data into both the **Location** table and the **Inventory** table:

The same *values* that reside within the Import Data Columns you choose to map to the Location table's **Site** and **Location** fields must also occur within the Import Data Columns you choose to map to the Inventory table's Site and Location fields. The actual Import file used for the Location import does not have to be used for the Inventory import. It's the Site and Location *values* themselves which must be the same in both Imports to create the proper connections between the Location and Inventory tables.



If, while importing Inventory data, a previously unknown Site or Location value is read, a new Site and/or Location will be created using the new value; the Inventory record being imported will not be associated with an existing Site and Location.

- If you will be importing data into the **Supplier** table and the **Item** table (or into the Supplier table and both the Item and **Inventory** tables):

The same *values* that reside within the Import Data Columns you choose to map to the Supplier table's **Supplier Code** field must also occur within the Import Data Columns you choose to map to the Item or Inventory table's Supplier Code field. The actual Import file used for the Supplier import does not have to be used for the Item or Inventory import. It's the Supplier Code *values* themselves which must be the same in both Imports (or in all three Imports) to create the proper connections between the Supplier and Item tables (or between the Supplier, Item and Inventory tables).



If, while importing Item data, a previously unknown Supplier Code value is read, a new Supplier Code will be created using the new value; the Item record being imported will not be associated with an existing Supplier Code.



If, while importing Inventory data, a previously unknown Supplier Code value is read, a new Supplier Code will *not* be created using the new value; the Inventory record being imported will be *rejected*.

- If you will be importing data into both the **Manufacturer** table and the **Item** table:

The same *values* that reside within the Import Data Columns you choose to map to the Manufacturer table's **Name** field must also occur within the Import Data Columns you choose to map to the Item table's **Manufacturer** field. The actual Import file used for the Manufacturer import does not have to be used for the Item import. It's the Name and Manufacturer *values* themselves which must be the same in both Imports to create the proper connections between the Manufacturer and Item tables.



If, while importing Item data, a previously unknown Manufacturer value is read, a new Manufacturer will be created using the new value; the Item record being imported will not be associated with an existing Manufacturer.

- If you will be importing data into both the **Item** table and the **Inventory** table:

The same *values* that reside within the Import Data Columns you choose to map to the Item table's **Item Number's** field must also occur within the Import Data Columns you choose to map to the Inventory table's Item Number field. The actual Import file used for the Item import does not have to be used for the Inventory import. It's the Item Number *values* themselves which must be the same in both Imports to create the proper connections between the Item and Inventory tables.



If, while importing Inventory data, a previously unknown value for either **Item Number**, **Site**, **Location**, or **Supplier Code** is read, a new Item Number, Site, Location or Supplier Code will *not* be created using the new value; the Inventory record being imported will be *rejected*. Negative values for **Quantity** can also cause an Inventory record to be rejected.

Lastly, if one or more Tracked By or Require the user to fill out options are enabled for the Item Number specified in an Inventory record that fails to supply that information, the record will be rejected. These errors will be listed in the Import-Export Error Report.



These same relationships apply when using Create New Location, Create New Supplier, Create New Manufacturer, Create New Item or Add Inventory.



The Customer table's fields are not related to fields within any of the other tables.

Import Specifics

This topic lists all **Field Names**, **Data Types** and **Sizes** for the fields that can be imported.

The import wizard contained in this software can automatically map the columns in your import files to the correct column in the database. To do this, however, the column header must match one that the wizard is looking for and the data type must be correct. Below is the header and data type the import wizard is expecting. Modify your .csv or .txt file with the correct column header to simplify the import process. The order in which your columns are arranged in your file does not matter. You can also find a .csv file with the header and one row of sample data on the installation cd that came with this product.

The imported file formats discussed in this topic are:

Customer

Inventory

Item

Location

Manufacturer

Supplier

Data Type Definitions are listed after the Table Properties.

Customer Import Format:

Column Header	Data Type	Size (Precision, Scale)
Address 1	varchar	100
Address 2	varchar	100
Cell No	varchar	20
City	varchar	50
Company Name	varchar	50
Country	varchar	50
Custom Date 1	datetime	
Custom Date 2	datetime	
Custom Date 3	datetime	
Custom Date 4	datetime	
Custom Date 5	datetime	
Custom Number 1	decimal	9(15,4)
Custom Number 2	decimal	9(15,4)

Custom Number 3	decimal	9(15,4)
Custom Number 4	decimal	9(15,4)
Custom Number 5	decimal	9(15,4)
Custom Text 1	varchar	100
Custom Text 2	varchar	100
Custom Text 3	varchar	100
Custom Text 4	varchar	100
Custom Text 5	varchar	100
Custom Text 6	varchar	100
Custom Text 7	varchar	100
Custom Text 8	varchar	100
Custom Text 9	varchar	100
Custom Text 10	varchar	100
Customer No.	varchar	30
Date Added	datetime	
Department	varchar	20
Email	varchar	255
FAX	varchar	20
Home Phone	varchar	20
Name	varchar	100
Notes	varchar	255
Phone	varchar	20
Cell Phone	varchar	20
Customer Billing Address 1	varchar	100
Customer Billing Address 2	varchar	100
Customer Billing City	varchar	50
Customer Billing State	varchar	50
Customer Billing Postal Code	varchar	10
Customer Billing Country	varchar	50
Customer Billing Mail Drop	varchar	20

Inventory Import Format:

Field Name	Data Type	Size (Precision, Scale)
Date Acquired	datetime	8
Date Code	varchar	25
Item Description	varchar	255
Item Number	varchar	30
Location	varchar	30
Lot	varchar	25

Pallet	varchar	25
PO	varchar	25
Quantity	decimal	9(18,4)
Serial Number	varchar	25
Site	varchar	255
Supplier Code	varchar	30

Item Import Format:

Field Name	Data Type	Size (Precision, Scale)
Alt Item Number	varchar	30
Category	varchar	255
Checkout Length	int	4
Cost	money	8
Custom Date 1	datetime	8
Custom Date 2	datetime	8
Custom Date 3	datetime	8
Custom Date 4	datetime	8
Custom Date 5	datetime	8
Custom Number 1	decimal	9(15,4)
Custom Number 2	decimal	9(15,4)
Custom Number 3	decimal	9(15,4)
Custom Number 4	decimal	9(15,4)
Custom Number 5	decimal	9(15,4)
Custom Text 1	varchar	100
Custom Text 2	varchar	100
Custom Text 3	varchar	100
Custom Text 4	varchar	100
Custom Text 5	varchar	100
Custom Text 6	varchar	100
Custom Text 7	varchar	100
Custom Text 8	varchar	100
Custom Text 9	varchar	100
Custom Text 10	varchar	100
Customer (Required ?)	char	1
Date Code (Track By?)	char	1
Description	varchar	255
Dimension Unit	varchar	50
File Reference	varchar	255
Height	varchar	50
Item Number	varchar	30
Length	varchar	50
List Price	money	8
Lot (Track By?)	char	1
Manager	varchar	50

Manufacturer	varchar	50
Max Stock Level	decimal	9(15,4)
Min Stock Level	decimal	9(15,4)
Notes	varchar	255
Pallet (Track By?)	char	1
PO (Required?)	char	1
Reorder Qty	decimal	9(15,4)
Sale Price	money	8
Serial Number (Track By?)	char	1
Supplier (Required?)	char	1
Supplier Code	varchar	30
Supplier Name	varchar	50
Unit of Measure	varchar	10
Weight	varchar	50
Weight Unit	varchar	50
Width	varchar	50

Location Table Properties:

Field Name	Data Type	Size (Precision, Scale)
Custom Date 1	datetime	8
Custom Date 2	datetime	8
Custom Date 3	datetime	8
Custom Date 4	datetime	8
Custom Date 5	datetime	8
Custom Number 1	decimal	9(15,4)
Custom Number 2	decimal	9(15,4)
Custom Number 3	decimal	9(15,4)
Custom Number 4	decimal	9(15,4)
Custom Number 5	decimal	9(15,4)
Custom Text 1	varchar	100
Custom Text 2	varchar	100
Custom Text 3	varchar	100
Custom Text 4	varchar	100
Custom Text 5	varchar	100
Custom Text 6	varchar	100
Custom Text 7	varchar	100
Custom Text 8	varchar	100
Custom Text 9	varchar	100
Custom Text 10	varchar	100
Default?	char	1
Description	varchar	255
Location	varchar	30
Notes	varchar	255

Site	varchar	255
------	---------	-----


Manufacturer Table Properties:


Field Name	Data Type	Size (Precision, Scale)
Address 1	varchar	100
Address 2	varchar	100
City	varchar	50
Contact Cell No	varchar	20
Contact Ext.	varchar	10
Contact FAX	varchar	20
Contact Name	varchar	50
Contact Phone	varchar	20
Country	varchar	50
Custom Date 1	datetime	8
Custom Date 2	datetime	8
Custom Date 3	datetime	8
Custom Date 4	datetime	8
Custom Date 5	datetime	8
Custom Number 1	decimal	9(15,4)
Custom Number 2	decimal	9(15,4)
Custom Number 3	decimal	9(15,4)
Custom Number 4	decimal	9(15,4)
Custom Number 5	decimal	9(15,4)
Custom Text 1	varchar	100
Custom Text 2	varchar	100
Custom Text 3	varchar	100
Custom Text 4	varchar	100
Custom Text 5	varchar	100
Custom Text 6	varchar	100
Custom Text 7	varchar	100
Custom Text 8	varchar	100
Custom Text 9	varchar	100
Custom Text 10	varchar	100
Email	varchar	250
Extension	varchar	10
FAX	varchar	20
Mail Stop	varchar	20
Name	varchar	50
Notes	varchar	255
Phone	varchar	20
Postal Code	varchar	10
State	varchar	50
Web Site	varchar	255

Supplier Table Properties:

Field Name	Data Type	Size (Precision, Scale)
Address 1	varchar	100
Address 2	varchar	100
City	varchar	50
Contact Cell No	varchar	20
Contact Ext.	varchar	10
Contact FAX	varchar	20
Contact Name	varchar	50
Contact Phone	varchar	20
Country	varchar	50
Custom Date 1	datetime	8
Custom Date 2	datetime	8
Custom Date 3	datetime	8
Custom Date 4	datetime	8
Custom Date 5	datetime	8
Custom Number 1	decimal	9(15,4)
Custom Number 2	decimal	9(15,4)
Custom Number 3	decimal	9(15,4)
Custom Number 4	decimal	9(15,4)
Custom Number 5	decimal	9(15,4)
Custom Text 1	varchar	100
Custom Text 2	varchar	100
Custom Text 3	varchar	100
Custom Text 4	varchar	100
Custom Text 5	varchar	100
Custom Text 6	varchar	100
Custom Text 7	varchar	100
Custom Text 8	varchar	100
Custom Text 9	varchar	100
Custom Text 10	varchar	100
Email	varchar	250
Extension	varchar	10
FAX	varchar	20
Mail Stop	varchar	20
Name	varchar	50
Notes	varchar	255
Phone	varchar	20
Postal Code	varchar	10
State	varchar	50
Supplier Code	varchar	30
Web Site	varchar	255

Data Type Definitions:

 The maximum sizes permitted by the data types defined below are greater than the field lengths used in the database. Refer to the sizes given in the tables above to avoid truncation when using Import.

 Any field defined to the tables above that has a length of only one character expects only two possible values: "T" or "F" (uppercase). "T" represents "True" or "On", "F" represents "False" or "Off". For example, The **Customer (Required ?)** field in the Item Table, is defined as "Char" with a Size of "1". If you want to enable the **Require user to fill out** option for the Item record being imported, supply a value of "T".

char Fixed-length non-Unicode character data with a maximum length of 8,000 characters.

datetime Date and time data from January 1, 1753, through December 31, 9999, with an accuracy of three-hundredths of a second, or 3.33 milliseconds.

Valid Alphabetic datetime Formats for Microsoft® SQL Server™ 2000 date data (characters enclosed in brackets are optional):

Apr[il] [15][,] 1996 -- (mdy)

Apr[il] 15[,] [19]96 -- (mdy)

Apr[il] 1996 [15] -- (mdy)

[15] Apr[il][,] 1996 -- (dmy)

15 Apr[il][,][19]96 -- (dmy)

15 [19]96 apr[il] -- (dmy)

[15] 1996 apr[il] -- (dmy)


1996 APR[IL] [15] -- (ymd)

1996 [15] APR[IL] -- (ymd)



Suggestion: To avoid ambiguity, use four-digit years.

If the day is missing, the first day of the month is supplied.

 Any of the alphabetic datetime formats shown above may be used -as *long as*- the format you select conforms to the year, month and date sequence exhibited by the Long Date format in effect on your PC. This can be found at:

Start > Settings > Control Panel > Regional Options > Date tab > Long Date format

For example, if your Long Date format, as shown in Regional Options is **dddd, MMMM dd, yyyy** (Friday, June 27, 2003), you can use any of the **mdy** alphabetic formats shown above, but you *can not* use any of the **dmy** or **ymd** formats.

Valid Numeric datetime Formats for Microsoft® SQL Server™ 2000
(characters enclosed in brackets are optional):

number separator number separator number [time] [time]

[0]4/15/[19]96 -- (mdy)

[0]4-15-[19]96 -- (mdy)

[0]4.15.[19]96 -- (mdy)

[04]/[19]96/15 -- (myd)

15/[0]4/[19]96 -- (dmy)

15/[19]96/[0]4 -- (dym)

[19]96/15/[0]4 -- (ydm)

[19]96/[04]/15 -- (ymd)

Slash marks (/), hyphens (-), or periods (.) may be used as separators.



Any of the numeric datetime formats shown above may be used *-as long as-* the format you select conforms to the year, month and date sequence exhibited by the Short Date format in effect on your PC. This can be found at:

Start > Settings > Control Panel > Regional Options > Date tab >
Short Date format

For example, if your Short Date format, as shown in Regional Options is **M/d/yyyy** (6/27/2003), you can use any of the **mdy** numeric formats shown above, but you *can not* use any of the **dmy**, **ydm**, **ymd**, **myd**, or **dym** formats.

decimal Fixed precision and scale numeric data from $-10^{38} + 1$ through $10^{38} - 1$.

Precision specifies the maximum *total number of decimal digits* that can be stored, both to the left and to the right of the decimal point.

Scale specifies the maximum number of decimal digits that can be stored *to the right of the decimal point*.

Size is the number of storage bytes consumed internally - this value should be ignored when determining whether or not a decimal value will be truncated - use Precision and Scale instead, to make this assessment. Size can and should be used for all other Data Types.

int Integer (whole number) data from -2^{63} (-9223372036854775808) through $2^{63}-1$ (9223372036854775807).

money Monetary data values from -2^{63} (-922,337,203,685,477.5808) through $2^{63}-1$ (+922,337,203,685,477.5807), with accuracy to a ten-thousandth of a monetary unit.

This data type is limited to a maximum of four decimal points. Use a period to separate partial monetary units, like cents, from whole monetary units. For example, **2.15** specifies **2 dollars and 15 cents**.



Comma separators are not allowed.

varchar Variable-length non-Unicode data with a maximum of 8,000 characters.

Performing an Audit

Auditing Your Inventory

As many business owners know, keeping accurate counts of inventory is a critical part of maintaining a well-run business. For instance, if an inventory item is listed in the system as having met its reorder point, but the quantity in the system is based on an inaccurate count, your business could end up wasting money on reordering inventory that was not in danger of being depleted. On the other hand, if your system lists plenty of inventory for an item that is actually at or below the reorder point, you could be faced with too little stock on hand to fulfill orders, creating a costly back-order situation. Many business owners also know that getting accurate counts can be a time-consuming task.

With these issues in mind, InventoryControl was designed with a built-in audit mode that allows you to conveniently conduct audits at the PC and on one or more mobile devices while preventing access to such features as Remove and Add so that you can be assured you are getting accurate count comparisons.

Audit Mode allows you to check the counts of all your inventory while disabling the Add, Remove, Move, Adjust, Check-In and Check-Out features to make sure inventory counts in the system do not change while you are performing the audit. If you are using mobile devices, you can use them simultaneously with the PC to perform an audit by downloading the database in audit mode to each device. **Audit Mode** features a simple **Audit** screen that allows you to enter your counts for inventory in each location and compares these to the counts already in the system. You can then view the **Complete Audit** screen to review any discrepancies between your counts and what was in the system. At the click of a button you can reconcile the counts or you can select certain transactions to accept or reject. This software also comes equipped with several **Audit Reports** that allow you to review a variety of information at-a-glance.

The topics listed below are included in this section. It is best to review these topics in order as they outline the flow of performing an audit.

1. **Audit Flow Overview**
 2. **Beginning the Audit**
 3. **Using the Audit Screen**
 4. **Reviewing the Not Counted Items Report**
 5. **Reconciling Your Counts on the Complete Audit screen**
 6. **Reviewing the Remainder of the Audit Reports**
 7. **Ending the Audit**
-

Audit Flow Overview:

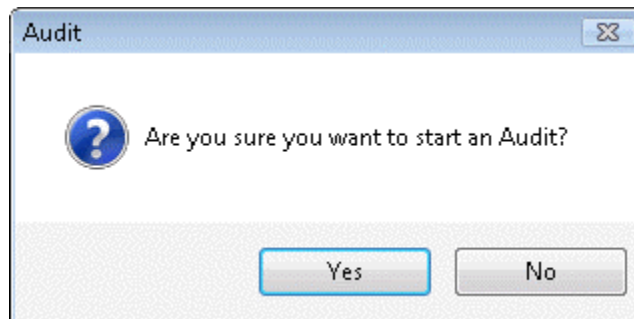
The audit process in this software is broken into 7 steps:

1. Create a pre-audit backup of your database.
2. Start the **Audit Mode** on the PC. If you are using mobile devices, create a database of the system while in audit mode and download it to the mobile devices to be used during the audit.

3. Use the **Audit** screen or the mobile devices to enter counts (and sync the mobile device data back to the PC).
 4. Review the **Items Not Counted Report**.
 5. Reconcile your counts entered in the **Audit** screen against the counts that were in the system.
 6. Review the remainder of the **Audit Reports**.
 7. End the **Audit Mode**.
-

Beginning the Audit:

1. On the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click the **Audit** icon. The following confirmation message appears:



3. Click **Yes** to begin the audit. If you are using the Pro or Enterprise version of InventoryControl, a message appears reminding you to create a pre-audit backup of your database, if you have not already done so.
4. Select **OK** on the **Backup Reminder** message to go to the **Backup** screen and create the backup now. We recommend you create the backup file with a name similar to the following:

Pre-Audit-yyyy-mm-dd-hh-mm-ss.bkp

This backup of your database can be restored later, if necessary, but you will lose any transactions completed since that backup. For more information on creating backups, please refer to the **Backing Up the Database** topic.

Select **No** to begin the audit without creating a backup (this is not recommended).

The screen will prominently display a message that **Audit Mode** is active and most of the **Inventory** menu will be disabled. An example of the **Inventory** menu with **Audit Mode** activated is displayed below:

Audit



With **Audit Mode Active**, you should next create mobile databases and download them to mobile devices if you will be using mobile devices for the audit.


5. Now you can begin entering counts manually on the PC or on the mobile devices via the **Audit** screen. For information on using the **Audit** screen on the mobile device, please refer to the

Using the Audit Screen:

Now that you have started the **Audit Mode** on the PC and (optionally) downloaded the audit database to your mobile devices, you can begin your counts.

To enter your counts on the PC:

1. On the **Inventory** menu, click the **Audit** icon (this is the same icon you clicked to begin the **Audit Mode**). The **Audit** screen appears:

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Adds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. (The **Add** button does not have to be clicked between each scan to post these add transactions to the **Pending Transaction List**.)

Clicking the  button will unlock the field.

2. **Complete the Item fields:** Enter the **Item Number** of the item you want to audit. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item List**. You cannot create a new item during an audit.

Entering an **Item Number** populates the **Item Number** field as well as the **Description** field and enables the following fields:

- **Location**
- **Quantity** (unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of 0 or 1)
- Any of the associated **Tracked By** fields: **Serial Number**, **Date Code**, **Lot** or **Pallet** (Set on the **Add** or **Edit Item** screens). A **Tracked By** field is enabled or disabled at the time the item is created.

Items tracked by serial number that are checked-out cannot be audited.

Below is an example of the **Audit** screen enabled:

3. **Enter a Transaction Code (optional):** This field allows you to type in a value or select a previously-entered code that describes the transaction.
4. **Enter Notes (optional):** This field allows you to add and store additional information that describes the transaction.
5. After you have entered all information on the screen, click the **Audit** button. The audit transaction will be added to the **Pending Transaction List**.

The **Audit** button is not enabled until a valid value is entered in the **Item Number** field and the **Location** field.

6. After reviewing the **Pending Transaction List**, click **Remove** to delete any selected transactions or click **Remove All** to delete all the records listed, then click the **OK** button to post the remaining audit transactions to your database.

Audit's pending transactions are handled differently than other inventory transactions. All pending transactions are listed (those just added as well as those previously added.) They do not go away until they are reconciled or removed from the list.

7. Repeat these steps for each item for which you want to update quantity. After you have finished updating quantity for all audited items (and downloaded any audit data from the mobile devices, if used) you are ready to review the **Not Counted Items Report**.

Reviewing the Not Counted Items Report:

This software contains several audit reports that allow you to review count and discrepancy information. Most of these reports are useful for review after the audit is completed and are

discussed later in this topic. The **Not Counted Items Report**, however, should be reviewed before you reconcile your counts. This report lists any items for which quantity was not entered into the system either through the **Audit** screen on the PC or via the mobile devices. By reviewing this report, you can quickly determine if any items were missed during the audit.

To View the Not Counted Items Report:

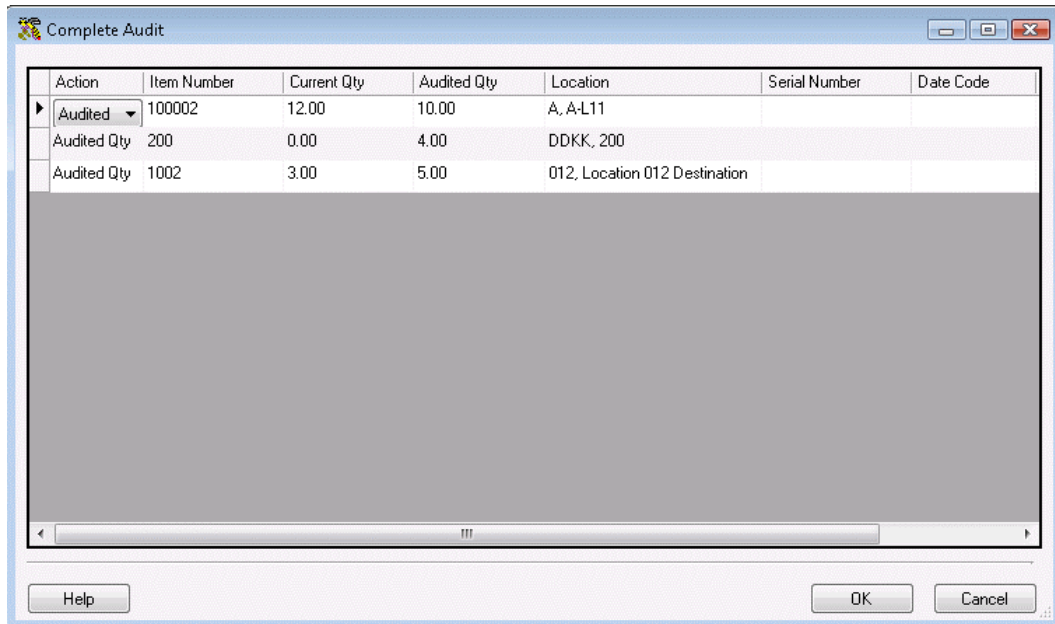
1. Click the **Reports** icon in the main functions section of the **Main Window**. The **Reports Selection** screen appears displaying all **Audit** reports.
2. Highlight the **Not Counted Items Report** and click **OK** or just double-click the report. The report opens in the **Report Viewer**. For more information on viewing reports, please refer to the **Report Viewer** topic.
3. Review the report and add counts for any items that were missed. After you have entered any additional quantities into the system, you are ready to reconcile your counts.

Reconciling the Counts:

The next step in the audit process is to reconcile your counts against those that were already in the system. You can view this screen and reconcile as you go along, or you can wait until all counts are entered and reconcile once before ending the audit.

To Reconcile:

1. On the **Inventory Menu** (in **Audit Mode**), click the **Reconcile/End** icon. The **Complete Audit** screen appears:



Action	Item Number	Current Qty	Audited Qty	Location	Serial Number	Date Code
Audited	100002	12.00	10.00	A, A-L11		
Audited Qty	200	0.00	4.00	DDKK, 200		
Audited Qty	1002	3.00	5.00	012, Location 012 Destination		

This screen lists all audit transactions and includes the following columns:

- **Item Number**

- **Current Quantity** - This is the quantity that was listed for this item in the system prior to the audit.
 - **Audited Quantity** - This is the quantity that you entered for this item on the **Audit** screen. You can update this field on the **Complete Audit** screen by selecting the field and typing in a new number or by using the up or down arrow buttons next to the field.
 - **Location** - The location you selected for this item on the **Audit** screen.
 - **Serial Number, Lot, Pallet** - These appear populated only if this item is tracked by one or more of these fields.
2. Select from the **Action** column what action you want to take with the selected item. Your options are:
- **Audited Qty** - Selecting this option means the system will keep the audited quantity you entered for this item on the Audit screen.
 - **Current Qty** - Selecting this option means the system will keep the quantity that was listed in the system prior to the audit.
 - **Ignore Record** - When the audit is ended, no action will be taken on this record. Quantity amounts will stay the same for this item. The system will behave as though this item was not audited. The item will not appear on any audit reports.
- You must remove those items you mark as **Ignore Record** from the **Pending Transaction List** tab on the **Audit** screen before you can end the audit.
3. After you have selected an action for all items on the list, click the **OK** button to post the transactions to your database. You are now ready to end the audit.
-

Reviewing the Remainder of the Audit Reports:

This software contains several audit reports that allow you to review a variety of information. Available reports are:

- **Accepted Audit Discrepancies Report**
- **Accepted Audit Result Report**
- **Audit History by Audit Date**
- **Audit History by Item Number**
- **Not Counted Item Report**
- **Unreconciled Audit Discrepancies**
- **Unreconciled Audit Report**

These reports are accessed by click the **Reports** icon on the **Main Window**. The reports are viewed in the **Reports Viewer**. For more information on viewing reports, please refer to the **Report Viewer** topic.

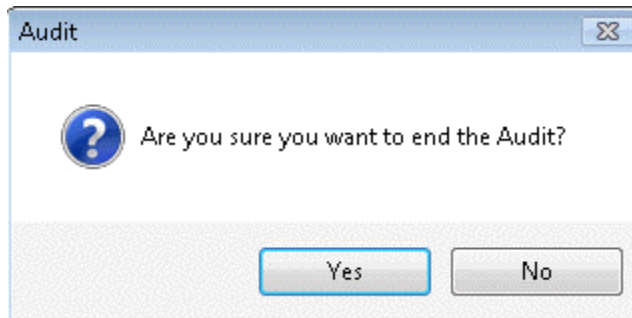
Ending the Audit:

The last step in the audit process is to end the **Audit Mode** session on your PC so all features are enabled. To do this:

1. On the **Inventory** menu (in **Audit Mode**), click the **Reconcile/End** icon.

If you have not reconciled all transactions on the **Complete Audit** screen (including removing any records marked as **Ignore Record** from the **Audit** screen/**Pending Transactions List** tab), the **Complete Audit** screen will appear. For information on using this screen, please refer to the **Reconciling the Counts** topic, above.

If you have reconciled all transactions, the following message will appear:



2. Click **Yes** on the message screen to end the audit. The system will go back into regular mode and you will have access to all features on the Inventory menu.
-

Creating New Data

Creating a New Site

The **Create New Site** screen allows you to add a new Site to your database. Typically, a Site is a building that contains one or more inventory **Locations**. It is usually a building, but it might also be a fleet vehicle, with one or more bins that can be defined as inventory Locations within that vehicle. For more information on **Locations**, please refer to the [Creating New Locations](#) topic.

It is not uncommon to use this product with only one **Site** defined. A minimum of one Site is required.

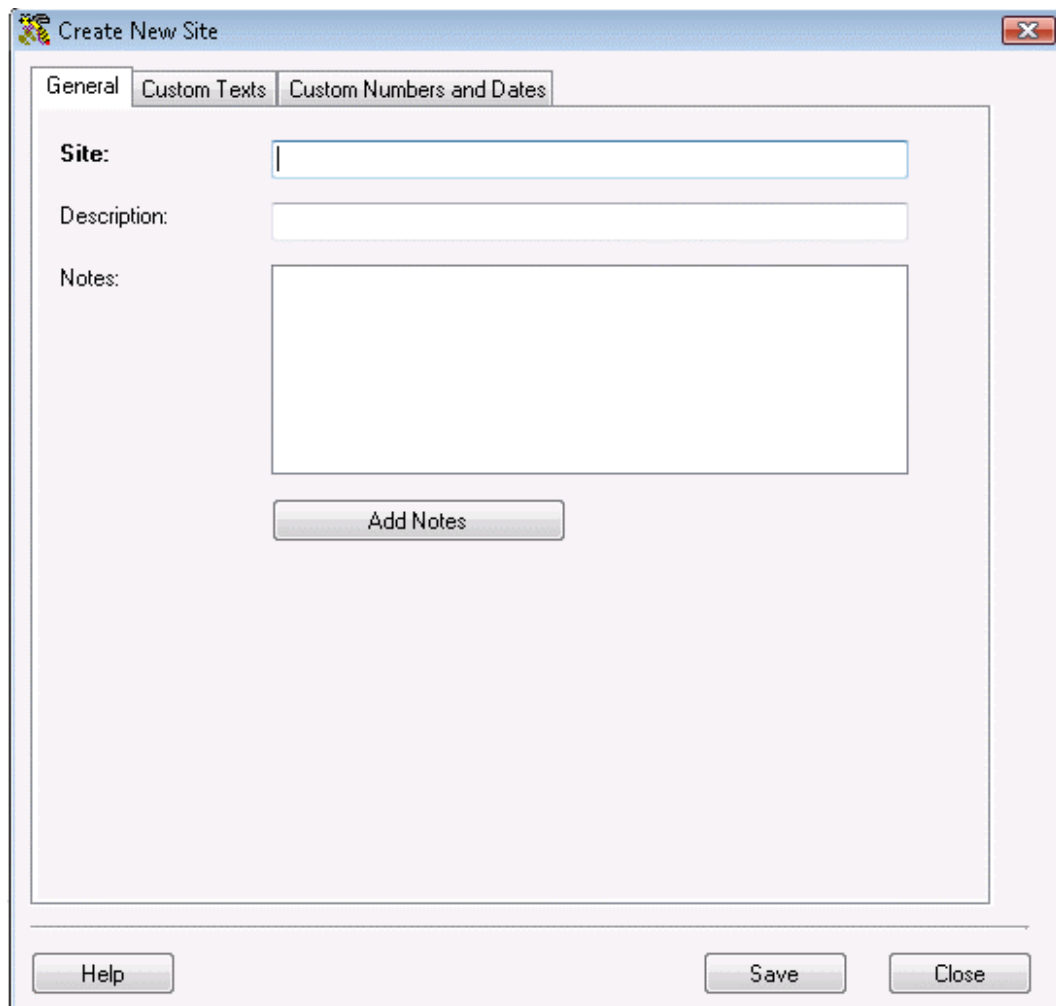
Adding a New Site:

1. From the **Main Window**, select **New > Site**.

OR

From the **Main Window**, select **Lists > Site**. On the **Site List**, select the **New** icon.

The **Create New Site** screen appears:



2. Enter a **Site** and **Description**. **Description** allows you to enter a description of the Site. This is useful when the Site value is vague (For example, Site "H7" could be described as "Hangar 7").

Notes is a text field available to record any additional information you might have about this Site. Click the **Add Notes** button to edit the **Notes** field.

3. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.
4. When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.
 - When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
 - When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the [Options Screen](#) topic.

Creating New Customers

The Create New Customer screen allows you to add a new customer to your database. When you are setting up your software for the first time, you may want to import your customers rather than adding them one at a time through this screen. For information on importing information into your database, please refer to the Import Into Database topic.

Adding a Customer:

1. From the **Main Window**, select **New > Customer**.

OR

From the **Main Window**, select **Lists > Customer**. On the **Customer List**, select the **New** icon.

The **Create New Customer** screen appears:

The screenshot shows the 'Create New Customer' dialog box with the following fields and options:

- Customer No.:** 11113
- Name:** [Empty text box]
- Company Name:** [Empty text box]
- Department:** [Empty text box]
- Date Added:** Wednesday, May 23, 2007
- Address:**
 - Address Type:** Customer Billing (dropdown menu)
 - Address 1:** [Empty text box]
 - Address 2:** [Empty text box]
 - Mail Stop:** [Empty text box]
 - City:** [Empty text box]
 - State:** [Empty text box]
 - Postal Code:** [Empty text box]
 - Country:** [Empty text box]

Buttons at the bottom: Help, Save, Close.

Note: This screen is opened automatically when **Checking Out** or **Checking In** inventory and a new customer name is entered.

2. Type in the customer information. The **Customer No.** and **Address Type** fields are required; all other fields are optional. The customer name and address can then be selected when creating **Pick Orders** (*Pro and Enterprise versions only*).

If you have the **Automatic Customer Numbers** option selected on the **Options** screen, the **Customer No.** field will appear populated with the next number in the sequence. For further information on the this option, please refer to the **Options Screen** topic.

The software provides you with the ability to enter a Billing Address, Receiving Address and/or Shipping Address for your customers. To enter multiple address, follow the steps below:

- a. On the **Company Information** screen, enter your company name. Select what type of address you will be entering from the **Address Type** drop down menu.
 - b. Enter the remainder of the address information, then click **OK**. You will be returned to the **Administration Menu**.
 - c. Click the **Company Info** icon again. The **Company Information** screen will reappear populated with the information you just entered.
 - d. Select a different address type of the **Address Type** drop down menu. The address lines (Address 1 and 2, City, State, Postal Code and Country) will clear while all other company information will remain on the screen.
 - e. Enter the new address information, then click **OK**. Repeat these steps for each address type.
3. When you have finished entering data in the **General Information** tab, click the **Additional Information** tab (this tab is optional).

The screenshot shows a window titled "Create New Customer" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there are four tabs: "General", "Additional", "Custom Texts", and "Custom Numbers and Dates". The "Additional" tab is currently selected. The form contains the following fields and controls:

- Phone:** A text input field.
- Extension:** A text input field.
- Fax:** A text input field.
- Cell No.:** A text input field.
- Home No.:** A text input field.
- Email:** A text input field.
- Notes:** A large text area for notes.
- Add Notes:** A button located below the Notes text area.
- Help:** A button at the bottom left of the window.
- Save:** A button at the bottom right of the window.
- Close:** A button at the bottom right of the window, next to the Save button.

The **Additional Information** tab provides optional fields where you can record the customer's **Phone**, **Extension**, **Fax**, **Cell No.**, **Home No.** and **Email**. In addition, you can create notes on this customer on this tab by clicking the **Add Notes** button.

4. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.
5. When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.
 - When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
 - When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about setting the **Close New Form** option on the **Options** screen, please refer to the **Options Screen** topic.

Creating New Items Inventory and Non-Inventory Items

The **Create New Item** screen allows you to add a new Item to your database and to specify how you want to track each item (by Serial Number, Lot, Date Code and/or Pallet).

For information on creating **Assembly Items**, please see the topic [Creating an Assembly Item](#) (Pro and Enterprise versions only).

For information on creating **Kit Items**, please see the topic [Creating a Kit Item](#) (Pro and Enterprise versions only).

An **Item** records information about each product you expect to have in inventory.

Note for Pro and Enterprise Version Users: You can create items that are not inventoried, but that you want to have a record of. For instance, you can create an item for marketing pamphlets. (In the Standard version of InventoryControl you cannot create items that are not inventoried.) If you are using the Pro or Enterprise version, you will see a **Type** field on the **Create New Items/General Tab**. Select **Inventory** or **Non-inventory** from the drop down list. **Inventory** is selected by default.

When you are setting up your software for the first time, you may want to import your items rather than adding them one at a time through this screen. For information on importing information into your database, please refer to the [Import Into Database](#) topic.

This topic discusses:

[Accessing the Create New Items Screen](#)

[General Information Tab](#)

[Location Settings Tab](#)

[Additional Information Tab](#)

[Manage Suppliers Tab](#)

[Custom Texts/Custom Numbers and Dates Tab](#)

[Saving the New Item](#)

Accessing the Create New Items Screen:

1. From the **Main Window**, select **New > Item > Inventory or Non-Inventory**.

OR

From the **Main Window**, select **Lists > Item**. On the **Item List**, select the **New** icon.

Note: or information on creating **Assembly Items**, please see the topic **Creating an Assembly Item** (Pro and Enterprise versions only).

For information on creating **Kit Items**, please see the topic **Creating a Kit Item** (Pro and Enterprise versions only).

The **Create New Item** screen appears:

The screenshot shows the 'Create New Item' window with the 'General' tab selected. The window has a title bar 'Create New Item' and a standard Windows-style close button. Below the title bar are several tabs: 'General', 'Location Settings', 'Additional', 'Manage Suppliers', 'Custom Texts', and 'Custom Numbers and Dates'. The 'General' tab contains the following fields and controls:

- Item Number:** A text box containing the value '8'.
- Alt Item Number:** An empty text box.
- Description:** An empty text box.
- Category:** A dropdown menu.
- Checkout Length:** An empty text box.
- Manufacturer:** A dropdown menu.
- Type:** A dropdown menu with 'Inventory' selected.
- Item To Be Tracked By:** A section with four checkboxes: 'Serial Number' (checked), 'Lot', 'Date Code', and 'Pallet'.
- Require the user to fill out:** A section with three checkboxes: 'PO' (checked), 'Supplier', and 'Customer'.
- Cost:** An empty text box.
- Average Cost:** An empty text box.
- List Price:** An empty text box.
- Sale Price:** An empty text box.
- Min Stock Level:** An empty text box.
- Max Stock Level:** An empty text box.
- Reorder Qty:** An empty text box.
- Total Available:** A label with the value '0'.
- Total Checked-Out:** A label with the value '0'.
- Total In-House:** A label with the value '0'.

At the bottom of the window are three buttons: 'Help', 'Save', and 'Close'.

General Information Tab:

The General Information tab is where you will enter the basic information about the item. Please see the screen shot above for an example of this tab.

Input the appropriate information in the fields provided:

- **Item Number** is a required field. The **Item Number** is often available on a barcode label already attached to the item. This allows you to scan or manually enter the number from each item as it comes in. Item numbers cannot exceed 20 digits.

Do not use a description as the item number. You should enter a numeric value

in the **Item Number** field. A description of the item can be entered in the **Description** field.

The **Item Number** is often the UPC code or SKU number of an inventory item. Using an existing barcode for Item Number allows you to scan or manually enter the number from each Item as it comes in without having to print and affix your own barcode inventory item labels.

Automatic Item Numbers: If you have the **Automatic Item Numbers** option selected on the **Options** screen, the **Item Number** field will appear populated with the next number in the sequence. For further information on the this option, please refer to the **Options Screen** topic.

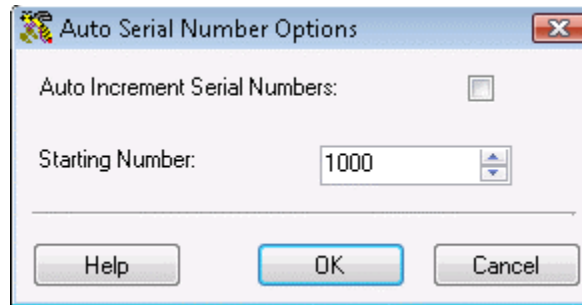
- **Category:** When a new **Category** value is typed into the field, you will receive a message asking if you want to save it as a new Category.
- **Checkout Length** specifies the default period, in days, that this **Item** can be checked out to a customer.
- When a new **Manufacturer** is typed into the Manufacturer field, you will receive a message asking if you want to save the value as a new Manufacturer.
- The **Type** drop down list applies to Pro and Enterprise version users only. Select **Non-inventory** if you do not want this item to be inventoried, or select **Inventory** to inventory this item. This field will not appear on the Standard version. You can also select Assembly or Kit items. See the **Assembly Overview** or **Kitting Overview** topics for more information on these item types.
- The **Item To Be Tracked By** section contains check boxes which determine whether the **Serial Number**, **Lot**, **Date Code** and **Pallet** fields must be completed throughout InventoryControl before you can create inventory from this item.

Items To Be Tracked By:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	No	-
Enabled (checked)	Yes	Yes

It is important at this time that you determine how you want to track each item. Typically, small items that are all the same may not need to have any **Tracked Bys** selected. Items such as printers may need to be tracked by **Serial Number**, so returns and maintenance can be properly tracked. Medical supplies or food may need to be tracked by **Date Code** and/or **Lot**.

Tracked By options cannot be changed after you add inventory to the item.

- **Automatic Serial Numbers:** You can choose to have the program automatically create and assign serial numbers each time you add inventory for this item (whether manually using the Add Inventory feature or by Receiving Inventory). To do this:
 - a. Click the button to the right of the **Serial Number** check box. The **Auto Serial Number Options** screen is displayed:



- b. Check the **Auto Increment Serial Numbers** to have the software automatically assign incremented serial numbers. Enter a **Starting Number**. This number determines the number at which the serial number sequence starts. Since this option is applied at the **Item** level, each **Item** in the program may have its own unique series of serial numbers.
 - c. Click **OK** to accept your entries.
- The **Require the user to fill out** section contains check boxes which act much like the Tracked By boxes, but contains a different set of fields (**Ref #**, **Supplier** and **Customer**) which are always available for use, even if they are not required. For example, if the option is not enabled for the Supplier Code field, a user adding inventory can enter a value for Supplier Code if he knows it or skip entering a value if he doesn't. If however this option is enabled, a value for Supplier Code is required to complete the transaction.

Require The User to Fill Out:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	Yes	No
Enabled (checked)	Yes	Yes

- Cost** specifies the amount paid to get this item into inventory.
- Average Cost** is a calculated value that averages the costs paid for the current Quantity.

If you have 20 quantity of this item at cost 10.00

and add another 30 quantity at cost 8.00,

$$\text{Average Cost} = ((20 \times 10.00) + (30 \times 8.00)) / 50 = 8.80$$

Removes are calculated using the FIFO method, therefore, if you later remove 5, 5 of the cost 10.00 items will be removed first,

$$\text{Average Cost} = ((15 \times 10.00) + (30 \times 8.00)) / 45 = 8.67$$

When calculating Average Cost, the software *does not* include records that have an average cost of zero. When you run an Inventory Cost Report, the software *does* include zero cost quantities when calculating Total Cost.

- **List Price** specifies a manufacturer's list price for an item.
- **Sale Price** specifies the price at which you sell an item.
- **Min Stock Level** specifies the minimum stock level you wish to maintain.
- **Max Stock Level** specifies the maximum stock level you wish to maintain.
- **Reorder Qty** specifies the quantity at which you want to reorder inventory.

Note: The **Minimum Stock Level**, **Maximum Stock Level** and **Reorder Quantity** fields found on this tab represent these levels at the item level only, meaning these are the stock levels for this item throughout all locations. If you want to maintain these levels by location, you can do so on the **Location Settings** tab (described below).

Note - The fields below only appear on the **Edit Item** screen.

- The **Total Available** counter is the sum of Total Checked-Out and Total In-House.
- The **Total Checked-Out** counter is the quantity of this item that is currently Checked-Out.
- The **Total In-House** counter is the Total Available less the Total Checked-Out.
- The **Total On Order** counter is the quantity of this item that is currently included on an active Pick Order.
- The **Total Buildable** (applies to Assembly Items only) is the quantity that can be built of this Assembly Item based on the inventory levels of the component items.
- The **Committed** counter (applies to Assembly, Inventory and Non-Inventory items only) is the number that has been committed to a pick order.
- The **Total Shippable** (applies to Kit Items only) is the total on hand amount minus committed quantities for all component items. (Committed is inventory that is contained on a pick order.)

Location Settings Tab:

When you have completed the **General Information** tab, click the **Location Settings** tab. This tab allows you to enter all locations where this item will be in inventory and to designate a primary location. You can assign items to more than one location. This tab uses the List functionality for grouping, ordering, filtering and deleting.

General Location Settings Additional Manage Suppliers Custom Texts Custom Numbers and Dates

Filter Group By Delete

To finish adding a new record please press enter key or down arrow button. Click on Filter toolbar button to bring up filter row, and to bring up group row please click on Grouping toolbar button.

Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty
<input type="checkbox"/>			0.00	0.00	0.00	0.00

Record: || ◀ ▶ Of 0 ▶▶ ▶▶

Help Save Close

Complete the fields on this screen as described below:




- **Primary Location** - Select this checkbox if this will be the primary location at this site for this item. A primary location can be selected for each **Site** you have setup in the system. When you select a primary location, when you **Receive** quantities of that item from a purchase order, they will automatically be assigned to that location. Also, when you **Pick** quantities of that item for pick orders, they will automatically be removed from that location. You can change these locations when picking and receiving if necessary. In addition, the primary location will appear in any location fields (on the **Add** inventory screen, for example), however; you can change the location, if needed.

Only one primary location can be selected per site.

- **Site and Location** - Click in the box and select a **Site** and **Location** from the drop down list. Only sites and locations you have previously selected will appear in this list. Select **More** to view the **Site** or **Location List**. You can also select **New Location** or **New Site** to access the **Create New** screen. These represent the site and the location where the inventory will reside.
- **Quantity** - This number is populated from the Inventory for this item. This number displays how many of this item is currently in stock at the selected site and location.
- **Max Stock Level** - Enter the maximum number of this item that you want to have in stock for the selected site and location. This number can be 0 or a positive number, negative numbers are not allowed.
- **Min Stock Level** - Enter the minimum number of this item that you want to have in stock for the selected Site and Location. This number can be 0 or a positive number, negative numbers are not allowed.

- **Reorder Qty** - Enter the number at which you want to reorder this item for the selected **Site** and **Location**. You can set an option in the software so that the system warns you at login of any inventory items that have hit their reorder quantity. For further information on setting this option, please refer to the **Options Screen** topic.

After you have completed all fields, hit ENTER to begin a new line. Your screen will look similar to the following after hitting ENTER:

General	Location Settings	Additional	Manage Suppliers	Custom Texts	Custom Numbers and Dates																								
<div>  Filter  Group By  Delete </div> <p>To finish adding a new record please press enter key or down arrow button. Click on Filter toolbar button to bring up please click on Grouping toolbar button.</p> <table border="1"> <thead> <tr> <th></th> <th>Primary Location</th> <th>Site</th> <th>Location</th> <th>Quantity</th> <th>Max Stock Level</th> <th>Min Stock Level</th> <th>Reorder Qty</th> </tr> </thead> <tbody> <tr> <td></td> <td><input checked="" type="checkbox"/></td> <td>Site...</td> <td>Loc 2</td> <td>0.00</td> <td>25</td> <td>15</td> <td>20</td> </tr> <tr> <td>▶</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>							Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty		<input checked="" type="checkbox"/>	Site...	Loc 2	0.00	25	15	20	▶	<input type="checkbox"/>			0.00	0.00	0.00	0.00
	Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty																						
	<input checked="" type="checkbox"/>	Site...	Loc 2	0.00	25	15	20																						
▶	<input type="checkbox"/>			0.00	0.00	0.00	0.00																						

Additional Information Tab:

When you have finished entering information on the Location Settings tab, click the **Additional** tab. The **Additional Information** tab provides optional fields where other information about the Item can be recorded. An example of this tab is shown below:

The screenshot shows a software window with several tabs: General, Location Settings, Additional (selected), Manage Suppliers, Custom Texts, and Custom Numbers and Dates. The 'Additional' tab contains the following fields:

- Item Measurements:** A group box containing:
 - Stocking Unit: [text box]
 - Dimension Unit: [text box]
 - Length: [text box]
 - Width: [text box]
 - Height: [text box]
 - Weight Unit: [text box]
 - Weight: [text box]
- Manager: [text box]
- File Reference: [text box] with a browse button (...)
- Notes: [large text area] with an 'Add Notes' button below it.

At the bottom of the window are three buttons: 'Help', 'Save', and 'Close'.

Complete the fields on this tab as described below:

- **Stocking Unit** is the portion by which the quantity will be tracked. At the item level, this should be "Eaches", meaning you should enter how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle, box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.)

You will have the opportunity on the **Managing Suppliers** tab to enter the Order Unit used by the supplier for shipping purposes (Box, Pallet, Lot, etc.). The Order Unit will be used when creating **Purchase Orders** rather than the "Eaches" UOM that is entered on this tab. Please see the **Managing Suppliers Tab** section, below.

- **Dimension Unit** is the increment to be used for Length, Width and Height. (Examples: inch, foot, yard, millimeter, centimeter, meter, etc.)
- **Length** is the length of one Unit of Measure expressed in Dimension Units.
- **Width** is the width of one Unit of Measure expressed in Dimension Units.
- **Height** is the height of one Unit of Measure expressed in Dimension Units.
- **Weight Unit** is the increment to be used for mass. (Examples: ounce, pound, ton, milligram, gram, kilogram, metric ton, etc.)
- **Weight** is the mass of one Unit of Measure expressed in Weight Units.
- **Manager** is used to record the name of someone who manages this inventory item.
- **File Reference** is used to record the path to a relevant file that might be an image file, documentation, specifications, etc. This field does not function as a hyperlink. It's just a static field where a filename or path and filename can be recorded.

- **Add Notes** allows you to record any additional information.

Manage Suppliers Tab:

This tab allows you to identify which suppliers you will use for this item and enter detailed supplier information, such as unit of measure. Pro and Enterprise users can enter multiple suppliers for an item and mark one as the default, or preferred supplier. Standard version users can enter only one supplier for each item.

Adding Suppliers to an Item:

To use this tab you must first select suppliers for this item in the **Supplier** window. To do this:

- Click the **New** button at the bottom of the list. The fields to the right of the **Supplier** window are enabled.
- Select a **Supplier Code** from the drop down list. You can also select **New Supplier** from the list to create a new supplier.
- Enter the SKU number for this item in the **Supplier Item SKU** field.
- Enter the description of this item given by the supplier in the **Supplier Item Description** field.
- Enter the number of days lead time the supplier needs to process orders for this item in the **Lead Time** (in days) field. The lead time is the time from the

requisition date to the delivery date. For example, if you need the item by the 15th of the month and the supplier requires 5 days to deliver the order, you would enter 5 here to ensure the order is sent to the supplier timely.

- f. The **Status** field displays the supplier's current status (Active or Inactive). You can change the status by making a new selection from the drop down menu.
- g. You can make this the default supplier for this item by checking the **Make this the default Supplier while ordering this item** checkbox (**Pro and Enterprise versions only**). When this is selected, this supplier will automatically populate purchase orders for this item. You can change the supplier on the purchase order, if needed.
- h. Any notes entered for this supplier will appear in the **Notes** section.
- i. You can enter the supplier's unit of measure settings in the **Order Unit Settings** window (**Pro and Enterprise versions only**). This is the unit used by the supplier when shipping this item. This may be box, pallet, etc. This is different from the "Eaches" stocking unit you entered on the **Additional** tab. For example, you may have entered "jar" for the stocking unit on the **Additional** tab, but the supplier may ship the item in boxes containing 10 jars. When creating purchase orders, you would want to specify the Order Unit as box rather than jar (or you could end up with 100 boxes of jars rather than 100 jars).
- j. When you are done entering supplier information, click the **Custom Texts** or **Custom Numbers and Dates** tab (these tabs are optional).

Deleting Suppliers from an Item:

- a. Highlight the supplier you want to delete from this item in the **Supplier** window.
- b. Click the **Delete** button.

Custom Text and Custom Numbers and Dates Tab:

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.

Saving the New Item:

When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Automatic Serial Numbers

You can choose to have the program automatically create and assign serial numbers each time you add inventory for this item (whether manually using the Add Inventory feature or by Receiving Inventory). This option is available when creating a new item on the Create New Item screen. For complete details on creating a new item, please refer to the Creating New Item topic.

1. Click the checkbox to make the item you are adding or editing auto increment the serial number for each item added into inventory.
 2. If you are using alphabetic or alphanumeric values as Serial Numbers, the Automatic Serial Number option will still generate a numeric Serial Number, beginning with the value of entered in the Starting Number Field, if it does not exist already.
 3. Click **OK** to set the options.
-

Creating New Locations

The **Create New Location** screen allows you to add a new Location to an existing Site or a new Location to a new Site. Locations are places within a Site where inventory resides. The site is usually a building, but it might also be a fleet vehicle, with one more bins that can be defined as inventory Locations within that vehicle. For example, a site might be setup as Building 1 with a location of Supply Closet.

A location is typically shorthand for a physical place such as a shelf in your warehouse. Commonly used conventions include Location codes like this:

01 02 05 (for Row #, Shelf #, Bin #)

When you are setting up your software for the first time, you may want to import your locations rather than adding them one at a time through this screen. For information on importing information into your database, please refer to the **Import Into Database** topic.

Adding Locations:

1. From the **Main Window**, click **New > Location**.

OR

From the **Main Window**, click **Lists > Location**. Then click the **New** icon on the **Location List**.

The **Create New Location** screen will appear.

The screenshot shows a window titled "Create New Location". It has three tabs: "General", "Custom Texts", and "Custom Numbers and Dates". The "General" tab is active and contains the following fields:

- Site:** A dropdown menu.
- Location:** A text input field.
- Description:** A text input field.
- Notes:** A large text area.

Below the "Notes" field is a button labeled "Add Notes". At the bottom of the window are three buttons: "Help", "Save", and "Close".

2. Select a site from the **Site** drop down menu, then enter the name of your new **Location**. The **Site** and **Location** fields are both required.

You can type in the name of a new site in the **Site** field. A message will appear asking if you want to add it to your database. Select **Yes** to add it. The **Create New Site** screen will appear allowing you to setup the new site. Complete this screen, then click **OK** to return to the **Create New Location** screen. For detailed information on entering a new site, please refer to the [Creating a New Site](#) topic.

Description allows you to enter a description of the Location. This is useful when the Location value is vague (For example, Location "A7B2" could be described as "Aisle 7 Bin 2").

Click the **Add Notes** button to add additional information to this record.

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see [Using Custom Fields](#).

2. When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Creating New Manufacturers

The **Create New Manufacturer** screen allows you to add a new Manufacturer to your database. A Manufacturer is typically the company or organization that creates an item you will inventory. If a Manufacturer is also your Supplier for an Item, it is best to setup the company in the software as both a Manufacturer and a Supplier.

When you are setting up your software for the first time, you may want to import your manufacturers rather than adding them one at a time through this screen. For information on importing information into your database, please refer to the [Import Into Database](#) topic.

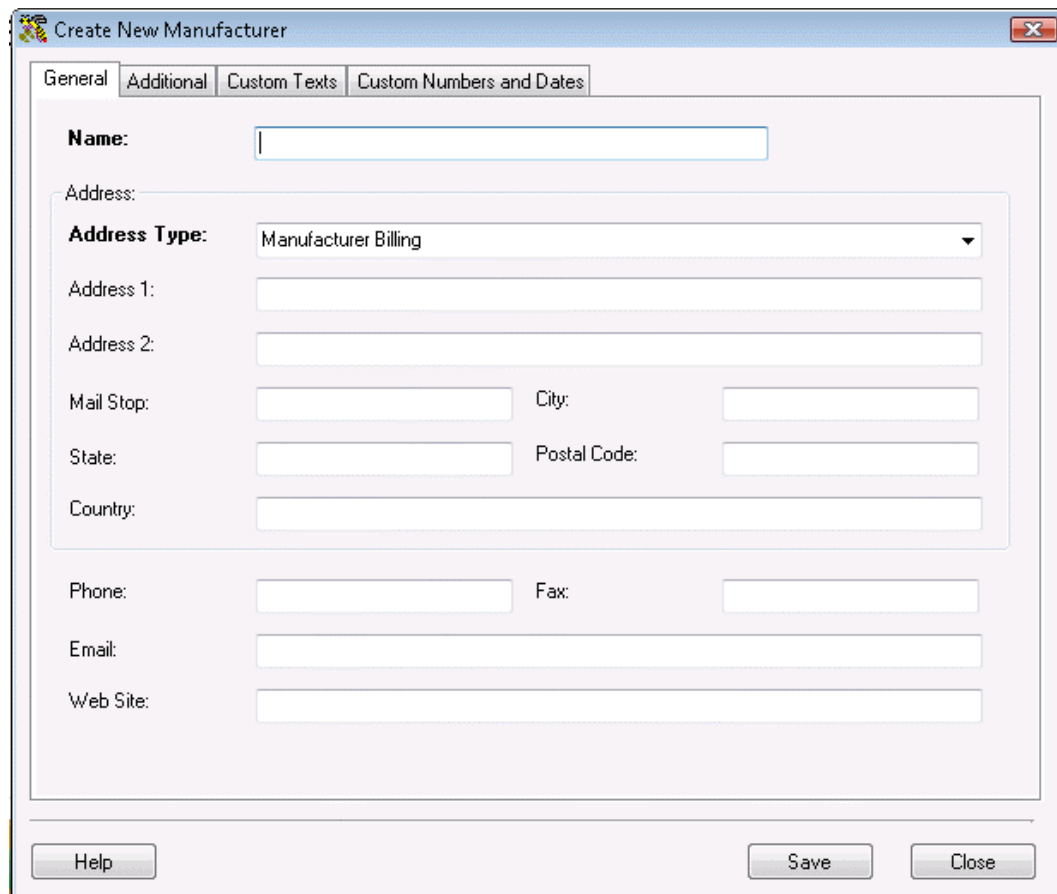
Adding a New Manufacturer:

1. From the **Main Window**, click **New > Manufacturer**.

OR

From the **Main Window**, click **Lists > Manufacturer**. Then click the **New** icon on the **Manufacturer List**.

The **Create New Manufacturer** screen will appear.



Note: This screen is opened automatically from the **Create New Item** screen when a new manufacturer name is entered.

2. Enter information on this screen as needed. The **Name** and **Address Type** fields are required, all other fields are optional.

The software provides you with the ability to enter a Billing Address, Receiving Address and/or Shipping Address for your manufacturers. To enter multiple address, follow the steps below:

- a. On the **Company Information** screen, enter your company name. Select what type of address you will be entering from the **Address Type** drop down menu.
 - b. Enter the remainder of the address information, then click **OK**. You will be returned to the **Administration Menu**.
 - c. Click the **Company Info** icon again. The **Company Information** screen will reappear populated with the information you just entered.
 - d. Select a different address type of the **Address Type** drop down menu. The address lines (Address 1 and 2, City, State, Postal Code and Country) will clear while all other company information will remain on the screen.
 - e. Enter the new address information, then click **OK**. Repeat these steps for each address type.
3. When you have finished entering data in the **General Information** tab, click the **Additional** tab (this tab is optional).

The screenshot shows a software window titled "Create New Customer" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there are four tabs: "General", "Additional", "Custom Texts", and "Custom Numbers and Dates". The "Additional" tab is currently selected. The form contains several input fields: "Phone:" and "Extension:" (two separate text boxes), "Fax:" and "Cell No:" (two separate text boxes), "Home No:" (one text box), "Email:" (one text box), and "Notes:" (a large multi-line text area). Below the "Notes" field is a button labeled "Add Notes". At the bottom of the window, there are three buttons: "Help", "Save", and "Close".

The **Additional** tab provides optional fields where you can record the manufacturer's **Phone**, **Extension**, **Fax**, **Cell No.**, **Home No.** and **Email**. In addition, you can create

notes on this manufacturer on this tab by clicking the **Add Notes** button.

4. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see **Using Custom Fields**.
5. When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.
 - When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
 - When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Creating New Suppliers

The **Create New Supplier** screen allows you to add a new supplier to your database. A supplier is typically the company or organization from which you obtain an Item you will inventory. If a manufacturer is also your supplier for an Item, it is best to add the company in the software as both a Manufacturer and a Supplier.

When you are setting up your software for the first time, you may want to import your suppliers rather than adding them one at a time through this screen. For information on importing information into your database, please refer to the [Import Into Database](#) topic.

Adding New Suppliers:

1. From the **Main Window**, click **New > Suppliers**.

OR

From the **Main Window**, click **Lists > Suppliers**. Then click the **New** icon on the **Supplier List**.

The **Create New Supplier** screen will appear.

The screenshot shows the 'Create New Supplier' window with the following fields and controls:

- Tabs:** General (selected), Additional, Custom Texts, Custom Numbers and Dates.
- Supplier Code:** Text input field.
- Name:** Text input field.
- Address:** Section containing:
 - Address Type:** Dropdown menu (currently set to 'Supplier Billing').
 - Address 1:** Text input field.
 - Address 2:** Text input field.
 - Mail Stop:** Text input field.
 - City:** Text input field.
 - State:** Text input field.
 - Postal Code:** Text input field.
 - Country:** Text input field.
- Phone:** Text input field.
- Fax:** Text input field.
- Email:** Text input field.
- Web Site:** Text input field.
- Buttons:** Help, Save, Close.

2. Enter information on this screen as needed. The **Supplier Code** and **Address Type** fields are required, all other fields are optional. **Supplier Codes** cannot exceed 25 digits.

The software provides you with the ability to enter a Billing Address, Receiving Address and/or Shipping Address for your suppliers. To enter multiple address, follow the steps below:

- a. On the **Company Information** screen, enter your company name. Select what type of address you will be entering from the **Address Type** drop down menu.
 - b. Enter the remainder of the address information, then click **OK**. You will be returned to the **Administration Menu**.
 - c. Click the **Company Info** icon again. The **Company Information** screen will reappear populated with the information you just entered.
 - d. Select a different address type of the **Address Type** drop down menu. The address lines (Address 1 and 2, City, State, Postal Code and Country) will clear while all other company information will remain on the screen.
 - e. Enter the new address information, then click **OK**. Repeat these steps for each address type.
3. When you have finished entering data in the **General Information** tab, click the **Additional Information** tab (this tab is optional).

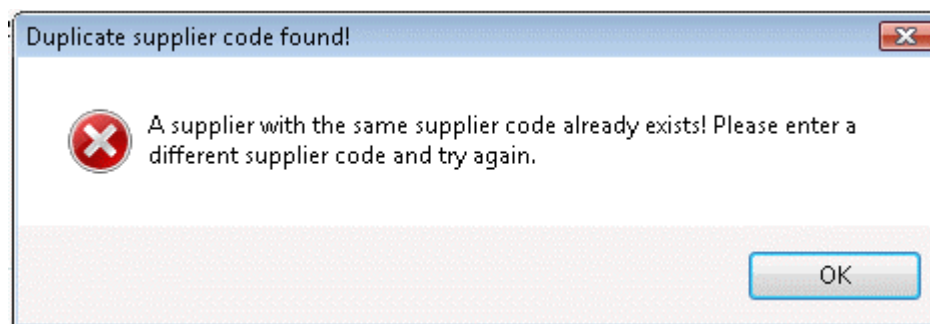
The screenshot shows a software window titled "Create New Supplier". It has four tabs: "General", "Additional", "Custom Texts", and "Custom Numbers and Dates". The "General" tab is active. Inside the "General" tab, there is a section titled "Contact Person Information:" containing five input fields: "Contact Name:", "Contact Phone:", "Contact Ext.:", "Contact Cell No:", and "Contact Fax:". Below this section is a "Notes:" label followed by a large text area and an "Add Notes" button. At the bottom of the window, there are three buttons: "Help", "Save", and "Close".

The **Additional Information** tab provides optional fields where you can record the manufacturer's **Phone**, **Extension**, **Fax**, **Cell No.**, **Home No.** and **Email**. In addition, you can create notes on this manufacturer on this tab by clicking the **Add Notes** button.

4. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.
5. When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.
 - When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
 - When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the [Options Screen](#) topic.

If a supplier with the same **Supplier Code** is found, the message below will appear when you try to save.



Enter a different **Supplier Code** to continue.

Creating a Pick Order

Pick orders are created to designate certain inventory to be shipped to a customer. On the **Create New Pick Order** screen, you are creating an order that tells your staff to get the order ready and what inventory to include. These orders can be sent to the mobile devices (although pick orders cannot be created on mobile devices). After the order has been picked, you need to mark it as ready to be shipped on the **Pick Order** screen accessed from the **Receive/Pick** menu. At this point, the inventory is removed from the system. For more information on the **Pick Order** screen, please refer to the **Shipping Pick Orders** topic.

We recommend you review the **Pick/Ship Overview** before creating pick orders for the first time.

Creating New Pick Orders:

1. From the **Main Window**, select **New > Pick Order**.

OR

From the **Main Menu**, click **Lists > Pick Order**. On the **Pick Order List**, click the **New** icon.

The **Create New Pick Order** screen appears.


Type	Item No	Request Qty	Stocking Unit	Description
Inventory		1.00		

Notice that the screen prominently displays the status as **New**. This status message

changes based on the state the order is in.

Possible statuses are:

- **New** - This always displays when creating a new order.
- **Issued** - Once the pick order is printed or emailed, the status changes to **Issued**.
- **In Process** - Once the order has started to be picked (via the **Pick Order** screen accessed from the **Receive/Pick** menu), the status becomes **In Process** and the **Picked Quantity** will display for each item on the order.
- **Overdue** - This status can appear for **New** or **In Process** orders that have passed the designated due date. These orders will appear with a symbol on the **Pick Order List** to alert you of their overdue status.
- **Closed** - This status means the order has been completed and marked as closed.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the  button will unlock the field.

1. Enter a **Pick Order Number**. This alpha-numeric value up to 36 characters can be manually entered at the time the pick order is created, scanned in, or you can click **Generate** to have the system assign an auto-generated number. For more information on setting up automatically generated **Pick Order Numbers**, please refer to the **Customize Numbers** topic.
2. Enter a Customer in the **Customer** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Customers selected on this screen. Select **<MORE>** to view the entire **Customer List** or click **<New>** to go to the **Create Customer Supplier** screen to add a new customer to the database.

When a customer is selected, the **Customer Address** information automatically populates. If the selected customer has more than one address entered for it, you can select the **Address Type** from the drop down list.

3. Enter an **Order Date** for this order. This date defaults to today, but you can change this date by clicking the down arrow and selecting a new date.
4. Enter a **Due Date** for this order. You can type in a date in this field or click the down arrow to select a date.
5. Enter a **Reference Number** for this **Pick Order** (optional).
6. Select the preferred shipping method for this order in the **Ship Via** field from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.
7. Enter any notes you want to associate with this order in the **Notes** field.

8. Now you are ready to enter your item information in the **Line Item Details** section.

Complete this information as follows:

- **Type** - Select the type of item that needs to be picked. Options are:
 - **Inventory** - This item is in your inventory database. Use this to pick existing items.
 - **Non-Inventory** - This item is not in your inventory database. Use this to pick items that you do not want to appear in your inventory database, such as marketing fliers or business cards.
 - **Assembly - Assembly Items** are a collection of items that, once grouped, are considered to be a new, single item. Assembly Items are pre-assembled and kept in stock.
 - **Kit** - Kit items are a collection of items that are grouped, or picked, at the time they are sold.
 - **Manual** - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be picked on the mobile devices.
- **Item Number** - Enter the **Item Number** of the item you want to add to the order. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item List**.

You can create a new item by selecting **<New>** or by entering an unknown item number. When either of these two situations occur, the **Create New Item** screen appears. For more information on creating items, please refer to the **Creating New Items** topic.

When you enter an **Item Number** the **Description** field populates.

- **Request Qty** - Enter the requested number of this item. This value can also be scanned. You cannot enter negative numbers.
- **Stocking Unit** - This field displays the stocking unit entered for this item on the **New Item/Edit Item** screen. The stocking unit represents how you stock this item in your inventory. For instance, if you stock the unit in boxes of 10. Box of 10 would display in the Stocking Unit field on this screen. For more information on creating items, please refer to the **Creating New Items** topic.
- **Description** - This field populates after the item number is entered and cannot be changed on this screen. If you need to change the description, you can do so on the **Edit Item** screen.

9. After you have entered all items for this order, you can optionally select to:

- **Print on Save** - If this box is checked, a copy of this order automatically prints when you click the **Save** button.
- **Email on Save** - If this box is checked, a copy of this order is automatically sent to the email address listed in the **Customer** screen for this customer when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent to the email address listed in the **Customer** screen *from* the email address listed in the **Company Information** screen. Please note that if the email addresses are not entered on the **Customer** or **Company Information** screens, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on setting these email options on the **Options** screen, please refer to the **Options Screen** topic. For more information on the Email Distribution List, please see the **Email Distribution List** topic.

10. Click **Save** to save this order to the database.
-

Creating a New Purchase Order

Purchase orders can be created in InventoryControl and emailed directly to your supplier, or printed for faxing or mailing. We recommend you review the topic **Purchase Orders/ Receiving Overview** before using the purchase order feature for the first time.

Creating New Purchase Orders:

1. From the **Main Window**, select **New > Purchase Order**.

OR

From the **Main Window**, select **Lists > Purchase Order**. On the **Purchase Order List**, click the **New** icon.

The **Create New Purchase Order** screen appears.


Type	Item No	Description	Supplier SKU	Ordered Qty	Order Unit	Cost	Line Total
Inventory				1.00			0.00

Notice that the screen prominently displays the status as **New**. This status message changes based on the stage the purchase order is in.

Possible statuses are:

- **New** - This always displays when creating a new order.
- **Issued** - Once the purchase order is printed or emailed, the status changes to **Issued**.

- **In Process** - Once the order has started to be received (via the **Receive** screen accessed from the **Receive/Pick** menu), the status becomes **In Process** and the **Received Quantity** will display for each item on the order.
- **Overdue** - This status can appear for **New** or **In Process** orders that have passed the designated due date. This orders will appear with a symbol on the **Purchase Order List** to alert you of their overdue status.
- **Closed** - This status means the order has been completed and marked as closed.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the  button will unlock the field.

2. Enter a supplier in the **Supplier** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Suppliers selected on this screen. Select **<More>** to view the entire **Supplier List** or click **<New>** to go to the **Create New Supplier** screen to add a new supplier to the database.

When a supplier is selected, the **Supplier Address** information automatically populates. If the selected supplier has more than one address, you can select the **Address Type** from the drop down list.

After you enter the **Supplier** information, you can click the **Items at Re-Order Quantity** button at the bottom of the screen. The system will then check for any items for this supplier that are at or below their reorder points and populate the purchase order with those items.

3. Enter a **Purchase Order Number**. This alpha-numeric value up to 36 characters can be manually entered at the time the purchase order is created, scanned in, or you can click **Generate** to have the system assign an auto-generated number. For more information on setting up automatically generated **Purchase Order Numbers**, please refer to the **Customize Numbers** topic.
4. Select a **Ship To Address** using the drop down menu. All address types you entered on the **Company Information** screen will appear in the list, or you can select **<New>** to enter a new address. Selecting **<New>** opens the **Company Information** screen allowing you to enter a new address. For more information on the **Company Information** screen, please refer to the **Entering Company Information** topic.
5. Enter a **Reference Number** for this **Purchase Order** (optional).
6. The **Order Date** defaults to today's date. You can change this date by clicking the button next to the field and selecting a new date.
7. Select a **Due Date** for this **Purchase Order**. You can type in a date or click the button next to the field and select a date.
8. Select the preferred **Ship Method** for this order from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase

orders.

9. Select the **Payment Method** from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

Note: If you need to delete a **Ship** or **Payment Method** you have entered, you can do so on the **Manage Ship Methods** or **Manage Payment Methods** screens. These screens also allow you to Print, Export and Add New methods. For more information on the **Manage Ship Methods** screen, please refer to the **Managing Shipping Methods** topic. For more information on the **Manage Payment Methods** screen, please refer to the **Managing Payment Methods** topic.

10. Now you are ready to enter your item information in the **Line Item Details** section. Complete this information as follows:
 - **Type** - Select the type of item you are ordering. Options are:
 - **Inventory** - This item is already in your inventory database. Use this to re-order existing items.
 - **Non-Inventory** - This item is not listed as inventory in your database. Use this to order items for which you do not want to track quantity, such as marketing fliers or business cards.
 - **Manual** - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be received on the mobile devices.
 - **Item Number** - Enter the **Item Number** of the item you want to order. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item List**.

When you enter an **Item Number**, the **Description** field populates.

- **Description** - This field populates after the item number is entered. This field can only be edited if Manual was selected in the **Type** field. If you need to change the description, you can do so on the **Edit Item** screen.
- **Vendor SKU** - This field populates after the item number is entered if a SKU was entered on the Add/Edit Item screen for this vendor. This field can only be edited if Manual was selected in the **Type** field.
- **Ordered QTY** - Enter the quantity you are ordering of this item. This field defaults to 1. You cannot enter negative values in this field.
- **Order Unit** - Select the Order Unit from the drop down field or select **<New>** to enter a new Unit. You may want to enter a new unit here that is not an "eaches" or Stocking Unit measurement. For example, if you want to order 1 box of an item and this item ships in boxes containing 15 units, the "eaches", or Stocking Unit measurement is 15, but for ordering purposes, you could create a new unit that is BOX containing 15 units. You would then order 1 box rather than 15 units to avoid confusion for the supplier.

You can setup multiple Order Unit types for each supplier on the **Create New/Edit Item** screen - **Manage Suppliers** tab. This allows you to enter units based on the suppliers method of shipping (whether the supplier ships in boxes of 15, pallets of 50, etc.) For instance, you could set up a Box and Pallet Order Unit on the **Suppliers** tab so that when you create a Purchase Order for that item to go to the supplier, you can quickly select whether you want a box or a pallet. For more information on the **Add Item** screen - **Manage Suppliers** tab, please refer to the **Creating New Items** topic.

- **Cost** - The cost will populate based on the **Order Unit** selected. You can also type in a new cost here.
- **Line Total** - This field calculates based on the **Quantity** multiplied by the cost.

11. After you have entered all items for this order, you can optionally select to:

- **Print on Save** - If this box is checked, a copy of this order automatically prints when you click the **Save** button.
- **Email on Save** - If this box is checked, a copy of this order is automatically sent to the email address listed in the **Supplier** screen for this supplier when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent **to** the email address listed in the **Supplier** screen **from** the email address listed in the **Company Information** screen. Please note that if the email addresses are not entered on the **Supplier** or **Company Information** screens, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on setting these email options on the **Options** screen, please refer to the **Options Screen** topic.

12. Click **Save** to save this purchase order to the database.

Creating a Kit Item

This function applies to Pro and Enterprise Version users only.

Kit Items are used when you want to combine two or more existing items in order for them to be sold together. Kit items are not kept or tracked in inventory (you cannot add, move, check out, etc.). We recommend you read the **Kitting Overview** topic before you begin creating **Kit Items**.

Note: You can import the general information for a Kit Item, but not the compositional information (i.e. which items make up the component items). If you import Kit Items, you must then finish setting them up manually on the **Edit Item** screen.

This topic discusses:

Accessing the Create New Items Screen

General Information Tab

Kit Information Tab

Additional Information Tab

Custom Texts/Custom Numbers and Dates Tab

Saving the New Item

Accessing the Create New Items Screen:

1. From the **Main Window**, select **New > Item > Kit**.

The **Create New Item** screen appears:

The screenshot shows the 'Create New Item' window with the 'General' tab selected. The 'Item Number' field is populated with '1009'. The 'Type' dropdown is set to 'Kit'. The 'Item To Be Tracked By' section has 'Serial Number' checked. The 'Require the user to fill out' section has 'Ref #', 'Supplier', and 'Customer' all unchecked. The bottom of the window features 'Help', 'Save', and 'Close' buttons.

Note that in addition to the usual tabs that appear on the **Create New Item** screen, there is also a tab labeled **Kit Information**.

General Information Tab:

The **General Information** tab is where you will enter the basic information about the item. Please see the screen shot above for an example of this tab.

Input the appropriate information in the fields provided:

- **Item Number** is a required field. The **Item Number** is often available on a barcode label already attached to the item. This allows you to scan or manually enter the number from each item as it comes in. Item numbers cannot exceed 20 digits.

Do not use a description as the item number. You should enter a numeric value in the **Item Number** field. A description of the item can be entered in the **Description** field.

The **Item Number** is often the UPC code or SKU number of an inventory item. Using an existing barcode for Item Number allows you to scan or manually enter the number from each item as it comes in without having to print and affix your own barcode inventory item labels.

Automatic Item Numbers: If you have the **Automatic Item Numbers** option selected on the **Options** screen, the **Item No.** field will appear populated with the next number in the sequence. For further information on this option, please refer to the **Options Screen** topic.

- **Category:** When a new **Category** value is typed into the field, you will receive a message asking if you want to save it as a new Category.
- **Checkout Length** is not available for Kit Items..
- When a new **Manufacturer** is typed into the Manufacturer field, you will receive a message asking if you want to save the value as a new Manufacturer.
- When you access the **Create New Item** screen by selecting **New > Item > Kit**, this field will automatically be set to **Kit**. If you accessed it any other way, you can select **Kit** from the **Type** drop down.
- The **Item To Be Tracked By** section is not available for Kit Items. Tracking can take place for the component items, but not for the Kit Item.
- **Cost** specifies the amount paid to get this item into inventory.
- **Average Cost** is a calculated value that averages the costs paid for the current Quantity.

If you have 20 quantity of this item at cost 10.00

and add another 30 quantity at cost 8.00,

$$\text{Average Cost} = ((20 \times 10.00) + (30 \times 8.00)) / 50 = 8.80$$

Removes are calculated using the FIFO method, therefore, if you later remove 5, 5 of the cost 10.00 items will be removed first,

$$\text{Average Cost} = ((15 \times 10.00) + (30 \times 8.00)) / 45 = 8.67$$

When calculating Average Cost, the software *does not* include records that have an average cost of zero. When you run an Inventory Cost Report, the software *does* include zero cost quantities when calculating Total Cost.

- **List Price** specifies a manufacturer's list price for an item.
- **Sale Price** specifies the price at which you sell an item.
- **Min Stock Level** is not available for Kit Items.
- **Max Stock Level** is not available for Kit Items.
- **Reorder Qty** is not available for Kit Items.
- **Total Shippable** is the total on hand amount minus committed quantities for all component items. (Committed is inventory that is contained on a pick order.)

Kit Information Tab:

This tab is where you will indicate which items you want included in this Kit.

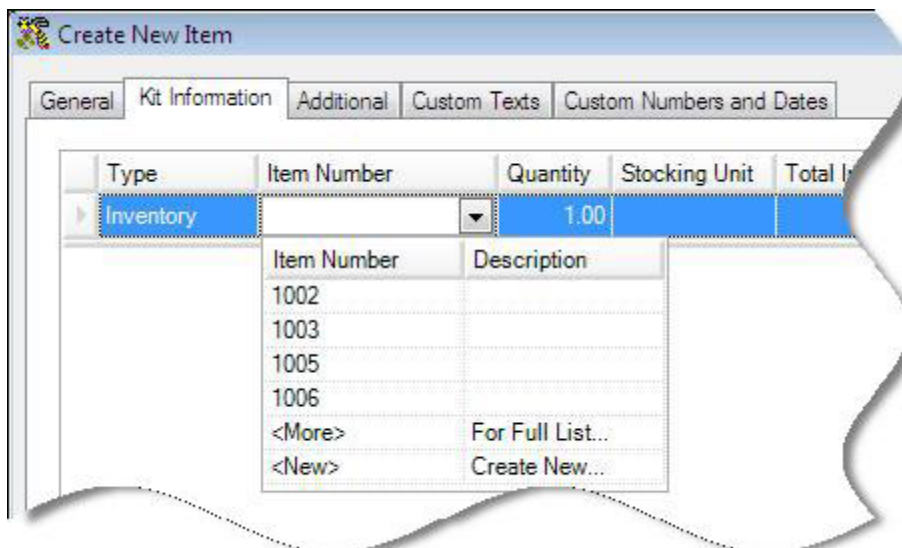
Type	Item Number	Quantity	Stocking Unit	Total In-House	Description
Inventory		1.00			

To select items to include in your Kit Item:

1. In the **Type** drop down, select **Inventory**, **Non-Inventory** or **Assembly**.



2. In the **Item Number** field, select which item you want to add to this assembly. If you select **Full List**, the **Item List** will be filtered by the **Type** you selected (i.e., if **Non-Inventory** is selected, only non-inventory items will appear on the **Item List**. If **Assembly** is selected, only Assembly items will appear in the List).



When you tab out of the **Item Number** field after selecting an item, the **Description**, **Stocking Unit** and **Total In-House** fields will populate with the information for that item.

3. Enter the **Quantity** you want included in this **Kit Item**.
4. Press **Enter** to access a new line and enter another Item, then repeat the steps above.

Note: The cost will be calculated and updated based on your selections on this tab unless you have checked the **Do Not Override Cost on the General Tab** checkbox located at the bottom of the **Kit Information** tab.

Additional Information Tab:

When you have finished entering information on the **Kit Information** tab, click the **Additional** tab. The **Additional Information** tab provides optional fields where other information about the Item can be recorded. An example of this tab is shown below:

The screenshot shows a software window with several tabs: General, Location Settings, Additional (selected), Manage Suppliers, Custom Texts, and Custom Numbers and Dates. The 'Additional' tab is active, displaying the 'Item Measurements' section. This section includes input fields for Stocking Unit, Dimension Unit, Length, Width, Height, Weight Unit, and Weight. Below these are fields for Manager, File Reference (with a browse button), and a large text area for Notes with an 'Add Notes' button. At the bottom of the window are 'Help', 'Save', and 'Close' buttons.

Complete the fields on this tab as described below:

- **Stocking Unit** is the portion by which the quantity will be tracked. At the item level, this should be "Eaches", meaning you should enter how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle,

box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.)

You will have the opportunity on the **Managing Suppliers** tab to enter the Order Unit used by the supplier for shipping purposes (Box, Pallet, Lot, etc.). The Order Unit will be used when creating **Purchase Orders** rather than the "Eaches" UOM that is entered on this tab. Please see the **Managing Suppliers Tab** section, below.

- **Dimension Unit** is the increment to be used for Length, Width and Height. (Examples: inch, foot, yard, millimeter, centimeter, meter, etc.)
- **Length** is the length of one Unit of Measure expressed in Dimension Units.
- **Width** is the width of one Unit of Measure expressed in Dimension Units.
- **Height** is the height of one Unit of Measure expressed in Dimension Units.
- **Weight Unit** is the increment to be used for mass. (Examples: ounce, pound, ton, milligram, gram, kilogram, metric ton, etc.)
- **Weight** is the mass of one Unit of Measure expressed in Weight Units.
- **Manager** is used to record the name of someone who manages this inventory item.
- **File Reference** is used to record the path to a relevant file that might be an image file, documentation, specifications, etc. This field does not function as a hyperlink. It's just a static field where a filename or path and filename can be recorded.
- **Add Notes** allows you to record any additional information.

Custom Text and Custom Numbers and Dates Tab:

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.

Saving the New Item:

When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Creating an Assembly Item

This function applies to Pro and Enterprise Version users only.

Assembly Items are used when you want to combine two or more existing items into one new item. We recommend you read the **Assembly Overview** topic before you begin creating Assembly Items.

This topic discusses:

Accessing the New Assembly Items Screen

General Information Tab

Location Settings Tab

Assembly Tab

Additional Information Tab

Manage Suppliers Tab

Custom Texts/Custom Numbers and Dates Tab

Saving the New Item

Accessing the New Assembly Item Screen:

1. From the **Main Window**, select **New > Item > Assembly**.

The **Create New Item** screen appears:

The screenshot shows a 'Create New Item' window with the following fields and controls:

- Item Number:** 1009
- Alt Item Number:** (empty)
- Description:** (empty)
- Category:** (dropdown menu)
- Manufacturer:** (dropdown menu)
- Checkout Length:** (empty)
- Type:** Assembly
- Item To Be Tracked By:**
 - ☐ Serial Number
 - ☐ Lot
 - ☐ Date Code
 - ☐ Pallet
- Require the user to fill out:**
 - ☐ Ref #
 - ☐ Supplier
 - ☐ Customer
- Cost:** (empty)
- Average Cost:** (empty)
- List Price:** (empty)
- Sale Price:** (empty)
- Min Stock Level:** (empty)
- Max Stock Level:** (empty)
- Reorder Qty:** (empty)
- Buttons:** Help, Save, Close

Note that in addition to the usual tabs that appear on the **Create New Item** screen, there is also a tab labeled **Assembly Information**.

General Information Tab:

The **General Information** tab is where you will enter the basic information about the item. Please see the screen shot above for an example of this tab.

Input the appropriate information in the fields provided:

- **Item Number** is a required field. The **Item Number** is often available on a barcode label already attached to the item. This allows you to scan or manually enter the number from each item as it comes in. Item numbers cannot exceed 20 digits.

Do not use a description as the item number. You should enter a numeric value in the **Item Number** field. A description of the item can be entered in the **Description** field.

The **Item Number** is often the UPC code or SKU number of an inventory item. Using an existing barcode for Item Number allows you to scan or manually enter the number from each Item as it comes in without having to print and affix your own barcode inventory item labels.

Automatic Item Numbers: If you have the **Automatic Item Numbers** option selected on the **Options** screen, the **Item No.** field will appear populated with the next number in the sequence. For further information on the this option, please refer to the **Options Screen** topic.

- **Category:** When a new **Category** value is typed into the field, you will receive a message asking if you want to save it as a new Category.
- **Checkout Length** specifies the default period, in days, that this **Item** can be checked out to a customer.
- When a new **Manufacturer** is typed into the Manufacturer field, you will receive a message asking if you want to save the value as a new Manufacturer.
- When you access the **Create New Item** screen by selecting **New > Item > Assembly**, this field will automatically be set to **Assembly**. If you accessed it any other way, you can select **Assembly** from the **Type** drop down.
- The **Item To Be Tracked By** section contains check boxes which determine whether the **Serial Number**, **Lot**, **Date Code** and **Pallet** fields must be completed throughout InventoryControl before you can create inventory from this item.

Note: Keep in mind that marking the track by fields here mean that the entire Assembly Item, after build, will be tracked with a unique serial number, lot number, etc. It may be the case that individual assets that make up the Assembly Item (selected on the Assembly tab) are also tracked by serial number, lot number, etc. When you Build the Assembly Item on the Build Assembly screen, you will be required to enter the serial number or any other track by fields *for each item* included in the Assembly Item.

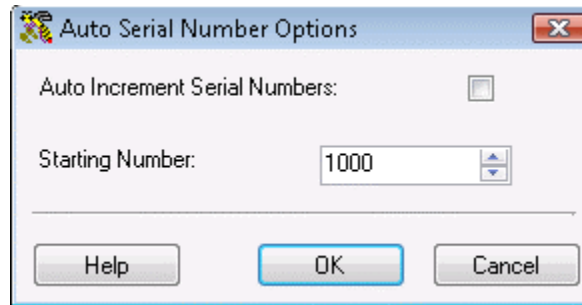
Items To Be Tracked By:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	No	-
Enabled (checked)	Yes	Yes

It is important at this time that you determine how you want to track each item.

Typically, small items that are all the same may not need to have any **Tracked By**s selected. Items such as printers may need to be tracked by **Serial Number**, so returns and maintenance can be properly tracked. Medical supplies or food may need to be tracked by **Date Code** and/or **Lot**.

Tracked By options cannot be changed after you add inventory to the item.

- **Automatic Serial Numbers:** You can choose to have the program automatically create and assign serial numbers each time you add inventory for this item (whether manually using the Add Inventory feature or by Receiving Inventory). To do this:
 - a. Click the button to the right of the **Serial Number** check box. The **Auto Serial Number Options** screen is displayed:



- b. Check the **Auto Increment Serial Numbers** to have the software automatically assign incremented serial numbers. Enter a **Starting Number**. This number determines the number at which the serial number sequence starts. Since this option is applied at the **Item** level, each **Item** in the program may have its own unique series of serial numbers.
 - c. Click **OK** to accept your entries.
- The **Require the user to fill out** section contains check boxes which act much like the Tracked By boxes, but contains a different set of fields (**Ref #**, **Supplier** and **Customer**) which are always available for use, even if they are not required. For example, if the option is not enabled for the Supplier Code field, a user adding inventory can enter a value for Supplier Code if he knows it or skip entering a value if he doesn't. If however this option is enabled, a value for Supplier Code is required to complete the transaction.

Require The User to Fill Out:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	Yes	No
Enabled (checked)	Yes	Yes

- Cost** specifies the amount paid to get this item into inventory.
- Average Cost** is a calculated value that averages the costs paid for the current Quantity.

If you have 20 quantity of this item at cost 10.00

and add another 30 quantity at cost 8.00,

$$\text{Average Cost} = ((20 \times 10.00) + (30 \times 8.00)) / 50 = 8.80$$

Removes are calculated using the FIFO method, therefore, if you later remove 5, 5 of the cost 10.00 items will be removed first,

$$\text{Average Cost} = ((15 \times 10.00) + (30 \times 8.00)) / 45 = 8.67$$

When calculating Average Cost, the software *does not* include records that have an average cost of zero. When you run an Inventory Cost Report, the software *does* include zero cost quantities when calculating Total Cost.

- **List Price** specifies a manufacturer's list price for an item.
- **Sale Price** specifies the price at which you sell an item.
- **Min Stock Level** specifies the minimum stock level you wish to maintain.
- **Max Stock Level** specifies the maximum stock level you wish to maintain.
- **Reorder Qty** specifies the quantity at which you want to reorder inventory.

Note: The **Minimum Stock Level**, **Maximum Stock Level** and **Reorder Quantity** fields found on this tab represent these levels at the item level only, meaning these are the stock levels for this item throughout all locations. If you want to maintain these levels by location, you can do so on the **Location Settings** tab (described below).

- The **Total Available** counter is the sum of Total Checked-Out and Total In-House.
- The **Total Checked-Out** counter is the quantity of this item that is currently Checked-Out.
- The **Total In-House** counter is the Total Available less the Total Checked-Out.
- The **Total On Order** counter is the quantity of this item that is currently included on an active Pick Order.
- The **Total Buildable** is the quantity that can be built of this Assembly Item based on the inventory levels of the component items.
- The **Committed** counter is the number of this Assembly Item that has been committed to a pick order.

Location Settings Tab:

When you have completed the **General Information** tab, click the **Location Settings** tab. This tab allows you to enter all locations where this item will be in inventory and to designate a primary location. You can assign items to more than one location. This tab uses the List functionality for grouping, ordering, filtering and deleting.

General Location Settings Assembly Information Additional Manage Suppliers Custom Texts Custom Numbers and Dates

Filter Group By Delete

To finish adding a new record please press enter key or down arrow button. Click on Filter toolbar button to bring up filter row, and to bring up group row please click on Grouping toolbar button.

Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty
<input type="checkbox"/>			0.00	0.00	0.00	0.00

Record: ||| Of 0 |||

Help Save Close

Complete the fields on this screen as described below:

- Primary Location** - Select this checkbox if this will be the primary location at this site for this item. A primary location can be selected for each **Site** you have setup in the system. When you select a primary location, when you **Receive** quantities of that item from a purchase order, they will automatically be assigned to that location. Also, when you **Pick** quantities of that item for pick orders, they will automatically be removed from that location. You can change these locations when picking and receiving if necessary. In addition, the primary location will appear in any location fields (on the **Add** inventory screen, for example), however; you can change the location, if needed.
- Only one primary location can be selected per site.
- Site and Location** - Click in the box and select a **Site** and **Location** from the drop down list. Only sites and locations you have previously selected will appear in this list. Select **More** to view the **Site** or **Location List**. You can also select **New Location** or **New Site** to access the **Create New** screen. These represent the site and the location where the inventory will reside.
- Quantity** - This number is populated from the Inventory for this item. This number displays how many of this item is currently in stock at the selected site and location. When you first create your item, this number will be zero. After you build your Assembly Item, this field will reflect the number you built (which is the quantity in stock).
- Max Stock Level** - Enter the maximum number of this item that you want to have in stock for the selected site and location. This number can be 0 or a positive number, negative numbers are not allowed.

- **Min Stock Level** - Enter the minimum number of this item that you want to have in stock for the selected Site and Location. This number can be 0 or a positive number, negative numbers are not allowed.
- **Reorder Qty** - Enter the number at which you want to reorder this item for the selected **Site** and **Location**. You can set an option in the software so that the system warns you at login of any inventory items that have hit their reorder quantity. For further information on setting this option, please refer to the **Options Screen** topic.

After you have completed all fields, hit ENTER to begin a new line. Your screen will look similar to the following after hitting ENTER:

Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty
<input checked="" type="checkbox"/>	200	100	0.00	0.00	0.00	0.00
<input type="checkbox"/>			0.00	0.00	0.00	0.00

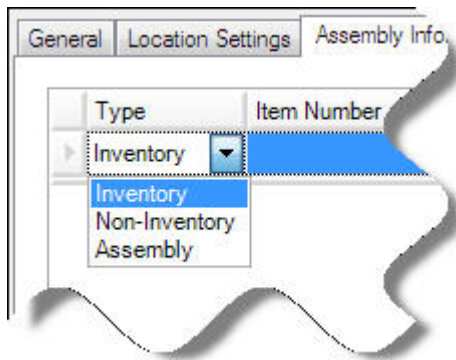
Assembly Tab:

This is the tab where you will indicate which items you want included in this Assembly Item. You can select any Inventoried, Non-inventoried and/or Assembly item.

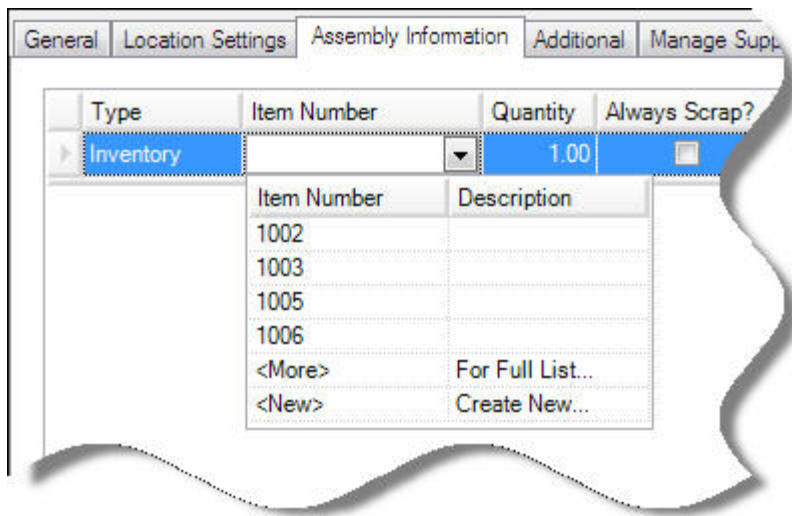
Type	Item Number	Quantity	Always Scrap?	Stocking Unit	Total In-House	Description
Inventory		1.00	<input checked="" type="checkbox"/>			

To select items to include in your Assembly Item:

1. In the **Type** drop down, select **Inventory**, **Non-Inventory** or **Assembly**.



2. In the **Item Number** field, select which item you want to add to this assembly. If you select **Full List**, the **Item List** will be filtered by the **Type** you selected (i.e., if **Non-Inventory** is selected, only non-inventory items will appear on the **Item List**).



When you tab out of the **Item Number** field after selecting an item, the **Description**, **Stocking Unit** and **Total In-House** fields will populate with the information for that item.

3. Enter the **Quantity** you want included in this **Assembly Item**. This number represents how many of this items is included with each build of this **Assembly Item**.

Example: Assume this **Assembly Item** is a cabinet. For each cabinet, you need 2 long panels, 2 short panels and one back piece and 6 screws. When you enter the long panel item on this tab, you will enter 2 in the **Quantity** field. When you enter the screws item on this tab, you will enter 6 in the **Quantity** field, etc.

4. Select the **Always Scrap** checkbox if you want InventoryControl to always "scrap" or permanently remove the item from inventory during the **Disassembly** process. You might use this option for a non-inventory item such as a box used for packaging the **Assembly Item**.

If the **Always Scrap** checkbox is not selected, the on hand amount for the item will be increased during **Disassembly** (the item is assumed to be returned to inventory rather than removed after Disassembly.)

- Press **ENTER** to access a new line and enter another Item, then repeat the steps above. Your screen will appear similar to the following after pressing ENTER:

General Location Settings Assembly Information Additional Manage Suppliers Custom Texts Custom Numbers and Dates							
Type	Item Number	Quantity	Always Scrap?	Stocking Unit	Total In-House	Description	
Inventory	1003	1.00	<input type="checkbox"/>		0.00	Test Item 3	
Inventory	1002	1.00	<input type="checkbox"/>		7.00	Test Item 1002	

Note: The cost will be calculated and updated based on your selections on this tab unless you have checked the **Do Not Override Cost on the General Tab** checkbox located at the bottom of the **Assembly Information** tab.

Additional Information Tab:

When you have finished entering information on the **Assembly** tab, click the **Additional** tab. The **Additional Information** tab provides optional fields where other information about the Item can be recorded. An example of this tab is shown below:

General Location Settings Additional Manage Suppliers Custom Texts Custom Numbers and Dates			
Item Measurements:			
Stocking Unit:	<input type="text"/>		
Dimension Unit:	<input type="text"/>	Length:	<input type="text"/>
Width:	<input type="text"/>	Height:	<input type="text"/>
Weight Unit:	<input type="text"/>	Weight:	<input type="text"/>
Manager:	<input type="text"/>		
File Reference:	<input data-bbox="808 1318 841 1350" type="button" value="..."/>		
Notes:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		
<input data-bbox="451 1644 586 1671" type="button" value="Add Notes"/>			
<input data-bbox="248 1734 354 1761" type="button" value="Help"/> <input data-bbox="1141 1734 1247 1761" type="button" value="Save"/> <input data-bbox="1271 1734 1377 1761" type="button" value="Close"/>			

Complete the fields on this tab as described below:

- **Stocking Unit** is the portion by which the quantity will be tracked. At the item level, this should be "Eaches", meaning you should enter how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle, box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.)

You will have the opportunity on the **Managing Suppliers** tab to enter the Order Unit used by the supplier for shipping purposes (Box, Pallet, Lot, etc.). The Order Unit will be used when creating **Purchase Orders** rather than the "Eaches" UOM that is entered on this tab. Please see the **Managing Suppliers Tab** section, below.

- **Dimension Unit** is the increment to be used for Length, Width and Height. (Examples: inch, foot, yard, millimeter, centimeter, meter, etc.)
- **Length** is the length of one Unit of Measure expressed in Dimension Units.
- **Width** is the width of one Unit of Measure expressed in Dimension Units.
- **Height** is the height of one Unit of Measure expressed in Dimension Units.
- **Weight Unit** is the increment to be used for mass. (Examples: ounce, pound, ton, milligram, gram, kilogram, metric ton, etc.)
- **Weight** is the mass of one Unit of Measure expressed in Weight Units.
- **Manager** is used to record the name of someone who manages this inventory item.
- **File Reference** is used to record the path to a relevant file that might be an image file, documentation, specifications, etc. This field does not function as a hyperlink. It's just a static field where a filename or path and filename can be recorded.
- **Add Notes** allows you to record any additional information.

Manage Suppliers Tab:

This tab allows you to identify which suppliers you will use for this item and enter detailed supplier information, such as unit of measure. Pro and Enterprise users can enter multiple suppliers for an item and mark one as the default, or preferred supplier. Standard version users can enter only one supplier for each item.

Adding Suppliers to an Item:

To use this tab you must first select suppliers for this item in the **Supplier** window. To do this:

- Click the **New** button at the bottom of the list. The fields to the right of the **Supplier** window are enabled.
- Select a **Supplier Code** from the drop down list. You can also select **New Supplier** from the list to create a new supplier.
- Enter the SKU number for this item in the **Supplier Item SKU** field.
- Enter the description of this item given by the supplier in the **Supplier Item Description** field.
- Enter the number of days lead time the supplier needs to process orders for this item in the **Lead Time** (in days) field. The lead time is the time from the requisition date to the delivery date. For example, if you need the item by the 15th of the month and the supplier requires 5 days to deliver the order, you would enter 5 here to ensure the order is sent to the supplier timely.
- The **Status** field displays the supplier's current status (Active or Inactive). You can change the status by making a new selection from the drop down menu.
- You can make this the default supplier for this item by checking the **Make this the default Supplier while ordering this item** checkbox (**Pro and Enterprise versions only**). When this is selected, this supplier will automatically populate purchase orders for this item. You can change the supplier on the purchase order, if needed.
- Any notes entered for this supplier will appear in the **Notes** section.
- You can enter the supplier's unit of measure settings in the **Order Unit Settings** window (**Pro and Enterprise versions only**). This is the unit used by the

supplier when shipping this item. This may be box, pallet, etc. This is different from the "Eaches" stocking unit you entered on the **Additional** tab. For example, you may have entered "jar" for the stocking unit on the **Additional** tab, but the supplier may ship the item in boxes containing 10 jars. When creating purchase orders, you would want to specify the Order Unit as box rather than jar (or you could end up with 100 boxes of jars rather than 100 jars).

- j. When you are done entering supplier information, click the **Custom Texts** or **Custom Numbers and Dates** tab (these tabs are optional).

Deleting Suppliers from an Item:

- a. Highlight the supplier you want to delete from this item in the **Supplier** window.
 - b. Click the **Delete** button.
-

Custom Text and Custom Numbers and Dates Tab:

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.

Saving the New Item:

When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Editing Data

Editing Items

The **Edit Items** screen allows you to modify an existing item. This screen is accessed from the **Item List** by highlighting an item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Items** screen is identical to the **New Item** screen, except all the information previously entered for the item appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Item** topic.

Editing Assembly Items

This function applies to Pro and Enterprise Version users only.

The **Edit Assembly Items** screen allows you to modify an existing assembly item. This screen is accessed from the **Item List** by highlighting an assembly item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Assembly Items** screen is identical to the **New Assembly Item** screen, except all the information previously entered for the item appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create an Assembly Item** topic.

When editing assembly items, there are two points to keep in mind:

1. You will need to sync the mobile device in order for the changes to be transferred.
2. The change of configuration will not impact mobile transactions already done on the device.

Example: You create an assembly item with two component parts, Item 1 and Item 2. Later, you edit the assembly item to have three component parts, Item 1, Item 2 and Item 3.

Editing Kit Items

This function applies to Pro and Enterprise Version users only.

The **Edit Kit Items** screen allows you to modify an existing kit item. This screen is accessed from the **Item List** by highlighting a kititem in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the [**Working with Lists**](#) topic.

The **Edit Kit Items** screen is identical to the **New Kit Item** screen, except all the information previously entered for the item appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [**Creating a Kit Item**](#) topic.

When editing Kit items, there are two points to keep in mind:

1. You will need to sync the mobile device in order for the changes to be transferred.
 2. The change of configuration will not impact mobile transactions already done on the device.
-

Editing Sites

The **Edit Site** screen allows you to modify an existing site. This screen is accessed from the **Site List** by highlighting a site in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Site** screen is identical to the **New Site** screen, except all the information previously entered for the site appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Site** topic.

Editing Locations (or a Site and Location)

The **Edit Location** screen allows you to modify an existing location. This screen is accessed from the **Location List** by highlighting an location in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Location** screen is identical to the **New Location** screen, except all the information previously entered for the location appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Location** topic.

Edit Customer

The **Edit Customer** screen allows you to modify an existing customer. This screen is accessed from the **Customer List** by highlighting a customer in the list, then clicking the **Edit** button on the toolbar. For more information on using the **List** screens, see the **Working with Lists** topic.

The **Edit Customer** screen is identical to the **New Customer** screen, except all the information previously entered for the customer appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Customers** topic.

Edit Supplier

The **Edit Supplier** screen allows you to modify an existing supplier. This screen is accessed from the **Supplier List** by highlighting a supplier in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Supplier** screen is identical to the **New Supplier** screen, except all the information previously entered for the supplier appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Supplier** topic.

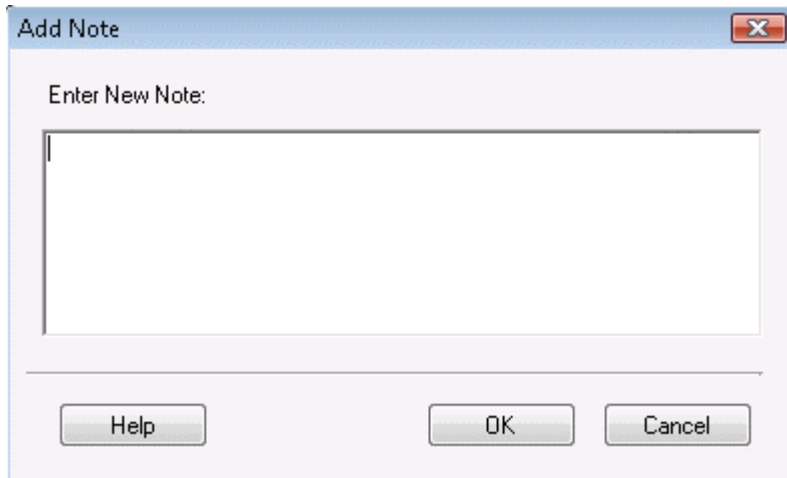
Editing Manufacturers

The **Edit Manufacturer** screen allows you to modify an existing manufacturer. This screen is accessed from the **Manufacturer List** by highlighting a manufacturer in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Manufacturer** screen is identical to the **New Manufacturer** screen, except all the information previously entered for the manufacturer appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Create New Customers** topic.

Adding Notes

Several screens in the software provide the option to add notes to the record. Clicking on the **Add Note** button allows you to associate any comments you may have with the record you are creating or editing. This is useful to keep comments associated with the record.

A screenshot of a software dialog box titled "Add Note". The dialog box has a light blue title bar with a close button (X) in the top right corner. Inside the dialog, there is a label "Enter New Note:" followed by a large, empty text input area. At the bottom of the dialog, there are three buttons: "Help", "OK", and "Cancel", arranged horizontally from left to right.

Enter your notes in the text box, then click **OK** to save and exit.

Notes are displayed along with the date/time it was entered and the user name of the user who added it.

Editing Pick Orders

This function applies to Pro and Enterprise Version users only.

The **Edit Pick Order** screen allows you to modify an existing purchase order. This screen is accessed from the **Pick Order List** by highlighting an item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the [**Working with Lists**](#) topic.

The **Edit Purchase Order** screen is identical to the **New Purchase Order** screen, except all the information previously entered for the order appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [**Creating a Pick Order**](#) topic.

Editing Purchase Orders

This function applies to Pro and Enterprise Version users only.

The **Edit Purchase Order** screen allows you to modify an existing purchase order. This screen is accessed from the **Purchase Order List** by highlighting an item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the **Working with Lists** topic.

The **Edit Purchase Order** screen is identical to the **New Purchase Order** screen, except all the information previously entered for the order appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the **Creating a Purchase Order** topic.

Assembly Items

Assembly Overview

This function applies to Pro and Enterprise Version users only.

Assembly items are created when you combine two or more existing items or multiple quantity of one item to create a new item. You will use the Assembly item type when you want to "build" several of the new items to have on hand in your inventory. You can create Assembly Items using Inventoried, *Non-Inventoried* items and other Assembly items.

Kit Items vs Assembly Items:

While these two item types are used to accomplish similar goals - the grouping of items - they are used for different reasons. **Assembly Items** are a collection of items that, once grouped, are considered to be a new, single item. The inventory quantities for the individual component items are reduced at the time the **Assembly Items** are built and the quantity for the **Assembly Item** is increased. You can build several **Assembly Items** and keep them on hand in your inventory. In addition, you can move and check in/out **Assembly Items**.

Kit Items are a collection of items that are sold together, but are listed separately in the transaction (similar to a bill of goods) and continue to be tracked as separate items. A **Kit Item** is created at the time of sale. You cannot Add inventory in order to have multiple **Kit Items** on hand. Inventory amounts for the component parts are reduced when the **Kit Item** is **Removed** from inventory.

Assembly Item Example:

Sebastian sells modular cabinets. Each cabinet is made of several different sizes of wood panels and hardware. Sebastian tracks each piece used to build these cabinets as a separate piece of inventory in his system, so he will know when he needs to reorder a particular size of panel or piece of hardware. He builds several of each type of cabinet to have on hand to sell as well. When he does this, he creates an Assembly Item in InventoryControl that is made up of each piece of inventory used to build the cabinet. InventoryControl will then deduct the on hand amount for each piece of inventory used in the assembly, and increase the amount on hand of the assembled item.

The flow of **Assembly Items** is provided below:

1. **Create Your Assembly Item:** Use the **Create New Item** screen to create your Assembly Item. When Assembly is selected as the **Item Type**, there is a tab labeled **Assembly** on the **Create New Item** screen. Use this tab to indicate what items you want to include in the built Assembly Item. Keep in mind that after you create your Assembly Item, the quantity for that item is zero and the on hand amounts for the included items have not changed. As with other Items, creating the Assembly Item simply tells InventoryControl basic information about the Assembly Item and indicates what other items you want included with it.
2. **Build your Assembly Item:** This is a similar process as **Adding Inventory** to other item types. In this process you will tell InventoryControl how many of this Assembly Item you want to build. InventoryControl will check the on hand amounts for each item included in the build to make sure you have enough to complete the desired amount. After the build is complete, the on hand amounts for each item included in your Assembly Item will be

reduced by the number built, and the on hand amount for the Assembly Item will be increased.

Detailed instructions on how to create **Assembly Items** and **Build** them are provided in the links below:

[Creating an Assembly Item](#)

[Building Assembly Items](#)

[Disassembling \(Removing\) Assembly Items](#)

Creating an Assembly Item

This function applies to Pro and Enterprise Version users only.

Assembly Items are used when you want to combine two or more existing items into one new item. We recommend you read the **Assembly Overview** topic before you begin creating Assembly Items.

This topic discusses:

Accessing the New Assembly Items Screen

General Information Tab

Location Settings Tab

Assembly Tab

Additional Information Tab

Manage Suppliers Tab

Custom Texts/Custom Numbers and Dates Tab

Saving the New Item

Accessing the New Assembly Item Screen:

1. From the **Main Window**, select **New > Item > Assembly**.

The **Create New Item** screen appears:

The screenshot shows a software window titled "Create New Item". It features a tabbed interface with the following tabs: "General", "Location Settings", "Assembly Information", "Additional", "Manage Suppliers", "Custom Texts", and "Custom Numbers and Dates". The "General" tab is currently selected and displays the following fields:

- Item Number:** A text field containing the value "1009".
- Alt Item Number:** An empty text field.
- Description:** An empty text field.
- Category:** A dropdown menu.
- Manufacturer:** A dropdown menu.
- Checkout Length:** An empty text field.
- Type:** A dropdown menu with "Assembly" selected.
- Item To Be Tracked By:** A section with four checkboxes: "Serial Number" (checked), "Lot", "Date Code", and "Pallet".
- Require the user to fill out:** A section with three checkboxes: "Ref #", "Supplier", and "Customer".
- Cost:** An empty text field.
- Average Cost:** An empty text field.
- List Price:** An empty text field.
- Sale Price:** An empty text field.
- Min Stock Level:** An empty text field.
- Max Stock Level:** An empty text field.
- Reorder Qty:** An empty text field.

At the bottom of the window, there are three buttons: "Help", "Save", and "Close".

Note that in addition to the usual tabs that appear on the **Create New Item** screen, there is also a tab labeled **Assembly Information**.

General Information Tab:

The **General Information** tab is where you will enter the basic information about the item. Please see the screen shot above for an example of this tab.

Input the appropriate information in the fields provided:

- **Item Number** is a required field. The **Item Number** is often available on a barcode label already attached to the item. This allows you to scan or manually enter the number from each item as it comes in. Item numbers cannot exceed 20 digits.

Do not use a description as the item number. You should enter a numeric value in the **Item Number** field. A description of the item can be entered in the **Description** field.

The **Item Number** is often the UPC code or SKU number of an inventory item. Using an existing barcode for Item Number allows you to scan or manually enter the number from each Item as it comes in without having to print and affix your own barcode inventory item labels.

Automatic Item Numbers: If you have the **Automatic Item Numbers** option selected on the **Options** screen, the **Item No.** field will appear populated with the next number in the sequence. For further information on the this option, please refer to the **Options Screen** topic.

- **Category:** When a new **Category** value is typed into the field, you will receive a message asking if you want to save it as a new Category.
- **Checkout Length** specifies the default period, in days, that this **Item** can be checked out to a customer.
- When a new **Manufacturer** is typed into the Manufacturer field, you will receive a message asking if you want to save the value as a new Manufacturer.
- When you access the **Create New Item** screen by selecting **New > Item > Assembly**, this field will automatically be set to **Assembly**. If you accessed it any other way, you can select **Assembly** from the **Type** drop down.
- The **Item To Be Tracked By** section contains check boxes which determine whether the **Serial Number**, **Lot**, **Date Code** and **Pallet** fields must be completed throughout InventoryControl before you can create inventory from this item.

Note: Keep in mind that marking the track by fields here mean that the entire Assembly Item, after build, will be tracked with a unique serial number, lot number, etc. It may be the case that individual assets that make up the Assembly Item (selected on the Assembly tab) are also tracked by serial number, lot number, etc. When you Build the Assembly Item on the Build Assembly screen, you will be required to enter the serial number or any other track by fields *for each item* included in the Assembly Item.

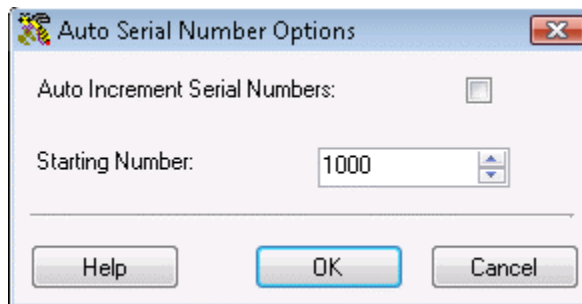
Items To Be Tracked By:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	No	-
Enabled (checked)	Yes	Yes

It is important at this time that you determine how you want to track each item.

Typically, small items that are all the same may not need to have any **Tracked Bys** selected. Items such as printers may need to be tracked by **Serial Number**, so returns and maintenance can be properly tracked. Medical supplies or food may need to be tracked by **Date Code** and/or **Lot**.

Tracked By options cannot be changed after you add inventory to the item.

- **Automatic Serial Numbers:** You can choose to have the program automatically create and assign serial numbers each time you add inventory for this item (whether manually using the Add Inventory feature or by Receiving Inventory). To do this:
 - a. Click the button to the right of the **Serial Number** check box. The **Auto Serial Number Options** screen is displayed:



- b. Check the **Auto Increment Serial Numbers** to have the software automatically assign incremented serial numbers. Enter a **Starting Number**. This number determines the number at which the serial number sequence starts. Since this option is applied at the **Item** level, each **Item** in the program may have its own unique series of serial numbers.
 - c. Click **OK** to accept your entries.
- The **Require the user to fill out** section contains check boxes which act much like the Tracked By boxes, but contains a different set of fields (**Ref #**, **Supplier** and **Customer**) which are always available for use, even if they are not required. For example, if the option is not enabled for the Supplier Code field, a user adding inventory can enter a value for Supplier Code if he knows it or skip entering a value if he doesn't. If however this option is enabled, a value for Supplier Code is required to complete the transaction.

Require The User to Fill Out:	Field Will Be Available For Use	Field Will Also Be Required
Disabled (not checked)	Yes	No
Enabled (checked)	Yes	Yes

- Cost** specifies the amount paid to get this item into inventory.
- Average Cost** is a calculated value that averages the costs paid for the current Quantity.

If you have 20 quantity of this item at cost 10.00

and add another 30 quantity at cost 8.00,

$$\text{Average Cost} = ((20 \times 10.00) + (30 \times 8.00)) / 50 = 8.80$$

Removes are calculated using the FIFO method, therefore, if you later remove 5, 5 of the cost 10.00 items will be removed first,

$$\text{Average Cost} = ((15 \times 10.00) + (30 \times 8.00)) / 45 = 8.67$$

When calculating Average Cost, the software *does not* include records that have an average cost of zero. When you run an Inventory Cost Report, the software *does* include zero cost quantities when calculating Total Cost.

- List Price** specifies a manufacturer's list price for an item.

- **Sale Price** specifies the price at which you sell an item.
- **Min Stock Level** specifies the minimum stock level you wish to maintain.
- **Max Stock Level** specifies the maximum stock level you wish to maintain.
- **Reorder Qty** specifies the quantity at which you want to reorder inventory.

Note: The **Minimum Stock Level**, **Maximum Stock Level** and **Reorder Quantity** fields found on this tab represent these levels at the item level only, meaning these are the stock levels for this item throughout all locations. If you want to maintain these levels by location, you can do so on the **Location Settings** tab (described below).

- The **Total Available** counter is the sum of Total Checked-Out and Total In-House.
- The **Total Checked-Out** counter is the quantity of this item that is currently Checked-Out.
- The **Total In-House** counter is the Total Available less the Total Checked-Out.
- The **Total On Order** counter is the quantity of this item that is currently included on an active Pick Order.
- The **Total Buildable** is the quantity that can be built of this Assembly Item based on the inventory levels of the component items.
- The **Committed** counter is the number of this Assembly Item that has been committed to a pick order.

Location Settings Tab:

When you have completed the **General Information** tab, click the **Location Settings** tab. This tab allows you to enter all locations where this item will be in inventory and to designate a primary location. You can assign items to more than one location. This tab uses the List functionality for grouping, ordering, filtering and deleting.

General Location Settings Assembly Information Additional Manage Suppliers Custom Texts Custom Numbers and Dates

Filter Group By Delete

To finish adding a new record please press enter key or down arrow button. Click on Filter toolbar button to bring up filter row, and to bring up group row please click on Grouping toolbar button.

Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty
<input type="checkbox"/>			0.00	0.00	0.00	0.00

Record: ||| Of 0 |||

Help Save Close

Complete the fields on this screen as described below:

- Primary Location** - Select this checkbox if this will be the primary location at this site for this item. A primary location can be selected for each **Site** you have setup in the system. When you select a primary location, when you **Receive** quantities of that item from a purchase order, they will automatically be assigned to that location. Also, when you **Pick** quantities of that item for pick orders, they will automatically be removed from that location. You can change these locations when picking and receiving if necessary. In addition, the primary location will appear in any location fields (on the **Add** inventory screen, for example), however; you can change the location, if needed.
- Only one primary location can be selected per site.
- Site and Location** - Click in the box and select a **Site** and **Location** from the drop down list. Only sites and locations you have previously selected will appear in this list. Select **More** to view the **Site** or **Location List**. You can also select **New Location** or **New Site** to access the **Create New** screen. These represent the site and the location where the inventory will reside.
- Quantity** - This number is populated from the Inventory for this item. This number displays how many of this item is currently in stock at the selected site and location. When you first create your item, this number will be zero. After you build your Assembly Item, this field will reflect the number you built (which is the quantity in stock).
- Max Stock Level** - Enter the maximum number of this item that you want to have in stock for the selected site and location. This number can be 0 or a positive number, negative numbers are not allowed.

- **Min Stock Level** - Enter the minimum number of this item that you want to have in stock for the selected Site and Location. This number can be 0 or a positive number, negative numbers are not allowed.
- **Reorder Qty** - Enter the number at which you want to reorder this item for the selected **Site** and **Location**. You can set an option in the software so that the system warns you at login of any inventory items that have hit their reorder quantity. For further information on setting this option, please refer to the **Options Screen** topic.

After you have completed all fields, hit ENTER to begin a new line. Your screen will look similar to the following after hitting ENTER:

Primary Location	Site	Location	Quantity	Max Stock Level	Min Stock Level	Reorder Qty
<input checked="" type="checkbox"/>	200	100	0.00	0.00	0.00	0.00
<input type="checkbox"/>			0.00	0.00	0.00	0.00

Assembly Tab:

This is the tab where you will indicate which items you want included in this Assembly Item. You can select any Inventoried, Non-inventoried and/or Assembly item.

Type	Item Number	Quantity	Always Scrap?	Stocking Unit	Total In-House	Description
Inventory		1.00	<input checked="" type="checkbox"/>			

To select items to include in your Assembly Item:

1. In the **Type** drop down, select **Inventory**, **Non-Inventory** or **Assembly**.

The screenshot shows the 'Assembly Info' tab of a software interface. The 'Type' dropdown menu is open, displaying three options: 'Inventory', 'Non-Inventory', and 'Assembly'. The 'Inventory' option is currently selected and highlighted in blue. The 'Item Number' field is visible to the right of the dropdown.

2. In the **Item Number** field, select which item you want to add to this assembly. If you select **Full List**, the **Item List** will be filtered by the **Type** you selected (i.e., if **Non-Inventory** is selected, only non-inventory items will appear on the **Item List**).

The screenshot shows the 'Assembly Information' tab. The 'Type' dropdown is set to 'Inventory'. The 'Item Number' field is populated with '1002'. The 'Quantity' field is set to '1.00'. The 'Always Scrap?' checkbox is unchecked. Below the 'Item Number' field, a list of items is displayed with columns for 'Item Number' and 'Description'.

Item Number	Description
1002	
1003	
1005	
1006	
<More>	For Full List...
<New>	Create New...

When you tab out of the **Item Number** field after selecting an item, the **Description**, **Stocking Unit** and **Total In-House** fields will populate with the information for that item.

3. Enter the **Quantity** you want included in this **Assembly Item**. This number represents how many of this items is included with each build of this **Assembly Item**.

Example: Assume this **Assembly Item** is a cabinet. For each cabinet, you need 2 long panels, 2 short panels and one back piece and 6 screws. When you enter the long panel item on this tab, you will enter 2 in the **Quantity** field. When you enter the screws item on this tab, you will enter 6 in the **Quantity** field, etc.

4. Select the **Always Scrap** checkbox if you want InventoryControl to always "scrap" or permanently remove the item from inventory during the **Disassembly** process. You might use this option for a non-inventory item such as a box used for packaging the **Assembly Item**.

If the **Always Scrap** checkbox is not selected, the on hand amount for the item will be increased during **Disassembly** (the item is assumed to be returned to inventory rather than removed after Disassembly.)

- Press **ENTER** to access a new line and enter another Item, then repeat the steps above. Your screen will appear similar to the following after pressing ENTER:

General Location Settings Assembly Information Additional Manage Suppliers Custom Texts Custom Numbers and Dates							
Type	Item Number	Quantity	Always Scrap?	Stocking Unit	Total In-House	Description	
Inventory	1003	1.00	<input type="checkbox"/>		0.00	Test Item 3	
Inventory	1002	1.00	<input type="checkbox"/>		7.00	Test Item 1002	

Note: The cost will be calculated and updated based on your selections on this tab unless you have checked the **Do Not Override Cost on the General Tab** checkbox located at the bottom of the **Assembly Information** tab.

Additional Information Tab:

When you have finished entering information on the **Assembly** tab, click the **Additional** tab. The **Additional Information** tab provides optional fields where other information about the Item can be recorded. An example of this tab is shown below:

General Location Settings Additional Manage Suppliers Custom Texts Custom Numbers and Dates			
Item Measurements:			
Stocking Unit:	<input type="text"/>		
Dimension Unit:	<input type="text"/>	Length:	<input type="text"/>
Width:	<input type="text"/>	Height:	<input type="text"/>
Weight Unit:	<input type="text"/>	Weight:	<input type="text"/>
Manager:	<input type="text"/>		
File Reference:	<input data-bbox="808 1318 841 1350" type="button" value="..."/>		
Notes:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		
<input data-bbox="451 1644 586 1671" type="button" value="Add Notes"/>			
<input data-bbox="248 1734 354 1761" type="button" value="Help"/> <input data-bbox="1141 1734 1247 1761" type="button" value="Save"/> <input data-bbox="1271 1734 1377 1761" type="button" value="Close"/>			

Complete the fields on this tab as described below:

- **Stocking Unit** is the portion by which the quantity will be tracked. At the item level, this should be "Eaches", meaning you should enter how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle, box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.)

You will have the opportunity on the **Managing Suppliers** tab to enter the Order Unit used by the supplier for shipping purposes (Box, Pallet, Lot, etc.). The Order Unit will be used when creating **Purchase Orders** rather than the "Eaches" UOM that is entered on this tab. Please see the **Managing Suppliers Tab** section, below.

- **Dimension Unit** is the increment to be used for Length, Width and Height. (Examples: inch, foot, yard, millimeter, centimeter, meter, etc.)
- **Length** is the length of one Unit of Measure expressed in Dimension Units.
- **Width** is the width of one Unit of Measure expressed in Dimension Units.
- **Height** is the height of one Unit of Measure expressed in Dimension Units.
- **Weight Unit** is the increment to be used for mass. (Examples: ounce, pound, ton, milligram, gram, kilogram, metric ton, etc.)
- **Weight** is the mass of one Unit of Measure expressed in Weight Units.
- **Manager** is used to record the name of someone who manages this inventory item.
- **File Reference** is used to record the path to a relevant file that might be an image file, documentation, specifications, etc. This field does not function as a hyperlink. It's just a static field where a filename or path and filename can be recorded.
- **Add Notes** allows you to record any additional information.



Manage Suppliers Tab:

This tab allows you to identify which suppliers you will use for this item and enter detailed supplier information, such as unit of measure. Pro and Enterprise users can enter multiple suppliers for an item and mark one as the default, or preferred supplier. Standard version users can enter only one supplier for each item.

Adding Suppliers to an Item:

To use this tab you must first select suppliers for this item in the **Supplier** window. To do this:

- Click the **New** button at the bottom of the list. The fields to the right of the **Supplier** window are enabled.
- Select a **Supplier Code** from the drop down list. You can also select **New Supplier** from the list to create a new supplier.
- Enter the SKU number for this item in the **Supplier Item SKU** field.
- Enter the description of this item given by the supplier in the **Supplier Item Description** field.
- Enter the number of days lead time the supplier needs to process orders for this item in the **Lead Time** (in days) field. The lead time is the time from the requisition date to the delivery date. For example, if you need the item by the 15th of the month and the supplier requires 5 days to deliver the order, you would enter 5 here to ensure the order is sent to the supplier timely.
- The **Status** field displays the supplier's current status (Active or Inactive). You can change the status by making a new selection from the drop down menu.
- You can make this the default supplier for this item by checking the **Make this the default Supplier while ordering this item** checkbox (**Pro and Enterprise versions only**). When this is selected, this supplier will automatically populate purchase orders for this item. You can change the supplier on the purchase order, if needed.
- Any notes entered for this supplier will appear in the **Notes** section.
- You can enter the supplier's unit of measure settings in the **Order Unit Settings** window (**Pro and Enterprise versions only**). This is the unit used by the

supplier when shipping this item. This may be box, pallet, etc. This is different from the "Eaches" stocking unit you entered on the **Additional** tab. For example, you may have entered "jar" for the stocking unit on the **Additional** tab, but the supplier may ship the item in boxes containing 10 jars. When creating purchase orders, you would want to specify the Order Unit as box rather than jar (or you could end up with 100 boxes of jars rather than 100 jars).

- j. When you are done entering supplier information, click the **Custom Texts** or **Custom Numbers and Dates** tab (these tabs are optional).

Deleting Suppliers from an Item:

- a. Highlight the supplier you want to delete from this item in the **Supplier** window.
 - b. Click the **Delete** button.
-

Custom Text and Custom Numbers and Dates Tab:

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.

Saving the New Item:

When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Building Assembly Items

This function applies to Pro and Enterprise Version users only.

After you create your Assembly Items (see the [Creating An Assembly Item](#) topic), you can "build" your **Assembly Items** as needed using the **Assembly** feature. **Building** Assembly Items can be thought of as the "manufacturing" portion of the Assembly Item feature. When you **Build** an Assembly Item, the on hand amounts for the sub-items are reduced by the number needed to make the Assembly Item, and the on hand amount for the Assembly Item is increased.

Assembling/Building Assembly Items increases inventory for the Assembly Item in the same way that Adding increases inventory for other item types.


Building an Assembly Item is a two part process. First, you will select which Assembly Item you want to build (add inventory to), next you will remove the sub-items from inventory. In other words, since your Assembly item is made up of other items, you have to remove the sub-items in order to add inventory to the Assembly Item.

Adding vs. Assembling: Keep in mind that while you can use the **Add** feature to add inventory to an **Assembly item**, **doing this will not affect the inventory amounts for the sub items**.

You should only use **Add** if you want to add inventory to an **Assembly Item** due to a return (you can also use the **Adjust** feature for this). To increase your inventory for an Assembly Item and decrease your inventory for the sub-items, use the **Assembly** feature.

To Assemble Items:

1. From the **Main** screen, click the **Inventory** icon.
2. From the **Inventory** menu, click **Assembly**. The **Build Assembly** screen appears:

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Builds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. The **Build Assembly** button does not have to be clicked between each scan to post these transactions to the **Pending Transaction List**. If any additional information, such as serial numbers is needed for one or more sub-items tied to this Assembly Item, you will be taken to the **Remove** screen so you can add this information. See below for information on using the **Remove** screen.

Clicking the  button will unlock the field.

3. In the **Item Number** field, enter the **Item Number** of the **Assembly Item** you want to build. The drop down list will display the last five items selected. Click **More** to view the **Item List**. The **Item List** will be filtered to only show **Assembly Items**. Click **New** to create a new Assembly Item.
4. If one of the sub-items has a default location, that location will appear in the **Location** field. If more than one sub-item has a default location, the field will appear blank. You can change the **Location** by clicking on the field and entering a new location.
5. Now you can enter the quantity you want to build. Note that the system tells you the maximum number you can build. This number is based on how many of each sub-item you on hand.

The screenshot shows a data entry form with the following fields and values:

- Item Number:** 1007
- Description:** (empty)
- Location:** (empty)
- Quantity:** 1.00 (Maximum: 2.00)
- No. of Labels:** (empty)
- Serial N:** (empty)
- Date:** (empty)
- Pallet:** (empty)

6. You can optionally enter **Cost**. This **Cost** reflects the cost of the entire **Assembly Item** (including sub-items).
7. You can optionally enter **Notes**.
8. If you setup any **Track By** fields when you created this **Assembly Item**, the **Track By** section will be enabled. These **Track By** fields are tied to the entire **Assembly Item** (including sub-items).
9. When you have entered all required information (**Item Number**, **Location** and any required **Track Bys**), the **Build Assembly** button will be enabled.

The **Build Assembly** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one **Remove** is posted to the **Pending Transaction List**.

Click this button to continue building your item. If no additional information (such as serial numbers) is needed for any of the associated sub-items, you can click **Commit** at this point to complete the build process.

If additional information is needed for one or more items, the **Remove** screen appears.

Remove

Data Pending Transaction List: 1

You have selected to build assembly item 1007: ..
 Quantity:: 1.
 The list below displays the items that will be removed to build your assembly item.

Type	Item Number	Quantity	Removed Qty	Stocking Unit	Description
<input checked="" type="checkbox"/> Inventory	1003	1.0000	1.0000		Test Item 3
<input type="checkbox"/> Inventory	1002	1.0000	0		Test Item 1002

Component Details:

Item Number:

Description:

Quantity:

Location:

Maximum: 0.00

Serial Number:

Lot:

Date Code:

Pallet:

1
Remove

This **Remove** screen displays all items tied to this **Assembly Item**. Those items that appear checked as in the example above are ready to be built.

Items that are not checked need additional information, usually a **Track By**.

10. In the **Item Number** field, enter the **Item Number**, or highlight an unchecked item in the display window. The selected item's information will populate the screen.
11. Enter any missing information, usually a **Track By** such as **Serial Number**. When you are tracking by serial number, click on the **Serial Number** drop down to see a list of all unique serial numbers associated with the selected item. You can also scan this information.

Note: To prevent fields from clearing, click the pushpin button located to the right of the field you want to lock. This is helpful when you have to perform multiple Builds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. This feature is especially useful when scanning serial numbers.

Clicking the button will unlock the field.

12. Click **Next** when you have completed entering the requested information. You will be returned to the **Assembly** screen. You can choose another **Assembly Item** to build, or click **Commit** to commit your changes to the database.

When you click **Commit**, the inventory quantities for the listed items will be reduced and the quantity for the **Assembly Item** will be increased by the number built.


Disassembling Assembly Items

This function applies to Pro and Enterprise Version users only.

The process of **Disassembling Assembly Items** will reduce your inventory for the Assembly Item and increase your inventory of the associated sub-items. You will be **Removing** inventory for the Assembly Item and **Adding** inventory to the sub-items, unless the sub-item has been marked to be *scrapped*.

To Disassemble Assembly Items:

1. From the **Main** screen, click **Inventory**.
2. On the **Inventory** menu, click **Disassemble**. The **Disassemble** screen will appear.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Disassemblies at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. The **Disassemble** button does not have to be clicked between each scan to post these transactions to the **Pending Transaction List**. If any additional information, such as serial numbers is needed for one or more sub-items tied to this Assembly Item, you will be taken to the **Add** screen so you can add this information. See below for information on using the **Add** screen.

Clicking the  button will unlock the field.

3. In the **Item Number** field, enter the **Item Number** of the **Assembly Item** you want to Disassemble. The drop down list will display the last five items selected. Click **More** to

view the **Item List**. The **Item List** will be filtered to only show **Assembly Items**.

4. If this Assembly Item is only in one location, that location will appear in the Location field. If the item exists in more than one location, click the drop down menu and select More to view the **Location List**.
5. Enter the quantity you want to disassemble. The **Maximum** number that appears directly below this field indicates the amount of this item that you have in inventory. You cannot disassemble more than you have in inventory.

The screenshot shows a software interface for disassembling an item. The 'Data' tab is active, and the 'Pending Transaction List' is empty. The 'Item Number' field is set to '1007'. The 'Description' field is empty. The 'Location' field is set to '200, 100'. The 'Quantity' field is set to '1.00', and a red box highlights the 'Maximum: 1.00' text below it. The 'Date Disassembled' field shows 'September 03, 2008'. The 'Serial Number' field is empty. The 'Lot' field is empty. The 'Date Code' field is empty. The 'Pallet' field is empty. The 'Customer' field is empty.

6. The current date will appear in the **Disassemble Date** field. You can keep this date, or enter a different date on which the **Disassembly** will occur. If you enter a future date, the inventory counts for the **Assembly Item** and component items will not be affected until that date.
7. If this **Assembly Item** is tracked by **Serial Number**, enter it in the **Serial Number** field. Remember that this is the serial number for the **Assembly Item** as a whole (entered on the **General** tab of the **Create New/Edit Assembly Item** screen).
8. If this **Assembly Item** is tracked by **Lot**, **Date Code** or **Pallet**, enter those in the appropriate fields.
9. You can optionally enter a **Customer** in the **Customer** field.
10. When you have completed the information on this screen, click **Disassemble**.

The **Disassemble** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one **Add** is posted to the **Pending Transaction List**.

If any of the component items are tracked (by serial number, for example), you will be taken to the **Add** screen after you click **Disassemble**.

Add

Data Pending Transaction List: 1

You have selected to disassemble assembly item 1007: .
 Quantity:: 1.
 The list below displays the items that will be added back into inventory.

Type	It...	Always Scrap?	Quantity	Removed Qty	Stocking Unit	Description
Inventory	1003		1.0000	0		Test Item 3
<input checked="" type="checkbox"/> Inventory	1002		1.0000	1		Test Item 1002

Component Details:

Item Number:

Description:

Quantity: Maximum: 1.00

Location:

☐ Scrap item due to:

Serial Number:

Lot:

Date Code:

Pallet:

1

Add

The **Add** screen lists all component items for this **Assembly Item**. Items that appear with a green checkmark are ready to be added.

Items that are not checked need additional information, usually a **Track By**.

Note: If this **Assembly Item** has been modified, the **View Config History** button, shown below, will appear at the top of the screen.

Add

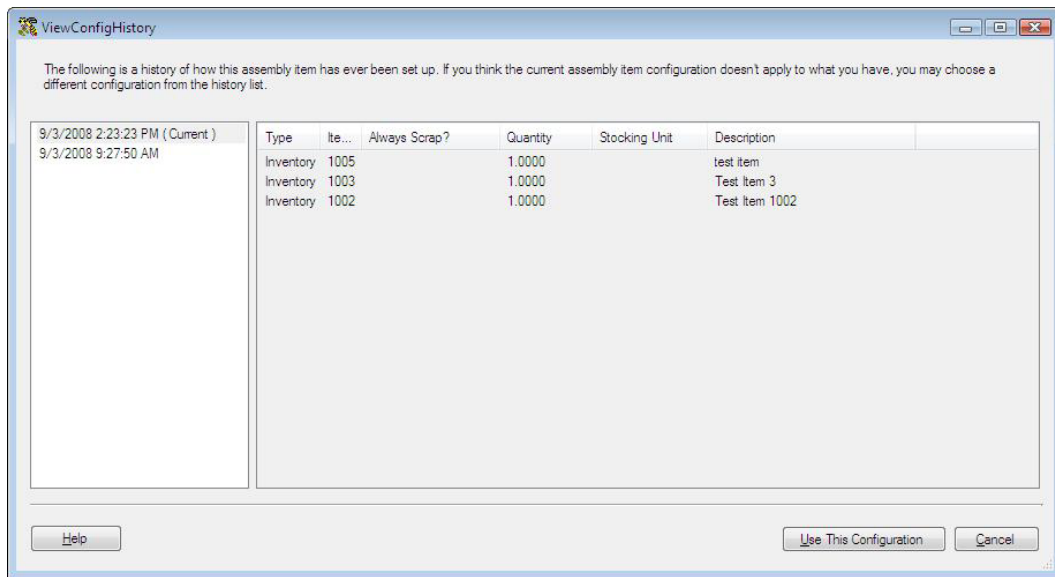
Data Pending Transaction List: 0

You have selected to disassemble assembly item 1007: .
 Quantity:: 1.
 The list below displays the items that will be added back into inventory.

Type	It...	Always Scrap?	Quantity	Removed Qty	Stocking Unit	Description
Inventory	1005		1.0000	0		test item
Inventory	1003		1.0000	0		Test Item 3
Inventory	1002		1.0000	0		Test Item 1002

View Config History

Click this button to view a list of all previous configurations. The **View Config History** screen appears.




To switch to a previous configuration, highlight a listing and click the **Use This Configuration** button.

11. In the **Item Number** field, enter the **Item Number**, or highlight an item in the display window. The selected item's information will populate the screen.
12. Select a location for this item (if there is only one location or that item has a primary location, this will appear in the **Location** field).
13. Select the **Scrap** checkbox if you want to scrap, or discard, this item. This means the inventory for this item will not be increased. You would use this if the item is damaged or you do not want to return it to your inventory for some reason.

You can also optionally enter a reason if you choose to scrap this item.

14. Enter any missing information, usually a **Track By** such as **Serial Number**. You can also scan this information.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Builds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. This feature is especially useful when scanning serial numbers.

Clicking the  button will unlock the field.

15. Click **Add** when you have entered the requested information. The item will now be check marked in the list.
16. Click **Next** to continue. You will be returned to the **Disassemble** screen. You can choose another **Assembly Item** to build, or click **Commit** to commit your changes to the database.

When you click **Commit**, the inventory quantities for the listed items will be increased and

the quantity for the **Assembly Item** will be decreased by the number disassembled.

Keep in mind that if an item is marked as "**Always Scrap**" on the **Create New/Edit Item** screen, or you have selected the **Scrap** option on this screen, the inventory for that item will not be increased.

Kit Items

Kitting Overview

This function applies to Pro and Enterprise Version users only.

Kit items are a group of items that are sold together, but are still considered separate inventory items. As opposed to **Assembly Items**, you cannot add inventory, move or check out/in **Kit Items**. While **Assembly Items** can be created in advance (pre-assembled) and kept in inventory, **Kit Items** are created at pick or remove time.

Kit Items vs Assembly Items

While these two item types are used to accomplish similar goals - the grouping of items - they are used for different reasons. **Assembly Items** are a collection of items that, once grouped, are considered to be a new, single item. The inventory quantities for the individual component items are reduced at the time the **Assembly Items** are built and the quantity for the **Assembly Item** is increased. You can build several **Assembly Items** and keep them on hand in your inventory. In addition, you can move and check in/out **Assembly Items**.

Kit Items are a collection of items that are sold together, but are listed separately in the transaction (similar to a bill of goods) and continue to be tracked as separate items. A **Kit Item** is created at the time of sale. You cannot Add inventory in order to have multiple **Kit Items** on hand. Inventory amounts for the component parts are reduced when the **Kit Item** is **Removed** from inventory.

Kit Item Example:

Here is an example of the workflow for creating a **Kit Item**:

John's Computer Store sells custom configured computers. While he keeps all components (monitors, keyboards, CPUs, Printers etc.) in stock, he tracks each of these as separate items. When a customer buys a computer, he or she designates which monitor is needed, which printer, etc. John then creates a **Kit Item** in InventoryControl made up of the selected components. The **Kit Item** goes onto his **Inventory List** with zero quantity and stays that way until he **Removes** it, which would be the time of customer pick up or shipping. At the time of **Removal**, the quantity for each component item is reduced and the **Kit Item** is completely removed from the **ItemList**.

Kit Items should not be confused with **Pick Orders**. **Pick Orders** can contain many unrelated items, **Kit Items** are a group of items that make up a new item (as in the Computer Store example). **Kit Items** can be included on **Pick Orders**.

Flow of Kit Items:

1. **Create the Kit Item:** Use the **Create New Item** screen to create your kit item. When you access the **Create New Item** screen for Kit items, there will be a tab labeled **Kitting Information**. Use this tab to designate which items you want included in this **Kit Item**. Keep in mind that inventory amounts for the component items are not changed when you create the **Kit Item**. The **Kit Item** is added to your **Item List**.
2. **Remove the Kit Item:** After the **Kit Item** has been picked and sold, use the **Remove** function to remove the designated quantity from inventory. At this time, inventory amounts for the component parts will be reduced.

Creating a Kit Item

This function applies to Pro and Enterprise Version users only.

Kit Items are used when you want to combine two or more existing items in order for them to be sold together. Kit items are not kept or tracked in inventory (you cannot add, move, check out, etc.). We recommend you read the **Kitting Overview** topic before you begin creating **Kit Items**.

Note: You can import the general information for a Kit Item, but not the compositional information (i.e. which items make up the component items). If you import Kit Items, you must then finish setting them up manually on the **Edit Item** screen.

This topic discusses:

Accessing the Create New Items Screen

General Information Tab

Kit Information Tab

Additional Information Tab

Custom Texts/Custom Numbers and Dates Tab

Saving the New Item

Accessing the Create New Items Screen:

1. From the **Main Window**, select **New > Item > Kit**.

The **Create New Item** screen appears:

The screenshot shows the 'Create New Item' window with the 'General' tab selected. The 'Item Number' field is populated with '1009'. The 'Type' dropdown is set to 'Kit'. The 'Item To Be Tracked By' section has 'Serial Number' checked. The 'Require the user to fill out' section has 'Ref #', 'Supplier', and 'Customer' all unchecked. The bottom of the window features 'Help', 'Save', and 'Close' buttons.

Note that in addition to the usual tabs that appear on the **Create New Item** screen, there is also a tab labeled **Kit Information**.

General Information Tab:

The **General Information** tab is where you will enter the basic information about the item. Please see the screen shot above for an example of this tab.

Input the appropriate information in the fields provided:

- **Item Number** is a required field. The **Item Number** is often available on a barcode label already attached to the item. This allows you to scan or manually enter the number from each item as it comes in. Item numbers cannot exceed 20 digits.

Do not use a description as the item number. You should enter a numeric value in the **Item Number** field. A description of the item can be entered in the **Description** field.

The **Item Number** is often the UPC code or SKU number of an inventory item. Using an existing barcode for Item Number allows you to scan or manually enter the number from each item as it comes in without having to print and affix your own barcode inventory item labels.

Automatic Item Numbers: If you have the **Automatic Item Numbers** option selected on the **Options** screen, the **Item No.** field will appear populated with the next number in the sequence. For further information on this option, please refer to the **Options Screen** topic.

- **Category:** When a new **Category** value is typed into the field, you will receive a message asking if you want to save it as a new Category.
- **Checkout Length** is not available for Kit Items..
- When a new **Manufacturer** is typed into the Manufacturer field, you will receive a message asking if you want to save the value as a new Manufacturer.
- When you access the **Create New Item** screen by selecting **New > Item > Kit**, this field will automatically be set to **Kit**. If you accessed it any other way, you can select **Kit** from the **Type** drop down.
- The **Item To Be Tracked By** section is not available for Kit Items. Tracking can take place for the component items, but not for the Kit Item.
- **Cost** specifies the amount paid to get this item into inventory.
- **Average Cost** is a calculated value that averages the costs paid for the current Quantity.

If you have 20 quantity of this item at cost 10.00

and add another 30 quantity at cost 8.00,

$$\text{Average Cost} = ((20 \times 10.00) + (30 \times 8.00)) / 50 = 8.80$$

Removes are calculated using the FIFO method, therefore, if you later remove 5, 5 of the cost 10.00 items will be removed first,

$$\text{Average Cost} = ((15 \times 10.00) + (30 \times 8.00)) / 45 = 8.67$$

When calculating Average Cost, the software *does not* include records that have an average cost of zero. When you run an Inventory Cost Report, the software *does* include zero cost quantities when calculating Total Cost.

- **List Price** specifies a manufacturer's list price for an item.
- **Sale Price** specifies the price at which you sell an item.
- **Min Stock Level** is not available for Kit Items.
- **Max Stock Level** is not available for Kit Items.
- **Reorder Qty** is not available for Kit Items.
- **Total Shippable** is the total on hand amount minus committed quantities for all component items. (Committed is inventory that is contained on a pick order.)

Kit Information Tab:

This tab is where you will indicate which items you want included in this Kit.

Type	Item Number	Quantity	Stocking Unit	Total In-House	Description
Inventory		1.00			

To select items to include in your Kit Item:

1. In the **Type** drop down, select **Inventory**, **Non-Inventory** or **Assembly**.

2. In the **Item Number** field, select which item you want to add to this assembly. If you select **Full List**, the **Item List** will be filtered by the **Type** you selected (i.e., if **Non-Inventory** is selected, only non-inventory items will appear on the **Item List**. If **Assembly** is selected, only Assembly items will appear in the List).

Type	Item Number	Quantity	Stocking Unit	Total In-House	Description
Inventory		1.00			

When you tab out of the **Item Number** field after selecting an item, the **Description**,

Stocking Unit and **Total In-House** fields will populate with the information for that item.

3. Enter the **Quantity** you want included in this **Kit Item**.
4. Press **Enter** to access a new line and enter another Item, then repeat the steps above.

Note: The cost will be calculated and updated based on your selections on this tab unless you have checked the **Do Not Override Cost on the General Tab** checkbox located at the bottom of the **Kit Information** tab.

Additional Information Tab:

When you have finished entering information on the **Kit Information** tab, click the **Additional** tab. The **Additional Information** tab provides optional fields where other information about the Item can be recorded. An example of this tab is shown below:

The screenshot shows a software window with a tabbed interface. The 'Additional' tab is selected, showing fields for item measurements, manager, file reference, and notes. The 'Item Measurements' section includes fields for Stocking Unit, Dimension Unit, Length, Width, Height, Weight Unit, and Weight. The 'Manager' field is a text input. The 'File Reference' field is a text input with a browse button. The 'Notes' field is a large text area with an 'Add Notes' button. The window has a 'Help' button on the bottom left and 'Save' and 'Close' buttons on the bottom right.

General Location Settings Additional Manage Suppliers Custom Texts Custom Numbers and Dates					
Item Measurements:					
Stocking Unit:	<input type="text"/>				
Dimension Unit:	<input type="text"/>	Length:	<input type="text"/>		
Width:	<input type="text"/>	Height:	<input type="text"/>		
Weight Unit:	<input type="text"/>	Weight:	<input type="text"/>		
Manager:	<input type="text"/>				
File Reference:	<input type="text"/> <input data-bbox="808 1163 841 1192" type="button" value="..."/>				
Notes:	<div data-bbox="448 1213 1325 1465"></div> <div data-bbox="448 1486 586 1518">Add Notes</div>				
<div data-bbox="245 1577 354 1608">Help</div> <div data-bbox="1138 1577 1247 1608">Save</div> <div data-bbox="1268 1577 1377 1608">Close</div>					

Complete the fields on this tab as described below:

- **Stocking Unit** is the portion by which the quantity will be tracked. At the item level, this should be "Eaches", meaning you should enter how you want each item of this type to be measured. (Examples: bag, barrel, basket, block, bottle, box, carton, container, drum, gallon, jar, pack, package, pallet, section, tub, vial, etc.)

You will have the opportunity on the **Managing Suppliers** tab to enter the Order Unit used by the supplier for shipping purposes (Box, Pallet, Lot, etc.). The Order Unit will be used when creating **Purchase Orders** rather than the "Eaches" UOM that is entered on this tab. Please see the **Managing Suppliers Tab** section, below.

- **Dimension Unit** is the increment to be used for Length, Width and Height. (Examples: inch, foot, yard, millimeter, centimeter, meter, etc.)
- **Length** is the length of one Unit of Measure expressed in Dimension Units.
- **Width** is the width of one Unit of Measure expressed in Dimension Units.
- **Height** is the height of one Unit of Measure expressed in Dimension Units.
- **Weight Unit** is the increment to be used for mass. (Examples: ounce, pound, ton, milligram, gram, kilogram, metric ton, etc.)
- **Weight** is the mass of one Unit of Measure expressed in Weight Units.
- **Manager** is used to record the name of someone who manages this inventory item.
- **File Reference** is used to record the path to a relevant file that might be an image file, documentation, specifications, etc. This field does not function as a hyperlink. It's just a static field where a filename or path and filename can be recorded.
- **Add Notes** allows you to record any additional information.

Custom Text and Custom Numbers and Dates Tab:

For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, see Using Custom Fields.

Saving the New Item:

When you have finished adding information, click the **OK/Save** button. The system behaves differently at this point depending on your settings on the **Options** screen.

- When the **Close New Form** option is turned *off*: Click **Save** to commit your entry or click **Close** to exit the form.
- When the **Close New Form** option is turned *on*: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

For more information about the **Options** screen, please refer to the **Options Screen** topic.

Removing Kit Items

The **Remove** screen allows you to remove a kit item from the database. This can be considered the same as shipping inventory. You can designate which customer this inventory was shipped to on this screen.

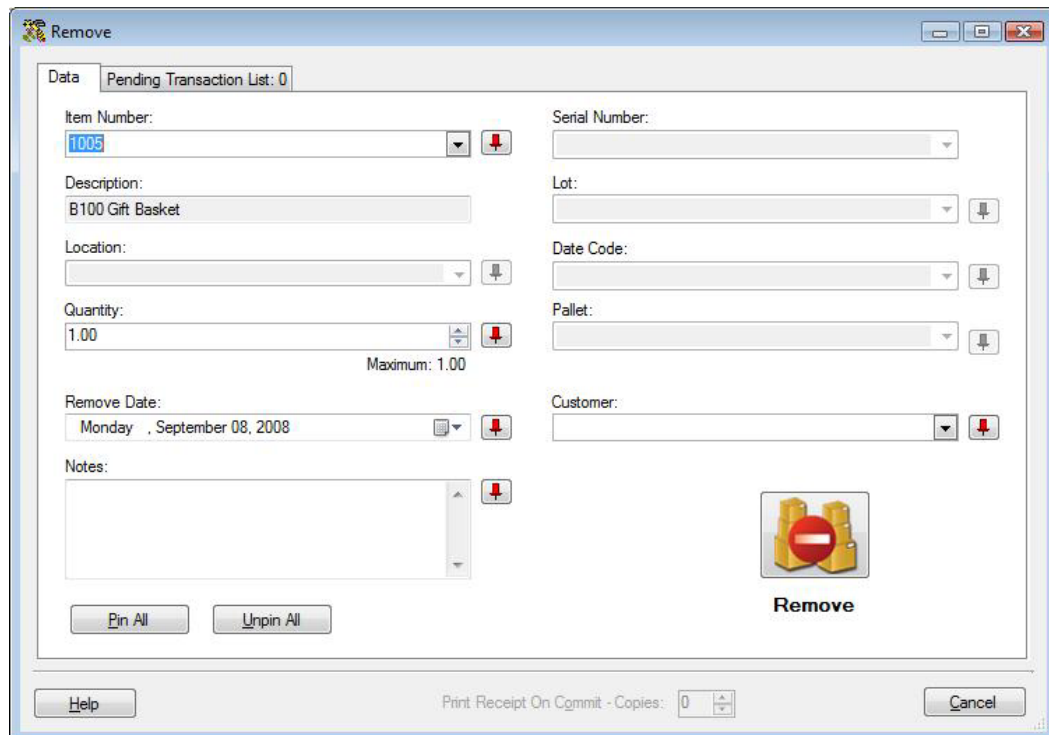
The Remove function uses FIFO (First in First Out) to determine what inventory is removed first. If you Add 5 of Item 123 to Location Bin 1, for example, then another 5 come in on another day, you will have ten of that item. When you later remove 3 of Item 123, the first set of 5 will be subtracted from inventory before the second set.

Removing Inventory from an Item:

1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click the **Remove** icon. The **Remove** screen appears.


OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. On the **Item List**, highlight an item in the grid, then click the **Remove** icon.



The screenshot shows the 'Remove' window with the following fields and controls:

- Data** tab: Pending Transaction List: 0
- Item Number:** 1005 (with a Pushpin icon to its right)
- Description:** B100 Gift Basket
- Location:** (with a Pushpin icon to its right)
- Quantity:** 1.00 (with a Pushpin icon to its right and 'Maximum: 1.00' below it)
- Remove Date:** Monday, September 08, 2008 (with a Pushpin icon to its right)
- Notes:** (with a Pushpin icon to its right)
- Serial Number:** (empty field)
- Lot:** (empty field with a Pushpin icon to its right)
- Date Code:** (empty field with a Pushpin icon to its right)
- Pallet:** (empty field with a Pushpin icon to its right)
- Customer:** (empty field with a Pushpin icon to its right)
- Buttons:** Pin All, Unpin All, Remove (with a red 'X' icon), Help, Print Receipt On Commit - Copies: 0, Cancel

To prevent fields from clearing, click the Pushpin  button located to the right of the field you want to lock for subsequent transactions. This is helpful when you have to perform multiple removes at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly remove

inventory just by repeatedly scanning barcodes into that field. (The **Remove** button does not have to be clicked between each scan to post these remove transactions to the Pending Transaction List.)

Clicking the  button will unlock the field.

3. **Complete the Item fields:** Enter the **Item Number** of the item from which you want to remove inventory. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to select an existing item from the first 10 Items shown there, or select **<more>** to select an Item from the **Item List**. You can only **Remove** quantity from items with quantity greater than 0. The **Item Number** list on this screen will not display or accept numbers that do not have quantity.

Entering an **Item Number** populates the **Item Number** field as well as the **Description** field and enables the following fields:

- **Quantity** (unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of 1).
- **Location**
- **Any of the associated Tracked By fields:** Track by fields are not used for Kit items, though the individual component items may have track bys.
- **Customer**
- **Notes**

You can use the drop down list of any enabled field to select an existing value for that field.

Note: If the **Automatic New** option is enabled on the **Options** screen, the **Create New Customer** screen will be opened automatically if an unknown **Customer** is entered. If the **Automatic New** option is turned off when an unknown **Customer** is entered, a prompt will ask if you want to use the Create New screen. For more information on the enabling and disabling the Automatic New option, please refer to the **Options** screen topic.

4. **Enter the Customer:** Select a **Customer** from the drop down list. Select **<New>** from the **Customer** drop list to open the **Create New Customer** screen.

The **Notes** field allows you to add and store additional information that describes the transaction.

5. After you have completed entering the information, click the **Remove** button to add the transaction to the **Pending Transaction List**. All fields on the **Remove** screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item to be removed or you can click **Commit** on the **Pending Transaction List** to submit the transaction(s).

The **Remove** button will not be enabled until all required information is entered in the appropriate fields. Click the **Remove** button to continue Removing the kit item. If no additional information (such as serial numbers) is needed for any of the associated component items, you can click **Commit** at this point to complete the remove process.

If additional information is needed for one or more items, this **Remove** screen appears.

Remove

Data Pending Transaction List: 1

You have selected to remove kit item 1005: B100 Gift Basket.
 Quantity: 1.
 The list below displays the items that will be removed for the kit item.

Type	Item Number	Quantity	Removed Qty	Stocking Unit	Description
Inventory	1004	2.0000	0		Track by serial number
<input checked="" type="checkbox"/> Inventory	1001	1.0000	1.0000		

Component Details:

Item Number:

Serial Number:

Description:

Lot:

Quantity:

Date Code:

Location:

Pallet:

Maximum: 0.00

1

Remove

Pin All Unpin All

Help Next > Cancel

This **Remove** screen displays all items tied to this **Kit Item**. Those items that appear checked as in the example above are ready to be removed.

Items that are not checked need additional information, usually a **Track By** or **Location**, if inventory is kept at more than one location.

6. In the **Item Number** field, enter the **Item Number**, or highlight an unchecked item in the display window. The selected item's information will populate the screen.
7. Enter any missing information, usually a **Track By** such as **Serial Number**. When you are tracking by serial number, click on the **Serial Number** drop down to see a list of all unique serial numbers associated with the selected item. You can also scan this information.

Note: To prevent fields from clearing, click the pushpin button located to the right of the field you want to lock. This is helpful when you have to enter multiple serial numbers, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. This feature is especially useful when scanning serial numbers.

Clicking the  button will unlock the field.

8. Click the **Next** button to continue. You will be returned to the **Remove** screen where you can enter another item for removal, if needed.
 9. If you want to print a receipt of this transaction, enter the number of receipts in the **Print receipt on Commit - Copies** field.
 10. Click **Commit** to submit the transaction(s) to your database.
-

Using the List Screens

Working with Lists

This software contains easy to use List screens that allow you to view and access a variety of information quickly. Screens that use the list view are Customer, Manufacturer, Item, Location, Site, Supplier, Inventory, Transaction, Purchase Order and Pick Order. Each of these screens can be accessed by clicking the Lists Icon on the Main Window.



Note: These screens all function the same; however, individual options may vary for each screen. This topic covers how to use all possible functions available on the list screens. Keep in mind that not all list screens contain all functions mentioned here.

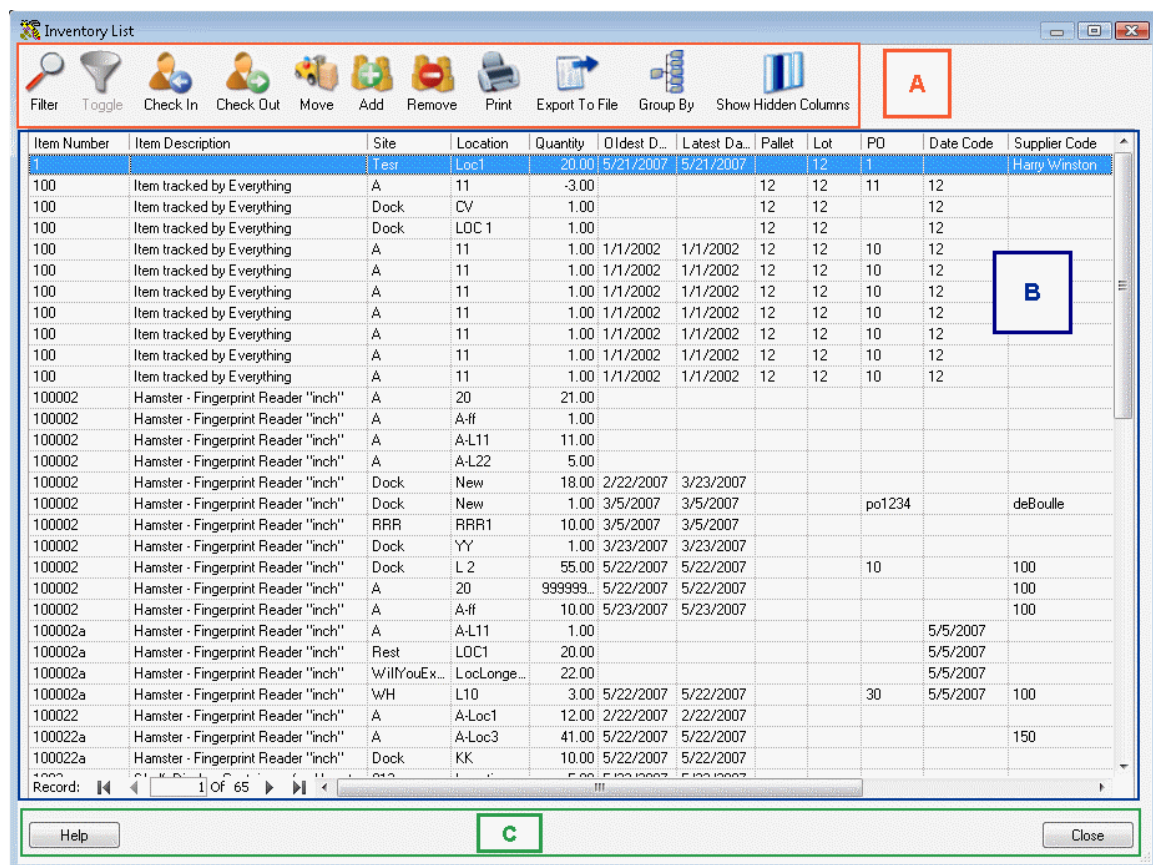
Below is an example of the basic list screen layout. This is an example of the **Inventory List**. This screen can be divided into three sections (labeled A through C in the example below):

A. Toolbar

B. Contents List

C. Buttons

In addition to these menus there are also "Context-Sensitive Menus" that appear when you right-click on certain areas of the screen. These provide another way to access many of the functions available in the toolbar. These types of menus are also discussed later in this section.



Quick Links:

Click a link below to jump to that section of the topic:

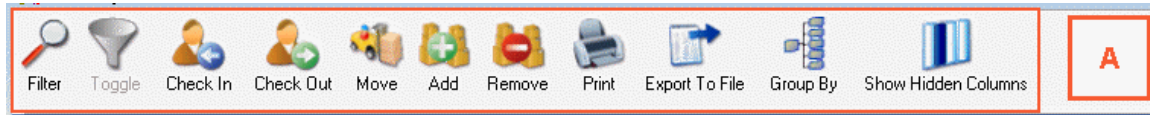
[Section A: Toolbar](#)

[Section B: Contents List](#)

[Section C: Buttons](#)

["Context-Sensitive Menus"](#)

Section A: Toolbar



The toolbar at the top of the list screen provides quick access to a variety of functions and also allows you to customize how the information on the list is displayed. Each of these functions is described below:

Button	Description
Filter	Filter access the Find screen allowing you to quickly lookup information. For more information on the Find screen, please see Searching for Information .
Toggle	The Toggle button is enabled after you have used the Filter feature to limit the list to certain information. Click the Toggle button to view all listings again. For instance, if you have filtered your Item List to display only items with Monitor in the description field, you can click the Toggle button to display all items on the list again. Click Toggle again and the list will again be filtered by your selection.
Check-In	(Applies to the Item and Inventory List screens only.) Highlight a listing that is Checked Out, then click the Check-In button. The Check-In screen allows you to Check-In inventory that has previously been Checked Out to one or more customers. While checking in inventory does not actually add inventory (quantity) to an item, it does free up that inventory to be checked-out to another customer, if needed, or to be included in a pick order. For more information, please refer to the Checking In Inventory topic.
Check-Out	(Applies to the Item, Inventory and Customer List screens only.) Highlight a listing, then click the Check-Out button. The Check-Out screen allows you to check-out, or assign, inventory to customers. For more information, please refer to the Checking Out Inventory topic.
Move Inventory	(Applies to the Location and Inventory List screens only.) Highlight a listing, then click the Move button. The Move screen allows you to move inventory quantity for an item from one Location to another. When you create an item, you can add which locations it may be. When you then add inventory (quantity) to the item, you select in which location that quantity will reside. The Move function allows you to move that inventory from the originally assigned location to another. By moving inventory in the software, you can easily keep accurate records of where all of your inventory is currently located. For more information, please refer to the Moving Inventory topic.
Add Inventory	(Applies to the Item and Inventory List screens only.) Highlight a listing, then click the Add Inventory button, or just click the button to access the Add screen. The Add screen allows you to manually add quantity to items already entered into your database. Inventory is the amount or quantity of a particular item. Items must first be imported or entered on the Create New Item screen (by selecting Lists > Item List > New) before you can add quantity to it. For more information, please refer to the Adding Inventory topic.
Remove Inventory	(Applies to the Item and Inventory List screens only.) Highlight a listing, then click the Remove button, or just click the button to access the Remove screen. The Remove Inventory screen allows you to remove quantity from any item in the database. For more information, please refer to the Removing Inventory topic.
Edit	Highlight a listing on the screen, then click the Edit button. The Edit screen appears allowing you to update and change information.
New	Accesses the New screen allowing you to enter a new Customer, Item, Manufacturer, Site, Supplier, Purchase Order or Pick Order.
Duplicate	Highlight a listing, then click the Duplicate button. The New screen appears with all fields populated with the information from the listing you copied.

Export to File

Export allows you to export the entire list to a comma-delimited text file.

What is a comma-delimited file?

This is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line:

Adams, Jane, 46, female, New York

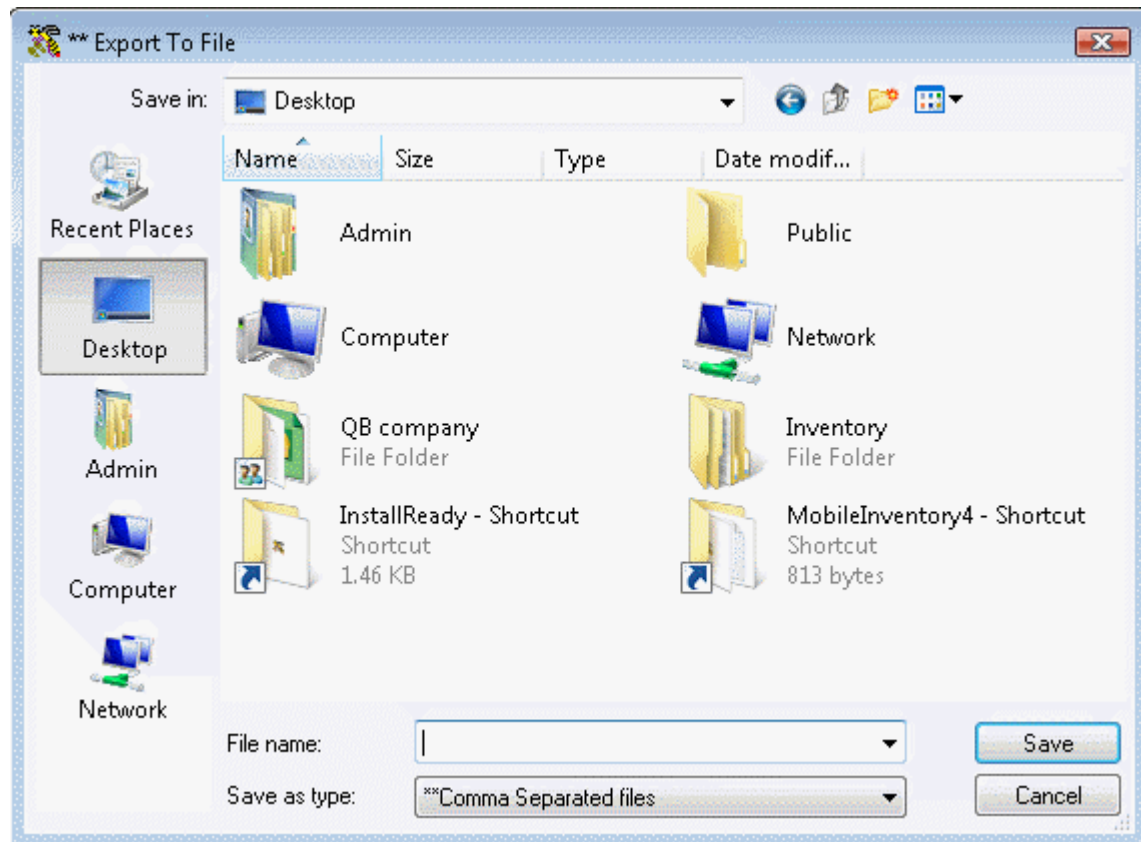
Doe, John, 32, male, California

Jones, Sam, 13, male, Texas

Smith, Mary, 64, female, Louisiana

When data is represented in comma-delimited format they also are referred to as comma-separated values, abbreviated CSV.

When the **Export** button is selected, a screen appears allowing you to specify where the exported data will be saved on your computer. An example of the **Export** screen is shown below:

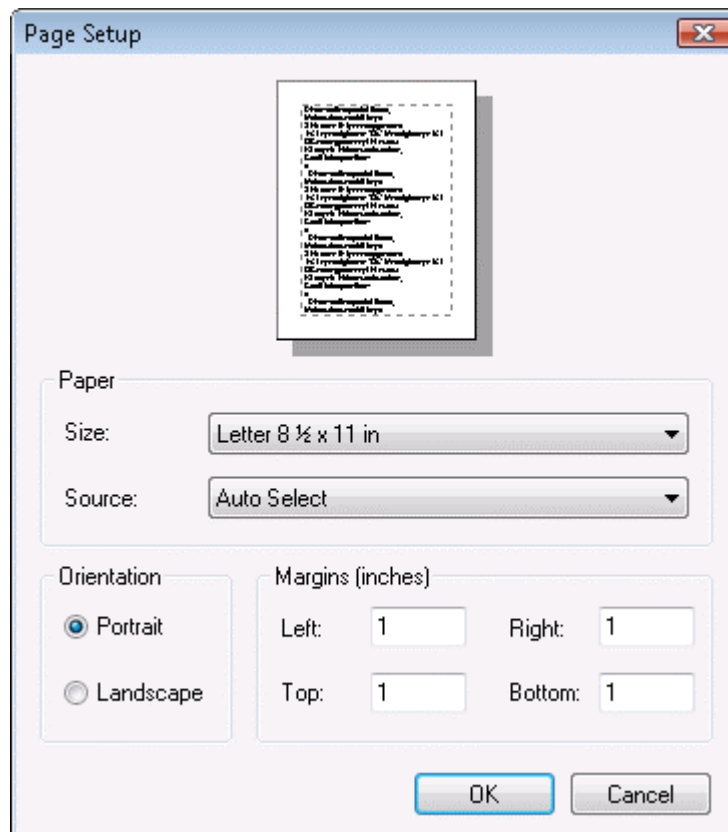


Make sure you save this to a location you can remember. You must also choose a name for your file on this screen. After you have made your selections, click **Save** to export your data.

A confirmation message will appear when your data has been successfully exported by the system.

Print

Print allows you to print the list. When this button is selected, a standard **Page Setup** screen appears allowing you to enter margins. An example of this screen is shown below:



Click the **OK** button on the **Page Setup** screen to print the list. The list will print to your default printer.

Group By

The list screens provide you with the capability of "grouping" the displayed information so you can view data in a way that is most easy-to-read for you. You can have one group, two groups, or many groups depending on how you want to view your information. For instance, if you want all inventory on the Inventory List to be displayed grouped by location, you can quickly set this up.

To see the grouping options, click the **Group By** button. The top of the list screen expands to display the group selections as shown below:

Inventory List

Filter Toggle Check In Check Out Move Add Remove Print Export To File Group By Hidden Columns

Drag a column header here to group by that column.

Item Number	Item Desc...	Site	Loca...	Quantity	Q Ides...	Latest...	Pallet	Lot	PO	Date Code	Supplier Code	Min Stock Level	Max Stock Level	Re
5	Item All Tr...	Site 1	Loc 2	1.00	6/18/2...	6/18/20...	pal	lot		dc	1	25.00	250.00	
7	no track	Site 1	Loc 1	1.00	6/18/2...	6/18/20...					1	20.00	100.00	
7	no track	Site 1	LOC5	1.00	6/18/2...	6/18/20...						20.00	100.00	
7	no track	Site 1	Loc 1	3.00	6/18/2...	6/18/20...			po...		1	20.00	100.00	

Creating Groups

To create a new group, click on a column header, then drag it to the space indicated on the screen. For example, if you want to group information by Location, click on the Location column header and drag it to the indicated space.

Location

Item Number	Item Desc...	Site	L...	Quantity	Q Ides...	Latest...	Pallet	Lot	PO	Date Code	Supplier Code	Min Stock Level	Max Stock Level	Re
Location: Loc 1														
7	no track	Site 1	Loc 1	1.00	6/18/2...	6/18/20...					1	20.00	100.00	
7	no track	Site 1	Loc 1	3.00	6/18/2...	6/18/20...			po...		1	20.00	100.00	
Location: Loc 2														
5	Item All Tr...	Site 1	Loc 2	1.00	6/18/2...	6/18/20...	pal	lot		dc	1	25.00	250.00	
Location: LOC5														
7	no track	Site 1	LOC5	1.00	6/18/2...	6/18/20...						20.00	100.00	

The screen now lists Site as one of your groups and the assets are grouped according to what Site they are assigned.

You can create additional groups to further organize your information by continuing to drag and drop column headers.

By default, the groups list information in ascending order (Location 001, Location 002, etc.). You can change this to descending order by clicking on the group name. Notice that after you click on the group name, the arrow next to the name is now pointing in the opposite direction and the information on the screen is reorganized.

Location

Item Number	Item Desc...	Site	L...	Q
Location: LOC5				
7	no track	Site 1	LOC5	
Location: Loc 2				
5	Item All Tr...	Site 1	Loc 2	
Location: Loc 1				
7	no track	Site 1	Loc 1	
7	no track	Site 1	Loc 1	

Deleting Groups

If you no longer want to display information in a particular group you can easily ungroup the data. For instance, if you have created a group for Location but now wish to remove it, you can do so by clicking on the group name and dragging it down into the column header section. Let go of

your cursor anywhere in the column header section and the group disappears.

Item Number	Item Desc...	Site	Location	Quantity	Oldest...	Latest...	Pallet	Lot	PO	Date
Location: LOC5										
7	no track	Site 1	LOC5	1.00	6/18/2...	6/18/20...				
Location: Loc 2										
5	Item All Tr...	Site 1	Loc 2	1.00	6/18/2...	6/18/20...	pal	lot		dc
Location: Loc 1										
7	no track	Site 1	Loc 1	1.00	6/18/2...	6/18/20...				
7	no track	Site 1	Loc 1	3.00	6/18/2...	6/18/20...				po...

The information contained in that group still appears on the display screen, but it is no longer grouped together.

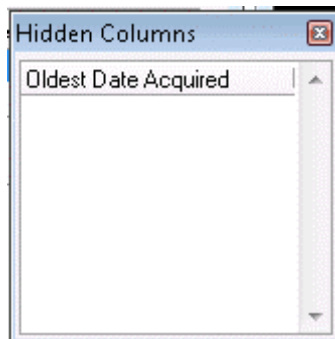
Drag a column header here to group by that column.

Item Number	Item Desc...	Site	Loca...	Quantity	Oldest...	Latest...	Pallet	Lot	PO	Date Code	Supplier Code	Min Stock Level	Max Stock Level	Re
5	Item All Tr...	Site 1	Loc 2	1.00	6/18/2...	6/18/20...	pal	lot		dc	1	25.00	250.00	
7	no track	Site 1	Loc 1	1.00	6/18/2...	6/18/20...					1	20.00	100.00	
7	no track	Site 1	LOC5	1.00	6/18/2...	6/18/20...						20.00	100.00	
7	no track	Site 1	Loc 1	3.00	6/18/2...	6/18/20...				po...	1	20.00	100.00	

Hidden Columns

Hidden Columns - The list allows you to hide columns by right-clicking on a column label and selecting Hide Column. This enables you to hide information you do not usually need.

You can view the columns you have hidden by right clicking on any column and selecting Show Hidden Columns. A pop-up screen similar to the one below appears listing all columns that are not currently visible.



You can return these columns to the full **List** screen by double-clicking on a listing in the **Hidden Columns** screen and dragging it back to the column labels section on the **List** screen.

Section B: Contents List

The contents list displays all data related to the selected list. For example, if you selected Inventory, all Inventory entered in the system will display here, if you selected Manufactures, all manufacturers will display here, etc.

Item Number	Item Description	Site	Location	Quantity	Oldest D...	Latest Da...	Pallet	Lot	PO	Date Code	Supplier Code
1		Test	Loc1	20.00	5/21/2007	5/21/2007		12	1		Harry Winston
100	Item tracked by Everything	A	11	-3.00			12	12	11	12	
100	Item tracked by Everything	Dock	CV	1.00			12	12		12	
100	Item tracked by Everything	Dock	LOC 1	1.00			12	12		12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100002	Hamster - Fingerprint Reader "inch"	A	20	21.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-ff	1.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-L11	11.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-L22	5.00							
100002	Hamster - Fingerprint Reader "inch"	Dock	New	18.00	2/22/2007	3/23/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	New	1.00	3/5/2007	3/5/2007			po1234		deBouille
100002	Hamster - Fingerprint Reader "inch"	RRR	RRR1	10.00	3/5/2007	3/5/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	YY	1.00	3/23/2007	3/23/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	L 2	55.00	5/22/2007	5/22/2007			10		100
100002	Hamster - Fingerprint Reader "inch"	A	20	999999...	5/22/2007	5/22/2007					100
100002	Hamster - Fingerprint Reader "inch"	A	A-ff	10.00	5/23/2007	5/23/2007					100
100002a	Hamster - Fingerprint Reader "inch"	A	A-L11	1.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	Rest	LOC1	20.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	WillYouEx...	LocLonge...	22.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	WH	L10	3.00	5/22/2007	5/22/2007			30	5/5/2007	100
100022	Hamster - Fingerprint Reader "inch"	A	A-Loc1	12.00	2/22/2007	2/22/2007					
100022a	Hamster - Fingerprint Reader "inch"	A	A-Loc3	41.00	5/22/2007	5/22/2007					150
100022a	Hamster - Fingerprint Reader "inch"	Dock	KK	10.00	5/22/2007	5/22/2007					


Sorting Columns: Most of the columns that appear in the lists can be sorted ascending or descending. The columns sort ascending by default. To change the sort order, click on the column heading. An arrow will appear next to the column name to let you know in which direction the information is sorted. The example below shows the Last Name column sorted Ascending.

Last Name
Cricket
deBlonk
Dixson
Fromage
Gabbard
Herman
Huffman
Juniper
Melroast
Melville
Nugent

Selecting a Listing: You can quickly scroll through the listings using the buttons directly below the contents list. Keep in mind that you can also use the **Filter** button to limit the items that appear in the list (see Section A: Toolbars, above). The list screens can display up to 1000 lines of information at a time. If your list contains more than 1000 items, you must create a filter to show the items not on the list.

Click on a listing to highlight it, then click the button that accesses the desired function. For example, if you want to edit Item 10002, use your mouse to click on that listing in your **Item List**, then click the **Edit** button.

Arranging Columns: You can arrange the columns in the list into any order you wish. To change the order, click on a column heading and drag it somewhere else on the list. For example, if you want to make **Location** the first column in your **Inventory List**, click on the **Location** column heading and drag it to the first column in the list as shown below:



Il Loca...	Item Desc...	Site	Loca...	Quantity	OIdes...
5	Item All Tr...	Site 1	Loc 2	1.00	6/18/2...
7	no track	Site 1	Loc 1	1.00	6/18/2...
7	no track	Site 1	LOC5	1.00	6/18/2...
7	no track	Site 1	Loc 1	3.00	6/18/2...

After you drop the column into its new position, the list will reorganize with the **Group** information appearing first:

Loca...	Item Number	Item Desc...	Site	Quantity	OIdes...	Latest...	Pallet	Lot	PO	Date Code	Supplier Code	Min Stock Level	Max Stock Level	Re
Loc 2	5	Item All Tr...	Site 1	1.00	6/18/2...	6/18/20...	pal	lot		dc	1	25.00	250.00	
Loc 1	7	no track	Site 1	1.00	6/18/2...	6/18/20...					1	20.00	100.00	
LOC5	7	no track	Site 1	1.00	6/18/2...	6/18/20...						20.00	100.00	
Loc 1	7	no track	Site 1	3.00	6/18/2...	6/18/20...			po...		1	20.00	100.00	

Section C: Buttons



This section contains the following buttons:

Help (F1) - Click this button (or hit the F1 key on your keyboard) to access this help document.

Close - Click this button to close the List. Keep in mind when closing the list that your groups and column settings will be retained.

Context-Sensitive Menus:

The software provides you with a toolbar for quick access to various list features and, in addition, many of these features can also be accessed via "context-sensitive menus". By right-clicking on a column heading, a list of available features appears, as shown below (Note that not all options shown below are available on all screens):



Any changes you make to the list via this menu will be retained when the screen is closed and re-opened.

This menu allows you to:

Sort ASC - Select this option to sort the column in ascending order (A through Z or 1 through 10, etc.).

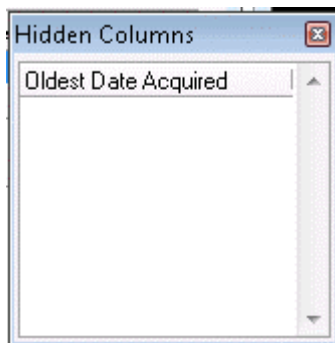
Sort DESC - Select this option to sort the column in descending order (Z through A or 10 through 1, etc.).

Group By this Column - Select this option to group the screen by the selected column. Please see Section A - Toolbar above for more information on grouping.

Show Grouping - Select this option to show the groups selected for this list screen. Please see Section A - Toolbar above for more information on grouping.

Hide Columns - The list allows you to hide columns by right-clicking on a column label and selecting Hide Column. This enables you to hide information you do not usually need. When you hide a column, it will remain hidden until you manually return it to the List screen by following the instructions below.

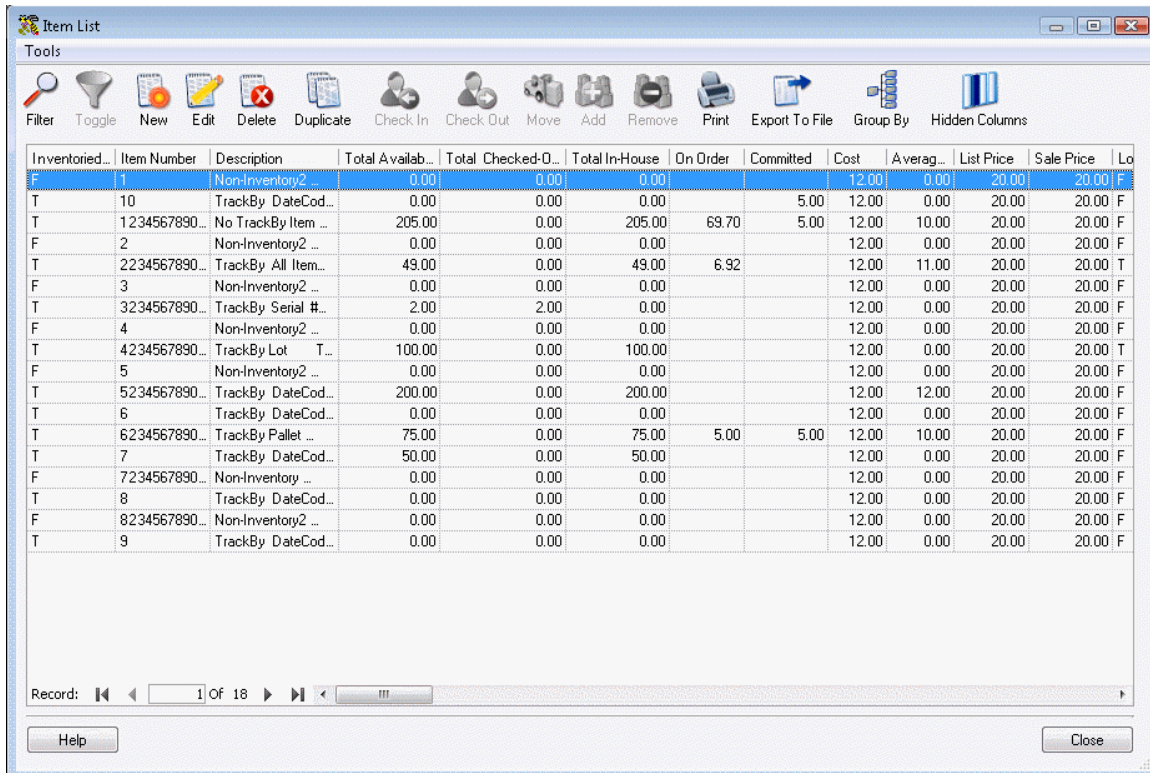
Show Hidden Columns - You can quickly view the columns you have hidden by right clicking on any column and selecting Show Hidden Columns (or by clicking the Show Hidden button). A pop-up screen similar to the one below appears listing all columns that are not currently visible.



You can return these columns to the full **List** screen by clicking on a listing in the **Hidden Columns** screen and dragging it back to the column labels section on the **List** screen.

Item List Example

The **Item List** displays all items you have entered in the system. Below is an example of this screen:



Inventoried...	Item Number	Description	Total Availab...	Total Checked-Out...	Total In-House	On Order	Committed	Cost	Averag...	List Price	Sale Price	Lo
F	1	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	10	TrackBy DateCod...	0.00	0.00	0.00		5.00	12.00	0.00	20.00	20.00	F
T	1234567890...	No TrackBy Item ...	205.00	0.00	205.00	69.70	5.00	12.00	10.00	20.00	20.00	F
F	2	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	2234567890...	TrackBy All Item...	49.00	0.00	49.00	6.92		12.00	11.00	20.00	20.00	T
F	3	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	3234567890...	TrackBy Serial #...	2.00	2.00	0.00			12.00	0.00	20.00	20.00	F
F	4	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	4234567890...	TrackBy Lot T...	100.00	0.00	100.00			12.00	0.00	20.00	20.00	T
F	5	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	5234567890...	TrackBy DateCod...	200.00	0.00	200.00			12.00	12.00	20.00	20.00	F
T	6	TrackBy DateCod...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	6234567890...	TrackBy Pallet ...	75.00	0.00	75.00	5.00	5.00	12.00	10.00	20.00	20.00	F
T	7	TrackBy DateCod...	50.00	0.00	50.00			12.00	0.00	20.00	20.00	F
F	7234567890...	Non-Inventory ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	8	TrackBy DateCod...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
F	8234567890...	Non-Inventory2 ...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F
T	9	TrackBy DateCod...	0.00	0.00	0.00			12.00	0.00	20.00	20.00	F

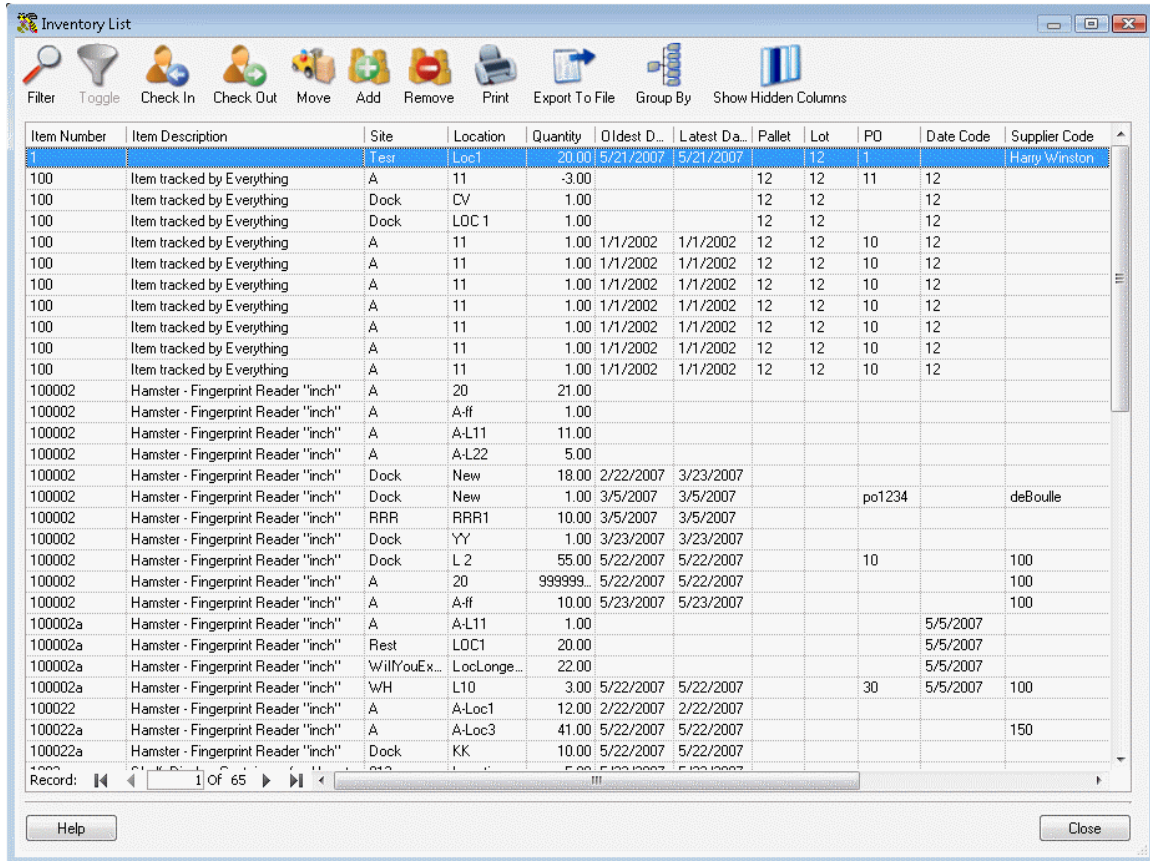
Record: 1 Of 18

Help Close

The **Item List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Items**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Inventory List Example

The **Inventory List** displays all items that have inventory (quantity) in the software. Inventory is the amount or quantity of a particular item. Items must first be imported or entered on the **Add Item** screen before you can add quantity to it.

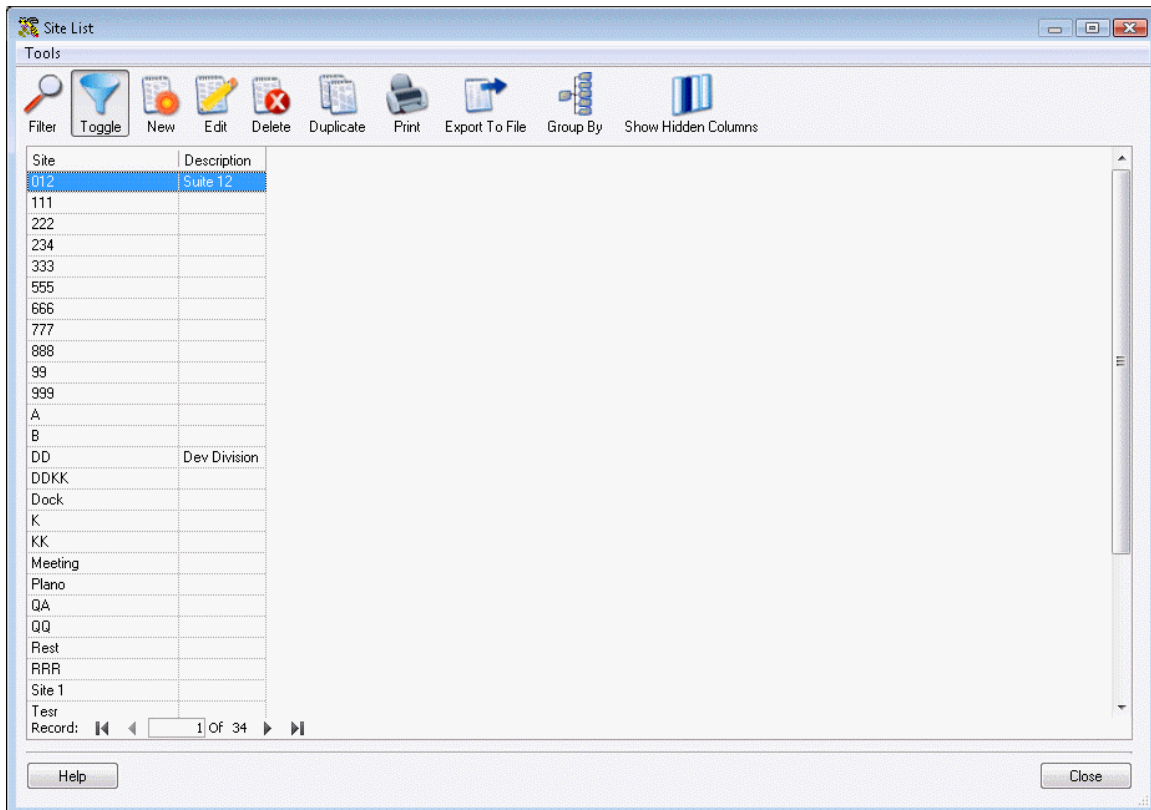


Item Number	Item Description	Site	Location	Quantity	Oldest D...	Latest Da...	Pallet	Lot	PO	Date Code	Supplier Code
1	Item tracked by Everything	Test	Loc1	20.00	5/21/2007	5/21/2007		12	1		Harry Winston
100	Item tracked by Everything	A	11	-3.00			12	12	11	12	
100	Item tracked by Everything	Dock	CV	1.00			12	12		12	
100	Item tracked by Everything	Dock	LOC 1	1.00			12	12		12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100	Item tracked by Everything	A	11	1.00	1/1/2002	1/1/2002	12	12	10	12	
100002	Hamster - Fingerprint Reader "inch"	A	20	21.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-ff	1.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-L11	11.00							
100002	Hamster - Fingerprint Reader "inch"	A	A-L22	5.00							
100002	Hamster - Fingerprint Reader "inch"	Dock	New	18.00	2/22/2007	3/23/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	New	1.00	3/5/2007	3/5/2007			po1234		deBouille
100002	Hamster - Fingerprint Reader "inch"	RRR	RRR1	10.00	3/5/2007	3/5/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	YY	1.00	3/23/2007	3/23/2007					
100002	Hamster - Fingerprint Reader "inch"	Dock	L 2	55.00	5/22/2007	5/22/2007			10		100
100002	Hamster - Fingerprint Reader "inch"	A	20	999999...	5/22/2007	5/22/2007					100
100002	Hamster - Fingerprint Reader "inch"	A	A-ff	10.00	5/23/2007	5/23/2007					100
100002a	Hamster - Fingerprint Reader "inch"	A	A-L11	1.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	Rest	LOC1	20.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	WillYouEx...	LocLonge...	22.00						5/5/2007	
100002a	Hamster - Fingerprint Reader "inch"	WH	L10	3.00	5/22/2007	5/22/2007			30	5/5/2007	100
100022	Hamster - Fingerprint Reader "inch"	A	A-Loc1	12.00	2/22/2007	2/22/2007					
100022a	Hamster - Fingerprint Reader "inch"	A	A-Loc3	41.00	5/22/2007	5/22/2007					150
100022a	Hamster - Fingerprint Reader "inch"	Dock	KK	10.00	5/22/2007	5/22/2007					

The **Inventory List** allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** a list of Inventory. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Site List Example

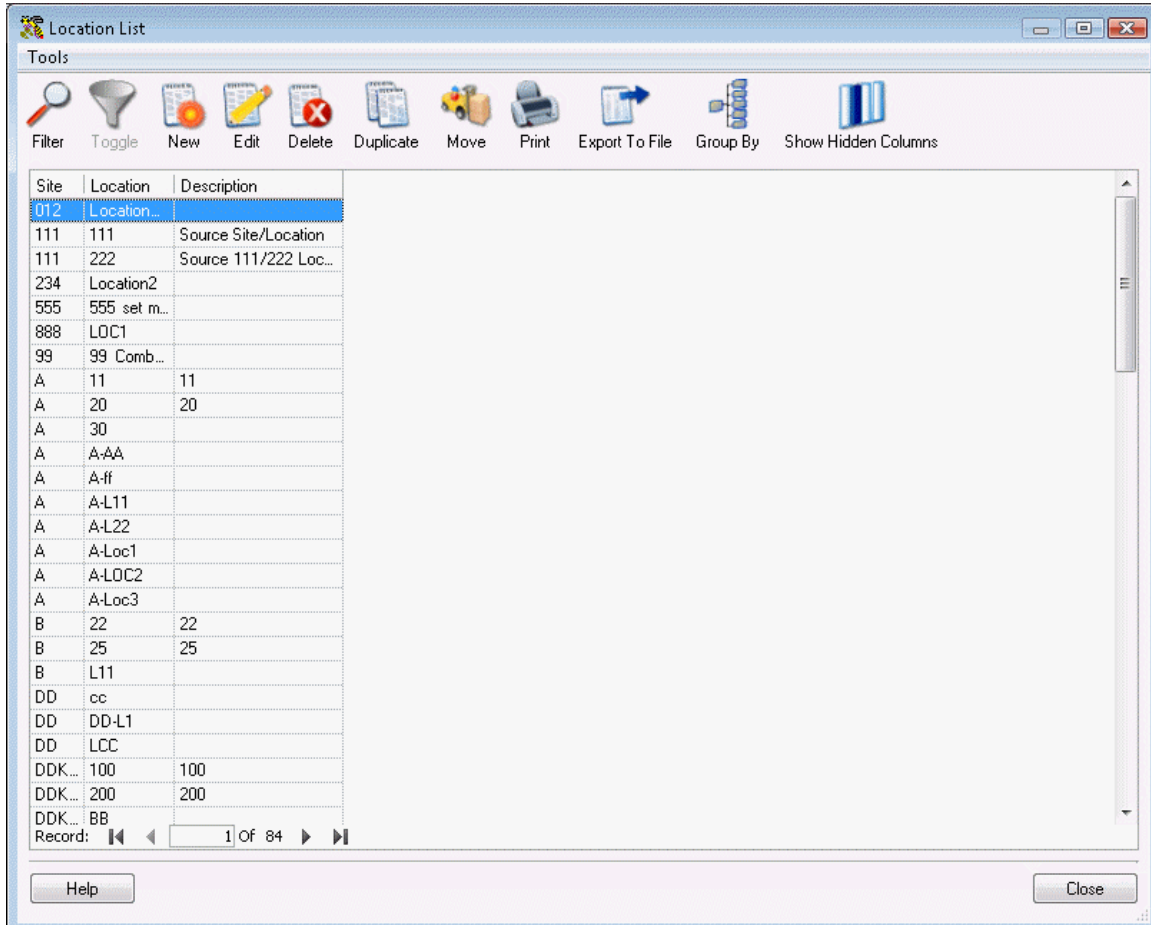
The **Site List** displays all sites you have setup in the system.



The **Site List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Sites**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Location List Example

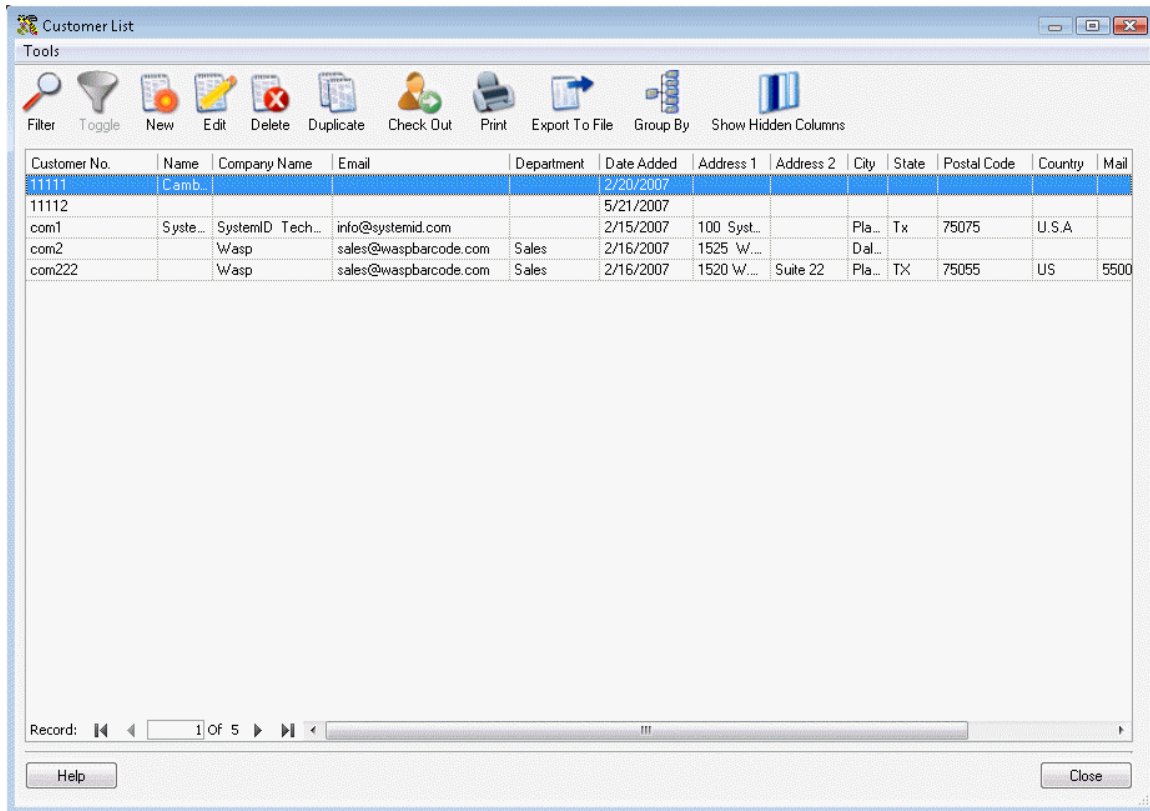
The **Location List** displays all locations you have setup in your system. Below is an example of the **Location List**:



The **Location List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Locations**. For detailed information regarding each of these options, refer to the [Working with Lists](#) topic.

Customer List Example

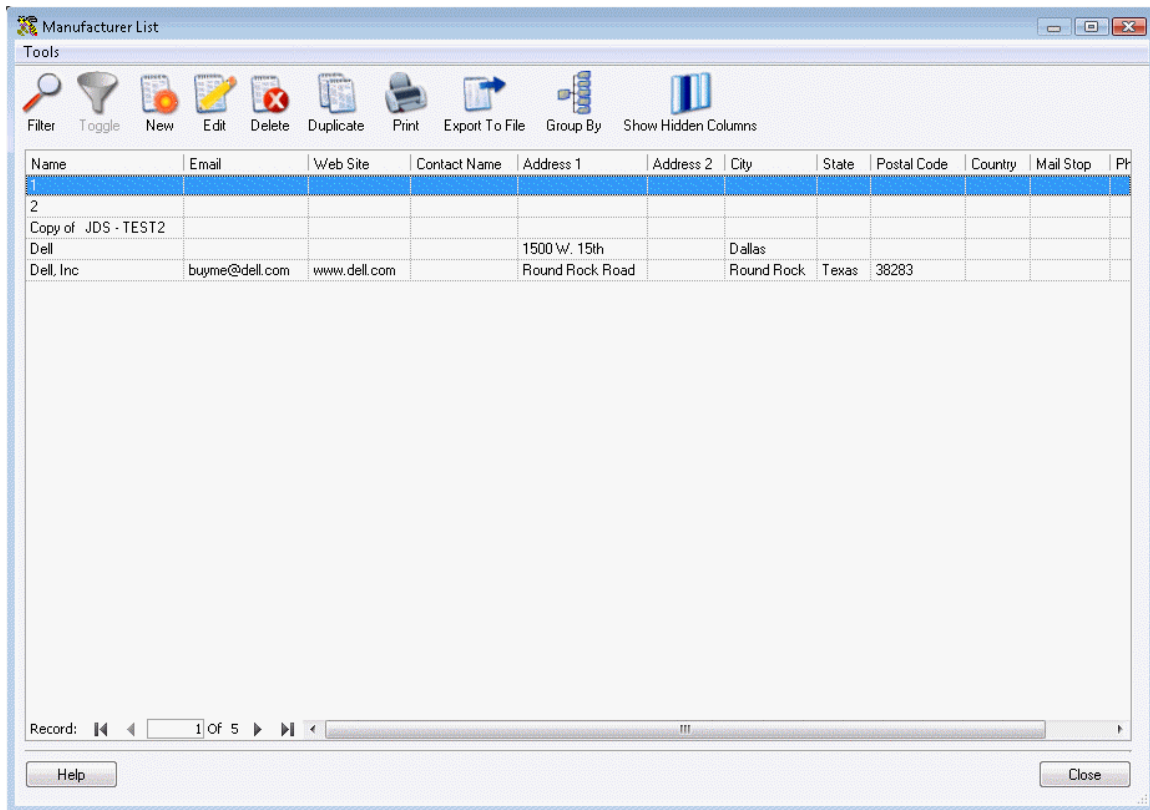
The **Customer List** displays all customers you have setup in the software. A customer is any person or entity to whom you check-out, receive or send (pick) inventory.



The **Customer List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Customers**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Manufacturer List

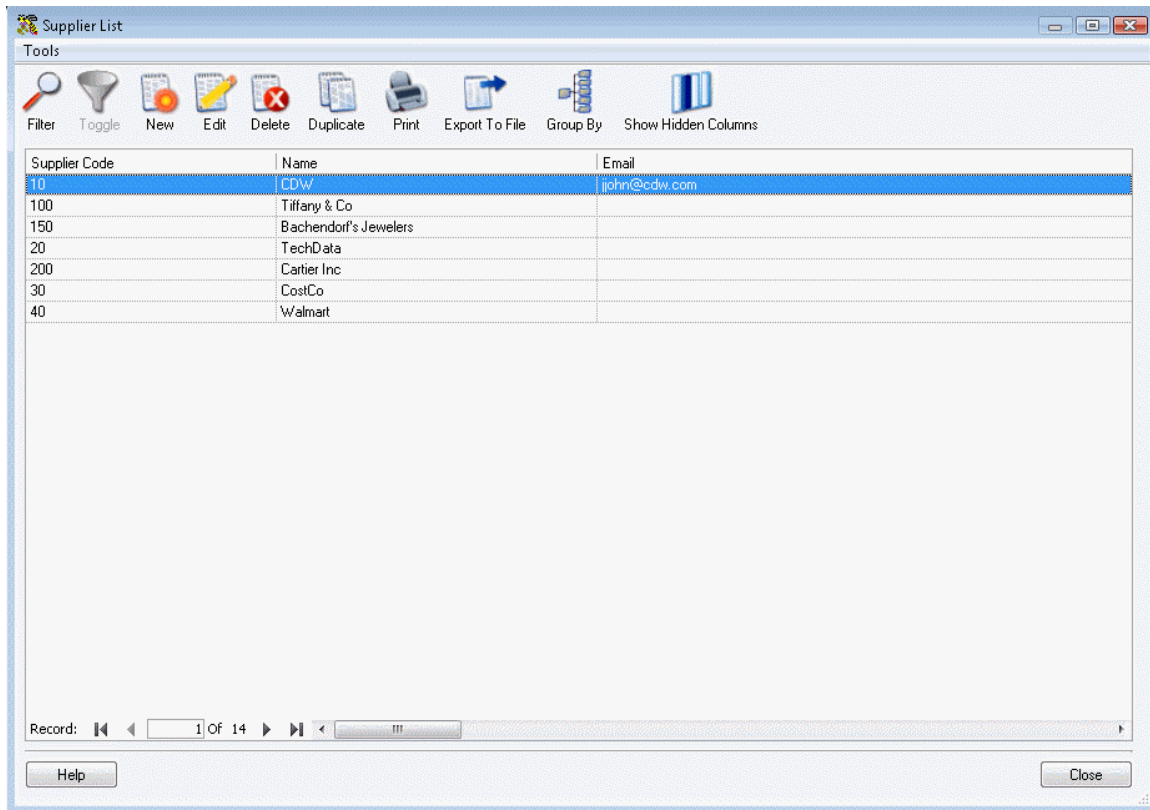
The **Manufacturer List** displays all manufacturers you have setup in the system.



The **Manufacturer List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Manufacturers**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Supplier List

The **Supplier List** displays all suppliers you have setup in the system.

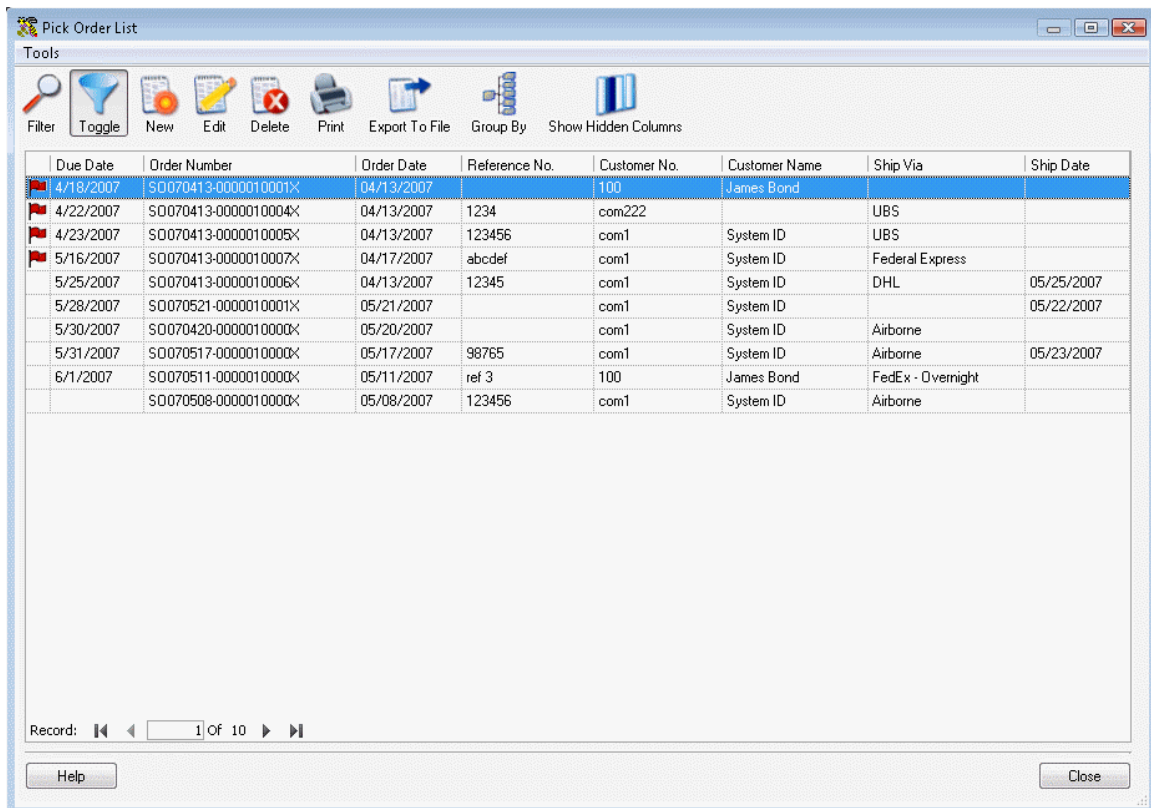


The **Supplier List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Suppliers**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Pick Order List Example

This function applies to Pro and Enterprise Version users only.

The **Pick Order List** displays all active pick orders entered in the system. Active pick orders are those that have a status of **New**, **New-Over Due**, **In Process** or **In Process-Over Due**. Below is an example of the **Pick Order List**.



Due Date	Order Number	Order Date	Reference No.	Customer No.	Customer Name	Ship Via	Ship Date
4/18/2007	S0070413-0000010001X	04/13/2007		100	James Bond		
4/22/2007	S0070413-0000010004X	04/13/2007	1234	com222		UBS	
4/23/2007	S0070413-0000010005X	04/13/2007	123456	com1	System ID	UBS	
5/16/2007	S0070413-0000010007X	04/17/2007	abcdef	com1	System ID	Federal Express	
5/25/2007	S0070413-0000010006X	04/13/2007	12345	com1	System ID	DHL	05/25/2007
5/28/2007	S0070521-0000010001X	05/21/2007		com1	System ID		05/22/2007
5/30/2007	S0070420-0000010000X	05/20/2007		com1	System ID	Airborne	
5/31/2007	S0070517-0000010000X	05/17/2007	98765	com1	System ID	Airborne	05/23/2007
6/1/2007	S0070511-0000010000X	05/11/2007	ref 3	100	James Bond	FedEx - Overnight	
	S0070508-0000010000X	05/08/2007	123456	com1	System ID	Airborne	

Notice the red flags next to some of the orders on the list. These red flags indicate that the order is past due. The status may be **New-Past Due** or **In Process-Past Due**. Overdue orders will appear at the top of the list by default, but you can reorder the list as needed.

The **Pick Order List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Pick Orders**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Purchase Order List Example

This function applies to Pro and Enterprise Version users only.

The Purchase Order List displays all active purchase orders you have in your system. Active purchase orders are those that have a status of **New**, **New-Over Due**, **In Process** or **In Process-Over Due**. Below is an example of the **Purchase Order List**.

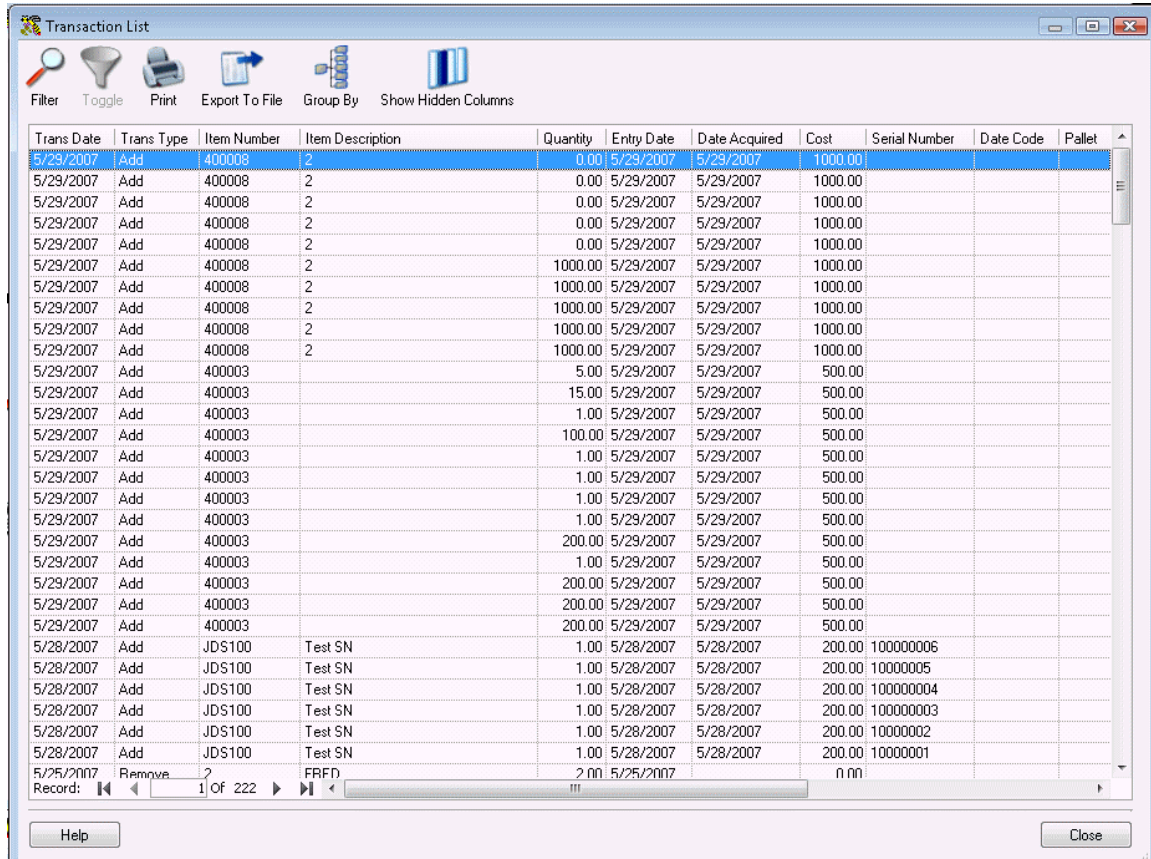
Due Da.	Type	PO Number	Order Da.	Reference Num.	Supplier No.	Supplier	Ship Method	Pay Method
3/31/20...	PO	P0070323-0000020...	03/23/20...	1200	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
5/1/2007	PO	P0070515-0000010...	05/01/20...		100	Tiffany & Co	Airborne	Due on Rec...
5/1/2007	PO	1	05/09/20...	123	100	Tiffany & Co	US Mail	1% 10 Net 30
5/17/20...	PO	10	05/17/20...	10	100	Tiffany & Co	US Mail	Net 30
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 4	150	Bachendorf's Jewelers	US Mail	Net 15
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 5	30	CostCo	DHL	1% 10 Net 30
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 6	deBouille	deBouille Diamond and Jewelry	FedEx	COD
7/11/20...	PO	20	05/17/20...	Wasp.Costco.20	30	CostCo	FedEx - Overm...	COD
8/17/20...	PO	30	05/17/20...	30	30	CostCo	US Mail	Net 30
	PO	2	05/15/20...		100	Tiffany & Co		
	PO	3	05/17/20...		Test Long Supplier...	This is a long Supplier Name to test the L		
	PO	4	05/17/20...		Test Long Supplier...	This is a long Supplier Name to test the L		
	PO	5	05/17/20...		Test Long Supplier...	This is a long Supplier Name to test the L		
	PO	P0070323-0000010...	03/23/20...	123	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070323-0000040...	03/23/20...	1000	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070327-1	03/27/20...		100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070329	03/29/20...		100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070515-0000010...	05/15/20...	999	100	Tiffany & Co	Airborne	Net 15

Notice the red flags next to some of the orders on the list. These red flags indicate that the order is past due. The status may be **New-Past Due** or **In Process-Past Due**. Overdue orders will appear at the top of the list by default, but you can reorder the list as needed.

The **Purchase Order List** allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Purchase Orders**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Transaction List Example

The **Transaction List** displays all transactions (add, move, remove, etc.) that have occurred in the system along with the date of the transactions and the user who performed them. Below is an example of the **Transaction List**:



Trans Date	Trans Type	Item Number	Item Description	Quantity	Entry Date	Date Acquired	Cost	Serial Number	Date Code	Pallet
5/29/2007	Add	400008	2	0.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	0.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	0.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	0.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	1000.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	1000.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	1000.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	1000.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400008	2	1000.00	5/29/2007	5/29/2007	1000.00			
5/29/2007	Add	400003		5.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		15.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		100.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		200.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		1.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		200.00	5/29/2007	5/29/2007	500.00			
5/29/2007	Add	400003		200.00	5/29/2007	5/29/2007	500.00			
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000006		
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000005		
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000004		
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000003		
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000002		
5/28/2007	Add	JDS100	Test SN	1.00	5/28/2007	5/28/2007	200.00	1000000001		
5/25/2007	Remove	?	FRFD	2.00	5/25/2007		0.00			

The **Transaction List** window allows you to **Filter**, **Export** or **Print** the list of **Transactions**. For detailed information regarding each of these options, refer to the [Working with Lists](#) topic.

Keep in mind that the list screens only display a maximum of 1000 rows. If the dates for which you are looking are not shown in the list, use the Filter function to display the records you need.

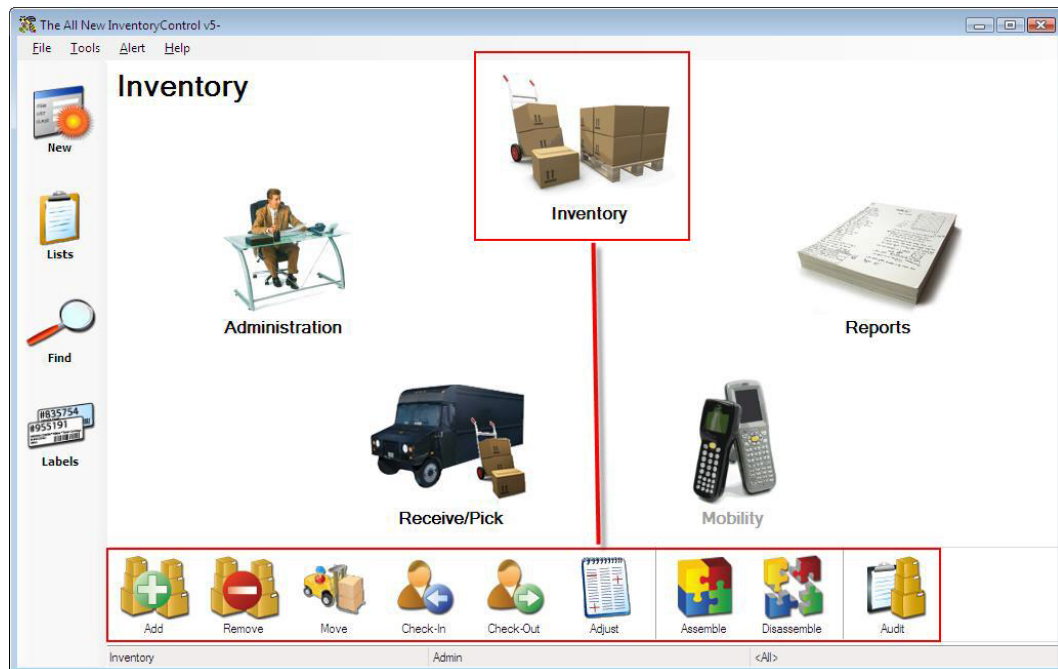
Inventory

Inventory Menu

The **Inventory Menu** groups tasks such as Adding/Removing, Moving, Checking In/Out, Adjusting and Auditing inventory into one place.

To Access the Inventory Menu:

1. From the **Main Window**, click the **Inventory** icon. The **Inventory Menu** appears at the bottom of the screen.



Click on any of the **Inventory Menu** icons to go to that function. Detailed descriptions of the options found on the **Inventory Menu** are provided below:

- **Add** - The **Add** screen allows you to add inventory (quantity) to an item at a specified location. This allows you to "manually" add quantity to an item rather than receiving the inventory through a fulfilled **Purchase Order**. For more information on adding inventory, please refer to the **Adding Inventory** topic. For more information on receiving inventory, please refer to the **Receiving Inventory** topic.
- **Remove** - The **Remove** screen allows you to remove inventory (quantity) from an item at a specified location. This allows you to "manually" remove quantity from an item rather than removing it through a pick order. For more information on removing inventory, please refer to the **Removing Inventory** topic. For more information on pick orders, please refer to the **Creating Pick Orders** topic.

- **Move** - The **Move** screen allows you to move inventory for an item from one **Location** to another. When you add inventory (quantity) to an item, you select in which location that quantity will reside. The **Move** function allows you to move that inventory from the originally assigned location to another. By moving inventory in the software, you can easily keep accurate records of where all of your inventory is currently located. For more information on the **Move** screen, please refer to the **Moving Inventory** topic.
 - **Check-In** - The **Check-In** screen allows you to check-in, or make available, inventory that has previously been **Checked-Out** to one or more customers. While checking in does not actually add inventory to an item, it does free up that inventory to be checked-out to another customer, if needed, or to be included in a pick order. For more information on the **Check-In** screen, please refer to the **Checking In Inventory** topic.
 - **Check-Out** - The **Check-Out** screen allows you to check-out, or assign, inventory to a customer for a specified length of time. For more information on the **Check-Out** screen, please refer to the **Checking Out Inventory** topic.
 - **Adjust** - The **Adjust** screen allows you to modify the quantity of existing items. **Adjust** is like a "mini" **Audit** and will update the quantity using FIFO (First In First Out) to make the total equal to the quantity you enter here. The **Adjust** function is useful if too much or too little quantity is accidentally entered for an item (on a mobile device, for example), inventory is lost, found, broken, etc. and you need to quickly correct the quantity for that item. **Adjusting** is different from an **Audit** in that the **Audit** function makes other functions of the software, such as adding inventory, unavailable to ensure inventory is not added or removed while you are doing the counts. All features are still available when adjusting inventory. For more information on the **Adjust** screen, please refer to the **Adjusting Inventory** topic.
 - **Assemble - Pro and Enterprise Versions Only** - This icon opens the **Build Assembly** screen. **Build Assembly** allows you to add inventory to your **Assembly Items**. The **Build** process adds inventory to the **Assembly Item** while decreasing inventory for the component items. For more information on the **Assemble** screen, please refer to the **Building Assembly Items** topic.
 - **Disassemble - Pro and Enterprise Versions Only** - This icon opens the **Disassemble** screen. **Disassemble** allows you to decrease inventory for your **Assembly Items**. The **Disassemble** process removes inventory for the **Assembly Item** while increasing inventory for the component items. For more information on the **Disassemble** screen, please refer to the **Disassembling Assembly Items** topic.
 - **Audit** - This icon starts the **Audit Mode** of the software. **Audit Mode** allows you to check the counts of all your inventory while disabling other features, such as add and remove, to make sure inventory counts in the system do not change while you are performing the audit. If you are using mobile devices, you can use them simultaneously with the PC to perform an audit. For more information on Auditing, please refer to the **Auditing Your Inventory** topic.
-

Manually Adding Inventory

The **Add Inventory** screen allows you to manually add quantity to items already entered into your database. Inventory is the amount or quantity of a particular item. Items must first be imported or entered on the **Add Item** screen before you can add quantity to it.

Inventory is also added when you add inventory on the mobile devices. For more information on adding inventory on the Wasp 3200 mobile device, please refer to the topic [Windows Mobile Device - Adding Inventory](#). For more information on adding inventory on the WDT2200 mobile device, please refer to the topic [WDT2200 - Adding Inventory](#).

Pro and Enterprise Version Users Only: Inventory is also added when you receive inventory from a purchase order. For further information on receiving inventory on the PC, please refer to the topic [Receiving Inventory](#).

Pro and Enterprise Version Users Only: Keep in mind that if you want to increase inventory amounts for **Assembly Items**, you should use the **Build Assembly** feature rather than the **Add** feature. **Build Assembly** will adjust the inventory amounts for all component items. You can use the **Add** feature if you want to add inventory to the **Assembly Item** only, without changing the inventory amounts for the component items, such as in the case of a returned item. Use the **Add** feature for this carefully, so you do not cause the system to have incorrect inventory amounts for the component items.


You cannot Add Non-inventory or Kit items.

Manually Adding Inventory:

1. From the **Main Window**, click on the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click **Add Inventory**. The **Add Inventory** screen appears.

OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. On the **Item List**, highlight an item in the grid, then click the **Add** icon.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Adds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. (The **Add** button does not have to be clicked between each scan to post these add transactions to the **Pending Transaction List**.)

Clicking the  button will unlock the field.

- Complete the **Item** fields: Enter the **Item Number** of the item to which you want to add inventory (if you accessed this screen from the **Item List**, this field will already be populated). To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the Item List or you can create a new item.

Entering an **Item Number** populates the **Item Number** field as well as the **Description** field and enables the following fields:

- **Location**
- **Quantity** (unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of 1)
- **Cost**
- **Date Acquired**
- Any of the associated **Track By** fields: **Serial Number**, **Date Code**, **Lot** or **Pallet** (Set on the **Add** or **Edit Item** screens). A **Track By** field is enabled or disabled at the time the item is created.

Below is an example of the screen with the fields enabled:

You can use the drop down list of any enabled field to select an existing value for that field or select **<New>** from the **Item Number**, **Location** or **Supplier** drop down lists to open the **Create New Item**, **Create New Location** or **Create New Supplier** screens.

Note: If the **Automatic New** option is enabled on the **Options** screen, the **Create New Item**, **Create New Location** or **Create New Supplier** screens will be opened automatically if an unknown **Item Number**, **Location**, or **Supplier** is entered. If the **Automatic New** option is turned off when an unknown **Item Number**, **Location** or **Supplier** is entered, a prompt will ask if you want to use the **Create New** screen. For more information on enabling and disabling the **Automatic New** option, please refer to the **Options** screen topic.

The **No. of Labels** field determines the number of item labels that will be printed when the transaction is completed if the **Print** checkbox is selected. The **No. of Labels** value defaults to the **Quantity** value but can be modified. The maximum number of labels for this field is 1000. The item label used for this function is named AddTransactionItemLabel.lab and can be modified through the **Labels** interface.

4. Complete the **Track By** fields. As mentioned above, the **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.
5. Complete the rest of the screen: If a **Supplier** and/or **Ref #** is required for this item, you can enter it now. Similar to Tracked By fields, the requirement that one or more of these fields be filled out is established at the time the item was entered on the **Create New Item** screen and can be edited on the **Edit Item** screen.

The **Ref #** drop down list displays the last ten **Ref #s** used. The **<More>** option of the **Ref #** drop down list displays all **Ref #s** with active quantity.

The **Supplier** drop down list displays the last ten suppliers used. The **<More>** option of the **Supplier** drop down list displays all suppliers that can be chosen (active suppliers).

The **No. of Labels** field determines the number of item labels that will be printed if the **Print** checkbox is checked. The value in this field defaults to the **Quantity** field value.

The **Notes** field allows you to add and store additional information that describes the transaction.

6. You can optionally enter the **Customer** if you want to track return information.
7. When you have finished entering information, click the **Add** button to post the transaction to the **Pending Transaction List**. All fields on the **Add Inventory** screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item to be added to the **Pending Transaction List** or you can click **Commit** to submit the transaction(s).

The **Add** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one **Add** is posted to the **Pending Transaction List**.

The screenshot shows a window titled 'Add' with a tab labeled 'Pending Transaction List: 1'. Inside the window is a table with the following data:

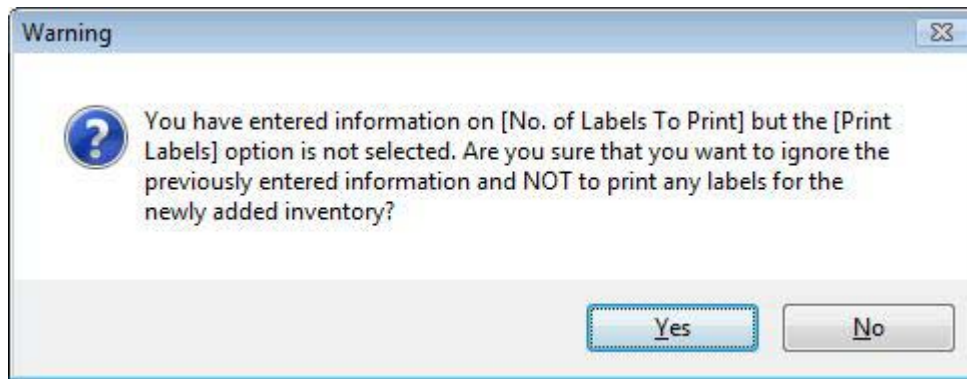
Item Number	Item Description	Site	Locati...	Quantity	No. of Labels	Date Acquired	Serial Number	Cost
1004	Track by serial number	100	Aisle 1	1.00	1	9/8/2008	1001	0.00...

Below the table are two buttons: 'Remove' and 'Remove All'. At the bottom of the window, there is a 'Help' button, a label 'Print Receipt On Commit - Copies:' followed by a numeric input field set to '0', a checked checkbox for 'Print Label', and two buttons: 'Commit' and 'Discard'.

At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error.

8. If you want to print a receipt of this transaction, enter the number of receipts in the **Print receipt on Commit - Copies** field.
9. Select the **Print Label** checkbox to tell InventoryControl to print the number of labels in the **No. of Labels** field. The file used to print this label is named AddTransactionItemLabel.lab and can be customized through the **Labels** feature.

If the **Print Labels** box is not checked when you click **Commit**, but there is a quantity in the **No. of Labels** field, you will see the following message:



Click **Yes** to continue without printing labels. Click **No** to print the designated number of labels.

Removing Inventory

The **Remove Inventory** screen allows you to remove quantity from any item in the database.

This can be considered the same as shipping inventory. You can designate which customer this inventory was shipped to on this screen. Inventory is the amount or quantity of a particular item.

Items must first be imported or entered on the **Add Item** screen before you can add quantity or remove quantity.

Inventory is also removed when you pick items for a Pick Order (**Applies to Pro and Enterprise Versions only**). For further information on Picking Orders, please refer to the topic **Picking Orders**.

The Remove function uses FIFO (First in First Out) to determine what inventory is removed first.

If you Add 5 of Item 123 to Location Bin 1, for example, then another 5 come in on another day, you will have ten of that item. When you later remove 3 of Item 123, the first set of 5 will be subtracted from inventory before the second set.

Removing Inventory from an Item:

1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click the **Remove** icon. The **Remove** screen appears.

OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. On the **Item List**, highlight an item in the grid, then click the **Remove** icon.

Remove

Data Pending Transaction List: 0

Item Number: [dropdown] [pin]

Serial Number: [dropdown]

Description: [text box]

Lot: [dropdown] [pin]

Location: [dropdown] [pin]

Date Code: [dropdown] [pin]

Quantity: 1.00 [pin] Maximum: 0.00

Pallet: [dropdown] [pin]

Remove Date: Monday, September 08, 2008 [pin]


Customer: [dropdown] [pin]

Notes: [text area] [pin]

[Pin All] [Unpin All]

[Remove]

[Help] Print Receipt On Commit - Copies: 0 [Cancel]

To prevent fields from clearing, click the Pushpin  button located to the right of the field you want to lock for subsequent transactions. This is helpful when you have to perform multiple removes at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly remove inventory just by repeatedly scanning barcodes into that field. (The **Remove** button does not have to be clicked between each scan to post these remove transactions to the Pending Transaction List.)

Clicking the  button will unlock the field.

3. **Complete the Item fields:** Enter the **Item Number** of the item from which you want to remove inventory. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to select an existing item from the first 10 Items shown there, or select **<more>** to select an Item from the **Item List**. You can only **Remove** quantity from items with quantity greater than 0. The **Item Number** list on this screen will not display or accept numbers that do not have quantity.

Entering an **Item Number** populates the **Item Number** field as well as the **Description** field and enables the following fields:

- **Quantity** (unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of 1).
- **Location**
- **Any of the associated Tracked By fields:** Serial Number, Date Code, Lot or Pallet (Set on the Add or Edit Item screens). A Tracked By field is enabled or disabled at the time the item is created.
- **Customer**
- **Notes**

Below is an example of the **Remove** screen with the fields enabled:

The screenshot shows the 'Remove' screen with the following fields and values:

- Item Number: 1004
- Serial Number: 1001
- Description: Track by serial number
- Lot: 100
- Location: 100, Aisle 1
- Date Code: 05/05/2010
- Quantity: 1.00 (Maximum: 1.00)
- Pallet: 12
- Remove Date: Monday, September 08, 2008
- Customer: (empty)
- Notes: (empty)

Buttons: Pin All, Unpin All, Remove, Help, Cancel.

Footer: Print Receipt On Commit - Copies: 0

You can use the drop down list of any enabled field to select an existing value for that field.

Note: If the **Automatic New** option is enabled on the **Options** screen, the **Create New Customer** screen will be opened automatically if an unknown **Customer** is entered. If the **Automatic New** option is turned off when an unknown **Customer** is entered, a prompt will ask if you want to use the Create New screen. For more information on the enabling and disabling the Automatic New option, please refer to the **Options** screen topic.

4. **Complete the Track By fields:** As mentioned above, the **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.

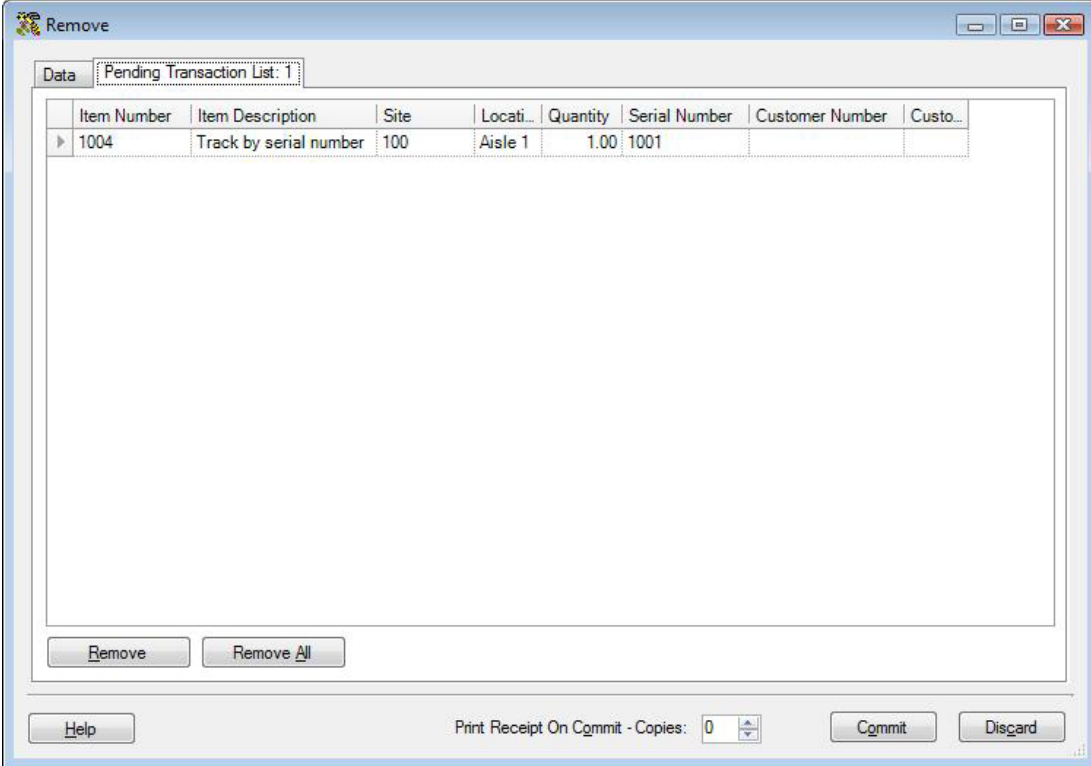
Since you can only remove existing quantity, if the **Tracked By** item you are removing is not in the list, make sure you have the right **Item Number** and **Location**. The **Tracked By** fields will only show values that are possible for the selected **Item Number** and **Location**. (If an item with a given Serial Number is not in the list, it may be **Checked-Out**, and thus, not removable.) If you still do not see the **Tracked By** information you expect, you should make sure the selected **Item Number** at the selected **Location** exists and has quantity. Also check that you are using the right **Site**.

5. **Enter the Customer:** Select a **Customer** from the drop down list. Select **<New>** from the **Customer** drop list to open the **Create New Customer** screen.

The **Notes** field allows you to add and store additional information that describes the transaction.

6. After you have completed entering the information, click the **Remove** button to add the transaction to the **Pending Transaction List**. All fields on the **Remove** screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item to be removed or you can click **Commit** on the **Pending Transaction List** to submit the transaction(s).

The **Remove** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one **Remove** is posted to the **Pending Transaction List**.



The screenshot shows a window titled "Remove" with a standard Windows interface. Inside, there's a tab labeled "Data" and a sub-tab "Pending Transaction List: 1". Below this is a table with the following data:

Item Number	Item Description	Site	Locati...	Quantity	Serial Number	Customer Number	Custo...
1004	Track by serial number	100	Aisle 1	1.00	1001		

Below the table are two buttons: "Remove" and "Remove All". At the bottom of the window, there's a "Help" button on the left, a "Print Receipt On Commit - Copies:" label with a numeric input field set to "0", and "Commit" and "Discard" buttons on the right.

At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error.

7. If you want to print a receipt of this transaction, enter the number of receipts in the **Print receipt on Commit - Copies** field.
8. Click **Commit** to submit the transaction(s) to your database.

Moving Inventory

The **Move Inventory** screen allows you to move inventory quantity for an item from one Location to another. When you create an item, you can add which locations it may be. When you then add inventory (quantity) to the item, you select in which location that quantity will reside. The Move function allows you to move that inventory from the originally assigned location to another. By moving inventory in the software, you can easily keep accurate records of where all of your inventory is currently located.

You can only move inventory that is listed in the system as having a quantity greater than 0 (quantity is added on the Add Inventory screen or when Receiving inventory.)

Moving Inventory to a Different Location:


1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click **Move**. The **Move** screen appears.

OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. Highlight the item for which you want to move inventory, then click the **Move** icon. The **Move** screen appears.

The screenshot shows the 'Move' window with the following fields and controls:

- Item Number:** A dropdown menu with a pushpin icon to its right.
- Quantity:** A numeric input field with a pushpin icon to its right.
- Description:** A text input field.
- From Location:** A dropdown menu with a pushpin icon to its right.
- Maximum:** A label with the value '0'.
- Track By:** A section containing:
 - Serial Number:** A dropdown menu.
 - Date Code:** A dropdown menu with a pushpin icon to its right.
 - Lot:** A dropdown menu with a pushpin icon to its right.
 - Pallet:** A dropdown menu with a pushpin icon to its right.
- To Location:** A dropdown menu with a pushpin icon to its right.
- Notes:** A text area with a pushpin icon to its right.
- Move:** A button with a box icon.
- Help:** A button at the bottom left.
- Print Receipt:** A checkbox at the bottom center.
- Cancel:** A button at the bottom right.

To prevent fields from clearing, click the Pushpin  button located to the right of the field you want to lock for subsequent transactions. This is helpful when you have to perform multiple removes at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly remove inventory just by repeatedly scanning barcodes into that field. (The **Move** button does

not have to click between each scan to post these remove transactions to the Pending Transaction List.)

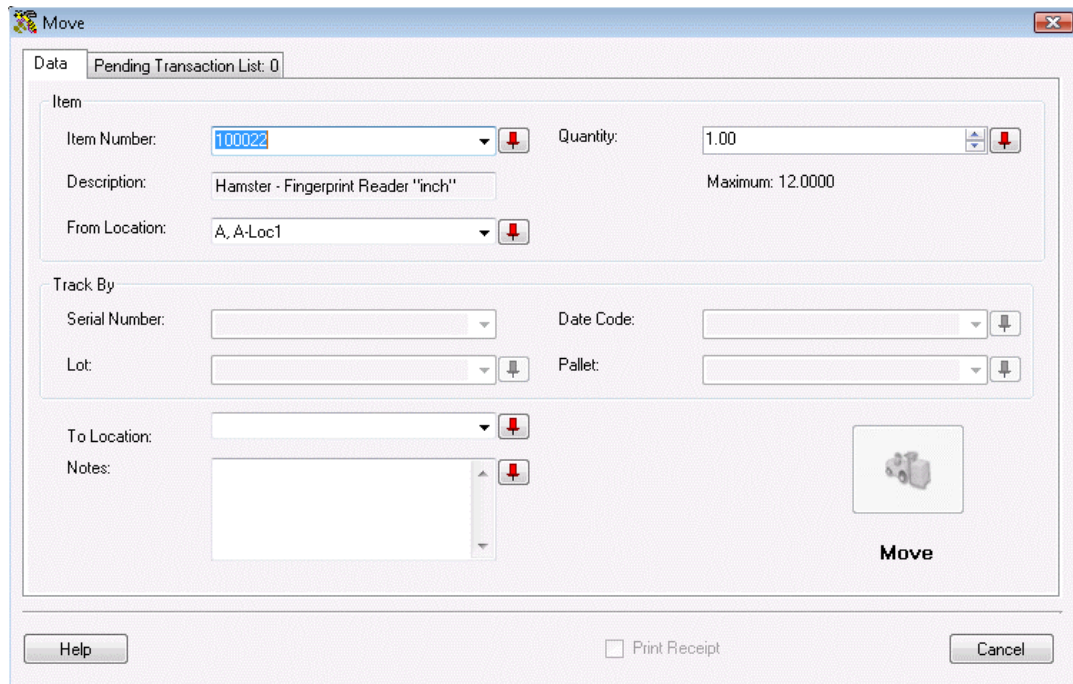
Clicking the  button will unlock the field.

3. **Complete the Item Fields:** To **Move** inventory, first enter the **Item Number** of the item you want to move. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to select an existing item from the 10 items shown or use **<more>** to select an item from the **Item List**.

When you enter an item number, the **Item Number** field is populated as well as the Description and the following fields are enabled:

- **From Location** (filtered by Site)
- **Quantity** (unless the item is Tracked By serial number, then the quantity defaults to 1 and cannot be changed),
- **To Location**
- Any of the associated **Track By** fields: Serial Number, Date Code, Lot or Pallet.
A Tracked By field is enabled or disabled at the time the Item is created.
- **Notes**

Below is an example of the **Move** screen with the fields enabled:



You can use the drop down list of any enabled field to select an existing value for that field. The **To Location** field is not enabled until the **From Location** information is entered.

Note: If the **Automatic New** option is enabled on the **Options** screen, the **Create New Location** screen will be opened automatically if an unknown **Location** is entered. If the **Automatic New** option is turned off when an unknown **Location** is entered, a prompt will ask if you want to use the Create New screen. For more information on the enabling and disabling the Automatic New option, please refer to the **Options** screen topic.

4. **Complete the Track By fields:** As mentioned above, the **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.

Since you can only move existing quantity, if the **Tracked By** item you are removing is not in the list, make sure you have the right **Item Number** and **Location**. The **Tracked By** fields will only show values that are possible for the selected **Item Number** and **Location**. (If an item with a given Serial Number is not in the list, it may be **Checked-Out**, and thus, not removable.) If you still do not see the **Tracked By** information you expect, you should make sure the selected **Item Number** at the selected **Location** exists and has quantity. Also check that you are using the right **Site**.

5. **Enter where you want the inventory moved:** After **Tracked By** information is entered, choose the **To Location** (where the Inventory is being moved).

The **Notes** fields allows you to add and store additional information that describes the transaction.

6. After you have entered the information on the screen, click the **Move** button to add the transaction to the **Pending Transaction List**. All fields on the screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item to be added to **Pending Transaction List** or you can click **Commit** on the Pending Transaction List to submit the transaction(s).

The **Move** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one move is posted to the **Pending Transaction List**.

The screenshot shows a window titled "Move" with a tab labeled "Data" and a sub-tab "Pending Transaction List: 1". Inside the window is a table with the following data:

Item Number	Item Description	Site	Location	To Site	To Location	Quantity	Serial N
100022	Hamster - Fingerprint Reader "	A	A-Loc1	A	A-L22	2.00	

Below the table are two buttons: "Remove" and "Remove All". At the bottom of the window are three buttons: "Help", "Print Receipt" (with a checkbox), and "Commit". There is also a "Discard" button.

At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error.

7. Check the **Print Receipt** option to print a receipt when the transactions are **Committed**.
 8. Click **Commit** to submit the transaction(s) to your database.
-

Checking In Inventory

The **Check-In** screen allows you to Check-In inventory that has previously been **Checked-Out** to one or more customers. While checking in inventory does not actually add inventory (quantity) to an item, it does free up that inventory to be checked-out to another customer or to be included in a pick order.

Checking In Inventory:

1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the Inventory menu, click the **Check-In** icon. The **Check-In** screen appears.

OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. Highlight the item for which you want to check-in inventory, then click the **Check-In** icon. The **Check-In** screen appears.

Check-In

Data Pending Transaction List: 0

Item

Item Number: [dropdown] [pushpin]

Description: [text box]

Customer: [dropdown] [pushpin]

Quantity: [spinner: 1.00] [pushpin]
Maximum: 0

Track By

Serial Number: [dropdown] Date Code: [dropdown] [pushpin]


Lot: [dropdown] [pushpin] Pallet: [dropdown] [pushpin]

Check-In Location: [dropdown] [pushpin]

Notes: [text area] [pushpin]

[person icon] Check-In

Help [checkbox] Print Receipt Cancel

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Adds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning

barcodes into that field. (The **Add** button does not have to be clicked between each scan to post these add transactions to the **Pending Transaction List**.)

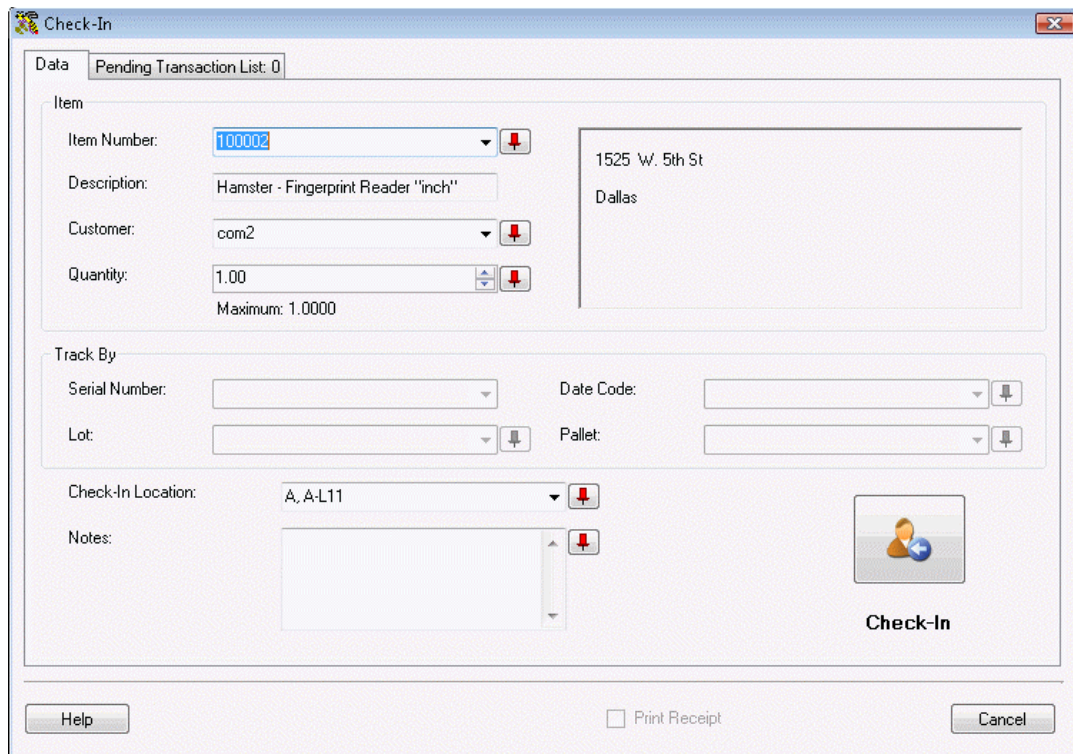
Clicking the  button will unlock the field.

3. **Complete the Item fields:** To **Check-In** Inventory, first enter the **Item Number** of the inventory item you want to Check-In. To input an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to select an existing item from the **Item List**.

Entering an item number populates the **Item Number** field as well as the **Description** and **Check-In Location** and will enable the following fields:

- **Quantity** (unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of 1)
- Any of the associated **Tracked By** fields: **Serial Number**, **Date Code**, **Lot** or **Pallet** (Set on the **Add** or **Edit Item** screens). A **Tracked By** field is enabled or disabled at the time the item is created.

Below is an example of the **Check-In** screen with the fields enabled:



The **Maximum** field displays the quantity of this item currently Checked-Out.

To enter a customer, you can type or scan the value into the field, or you can use the drop down list. You can only check-In inventory from a customer that was previously entered on the **Create New Customer** screen and only customers who have items checked-out will appear in the **Customer List**. After a customer is selected, the customer information is displayed.

4. **Complete the Track By fields:** As mentioned above, the **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.

If the item being checked-in is tracked by **Serial Number**, after the Serial Number is entered, the default location in the **Location** drop down list will be the location from which the Item was checked-out.

For items not tracked by **Serial Number**, the default check-in location is the first location of all the locations from which this customer has this item checked-out. For example, if a customer has an item checked out from three locations - A, B, and C - Location A will become the default location when the **Item Number** is entered.

5. **Enter the Check-In Location:** The locations included in the **Locations** drop down list are also limited by any other tracked by options that may have been enabled for this item. Thus, the listed locations will:

1. Have an item Checked-Out by the selected customer

and

2. Match all other Track By options enabled for this item

Using the previous example, if the **Track By Lot** option is enabled, and the **Lot** for the item at **Locations A and B** is 123, but the **Lot** for this item at **Location C** is 199, once you input 123 in the **Lot** field of the **Check-In** screen, only **Locations A and B** will be displayed in the **Location** drop list.

The default check-in location can be replaced by selecting the location of choice from the drop down list.

<More> can be selected from the drop down list to select any location entering into the system. This will cause the item to be **Moved** automatically to the selected location immediately after the check-in. Continuing with the example above, if the item came from **Location A** but you want to check it into **Location F**, click **<More>** and select **Location F**. When the transaction is processed, the item will be checked-in to **Location A** and then moved to **Location F** automatically.

The **Notes** field allows you to add and store additional information that describes the transaction.

6. Once you have entered the required information on the Check-In screen, click the **Check-In** button to add the transaction to the **Pending Transaction List**. All fields on the screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item for Check-In or you can click **Commit** on the **Pending Transaction List** to submit the transaction(s).

The **Check-In** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one **Check-In** is posted to the **Pending Transaction List**.

The screenshot shows a software window titled 'Check-In'. Inside, there is a tab labeled 'Data' and a sub-tab 'Pending Transaction List: 1'. Below this is a table with the following data:

Item Number	Item Description	Site	Location	Customer	Quantity	Serial Number	Lo
100002	Hamster - Fingerprint Reader "	A	A-L11		1.00		

Below the table is a large grey rectangular area, likely a placeholder for a receipt or additional data. At the bottom of the window, there are several buttons: 'Remove', 'Remove All', 'Help', 'Print Receipt' (with a checkbox), 'Commit', and 'Discard'.

At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error using the **Remove** and **Remove All** buttons.

7. Check the **Print Receipt** option to print a receipt when the transactions are **Committed**.
 8. Click **Commit** to submit the transaction(s) to your database.
-

Checking Out Inventory

The **Check-Out** screen allows you to check-out, or assign, inventory to customers for a specified length of time. Checking out inventory decreases the quantity of that item that you have on-hand, but does not remove the inventory from your database (since it is assumed the inventory will be checked back in). The check-out function is useful if you lease equipment to customers or have a need to temporarily loan-out inventory.

You can only check-out inventory that has been added. This means that when you create an item, you must add inventory (quantity) to it before you can check out that item to a customer.

Remember that inventory is the amount or quantity of an item. You can add inventory to an item either on the **Add Inventory** screen or by **Receiving** inventory.

Checking Out Inventory:


1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the Inventory menu, click the **Check-Out** icon. The **Check-Out** screen appears.

OR

1. From the **Main Window**, select **Lists > Item**. The **Item List** appears.
2. Highlight the item for which you want to check-in inventory, then click the **Check-Out** icon. The **Check-Out** screen appears.

The screenshot shows the 'Check-Out' window with the following fields and controls:

- Data** tab: Pending Transaction List: 0
- Customer** section: Customer: [dropdown menu] [red pin icon]
- Item** section: Item Number: [dropdown menu] [red pin icon], Quantity: [text box with 1.00] [up/down arrows] [red pin icon], Description: [text box], Maximum: 0, Location: [dropdown menu] [red pin icon]
- Track By** section: Serial Number: [dropdown menu], Date Code: [dropdown menu] [red pin icon], Lot: [dropdown menu] [red pin icon], Pallet: [dropdown menu] [red pin icon]
- Due Date** section: ☒ Default, ☐ Custom, ☐ None, [text box with 5/23/2007] [calendar icon]
- Notes** section: [text box] [up/down arrows] [red pin icon]
- Check-Out** button: [icon of two people]
- Help** button, ☐ Print Receipt, **Cancel** button

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Adds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. (The **Add** button does not have to be clicked between each scan to post these add transactions to the **Pending Transaction List**.)

Clicking the  button will unlock the field.

3. **Complete the Customer field:** To Check-Out Inventory, first enter a customer in the **Customer** field. To input a Customer, you can type or scan the value into the field, you can use the drop down list to select an existing customer from the **Customer List** or select **<New>** from the drop down list to access the **Create New Customer** screen. This will populate the **Customer** field as well as the **Name**, **Address** and **Phone** fields.

Note: If the **Automatic New** option is enabled on the **Options** screen, the **Create Customer** screen will be opened automatically if an unknown **Customer** is entered. If the **Automatic New** option is turned off when an unknown **Customer** is entered, a prompt will ask if you want to use the **Create New** screen. For more information on the enabling and disabling the **Automatic New** option, please refer to the **Options** screen topic.

4. **Complete the Item fields:** Next, select the **Item Number** for the inventory the customer wants to check-out. To input an **Item Number**, you can type or scan the value into the field, or you can use the drop list to select an existing Item from the **Item List**.

Entering an **Item Number** populates the **Item Number** field as well as the **Description** field and enables the following fields:

- **Location** - filtered by **Site**.
- **Quantity** - unless the item is **Tracked By Serial Number** - Set on the **Add** or **Edit Item** screens, which fixes the Quantity to a value of .
- Any of the associated **Tracked By** fields: **Serial Number**, **Date Code**, **Lot** or **Pallet** (Set on the **Add** or **Edit Item** screens). A **Tracked By** field is enabled or disabled at the time the item is created.

Below is an example of this screen with the fields enabled:

The screenshot shows a 'Check-Out' window with the following sections:

- Data**: Pending Transaction List: 0
- Customer**: Customer: 11111 (dropdown), Cambridge Academy (text field)
- Item**: Item Number: 100022 (dropdown), Quantity: 1.00 (spinner), Description: Hamster - Fingerprint Reader "inch" (text field), Location: A, A-Loc1 (dropdown), Maximum: 12.0000 (text field)
- Track By**: Serial Number: (dropdown), Date Code: (dropdown), Lot: (dropdown), Pallet: (dropdown)
- Due Date**: Default (selected), Custom (radio button), None (radio button), 5/23/2007 (calendar icon)
- Notes**: (text area)
- Check-Out**: (button with icon)
- Buttons**: Help, Print Receipt (checkbox), Cancel

The **Maximum** value shows the greatest quantity of this Item that can be Checked-Out.

5. **Complete the Track By fields:** As mentioned above, the **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.

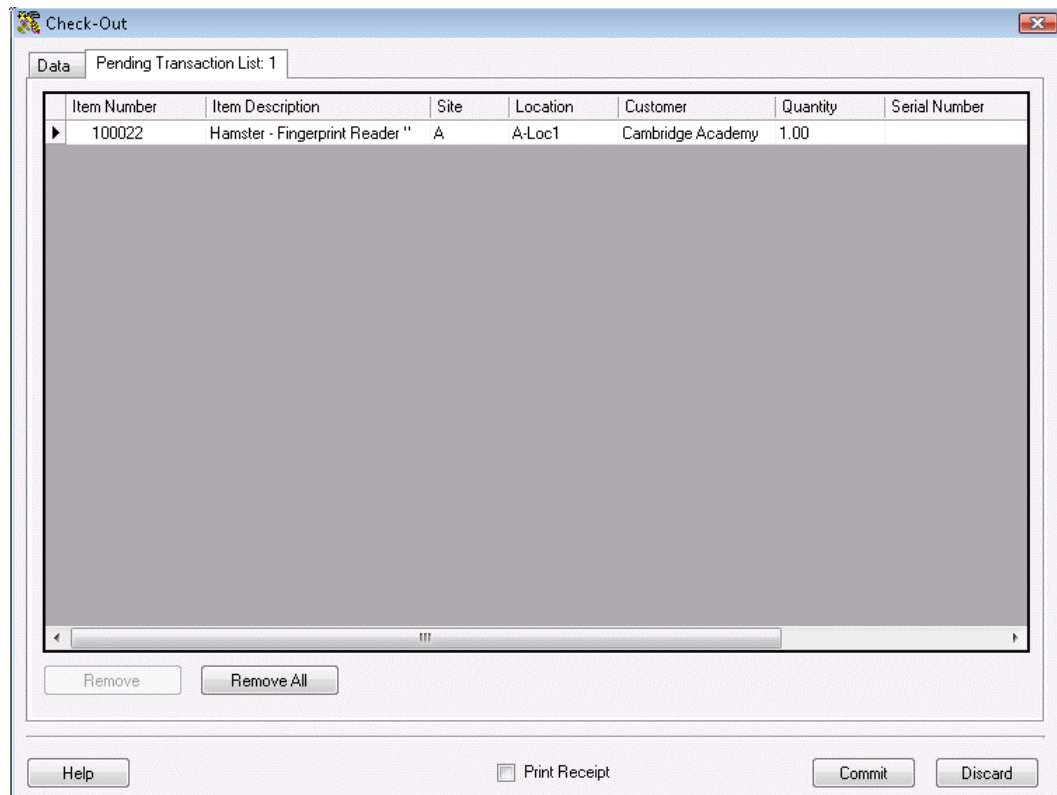
Since you can only check-out existing quantity, if the **Tracked By** item you are checking out is not in the list, make sure you have the right **Item Number** and **Location**. The **Tracked By** fields will only show values that are possible for the selected **Item Number** and **Location**. (If an item with a given Serial Number is not in the list, it may be **Checked-Out**, and thus, not removable.) If you still do not see the **Tracked By** information you expect, you should make sure the selected **Item Number** at the selected **Location** exists and has quantity. Also check that you are using the right **Site**.

6. **Complete the Due Date fields:** If you choose the default **Return Date**, it is calculated by adding the number of days specified in the item's **Checkout Length** field to today's date. The Checkout Length is set on the **Create New Item** screen and edited on the **Edit Item** screen. You can override the default return date by selecting the **Custom** or **None** button. **Custom** allows you to specify a return date by entering it in the **Custom Date** field. **None** allows a customer to check-out inventory for an indefinite period of time.

The **Notes** screen allows you to add and store additional information that describes the transaction.

7. After you have entered the inventory information on the **Check-Out** screen, click the **Check-Out** button to add the transaction to the **Pending Transaction List**. All fields on the screen will be cleared and all but the **Customer** and **Item Number** fields will be disabled. You can either select another item to be added to the **Pending Transaction List** or you can click **Commit** to submit the transaction(s).

The **Check-Out** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one transaction is posted to the **Pending Transaction List**.



The screenshot shows a window titled "Check-Out" with a tab labeled "Pending Transaction List: 1". Inside the window is a table with the following data:

Item Number	Item Description	Site	Location	Customer	Quantity	Serial Number
100022	Hamster - Fingerprint Reader "	A	A-Loc1	Cambridge Academy	1.00	

Below the table are two buttons: "Remove" and "Remove All". At the bottom of the window are three buttons: "Help", "Print Receipt" (with a checkbox icon), and "Commit". A "Discard" button is also present at the bottom right.

At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error.

8. Check the **Print Receipt** option to print a receipt when the transactions are **Committed**.
 9. Click **Commit** to submit the transaction(s) to your database or **Discard** to close without submitting the transactions.
-

Adjusting Inventory Amounts

The **Adjust Inventory** screen allows you to modify the quantity (inventory amount) of existing items. **Adjust** is like a "mini" Audit and will update the quantity using FIFO (First In First Out) to make the total equal to the quantity you enter here. The **Adjust** function is useful if too much or too little quantity is accidentally entered for an item (on a mobile device, for example), inventory is lost, found, broken, etc. and you need to quickly correct the quantity for that item. Adjusting is different from an Audit in that the Audit function makes other functions of the software, such as adding inventory, unavailable to ensure inventory is not added or removed while you are doing the counts. All features are still available when adjusting inventory.

Note: An item tracked by **Serial Number** which has been **Checked-Out** cannot be **Adjusted**.

This topic covers:

Adjusting Inventory

Duplicate Serial Numbers Warning

Adjusting Inventory:

1. From the **Main Window**, click the **Inventory** icon. The **Inventory** menu appears at the bottom of the screen.
2. On the **Inventory** menu, click the **Adjust** icon. The **Adjust** screen appears.

Adjust

Data Pending Transaction List: 0

Item Number: [dropdown] [pin]

Description: [text field]

Location: [dropdown] [pin]

Quantity: 0.00 [pin]

☒ By Counts ☐ By Difference

Reason: Found (+) [pin]

Notes: [text area] [pin]

Serial Number: [dropdown]

Lot: [dropdown] [pin]

Date Code: [dropdown] [pin]


Pallet: [dropdown] [pin]

Transaction Code: [dropdown] [pin]

Pin All Unpin All

Adjust

Help Print Receipt On Commit - Copies: 0 Cancel

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. This is helpful when you have to perform multiple Adds at one Location, for example. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field. (The **Add**, **Adjust**, etc. button does not have to be clicked between each scan to post these transactions to the **Pending Transaction List**.)

Clicking the  button will unlock the field.

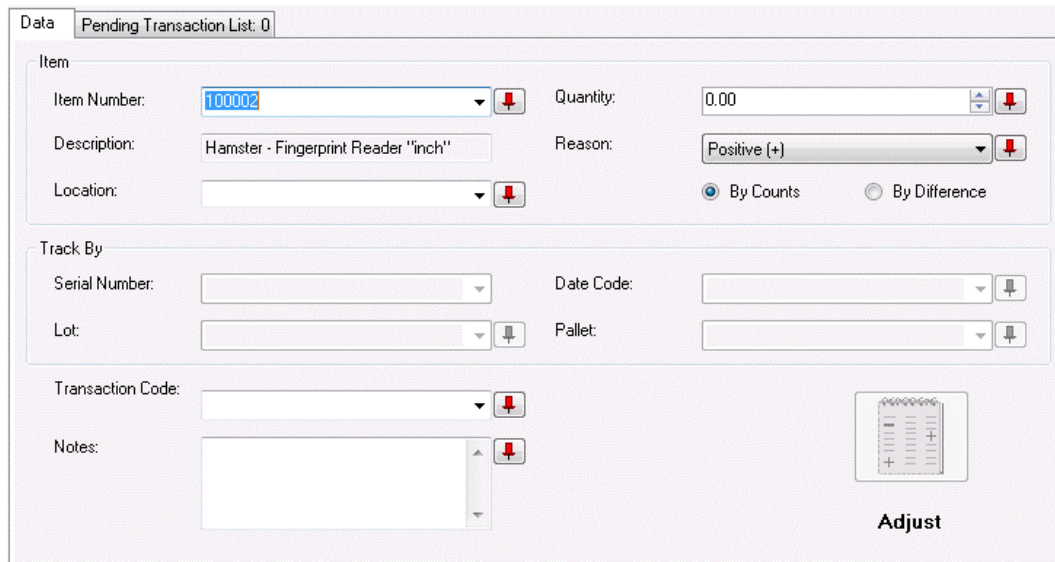
3. **Complete the Item fields:** To input an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to select an existing item from the **Item List**.

You can use the drop down list of any enabled field to select an existing value for that field.

Entering an item number populates the **Item Number** field as well as the **Description** and enables the following fields:

- **Location** - filtered by **Site**.
- **Quantity**
- **Any of the associated Track By fields:** Any of the associated Track By fields: Serial Number, Date Code, Lot or Pallet. A Tracked By field is enabled or disabled at the time the Item is created.

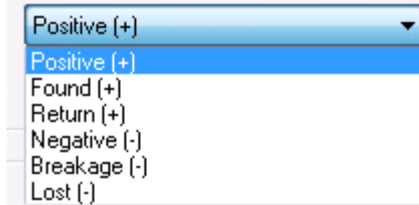
Below is an example of the screen with the fields enabled:



The screenshot shows a software interface titled "Data Pending Transaction List: 0". It contains several sections for data entry:

- Item Section:** Includes fields for "Item Number" (with a dropdown menu showing "100002" and a pushpin icon), "Quantity" (with a numeric input field showing "0.00" and a pushpin icon), "Description" (text input showing "Hamster - Fingerprint Reader 'inch'"), "Reason" (dropdown menu showing "Positive (+)" and a pushpin icon), "Location" (dropdown menu with a pushpin icon), and radio buttons for "By Counts" (selected) and "By Difference".
- Track By Section:** Includes fields for "Serial Number", "Date Code", "Lot", and "Pallet", each with a dropdown menu and a pushpin icon.
- Transaction Section:** Includes a "Transaction Code" dropdown menu with a pushpin icon and a "Notes" text area with a pushpin icon.
- Adjust Button:** A button with a notepad icon and the text "Adjust" is located at the bottom right.

Selecting a **Reason** from the drop down list allows you to track why this adjustment is being made. The **Reason** also determines if the quantity is positive or negative for **By Difference** adjusts.



When to select the By Counts or By Difference check boxes:

By Count indicates that the **Quantity** you are entering is the total count of that item at the specified **Location**. For instance, if the software shows that you have 3 of Item A at Location 1, but you have counted 5, you should enter 5.

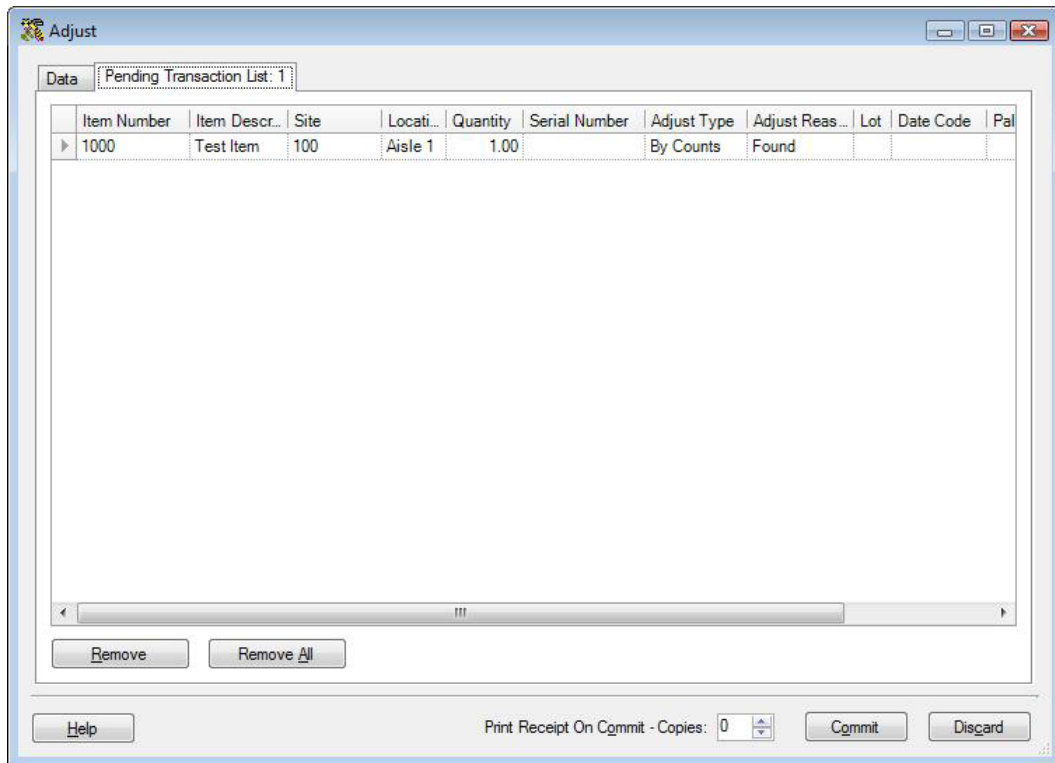
By Difference indicates that the **Quantity** you are entering is the change you want to see in the Quantity for that Item at that Location. For instance, if you just damaged 2 of Item A at Location 1, you can enter 2, set the **Reason** to **Breakage (-)**, and the total will be adjusted downward by 2.

4. **Complete the Track By fields:** The **Track By** fields are enabled based on the Item Number you enter. If there are no Track Bys set for the selected item, these fields will be disabled. **Track By** fields are enabled or disabled at the time the item is entered on the **Create New Item** screen or when editing an item on the **Edit Item** screen.

When an item is tracked by **Serial Number**, 0 and 1 are the only valid values for **Quantity**.

5. **Enter the Quantity:** After you have specified the **Item**, **Location** and **Track Bys**, you should input the total **Quantity** you are adding to the item.
6. **Enter the Transaction Code:** This field allows you to type a new or select a previously committed code that describes the transaction. Transaction Codes can be any code your business assigns to certain types of adjustment transactions. Assigning these codes can help you with reporting as each type of adjustment can (breakage, return, etc.) can be given it's own code. This software does not contain any preset codes. This gives you the opportunity to assign a code that best suits your needs, and allows for the entry of codes you already use in your business for these types of transactions.
7. **Enter Notes (Optional):** The **Notes** field allows you to add and store additional information that describes the transaction.
8. Click the **Adjust** button to add the transaction to the **Pending Transaction List**. All fields on the screen will be cleared and all but the **Item Number** field will be disabled. You can either select another item to Adjust or you can click **Commit** on the **Pending Transaction List** to submit the transaction(s).

The **Adjust** button will not be enabled until all required information is entered in the appropriate fields. The **Commit** button will not be enabled until at least one transaction is posted to the **Pending Transaction List**.



At any time, you can review the **Pending Transaction List** and remove any transactions that were entered in error using the **Remove** or **Remove All** buttons.

9. If you want to print a receipt of this transaction, enter the number of receipts in the **Print receipt on Commit - Copies** field.
10. Click **Commit** to submit the transaction(s) to your database.

Duplicate Serial Numbers Warning:

If you are tracking the item by **Serial Number** and the system detects an item with the same serial number in a location other than the one you selected on the **Adjust** screen, when you click the **Adjust** button you will receive a warning message that states:

"You are trying to adjust an item that is tracked by serial number. We have found that serial number at a different location. Do you want to adjust the item at that location to 0 so you can move it to this location?"

Select **Yes** on this message to adjust the quantity of the item to 0 at the location detected by the software. The quantity adjustment will be made in the location detected by the software and the item will automatically be moved to the location you selected on the **Adjust** screen. The transaction will appear on the **Pending Transaction List**.

Select **No** if you think you have selected the incorrect location. The **Adjust** transaction will not appear on the **Pending Transaction List** and you will be able to correct the location on the **Adjust** screen.

Purchase Orders/Pick Orders

Pick Order Overview

This function applies to Pro and Enterprise Version users only.

Pick Orders are orders that you create when inventory is requested by a customer and needs to be taken (picked) from your warehouse, store, storage facility, etc. and shipped to the customer. InventoryControl allows you to create a pick order that can then be automatically emailed to the warehouse and/or printed for reference.

The basic flow of pick orders is as follows:

1. Your business receives a request for inventory (through an invoice, a sales slip, etc.). A pick order for the requested merchandise is entered on the **Create New Pick Order** screen. You can enter any item in any quantity on this screen. Actual on-hand amounts are not checked at this point. You can choose to email the order and/or print the order. These two actions occur when you click the **Save** button.

A newly created **Pick Order** has a status of **New**. The status remains **New** until pick quantities are entered on the **Picking Order** screen. If the order becomes overdue before it begins to be picked, the status changes to **New - Overdue**.

For detailed information creating pick orders, please see the [Creating a Pick Order](#) topic.

The **Pick Order** now appears on your **Pick Order List (Lists > Pick Orders)**. From the **Pick Order List** you can **Edit** or **Delete** (as long as the order is not in process) the order as needed.

For an example of the **Pick Order List**, please refer to the [Pick Order List Example](#) topic. For detailed information on using the list screen, please refer to the Working with Lists topic.

2. When the order is actually being picked, that is, the inventory is being readied for shipping to the customer, the picked quantities for each item on the order are entered in the **Picking Order** screen (**Receive/Pick** menu > **Pick**). This can be done on the PC or on the mobile devices. At this time, the quantities are checked and you cannot pick more than you actually have in inventory.

For detailed information on picking orders on the PC, please refer to [Picking Orders](#).

For detailed information on picking orders on a Windows Mobile Device, please refer to Windows Mobile Device - Picking Items for Orders. For detailed information on picking orders on the WDT2200, please refer to [WDT2200 - Picking Inventory for Orders](#).

Pick orders that have some items picked have a status of **In Process**. If the order becomes overdue, it will have a status of **In Process - Overdue**.

For detailed information on the **Picking Order** screen, please refer to the [Picking Orders](#) topic.

3. After the order is fully picked it has a status of **Completed**.

Creating a Pick Order

Pick orders are created to designate certain inventory to be shipped to a customer. On the **Create New Pick Order** screen, you are creating an order that tells your staff to get the order ready and what inventory to include. These orders can be sent to the mobile devices (although pick orders cannot be created on mobile devices). After the order has been picked, you need to mark it as ready to be shipped on the **Pick Order** screen accessed from the **Receive/Pick** menu. At this point, the inventory is removed from the system. For more information on the **Pick Order** screen, please refer to the **Shipping Pick Orders** topic.

We recommend you review the **Pick/Ship Overview** before creating pick orders for the first time.

Creating New Pick Orders:

1. From the **Main Window**, select **New > Pick Order**.

OR

From the **Main Menu**, click **Lists > Pick Order**. On the **Pick Order List**, click the **New** icon.

The **Create New Pick Order** screen appears.


Type	Item No	Request Qty	Stocking Unit	Description
Inventory		1.00		

Notice that the screen prominently displays the status as **New**. This status message

changes based on the state the order is in.

Possible statuses are:

- **New** - This always displays when creating a new order.
- **Issued** - Once the pick order is printed or emailed, the status changes to **Issued**.
- **In Process** - Once the order has started to be picked (via the **Pick Order** screen accessed from the **Receive/Pick** menu), the status becomes **In Process** and the **Picked Quantity** will display for each item on the order.
- **Overdue** - This status can appear for **New** or **In Process** orders that have passed the designated due date. These orders will appear with a symbol on the **Pick Order List** to alert you of their overdue status.
- **Closed** - This status means the order has been completed and marked as closed.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the  button will unlock the field.

1. Enter a **Pick Order Number**. This alpha-numeric value up to 36 characters can be manually entered at the time the pick order is created, scanned in, or you can click **Generate** to have the system assign an auto-generated number. For more information on setting up automatically generated **Pick Order Numbers**, please refer to the **Customize Numbers** topic.
2. Enter a Customer in the **Customer** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Customers selected on this screen. Select **<MORE>** to view the entire **Customer List** or click **<New>** to go to the **Create Customer Supplier** screen to add a new customer to the database.

When a customer is selected, the **Customer Address** information automatically populates. If the selected customer has more than one address entered for it, you can select the **Address Type** from the drop down list.

3. Enter an **Order Date** for this order. This date defaults to today, but you can change this date by clicking the down arrow and selecting a new date.
4. Enter a **Due Date** for this order. You can type in a date in this field or click the down arrow to select a date.
5. Enter a **Reference Number** for this **Pick Order** (optional).
6. Select the preferred shipping method for this order in the **Ship Via** field from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.
7. Enter any notes you want to associate with this order in the **Notes** field.

8. Now you are ready to enter your item information in the **Line Item Details** section.

Complete this information as follows:

- **Type** - Select the type of item that needs to be picked. Options are:
 - **Inventory** - This item is in your inventory database. Use this to pick existing items.
 - **Non-Inventory** - This item is not in your inventory database. Use this to pick items that you do not want to appear in your inventory database, such as marketing fliers or business cards.
 - **Assembly - Assembly Items** are a collection of items that, once grouped, are considered to be a new, single item. Assembly Items are pre-assembled and kept in stock.
 - **Kit** - Kit items are a collection of items that are grouped, or picked, at the time they are sold.
 - **Manual** - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be picked on the mobile devices.
- **Item Number** - Enter the **Item Number** of the item you want to add to the order. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item List**.

You can create a new item by selecting **<New>** or by entering an unknown item number. When either of these two situations occur, the **Create New Item** screen appears. For more information on creating items, please refer to the **Creating New Items** topic.

When you enter an **Item Number** the **Description** field populates.

- **Request Qty** - Enter the requested number of this item. This value can also be scanned. You cannot enter negative numbers.
- **Stocking Unit** - This field displays the stocking unit entered for this item on the **New Item/Edit Item** screen. The stocking unit represents how you stock this item in your inventory. For instance, if you stock the unit in boxes of 10. Box of 10 would display in the Stocking Unit field on this screen. For more information on creating items, please refer to the **Creating New Items** topic.
- **Description** - This field populates after the item number is entered and cannot be changed on this screen. If you need to change the description, you can do so on the **Edit Item** screen.

9. After you have entered all items for this order, you can optionally select to:

- **Print on Save** - If this box is checked, a copy of this order automatically prints when you click the **Save** button.
- **Email on Save** - If this box is checked, a copy of this order is automatically sent to the email address listed in the **Customer** screen for this customer when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent to the email address listed in the **Customer** screen from the email address listed in the **Company Information** screen. Please note that if the email addresses are not entered on the **Customer** or **Company Information** screens, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to

the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on setting these email options on the **Options** screen, please refer to the **Options Screen** topic. For more information on the Email Distribution List, please see the **Email Distribution List** topic.

10. Click **Save** to save this order to the database.
-

Editing Pick Orders

This function applies to Pro and Enterprise Version users only.

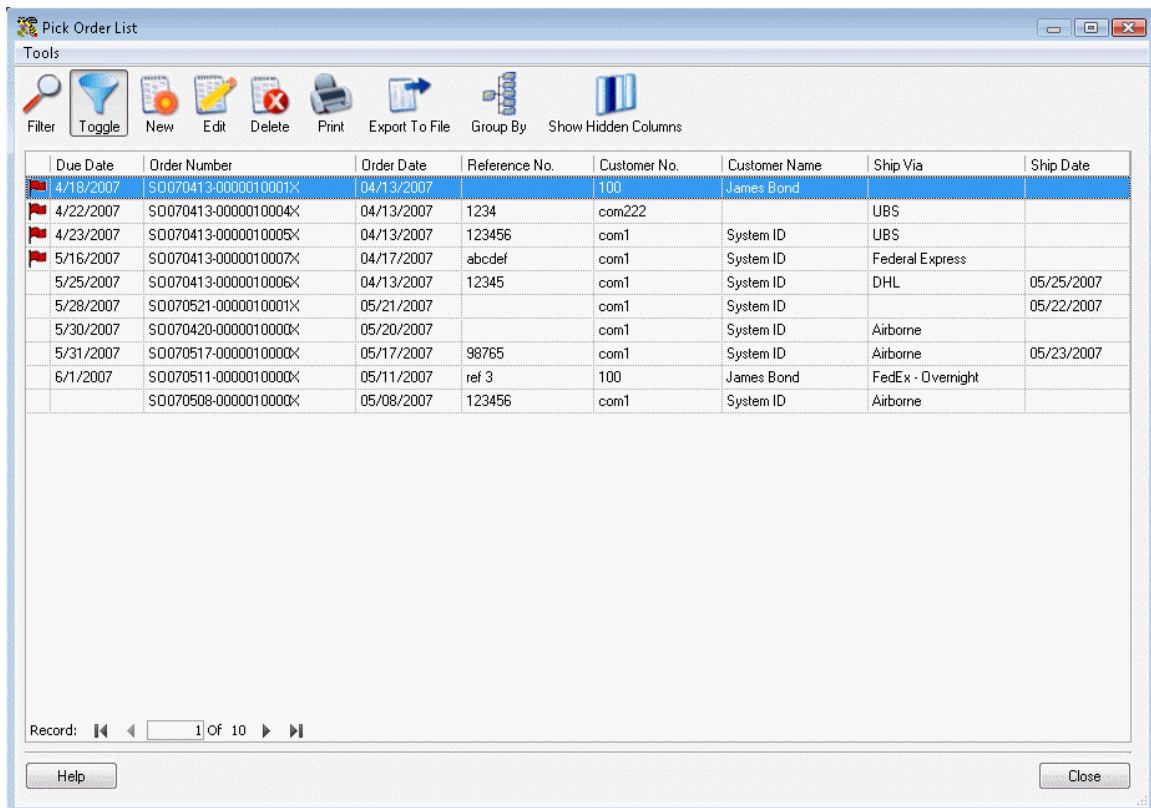
The **Edit Pick Order** screen allows you to modify an existing purchase order. This screen is accessed from the **Pick Order List** by highlighting an item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the [Working with Lists](#) topic.

The **Edit Purchase Order** screen is identical to the **New Purchase Order** screen, except all the information previously entered for the order appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [Creating a Pick Order](#) topic.

Pick Order List Example

This function applies to Pro and Enterprise Version users only.

The **Pick Order List** displays all active pick orders entered in the system. Active pick orders are those that have a status of **New**, **New-Over Due**, **In Process** or **In Process-Over Due**. Below is an example of the **Pick Order List**.



Due Date	Order Number	Order Date	Reference No.	Customer No.	Customer Name	Ship Via	Ship Date
4/18/2007	S0070413-0000010001X	04/13/2007		100	James Bond		
4/22/2007	S0070413-0000010004X	04/13/2007	1234	com222		UBS	
4/23/2007	S0070413-0000010005X	04/13/2007	123456	com1	System ID	UBS	
5/16/2007	S0070413-0000010007X	04/17/2007	abcdef	com1	System ID	Federal Express	
5/25/2007	S0070413-0000010006X	04/13/2007	12345	com1	System ID	DHL	05/25/2007
5/28/2007	S0070521-0000010001X	05/21/2007		com1	System ID		05/22/2007
5/30/2007	S0070420-0000010000X	05/20/2007		com1	System ID	Airborne	
5/31/2007	S0070517-0000010000X	05/17/2007	98765	com1	System ID	Airborne	05/23/2007
6/1/2007	S0070511-0000010000X	05/11/2007	ref 3	100	James Bond	FedEx - Overnight	
	S0070508-0000010000X	05/08/2007	123456	com1	System ID	Airborne	

Notice the red flags next to some of the orders on the list. These red flags indicate that the order is past due. The status may be **New-Past Due** or **In Process-Past Due**. Overdue orders will appear at the top of the list by default, but you can reorder the list as needed.

The **Pick Order List** window allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Pick Orders**. For detailed information regarding each of these options, refer to the [Working with Lists](#) topic.

Picking Orders

This function applies to Pro and Enterprise Version users only.

When a pick order is actually being picked, that is, the inventory is being readied for shipping to the customer, the quantities that are removed from inventory for each item on the order are entered in the **Pick** screen. At this time, the quantities are checked and you cannot pick more than you actually have in inventory.

Picking Orders:

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click the **Pick** button. The **Pick** screen appears:

The screenshot shows the 'Pick' window with the following details:

- Title Bar:** Pick
- Pick Order Information:**
 - Order Number:** A dropdown menu.
 - Pick Date:** 9/26/2008
 - Notes:** A text area.
- Table:**

Type	Item No	Stocking Unit	Description	Requested Qty	Previously Picked Qty	Quantity
------	---------	---------------	-------------	---------------	-----------------------	----------
- Record:** 0 Of 0
- On Save:**
 - Print Packing Slip. Copies: 0
 - ☐ Email Packing Slip
 - ☐ Close This Pick Order
- Buttons:** Help, Save, Cancel, Close, Quick/Scan Entry

3. Select which pick order you will be working on from the **Order Number** drop down list. The most recently selected orders will appear in the list or select **<More>** to view the **Pick Order List**. When you select an **Order Number**, the information for the selected picking order populates the screen:

Pick Order Information

Order Number: 00002

pick ref #123
6/18/2007 9:32:57 AM

Ship Date: 6/20/2007

Notes: Notes on Pick Order 00002

Type	Item No	Stocking Unit	Description	Requested Qty	Previously Picked Qty	Quantity
<input type="checkbox"/> INVENTORY	1		Item TrackBy	100.00	20.00	20.00

Location	Available Qty	Quantity
Site 1, Loc 1	80.00	20.00

- Enter the date these items are to be shipped in the **Ship Date** field.
- You can optionally type in notes for this order in the **Notes** screen.
- Now you can mark the items as picked. Select the checkbox next to the item you are picking:

	Type	Item No	UOM	Description	Requested Qty	Previously Picked Qty	Quantity
<input type="checkbox"/>	MANUAL			Paper	3.00	0.00	0.00
<input checked="" type="checkbox"/>	INVENTORY	200		Pendant	1234.00	0.00	0.00
<input type="checkbox"/>	NON_INVENTORY	Print Paper		Printer Papers	109.00	0.00	0.00

The **Quantity** field becomes enabled allowing you to enter the quantity you picked.

You must mark these items as picked from one or more locations by clicking the plus sign in front of the listing:

	Type	Item No	UOM	Description	Requested Qty	Previously Picked Qty	Quantity
<input type="checkbox"/>	MANUAL			Paper	3.00	0.00	0.00
<input checked="" type="checkbox"/>	INVENTORY	200		Pendant	1234.00	0.00	0.00
		Location	Available Qty	Quantity			
		DDKK, 200	5076.00	1.00			
			0.00	1233.00			
	Type	Item No	UOM	Description	Requested Qty	Previously Picked Qty	Quantity
<input type="checkbox"/>	NON_INVENTORY	Print Paper		Printer Papers	109.00	0.00	0.00

A box appears allowing you to select a **Location** and a **Quantity** for that location. The **Available Qty** is also shown so you can easily see how many of this item are available at this location.

- You can select options to be performed upon clicking **Save** from the **On Save** section. Options are:
 - Print Packing Slip. Copies** - Prints the packing slip containing all items picked for this order. Enter the number of copies of this packing slip you want to print in the field provided.

You can open a pick order and print one or more copies of the packing slip regardless of what state the pick order is in (new, issued). To do this, enter the number of copies you want to print, then click **OK**. All items picked for this order will be included on the packing slip, regardless of the setting of the **Packing Slip**

for **Session** option (see Note, below, for more information on the **Packing Slip for Session** option).

- **Email Packing Slip** - Sends an email containing this packing slip to the selected addresses. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email address or change email addresses as needed. If you have selected not to view the list, the packing slip will automatically be sent to the email address listed in the **Customer** screen from the email address listed in the **Company Information** screen. Please note that if the email addresses are not entered on the **Customer** or **Company Information** screens, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on the **Options** screen, please refer to the [Options Screen](#) topic.

- **Close this Pick Order** - Marks this order as closed. Select this option after all items for the order have been picked.

Note on the Packing Slip for Session Option:

By default, the packing slip that can be printed and/or emailed upon saving displays only items picked in the current pick session. If you want to pick multiple times and print a packing slip that displays all the picks for this pick order, including items picked previously, you can select to do so on the **Options** screen.

For example:

Assume Pick Order 001 a quantity of 5 for item ABC and a quantity of 4 for item XYZ. Today I pick 2 of item ABC and 2 of item XYZ and ship them. The packing slip will display 2 ABC and 2 XYZ. Tomorrow I pick the other 3 of item ABC and 2 of item XYZ and ship them. The packing slip has 3 ABC and 2 XYZ.

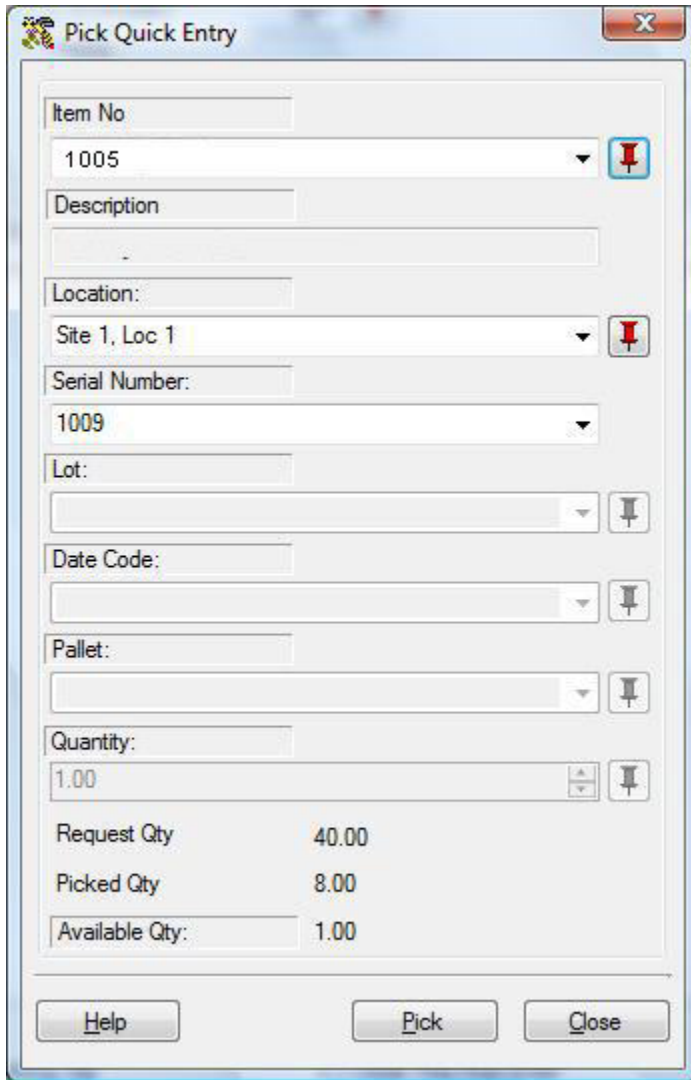
This would also be exactly the same if both picks and ships were done on the same day.

If, however, I pick what I have in the morning and don't ship it and a shipment comes in that day or the next and I complete the order before shipping anything, I will want all of the items picked throughout the day to display on one packing slip. To do this the option must be set on the **Options** screen to accumulate all of the picks on the pick slip. For more information on this option, please refer to the [Options Screen](#) topic.

After entering the pick quantities, click **Save** to update the amounts on the screen. Inventory is removed for those items you marked as picked. Click **Close** to close the screen.

Quick/Scan Entry:

This feature opens a window that allows you to quickly type in or scan in information. When you click the **Quick/Scan Entry** button, a window similar to the one shown below appears:



The screenshot shows a window titled "Pick Quick Entry" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains several input fields and buttons:

- Item No:** A dropdown menu with "1005" selected. To its right is a red pushpin icon.
- Description:** A text input field.
- Location:** A dropdown menu with "Site 1, Loc 1" selected. To its right is a red pushpin icon.
- Serial Number:** A dropdown menu with "1009" selected.
- Lot:** A dropdown menu. To its right is a pushpin icon.
- Date Code:** A dropdown menu. To its right is a pushpin icon.
- Pallet:** A dropdown menu. To its right is a pushpin icon.
- Quantity:** A text input field with "1.00" entered. To its right is a pushpin icon and a small up/down arrow button.
- Summary Section:** A table-like area at the bottom of the form:

Request Qty	40.00
Picked Qty	8.00
Available Qty:	1.00
- Buttons:** At the bottom of the window are three buttons: "Help", "Pick", and "Close".

You can scan the barcode label on the item and the fields on the **Quick/Scan Entry** screen will populate with the scanned information. Click the **Pick** button, then scan the next item and the screen clears and repopulates with the new information. This is an easy method for quickly marking items as picked.

Purchase Orders/Receiving Overview

This function applies to Pro and Enterprise Version users only.

Purchase orders can be created in InventoryControl when you need to order additional inventory from suppliers. These orders can be emailed to the supplier and/or printed upon creation and can be easily referenced and searched in the system. When you receive shipment of the items on the purchase order, the items can be marked as received either on the PC's **Receive** screen or on the mobile devices.

InventoryControl allows you to create purchase orders for:

- **Inventory Items** - This item is already in your inventory database. Use this to re-order existing items.
- **Assembly Items** - Assembly items are created when you combine two or more existing items or multiple quantity of one item to create a new item.
- **Non-Inventory Items** - This item is not listed as inventory in your database. Use this to order items for which you do not want to track inventory, such as marketing fliers or business cards.
- **Manually Entered Items** - Use this option to add one-time items, such as shipping and handling, to an order. Be aware that manual items cannot be received on the mobile devices.

The basic flow from purchase order creation to receiving the items is as follows:

1. When you need to replenish inventory for an item or items, create a purchase order on the **Create New Purchase Order** screen (accessed from **New > Purchase Order**). After you select a **Supplier** for this purchase order, you can click the **Items at Re-Order Point** button at the bottom of the screen. The system will then check for any items for this supplier that are at or below their reorder points and populate the purchase order with those items.

A newly created **Purchase Order** has a status of **New**. The status remains **New** until item quantities are entered on the **Receive** screen. If the order becomes overdue before you receive it, the status changes to **New - Overdue**.

For detailed information creating purchase orders, please see the [Creating a Purchase Order](#) topic.

The **Purchase Order** now appears on your **Purchase Order List (Lists > Purchase Orders)**. From the **Purchase Order List** you can **Edit** or **Delete** (as long as the order has not been partially received) the order as needed.

For an example of the **Purchase Order List**, please refer to the [Purchase Order List Example](#) topic. For detailed information on using the list screen, please refer to the [Working with Lists](#) topic.

2. When you begin to receive inventory the purchase order, you will enter the quantity received for each item on the **Receive** screen (**Receive/Pick** menu > **Receive**). Inventory for an item can be marked as received on the PC's **Receive** screen or on the mobile devices. This screen allows you to enter quantities received by location, and can optionally show you costing information as well. Receiving inventory on the Receive

screen adds inventory to that item.

Purchase orders that have some items received have a status of **In Process**. If the order becomes overdue, it will have a status of **In Process - Overdue**.

For detailed information on the **Receive** screen, please refer to the **Receiving Inventory** topic. For detailed information on receiving inventory on the WDT2200, please refer to **WDT2200 - Receiving Inventory**. For detailed information on receiving inventory on a Windows Mobile Device, please refer to Windows Mobile Device - Receiving Inventory.

3. After the order is fully picked it has a status of **Completed**.
-

Creating a New Purchase Order

Purchase orders can be created in InventoryControl and emailed directly to your supplier, or printed for faxing or mailing. We recommend you review the topic **Purchase Orders/ Receiving Overview** before using the purchase order feature for the first time.

Creating New Purchase Orders:

1. From the **Main Window**, select **New > Purchase Order**.

OR

From the **Main Window**, select **Lists > Purchase Order**. On the **Purchase Order List**, click the **New** icon.

The **Create New Purchase Order** screen appears.


Type	Item No	Description	Supplier SKU	Ordered Qty	Order Unit	Cost	Line Total
Inventory				1.00			0.00

Notice that the screen prominently displays the status as **New**. This status message changes based on the stage the purchase order is in.

Possible statuses are:

- **New** - This always displays when creating a new order.
- **Issued** - Once the purchase order is printed or emailed, the status changes to **Issued**.
- **In Process** - Once the order has started to be received (via the **Receive** screen accessed from the **Receive/Pick** menu), the status becomes **In Process** and the **Received Quantity** will display for each item on the order.

- **Overdue** - This status can appear for **New** or **In Process** orders that have passed the designated due date. This orders will appear with a symbol on the **Purchase Order List** to alert you of their overdue status.
- **Closed** - This status means the order has been completed and marked as closed.

Note: To prevent fields from clearing, click the pushpin  button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the  button will unlock the field.

2. Enter a supplier in the **Supplier** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Suppliers selected on this screen. Select **<More>** to view the entire **Supplier List** or click **<New>** to go to the **Create New Supplier** screen to add a new supplier to the database.

When a supplier is selected, the **Supplier Address** information automatically populates. If the selected supplier has more than one address, you can select the **Address Type** from the drop down list.

After you enter the **Supplier** information, you can click the **Items at Re-Order Quantity** button at the bottom of the screen. The system will then check for any items for this supplier that are at or below their reorder points and populate the purchase order with those items.

3. Enter a **Purchase Order Number**. This alpha-numeric value up to 36 characters can be manually entered at the time the purchase order is created, scanned in, or you can click **Generate** to have the system assign an auto-generated number. For more information on setting up automatically generated **Purchase Order Numbers**, please refer to the **Customize Numbers** topic.
4. Select a **Ship To Address** using the drop down menu. All address types you entered on the **Company Information** screen will appear in the list, or you can select **<New>** to enter a new address. Selecting **<New>** opens the **Company Information** screen allowing you to enter a new address. For more information on the **Company Information** screen, please refer to the **Entering Company Information** topic.
5. Enter a **Reference Number** for this **Purchase Order** (optional).
6. The **Order Date** defaults to today's date. You can change this date by clicking the button next to the field and selecting a new date.
7. Select a **Due Date** for this **Purchase Order**. You can type in a date or click the button next to the field and select a date.
8. Select the preferred **Ship Method** for this order from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

9. Select the **Payment Method** from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

Note: If you need to delete a **Ship** or **Payment Method** you have entered, you can do so on the **Manage Ship Methods** or **Manage Payment Methods** screens. These screens also allow you to Print, Export and Add New methods. For more information on the **Manage Ship Methods** screen, please refer to the **Managing Shipping Methods** topic. For more information on the **Manage Payment Methods** screen, please refer to the **Managing Payment Methods** topic.

10. Now you are ready to enter your item information in the **Line Item Details** section. Complete this information as follows:
 - **Type** - Select the type of item you are ordering. Options are:
 - **Inventory** - This item is already in your inventory database. Use this to re-order existing items.
 - **Non-Inventory** - This item is not listed as inventory in your database. Use this to order items for which you do not want to track quantity, such as marketing fliers or business cards.
 - **Manual** - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be received on the mobile devices.
 - **Item Number** - Enter the **Item Number** of the item you want to order. To enter an **Item Number**, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item List**.

When you enter an **Item Number**, the **Description** field populates.

- **Description** - This field populates after the item number is entered. This field can only be edited if Manual was selected in the **Type** field. If you need to change the description, you can do so on the **Edit Item** screen.
- **Vendor SKU** - This field populates after the item number is entered if a SKU was entered on the Add/Edit Item screen for this vendor. This field can only be edited if Manual was selected in the **Type** field.
- **Ordered QTY** - Enter the quantity you are ordering of this item. This field defaults to 1. You cannot enter negative values in this field.
- **Order Unit** - Select the Order Unit from the drop down field or select **<New>** to enter a new Unit. You may want to enter a new unit here that is not an "eaches" or Stocking Unit measurement. For example, if you want to order 1 box of an item and this item ships in boxes containing 15 units, the "eaches", or Stocking Unit measurement is 15, but for ordering purposes, you could create a new unit that is BOX containing 15 units. You would then order 1 box rather than 15 units to avoid confusion for the supplier.

You can setup multiple Order Unit types for each supplier on the **Create New/Edit Item** screen - **Manage Suppliers** tab. This allows you to enter units based on the suppliers method of shipping (whether the supplier ships in boxes of 15, pallets of 50, etc.) For instance, you could set up a Box and Pallet Order Unit on the **Suppliers** tab so that when you create a Purchase Order for that item to go to the supplier, you can quickly select whether you want a box or a pallet. For more information on the **Add Item** screen - **Manage Suppliers** tab, please refer to the **Creating New Items** topic.

- **Cost** - The cost will populate based on the **Order Unit** selected. You can also type in a new cost here.
- **Line Total** - This field calculates based on the **Quantity** multiplied by the cost.

11. After you have entered all items for this order, you can optionally select to:

- **Print on Save** - If this box is checked, a copy of this order automatically prints when you click the **Save** button.
- **Email on Save** - If this box is checked, a copy of this order is automatically sent to the email address listed in the **Supplier** screen for this supplier when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent **to** the email address listed in the **Supplier** screen **from** the email address listed in the **Company Information** screen. Please note that if the email addresses are not entered on the **Supplier** or **Company Information** screens, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on setting these email options on the **Options** screen, please refer to the **Options Screen** topic.

12. Click **Save** to save this purchase order to the database.

Editing Purchase Orders

This function applies to Pro and Enterprise Version users only.

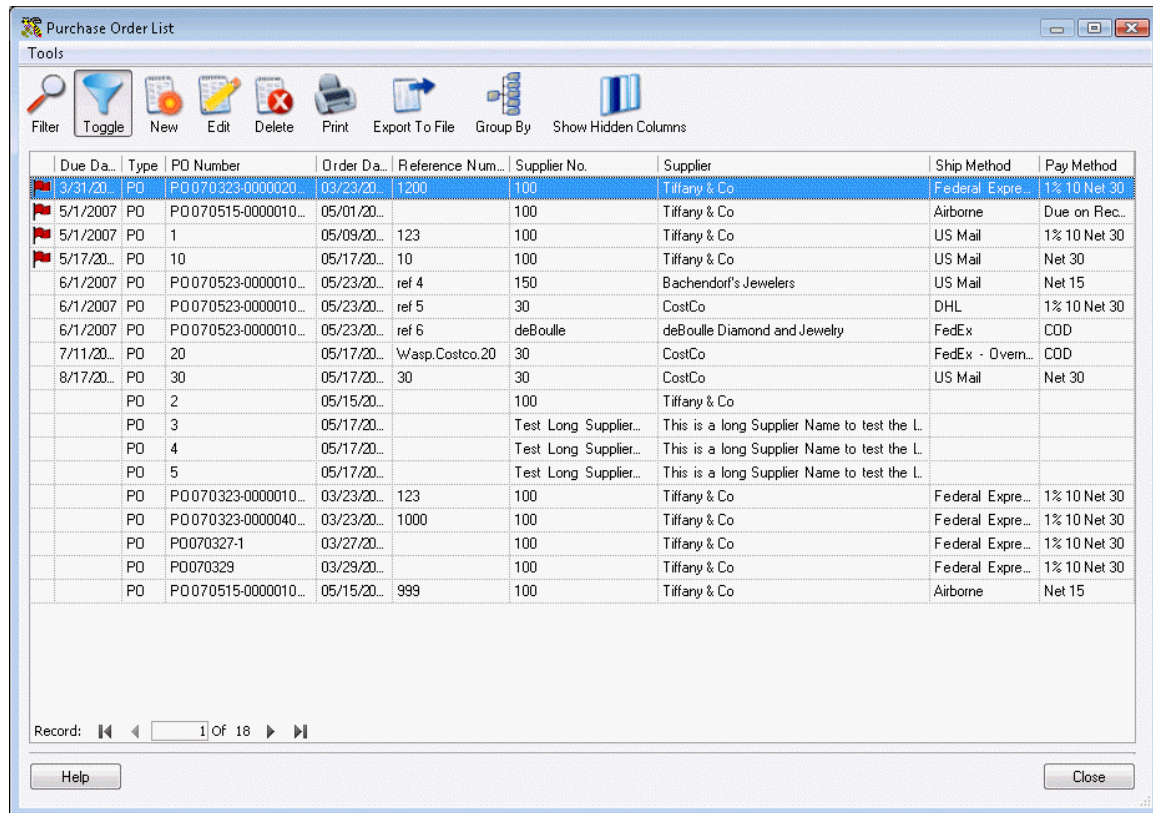
The **Edit Purchase Order** screen allows you to modify an existing purchase order. This screen is accessed from the **Purchase Order List** by highlighting an item in the list, then clicking the **Edit** button on the toolbar. For more information on using the List screens, see the [Working with Lists](#) topic.

The **Edit Purchase Order** screen is identical to the **New Purchase Order** screen, except all the information previously entered for the order appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [Creating a Purchase Order](#) topic.

Purchase Order List Example

This function applies to Pro and Enterprise Version users only.

The Purchase Order List displays all active purchase orders you have in your system. Active purchase orders are those that have a status of **New**, **New-Over Due**, **In Process** or **In Process-Over Due**. Below is an example of the **Purchase Order List**.



Due Da...	Type	PO Number	Order Da...	Reference Num...	Supplier No.	Supplier	Ship Method	Pay Method
3/31/20...	PO	P0070323-0000020...	03/23/20...	1200	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
5/1/2007	PO	P0070515-0000010...	05/01/20...		100	Tiffany & Co	Airborne	Due on Rec...
5/1/2007	PO	1	05/09/20...	123	100	Tiffany & Co	US Mail	1% 10 Net 30
5/17/20...	PO	10	05/17/20...	10	100	Tiffany & Co	US Mail	Net 30
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 4	150	Bachendorf's Jewelers	US Mail	Net 15
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 5	30	CostCo	DHL	1% 10 Net 30
6/1/2007	PO	P0070523-0000010...	05/23/20...	ref 6	deBouille	deBouille Diamond and Jewelry	FedEx	COD
7/11/20...	PO	20	05/17/20...	Wasp, Costco, 20	30	CostCo	FedEx - Overm...	COD
8/17/20...	PO	30	05/17/20...	30	30	CostCo	US Mail	Net 30
	PO	2	05/15/20...		100	Tiffany & Co		
	PO	3	05/17/20...			Test Long Supplier...	This is a long Supplier Name to test the L	
	PO	4	05/17/20...			Test Long Supplier...	This is a long Supplier Name to test the L	
	PO	5	05/17/20...			Test Long Supplier...	This is a long Supplier Name to test the L	
	PO	P0070323-0000010...	03/23/20...	123	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070323-0000040...	03/23/20...	1000	100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070327-1	03/27/20...		100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070329	03/29/20...		100	Tiffany & Co	Federal Expre...	1% 10 Net 30
	PO	P0070515-0000010...	05/15/20...	999	100	Tiffany & Co	Airborne	Net 15

Notice the red flags next to some of the orders on the list. These red flags indicate that the order is past due. The status may be **New-Past Due** or **In Process-Past Due**. Overdue orders will appear at the top of the list by default, but you can reorder the list as needed.

The **Purchase Order List** allows you to **Edit**, create **New**, **Copy**, **Delete**, **Show**, **Filter**, **Export** or **Print** the list of **Purchase Orders**. For detailed information regarding each of these options, refer to the **Working with Lists** topic.

Receiving Inventory from Purchase Orders

This function applies to Pro and Enterprise Version users only.

When you begin receiving inventory on a purchase order you created in the system, you will mark that inventory as received on the **Receive** screen. This screen allows you to select which purchase order you are receiving on and to mark individual items on that purchase order as received into a specific location.

Receiving Inventory:

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click **Receive**. The **Receive** screen appears:

Receive

Receiving Information

Purchase Order: [Dropdown] Date: 5/29/2007 Receipt Number: [Dropdown]

lblReceiptNumber

Type	Item No	Description	Ordered Qty	Recv'd Qty	Quantity	UOM	Cost	Grand Totals:
------	---------	-------------	-------------	------------	----------	-----	------	---------------

Record: 0 Of 0

On Save

☐ Print Receipt ☐ Close This PO

☐ Print Labels ☐ Create Backorder, if necessary

Quick/Scan Entry

Help Save Close

3. On the **Receive** screen, select which **Purchase Order** you are receiving on from the drop down list. When you select a **Purchase Order**, the screen populates with the information from that order as shown below:

Receive

Receiving Information

Purchase Order: Date: Receipt Number:

P0070523-0000010001X
30: CostCo
ref 5
5/23/2007 5:52:16 PM

Type	Item No	Description	Ordered Qty	Recv'd Qty	Quantity	UOM	Cost	Grand Totals:
<input type="checkbox"/> INVENTORY	400003		18.0000	0.0000	0	carton	500.00	0.00
								\$0.00

Record: Of 1

On Save

☐ Print Receipt ☐ Close This PO

☐ Print Labels ☐ Create Backorder, if necessary


Note: In the example above, the **Show Costing Information** option is enabled on the **Options** screen show costing information is displaying on the **Receive** screen. If this option was not enabled, the costing information would not appear on this screen. For more information on enabling the **Show Costing Information** option, please refer to the **Options Screen** topic.

4. Enter the date these items were received in the **Date** field. You can enter previous dates, but not future dates.
5. You can optionally type in a receipt number in the **Receipt Number** field. If you receive this order in more than one shipment, you can partially receive it and enter in each receipt number as you access the screen. Previously entered receipt numbers, if any, will appear in the **Receipt Number** drop down list.
6. Now you can mark the items as received. Select the checkbox next to the item you are receiving:

	Type	Item No	Description	Ordered Qty	Recv'd Qty	Quantity	UOM	Cost	Grand Totals:
<input checked="" type="checkbox"/>	INVENTORY	400003		18.0000	0.0000	0.00	carton	500.00	0.00
Σ									\$0.00

The **Quantity** field becomes enabled allowing you to enter the quantity you received. In the example above, you would enter however many cartons of this item you received.

You must mark these items as received into one or more locations by clicking the plus sign in front of the listing:

	Type	Item No	Description	Ordered Qty	Recv'd Qty	Quantity	UOM	Cost	Grand Totals:
	<input checked="" type="checkbox"/> INVENTORY	400003		18.0000	0.0000	0	carton	500.00	0.00
	Location		Quantity						
	Bin2		5						
	Σ								
	Type	Item No	Description	Ordered Qty	Recv'd Qty	Quantity	UOM	Cost	Grand Totals:
Σ									\$0.00

A box appears allowing you to select a **Location** and a **Quantity** for that location.

Please be aware that quantities entered here are broken into **Eaches**. For instance, in the example above, 18 cartons of Item 400003 were ordered. Assume there are 200 items per carton. When you enter 5 in the Location/Quantity field, you are telling the system that 5 items from a carton were received into this specific location, rather than 5 cartons being received. If you wanted to receive 5 cartons into this location, you would need to enter 1000 (5 x 200).

7. After you have entered quantity amounts for all items you are receiving, you can (optionally) select tasks from the **On Save** section. You can select to:
 - **Print Receipts:** When this is selected, when you click **Save** all receipts entered for this **Receive** screen will print. This means that if you received this order in two separate shipments, and entered two separate receipts in the **Receipt Number** field, both receipts will print.
 - **Print Labels:** When this is selected, when you click **Save**, labels will print for the received items.
 - **Close This PO:** When this is selected, when you click **Save**, the selected Purchase Order will be marked as closed. You would want to use this when you have received all items from the purchase order.
 - **Create Backorder, if necessary:** When this is selected, after you click **Save**, a backorder will be created for any items that have not been received on this Purchase Order.
8. Click **Save** to save your changes. The **Received Quantity** field for each item will go up by the amount you entered as received. When you click **Save**, the on hand quantities for the items you just received will increase by the amounts you entered.

If you partially received the order, the order's status will change to **In Process**.

Quick/Scan Entry:

This feature opens a window that allows you to quickly type in or scan in information. When you click the **Quick/Scan Entry** button, a window similar to the one shown below appears:

Receive Quick Entry

Item Number:
1005

Description:

Line Item Details:
1 Trackby Serial / Trackby Serial Item / 1 Trackby

Location:
Site 1, Loc 1

Serial Number:
1002

Lot:

Date Code:

Pallet:

Quantity:
1.00

Ordered Qty (In Stocking Unit.): 80.00
Recv'd Qty (In Stocking Unit.): 1.00

[Help](#) [Receive](#) [Close](#)

You can scan the barcode label on the item and the fields on the **Quick/Scan Entry** screen will populate with the scanned information. Click the **Receive** button, then scan the next item and the screen clears and repopulates with the new information. This is an easy method for quickly marking items as picked.

Deleting Purchase Orders/Pick Orders

You can quickly delete a Purchase Order or Pick Order from the Purchase Order or Pick Order List. Only orders with a status of New can be deleted. Once the status changes to In Process, meaning the order is partially received or partially picked, the order can no longer be deleted (however, these can still be edited or closed).

Deleting Purchase Orders/Pick Orders:

1. From the **Main Window**, select **Lists > Purchase Orders** or **Lists > Pick Orders**, depending on which type of order you want to delete. The **List** screen appears.
 2. On the **List** screen, highlight the order you want to delete, then click the **Delete** button. If this order cannot be deleted (has a status of **In Process**), a warning message will appear notifying you. If the order can be deleted, a confirmation message will appear.
 3. Click **Yes** on the confirmation message to delete the order.
-

Receive/Pick Menu

This function applies to Pro and Enterprise Version users only.

The **Receive/Pick Menu** groups functions for receiving inventory from purchase orders and shipping pick orders into one location. You can also manage your shipping methods and payment methods from this screen as well as customize automatically generated purchase order and pick order numbers.

Receiving can be done either through the PC or on the mobile devices and adds inventory to your database. Pick orders are orders to pick and ship inventory to a customer, thus removing the inventory from your database.

To Access the Receive/Pick Menu:

1. On the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.



2. Click on any of the **Receive/Pick Menu** icons to go to that function. Detailed descriptions of the options found on the **Receive/Pick Menu** are provided below:
 - **Receive** - The **Receive** function allows you to receive inventory from a purchase order. This adds inventory to an item in the same way you manually add inventory via the **Add Inventory** screen (accessed from the **Inventory** menu or from the **Item** and **Inventory** lists). For detailed information on this screen, please refer to the **Receiving Inventory** topic.

- **Pick** - The **Pick** function allows you to designate pick orders for shipping or to close a pick order. **Pick Orders** list inventory that needs to be sent to a customer. **Pick** orders remove inventory from an item in the same way you manually remove inventory via the **Remove Inventory** screen (accessed from the **Inventory** menu or from the **Item** and **Inventory** lists.) For information creating a new pick order, please refer to the **Creating a Pick Order** topic. For information on shipping **Pick Orders**, please refer to the **Picking Orders** topic. For an overview of Pick Orders, please refer to the **Pick Orders Overview** topic.
 - **Manage Ship Methods** - This function access a screen that allows you to add, delete, export or print shipping methods you have entered into the system (via the **Shipping Method** field on the **Create New Purchase Order** or **Create New Pick Order** screens). For detailed information on this function, please refer to the **Managing Shipping Methods** topic.
 - **Manage Payment Methods** - This function access a screen that allows you to add, delete, export or print shipping methods you have entered into the system (via the **Shipping Method** field on the **Create New Purchase Order** screen). For detailed information on this function, please refer to the **Managing Payment Methods** topic.
 - **Customize Numbers** - This feature allows you to customize the format of **Purchase Order Numbers** and **Pick Order Numbers** that the software automatically generates when creating a new **Purchase Order** or **Pick Order**. For detailed information on this feature, please refer to the **Customizing Numbers** topic.
-

Managing Payment Methods

This function accesses a screen that allows you to delete, export or print shipping methods you have entered into the system via the **Payment Method** field on the **Create New Purchase Order** screen.

This topic discusses:

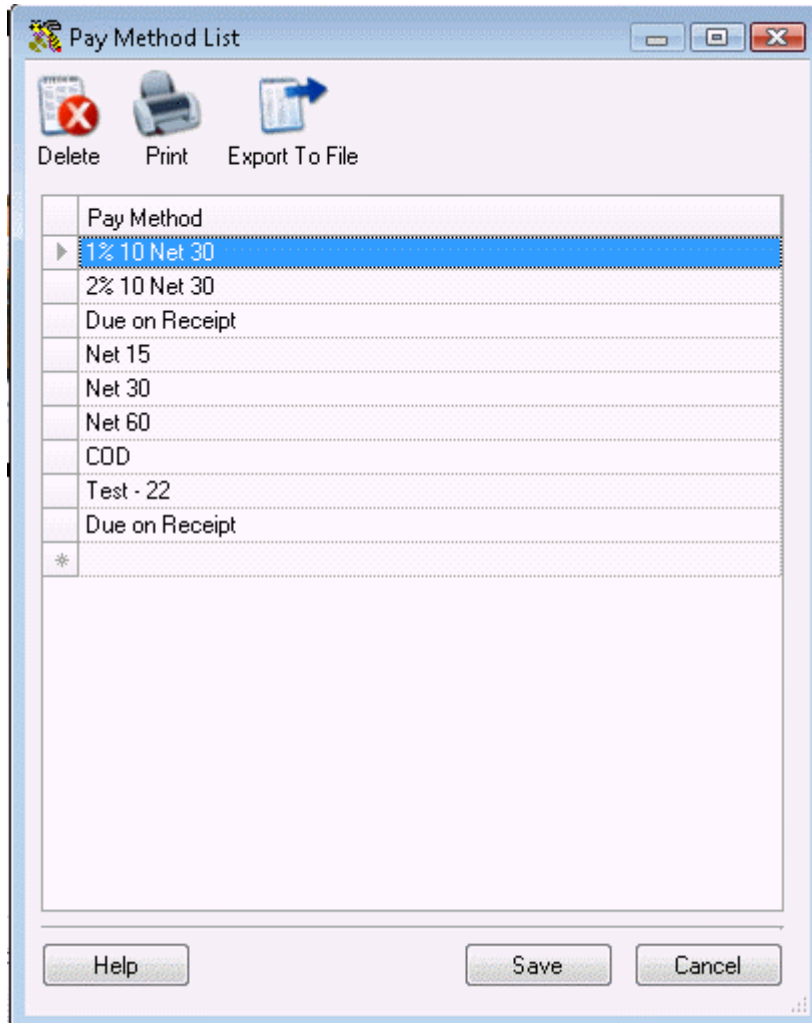
Adding Payment Methods

Deleting/Printing/Exporting Payment Methods

Adding Payment Methods:

Note: **Payment Methods** can also be added on the **Create New Purchase Order** screen by typing in a new method in the **Payment Method** field.

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click the **Manage Payment Methods** icon. The **Payment Method List** appears displaying all payment methods entered into the system.

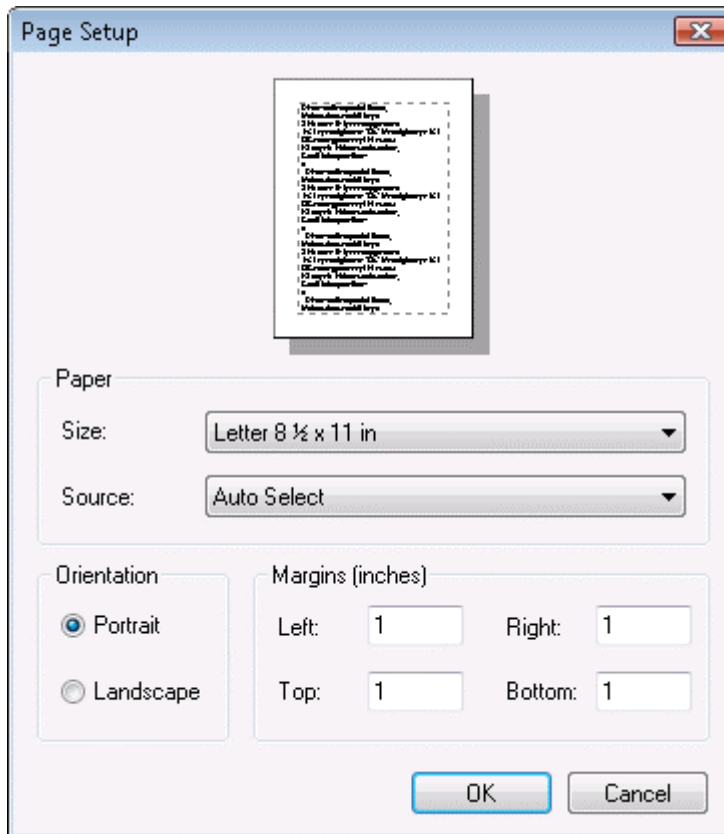


3. The last row on the grid is blank. Click in the row and type in the new payment method.
4. Press **ENTER** or the down arrow key on your keyboard to go to the next new row and enter another payment method.
5. Click **Save** to save your additions or **Cancel** to close the screen without saving.

Deleting/Printing/Exporting Payment Methods:

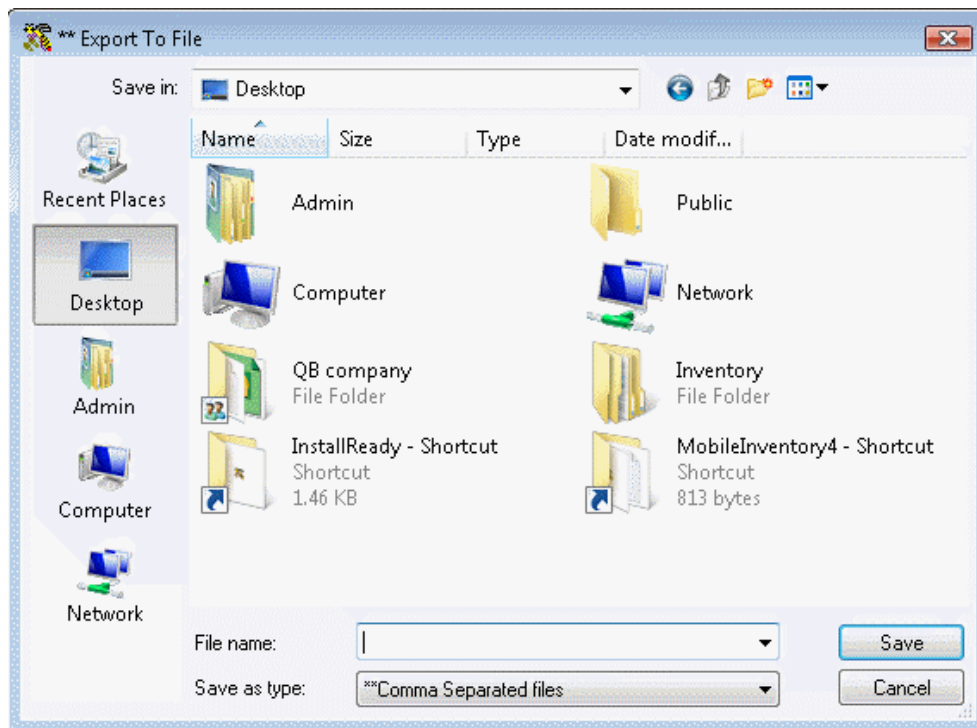
1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click the **Manage Payment Methods** icon. The **Payment Method List** appears displaying all shipping methods entered into the system.
3. Highlight the desired listing, then select the function you want to perform. Options are:

- **Delete** - This deletes the highlighted shipping method from the database. When you select this option, a confirmation message will appear. Select **Yes** on the confirmation message to delete the method. It will no longer appear in the **Payment Methods** drop down list.
- **Print** - Allows you to print the **Payment Method List**. When this option is selected, a standard **Page Setup** screen appears allowing you to enter margins. An example of this screen is shown below:



Click the **OK** button on the **Page Setup** screen to print the list. The list will print to your default printer.

- **Export** - Allows you to export the **Payment Method List** to an external text file. When the **Export** option is selected, a screen appears allowing you to specify where the exported data will be saved on your computer. An example of the **Export** screen is shown below:



Make sure you save this to a location you can remember. You must also choose a name for your file on this screen. After you have made your selections, click **Save** to export your data.

A confirmation message will appear when your data has been successfully exported by the system.

Managing Shipping Methods

This function accesses a screen that allows you to delete, export or print shipping methods you have entered into the system via the **Shipping Method** field on the **Create New Purchase Order** or **Create New Pick Order** screens.

This topic discusses:

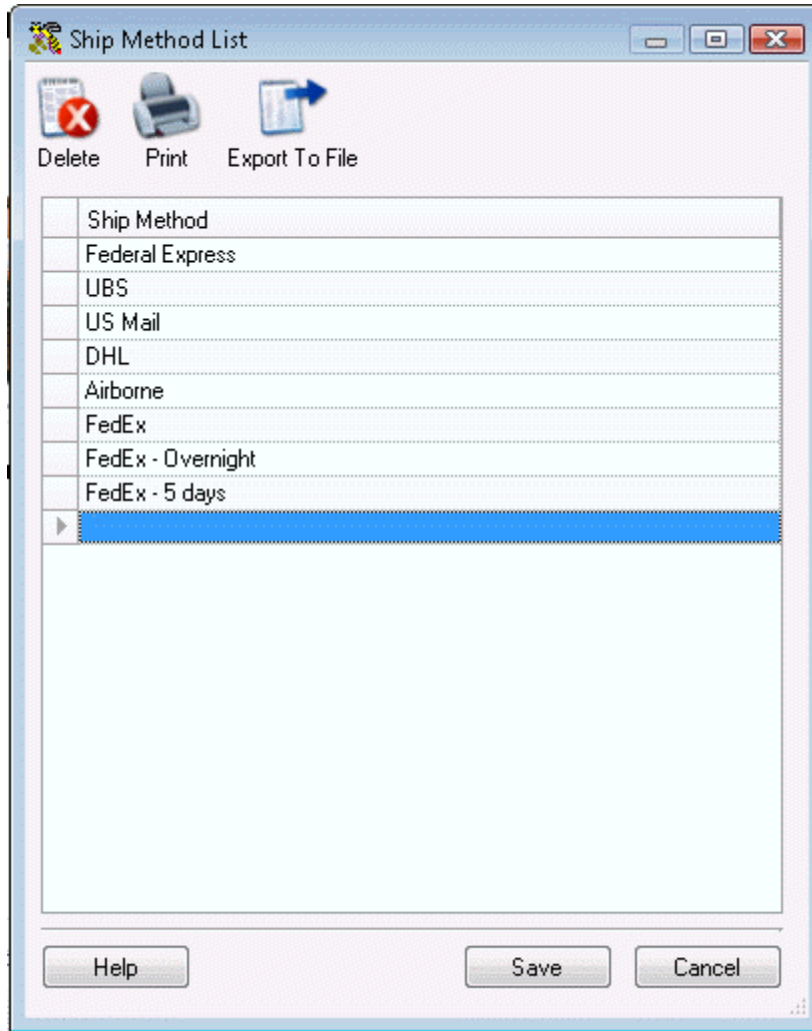
Adding Shipping Methods

Deleting/Printing/Exporting Shipping Methods

Adding Shipping Methods:

Note: **Shipping Methods** can also be added on the **Create New Purchase Order** and **Create New Pick Order** screens by typing in a new method in the **Shipping Method** field.

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click the **Manage Shipping Methods** icon. The **Ship Method List** appears displaying all shipping methods entered into the system.



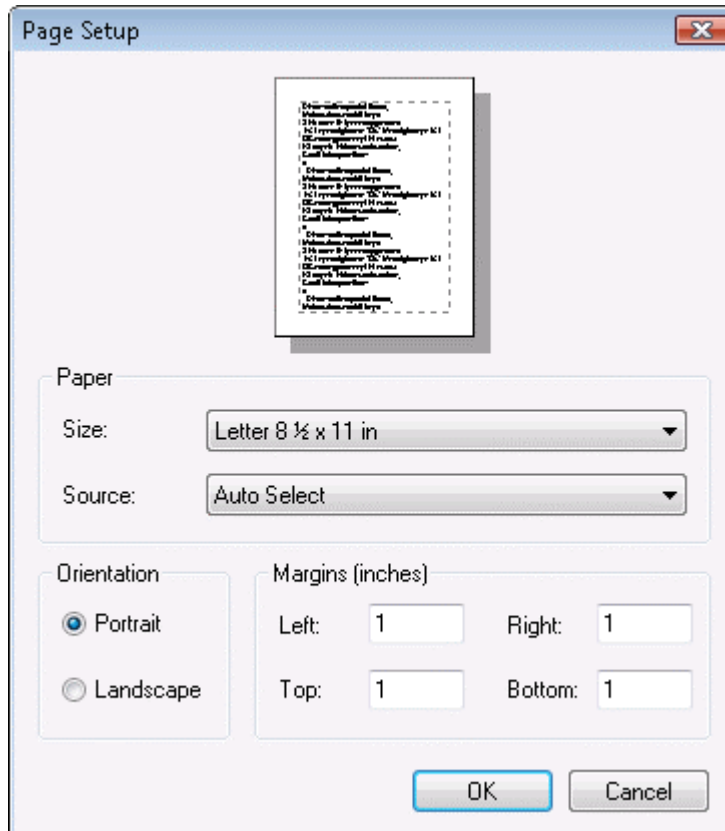
3. The last row on the grid is blank. Click in the row and type in the new shipping method.
4. Click enter to go to the next new row and enter another shipping method.
5. Click **Save** to save your additions or **Cancel** to close the screen without saving.

Deleting/Printing/Exporting Ship Methods:

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click the **Manage Ship Methods** icon. The **Ship Method List** appears displaying all shipping methods entered into the system.
3. Highlight the desired listing, then select the function you want to perform. Options are:
 - **Delete** - This deletes the highlighted shipping method from the database. When you select this option, a confirmation message will appear. Select **Yes** on the

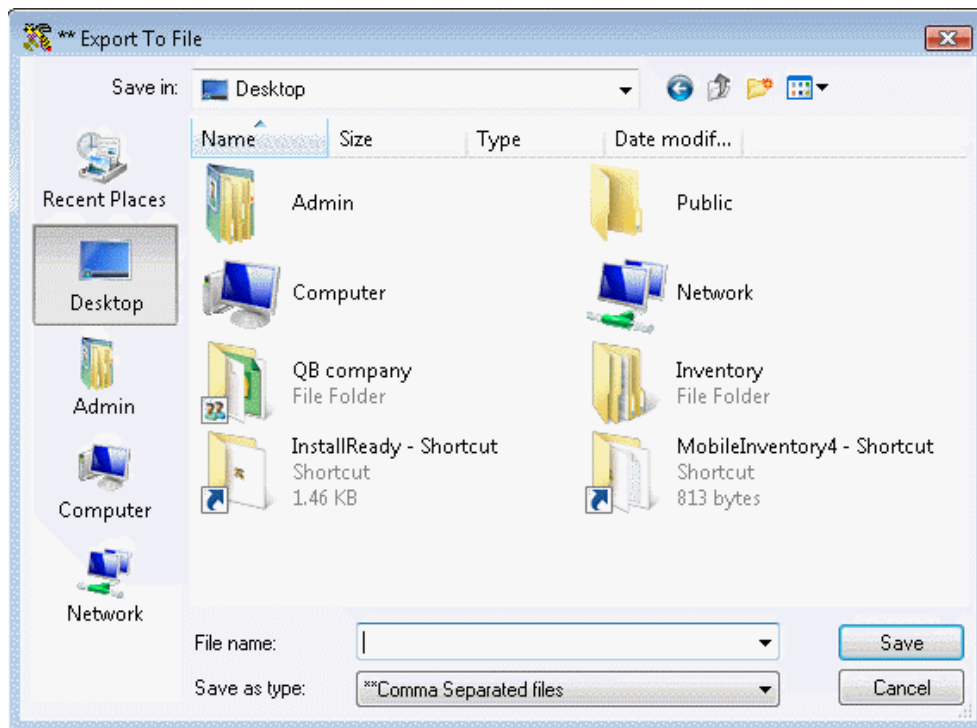
confirmation message to delete the method. It will no longer appear in the **Shipping Methods** drop down list.

- **Print** - Allows you to print the **Ship Method List**. When this option is selected, a standard **Page Setup** screen appears allowing you to enter margins. An example of this screen is shown below:



Click the **OK** button on the **Page Setup** screen to print the list. The list will print to your default printer.

- **Export** - Allows you to export the **Ship Method List** to an external text file. When the **Export** option is selected, a screen appears allowing you to specify where the exported data will be saved on your computer. An example of the **Export** screen is shown below:



Make sure you save this to a location you can remember. You must also choose a name for your file on this screen. After you have made your selections, click **Save** to export your data.

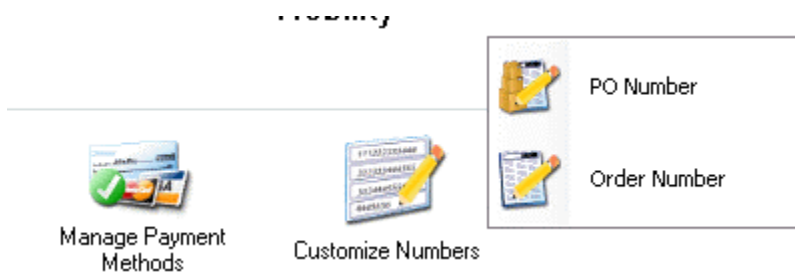
A confirmation message will appear when your data has been successfully exported by the system.

Customizing Numbers

To make creating Purchase Orders and Pick Orders easier, InventoryControl allows you to set up auto-generated numbers. This allows you to quickly create sequential numbers at the click of a button on the **Create New Purchase Order** and **Create New Pick Order** screens.

Customizing Purchase Order and Pick Order Numbers:

1. From the **Main Window**, click the **Receive/Pick** icon. The **Receive/Pick** menu appears at the bottom of the screen.
2. On the **Receive/Pick** menu, click **Customize Numbers**. A menu appears allowing you to select to customize **Purchase Order Numbers** or **Pick Order Numbers**.



3. Click on **Purchase Order Numbers** or **Pick Order Numbers**, depending on what you want to customize. The screen for these two are identical so for this example, we are going to select **Purchase Order Numbers**. The **Define PO Number Format** screen appears.

The 'Define PO Number Format' dialog box contains the following elements:

- Title Bar:** Define PO Number Format
- Instructions:** Please define the PO Number Format below: Purchase Order Number (a.k.a PO Number) is an alpha-numeric combination of up to 38 characters. Please specify its formation below.
- Table:** A table with three columns: Type, Value, and Length.
- Buttons:** Delete, Move Up, Move Down.
- Type Selection:** A dropdown menu labeled 'Type'.
- Buttons:** Add, Replace.
- Preview:** The PO Number will look like this: [Text Field] Total Characters: 0
- Buttons:** Help, OK, Cancel.

4. Select the type of value you are entering from the **Type** drop down list. Your options are:

- **Text** - This option enters text or numeric data into the number. If you select **Text**, a text field appears allowing you to enter the text you want to appear in the number.

The screenshot shows a configuration window for the 'Text' type. It has a 'Type' dropdown menu set to 'Text', a text input field, and two buttons labeled 'Add' and 'Replace'.

- **Date** - This option inserts the date into the number. If you select **Date**, a format field appears allowing you to select how you want the date to appear (mm/dd/yy. etc.)

The screenshot shows a configuration window for the 'Date' type. It has a 'Type' dropdown menu set to 'Date', a 'Format' dropdown menu with options 'mmddyyyy', 'ddmmyyyy', 'mmddyy', and 'ddmmyy' (the first option is selected), and two buttons labeled 'Add' and 'Replace'. Below the format dropdown, it says 'The PD Number will look like this:' followed by the selected format 'mmddyyyy'. To the right, it says 'Total Characters: 0'.

- **Counter** - This option inserts a sequential counter into the number. If you select **Counter**, fields appear allowing you to select how many digits you want to appear in the counter and at what number the counter should start. In the example below, we entered 5 in the Digits field and 2 in the counter field. This means the counter will display up to 5 digits and begin counting at 2.

The screenshot shows a configuration window for the 'Counter' type. It has a 'Type' dropdown menu set to 'Counter', a 'Digits' field with the value '5', a 'Starting From' field with the value '2', and two buttons labeled 'Add' and 'Replace'.

5. When you have chosen your **Type** and entered the required values, select **Add**. Your entries will appear in the grid at the top of the screen and an example of how your number will look appears in the window at the bottom of the screen.

Define PO Number Format

Please define the PO Number Format below:
 Purchase Order Number (a.k.a PO Number) is an alpha-numeric combination of up to 38 characters. Please specify its formation below.

Type	Value	Length
Text	PO	2
Date	MMddyy	6
Text	-	1
Counter	00001	5
Text	hello	5

Buttons: Delete, Move Up, Move Down

Type: Counter Digits: 5 Starting From: 2 Add Replace

The PO Number will look like this: Total Characters: 19

PO052907-00001hello

Buttons: Help, OK, Cancel

- Repeat steps 4 and 5 until you have entered all types of data you want to appear in your number. Your selections will appear in the number in the order they are displayed in the grid.

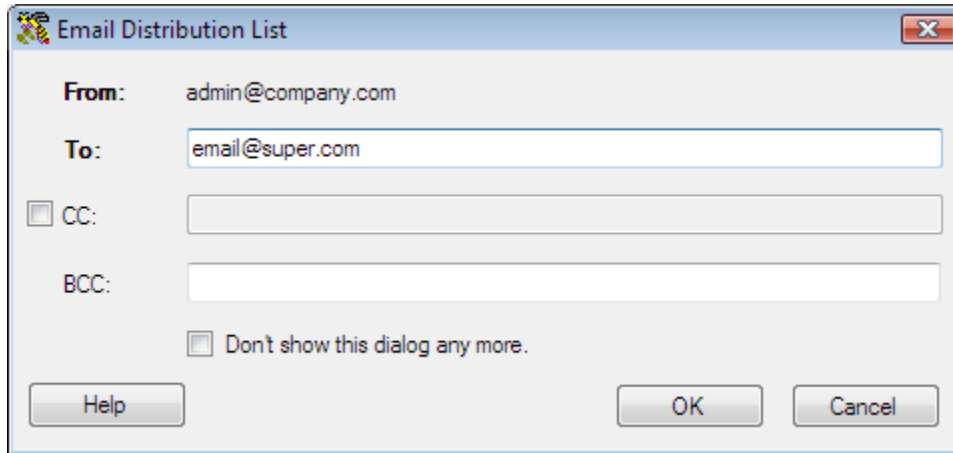
You can change the order by highlighting a listing in the grid and clicking the **Up** or **Down** buttons.

You can delete an item in the grid by highlighting it and clicking the **Delete** button.

- Click the **OK** button when you are finished formatting the number.

Email Distribution List

If the **Email on Save** box is checked on the **Create New Pick Order** or **Create New Purchase Order** screen, a copy of this order is automatically sent to the email address listed in the **Customer** screen for this customer (for Pick Orders) or to the email address listed in the **Supplier** screen for this supplier (for Purchase Orders) when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent. An example of this screen is shown below:

The image shows a Windows-style dialog box titled "Email Distribution List". It has a standard title bar with a close button (X). The dialog contains several fields: "From:" with the value "admin@company.com", "To:" with the value "email@super.com", and "CC:" and "BCC:" with empty text boxes. There is a checkbox next to the "CC:" field that is currently unchecked. Below these fields is another checkbox labeled "Don't show this dialog any more.", which is also unchecked. At the bottom of the dialog are three buttons: "Help", "OK", and "Cancel".

To Addresses: The order is sent **to** the email address listed in the **Customer** or **Supplier** screen. If there is no email address listed on the **Customer** or **Supplier** screen, you will receive an error message when you try to send emails. You can add an address to the **Customer** or **Supplier** screen, and/or edit the address listing on these screens at any time. See [Creating New Suppliers](#) or [Creating New Customers](#) for information on the **Suppliers** or **Customers** screen.

From Addresses: The order is sent **from** the email address listed in the **Company Information** screen. If there is no email address listed on the Company Information screen (this should be your company email address), you will receive an error message when you try to send emails. You can add/edit your company email address at any time on the **Company Information** screen. See [Entering Company Information](#) for more details on the **Company Information** screen.

CC Addresses: An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the CC address by deselecting the checkbox next to the **CC Addresses** field on the **Email Destination List**.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

For more information on setting these email options on the **Options** screen, please refer to the [Options Screen](#) topic. For more information on creating pick orders, please refer to the [Creating a Pick Order](#) topic. For more information on creating purchase orders, please refer to the [Creating a Purchase Order](#) topic.

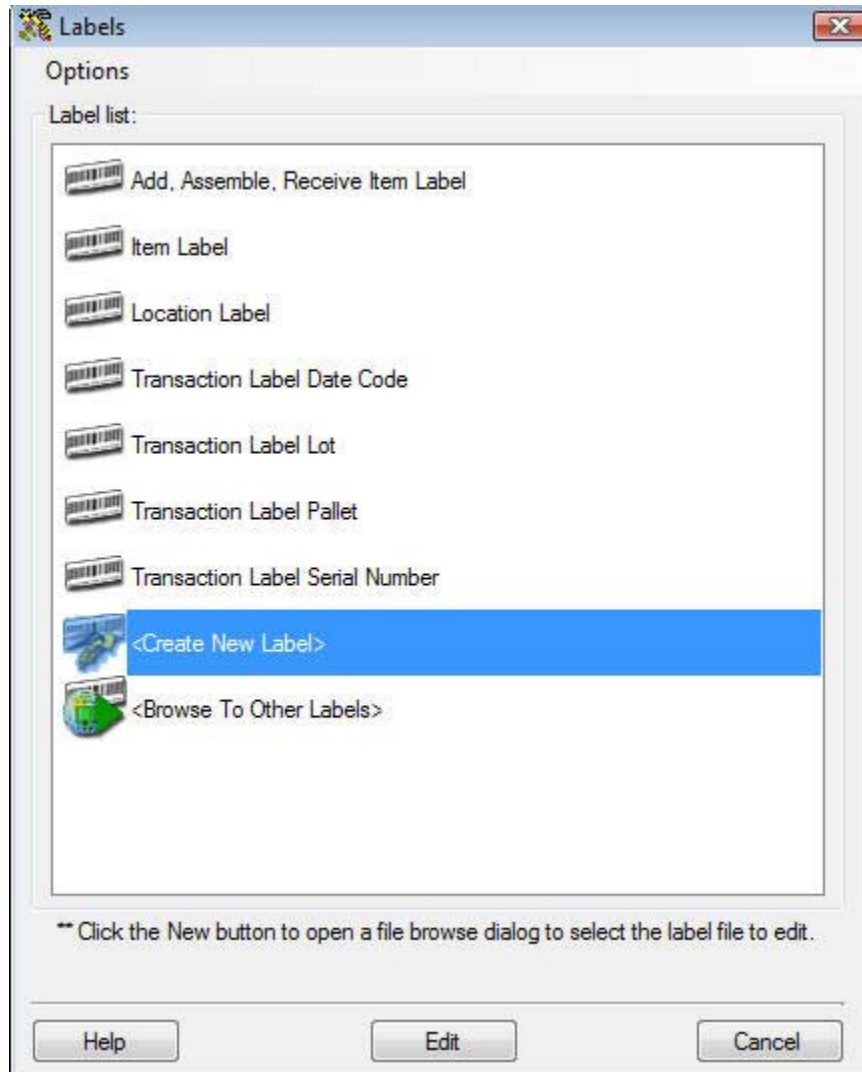
Labels

Labels Menu

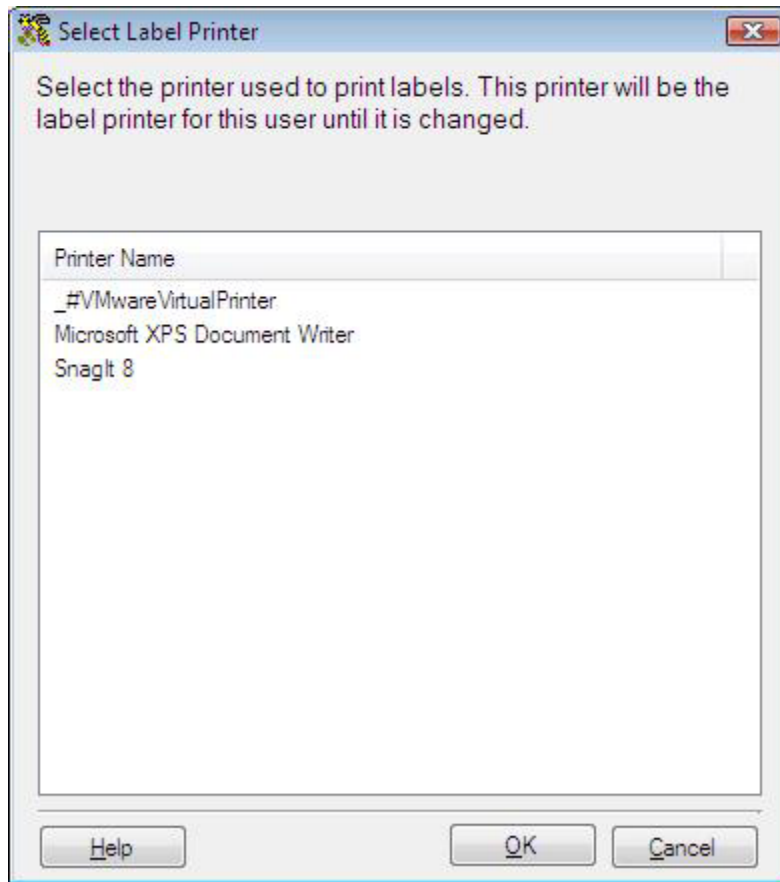
The **Labels** menu provides access to pre-built labels contained in the software or allows you to create new labels.

Printing, Editing, Creating, Browsing Labels:

1. On the **Main Window**, click **Labels**. The **Labels** screen appears:



2. **Printing Labels:** To print labels:
 - a. You must first select a Label printer. To do this, click **Options> Select Label Printer**. The **Select Label Printer** screen appears.



Highlight the printer you want to use, then click **OK**. This label printer will remain the default label printer for this user until you change it on this screen.

- b. Select the label you want to print from the **Label** screen.

Editing Labels: To edit a label that appears in the **Label** list, highlight the item then click the **Edit** button or double-click the label name. This will start the **Wasp Labeler** application with the selected label loaded.

Creating Labels: Selecting **<Create New Label>** will open Wasp Labeler with a blank label template.

Browsing Labels: Selecting **<Browse To Other Labels>** lets you select the .LAB file you want to open by browsing your drives.

For more information or help on the Wasp Labeler software click on Help within Wasp Labeler.

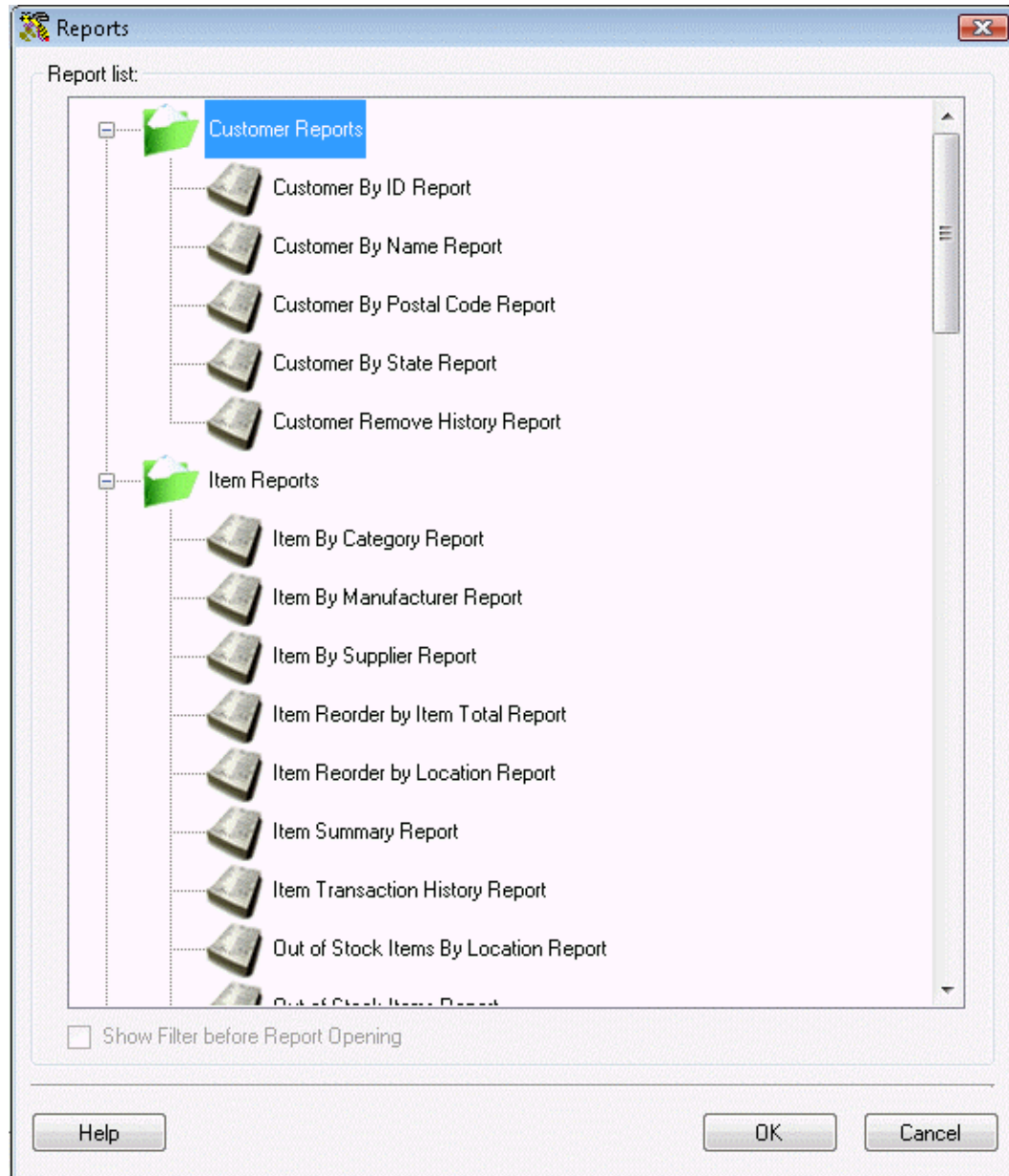
Reports

Report Selection

This software comes with many built-in reports to help you maintain your inventory.

Selecting a Report:

1. From the **Main Window**, click the **Reports** icon. The **Reports** screen appears:



2. Highlight the desired report, then click the **OK** button, or double-click on the report name. The report opens in the Report Viewer. For more information on viewing reports, please refer to the **Report Viewer** topic.

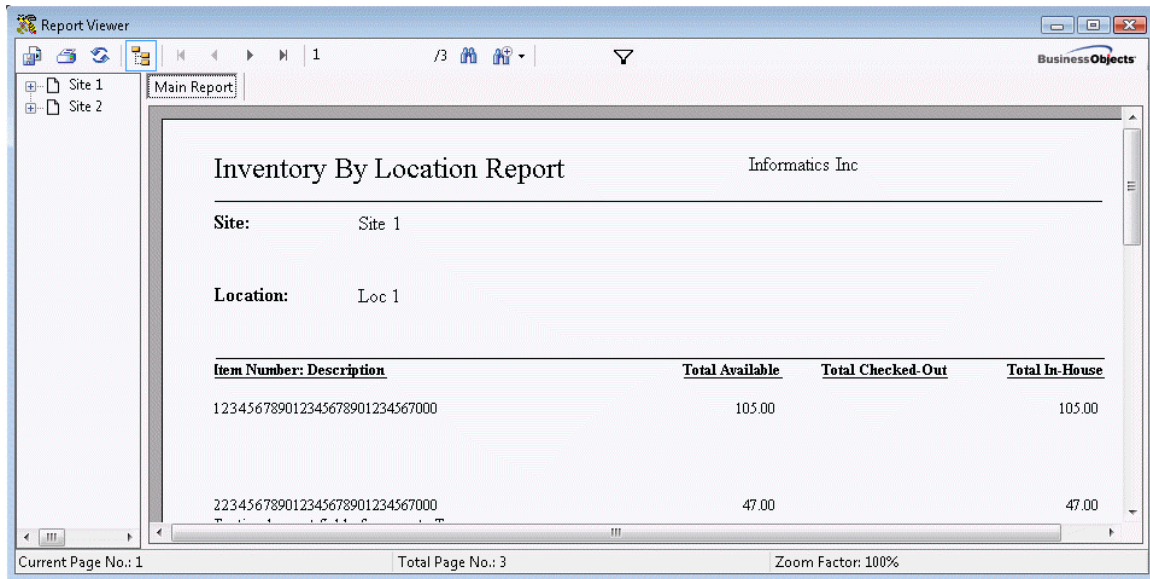
Selecting **<Browse To Other Reports>** lets you select the .RPT file you want to open by browsing your drives.

Note: If you use Crystal Reports™ (not included with Inventory Control) to create custom reports, they will be listed with the default reports shown above if you save your new .RPT files in the folder called Reports under the folder where you installed Inventory Control. If you are unsure where this is, just use the Windows Find (or Search) command to locate the folder containing the file **Inventory Control.exe**, then save your .RPT files in the Reports folder beneath it.

Report Viewer

The **Report Viewer** presents reports in an interactive environment that permits keyword searches, printing and export to Adobe Acrobat® Reader™ (.pdf), Microsoft® Excel (.xls), Microsoft® Word (.doc) or Rich Text Format (.rtf) files.

The Report Viewer is accessed by selecting a report name from the Report Selection screen.



The Status Bar in this example reports the current page being viewed, the total number of pages and the current zoom factor.

The left panel shows the report tree that shows how the report is organized and allows you to chose specific nodes.

The **ReportViewer Tool Bar** provides the following functions:



Go to First Page takes you to the beginning of the report.



Go to Previous Page



Go to Next Page



Go to Last Page takes you to the end of the report.



Print Report launches the Print dialog.



Refresh updates the report with current data.



Export Report allows you to save the report as your choice of any of the following formats:

Adobe Acrobat® Reader™ (.pdf file)

Microsoft® Excel (.xls file)

Microsoft® Word (.doc file)

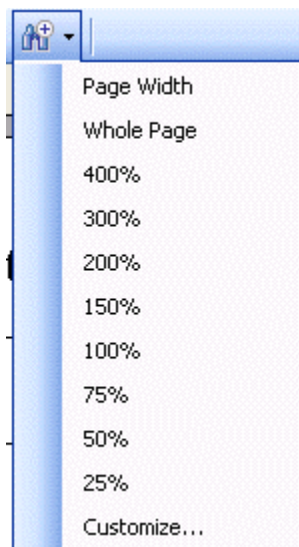
or Rich Text Format (.rtf file)



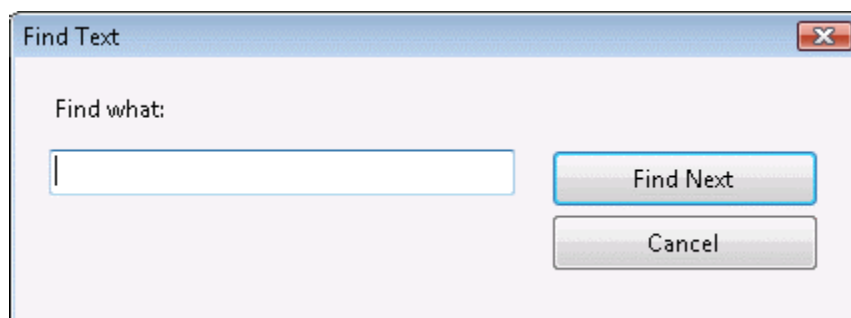
Toggle Group Tree OFF/ON - When this is turned off, it will increase the width of the Report display by turning off the Group Tree area at the left of the ReportViewer screen. When it is on, it will restore the Group Tree display at the left of the ReportViewer screen - the default display.



Zoom allows you to scale the Report display via a drop list of percentages:

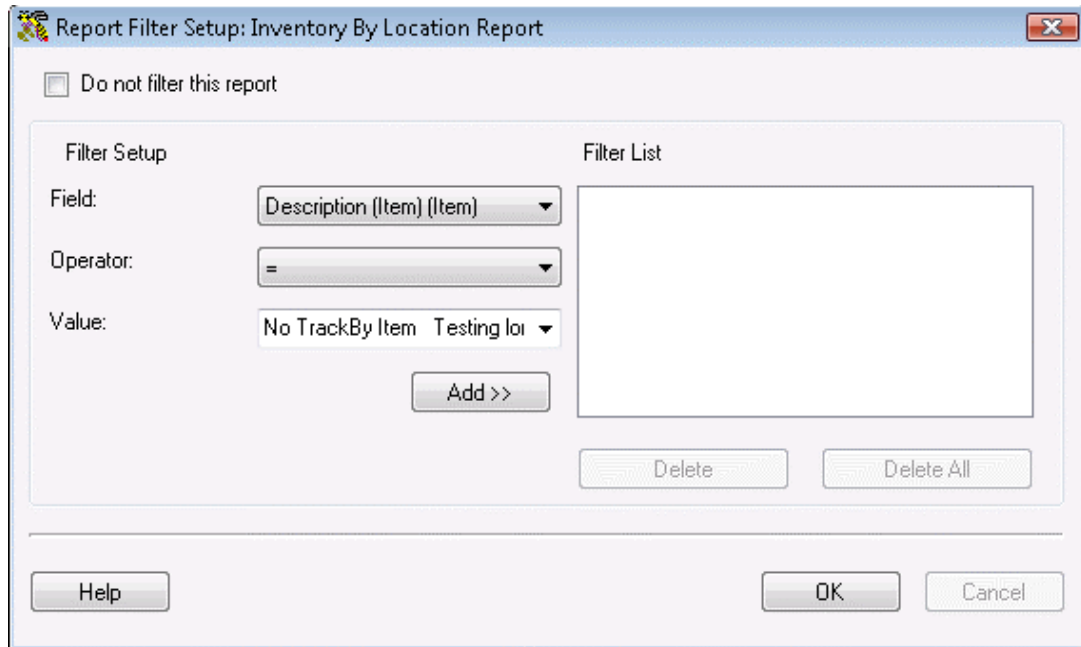


Search allows you to find all occurrences of a specified keyword within the displayed Report:



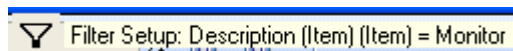
Specify a keyword and click **Find Next** to find the next occurrence.

 **Filter** allows you to create filters for the selected report using the Report Filter Setup dialog.



The dialog box is titled "Report Filter Setup: Inventory By Location Report". It contains a checkbox labeled "Do not filter this report". Below this, there are two main sections: "Filter Setup" and "Filter List". In the "Filter Setup" section, there are three dropdown menus: "Field:" with "Description (Item) (Item)" selected, "Operator:" with "=" selected, and "Value:" with "No TrackBy Item Testing lo" selected. Below these is an "Add >>" button. In the "Filter List" section, there is an empty rectangular box. Below the "Filter List" box are "Delete" and "Delete All" buttons. At the bottom of the dialog are "Help", "OK", and "Cancel" buttons.

Once a filter has been applied, the filter criteria will be displayed to the right of the **Filter** tool in the toolbar.



Depending on the number of transactions in your database, the Report you have selected, and the performance of your PC, ReportViewer can remain blank for quite some time while it access the database and dynamically builds the Report for display.

Alerts

InventoryControl contains built alerts that you can display to tell you when action needs to be taken on certain items or orders in the system. To access the Alerts feature, select **Check for Alerts** from the **Main** screen.

The following is a list of **Alerts** that might appear on your system:

Kit Item(s) with incomplete info *This function applies to Pro and Enterprise Version users only.*

Assembly items with incomplete info *This function applies to Pro and Enterprise Version users only.*

Checked Out Item(s) Past Due

Purchase Orders Past Due *This function applies to Pro and Enterprise Version users only.*

Pick Orders Past Due *This function applies to Pro and Enterprise Version users only.*

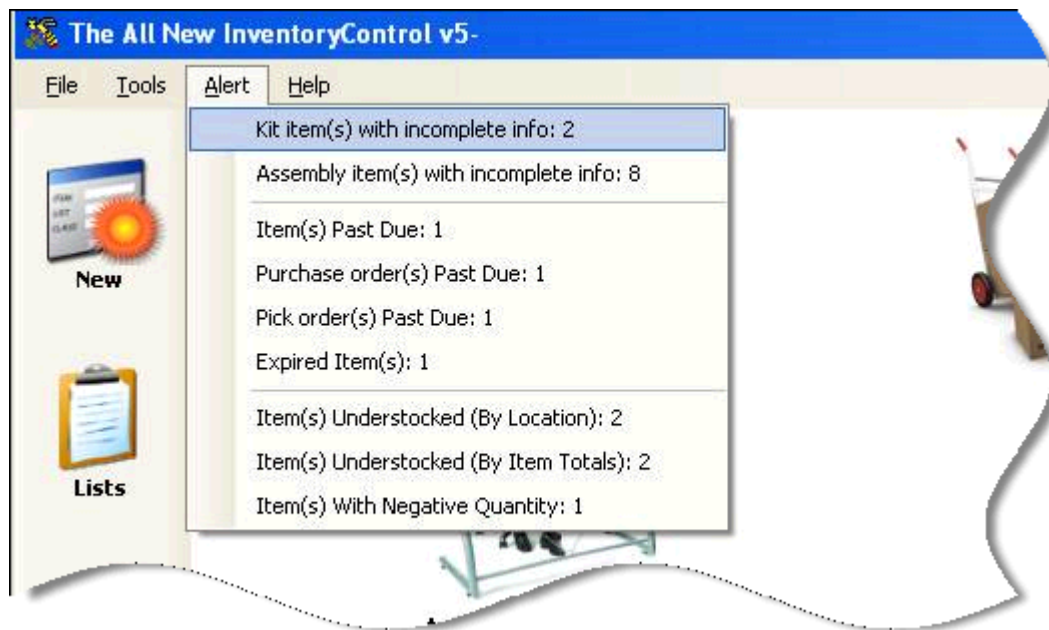
Expired Items

Items Understocked by Location

Items Understocked by Item Totals

Items with Negative Quantity

Below is an example of the **Alerts** menu:



Working with Mobile Devices

Pending Uploads Screen

The **Pending Uploads** screen allows you to select and validate data for upload into the InventoryControl database (on the PC). This data has previously been collected from one or more mobile devices.

Using the Pending Uploads Screen:

1. This screen will automatically appear after transferring data from the mobile device to the PC.

OR

From the **Mobility Menu**, click **Process Mobile**.



Step 1: Upload Selection is the first screen presented:

The screenshot shows a software window titled 'Pending Uploads' with a close button in the top right. The main area is titled 'Step 1: Upload Selection' and contains the instruction 'Select the user to upload.' Below this is a dropdown menu showing 'WindowsCE232_20070531_193130'. To the left of the main area is a preview of a data list with a green arrow pointing to it. At the bottom are buttons for 'Help', '< Back', 'Next >', and 'Cancel'.

Type	Quantity
Customers	0
Suppliers	0
Locations	1
Transactions	1

2. Use the **Upload Selection** screen to select one of the sets of data that has been downloaded from a mobile device. There may be several files in the list, depending on how many mobile devices you use and how often you do this step to process accumulated files.

We recommend that you always select the oldest file and process those transactions first.

The example above shows transactions uploaded from WindowsCE232 on May 31, 2007 at 19:31:30.

The device WindowsCE232 has been selected from the drop down list that displays all the mobile devices that have transferred mobile data to the PC, but have not yet been uploaded into the InventoryControl database.




3. Click **Next**.

If you had a new addition (customer, location, etc.) the New Records screen appears listing these. You can accept or reject each of them. If the new data was created in error, you can also assign an existing value to take its place.

If no new **Customers, Suppliers** or **Locations** were created by the mobile device User, InventoryControl will skip this step.

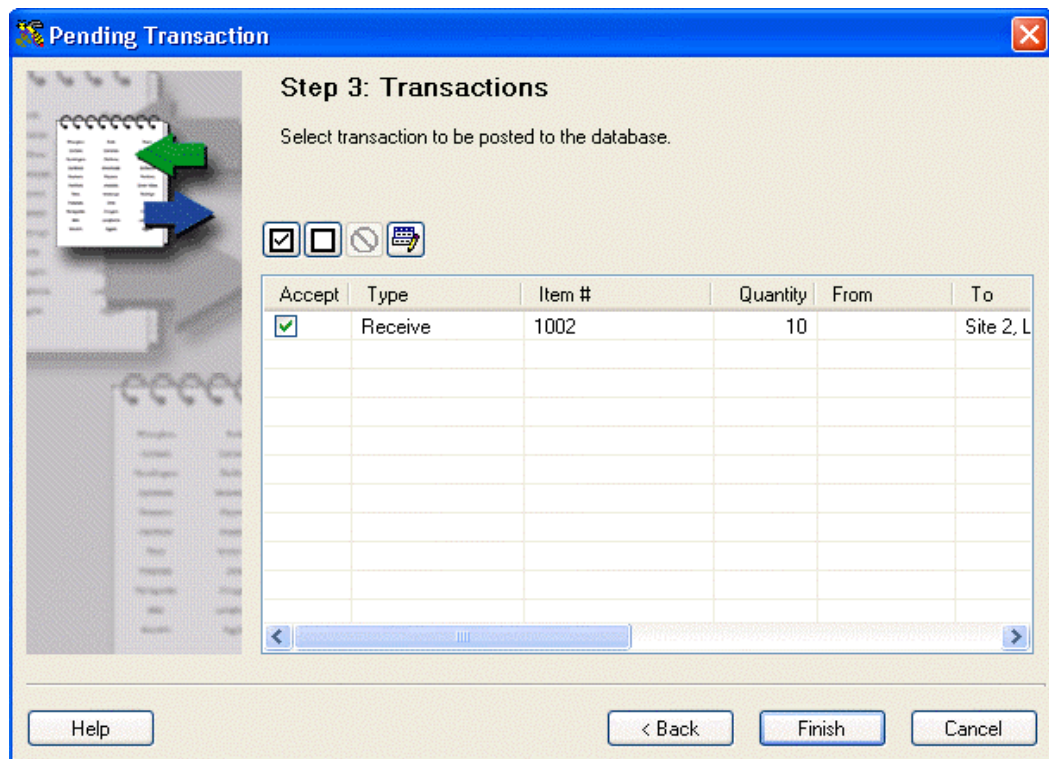
On occasion, you might notice that the number of new Customer, Supplier or Location records displayed here in Step 2 are less than the quantity shown in Step 1. This can happen when an existing Customer, Supplier or Location was not downloaded to the mobile device due to filtering done creating a mobile database. When the mobile device user subsequently specifies a "new" Customer, Supplier or Location while performing an inventory transaction, the "new" mobile device record gets automatically mapped to the existing PC record between Steps 1 and 2.

The **New Records toolbar** has the following functions:

-  Select all transactions in the list for Acceptance.
-  De-Select transactions in the list.
-  Assign an Existing Value instead of creating a new record

When this button is clicked, a screen appears with a drop down list of existing locations from which a value can be selected. Click **OK** after selecting the Existing Location you want to Assign from the drop down list.

4. Click **Next** to continue. The **Transactions** screen appears:



This screen displays any pending transactions.


The **Transactions toolbar** has the following functions:



This example shows an Add transaction that has been de-selected because there is an Error associated with it:

Click on the Display Error  toolbar button to see details about this record's error.




This example shows an Add transaction that has been de-selected because there is a Warning associated with it:

Accept	Type
<input checked="" type="checkbox"/>	Add
<input checked="" type="checkbox"/>	Move
<input type="checkbox"/> 	Audit

Click on the Display Error  toolbar button to see details about this record's warning.

The Error  or Warning  message associated with the selected transaction will be displayed in the XML Process Errors screen.

Click **Close** to return to the Pending Transaction screen.

The Display Error toolbar button will be  grayed-out when no record with an Error  or Warning  symbol is highlighted.



Edit Transactions allows you to make changes to the values specified at the mobile device.


6. Click **Finish** when you've decided which transactions to Accept and marked them appropriately.

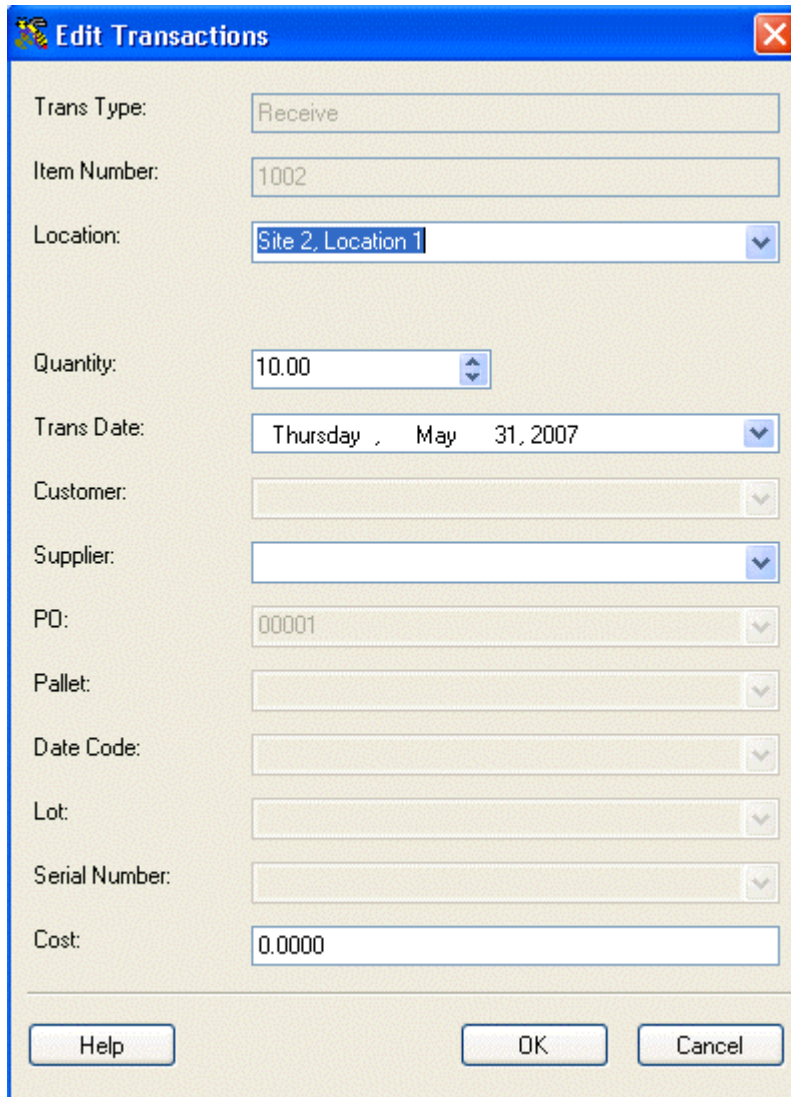
Pending Uploads will post the Accepted transactions to the InventoryControl database and then return to the Main Window.

Mobile Devices Pending Uploads - Edit Transactions

The **Edit Transactions** screen allows you to make changes to the values specified for a transaction (add, remove, etc.) before they are added to the database.

Editing Transactions:

1. From the [Pending Transactions](#) screen, click the **Edit Transactions**  button. The **Edit Transactions** screen appears:



The screenshot shows the 'Edit Transactions' dialog box. It has a blue title bar with a close button (X) in the top right corner. The dialog contains several input fields and dropdown menus. The fields are: Trans Type (Receive), Item Number (1002), Location (Site 2, Location 1), Quantity (10.00), Trans Date (Thursday, May 31, 2007), Customer (empty), Supplier (empty), PO (00001), Pallet (empty), Date Code (empty), Lot (empty), Serial Number (empty), and Cost (0.0000). At the bottom, there are three buttons: Help, OK, and Cancel.

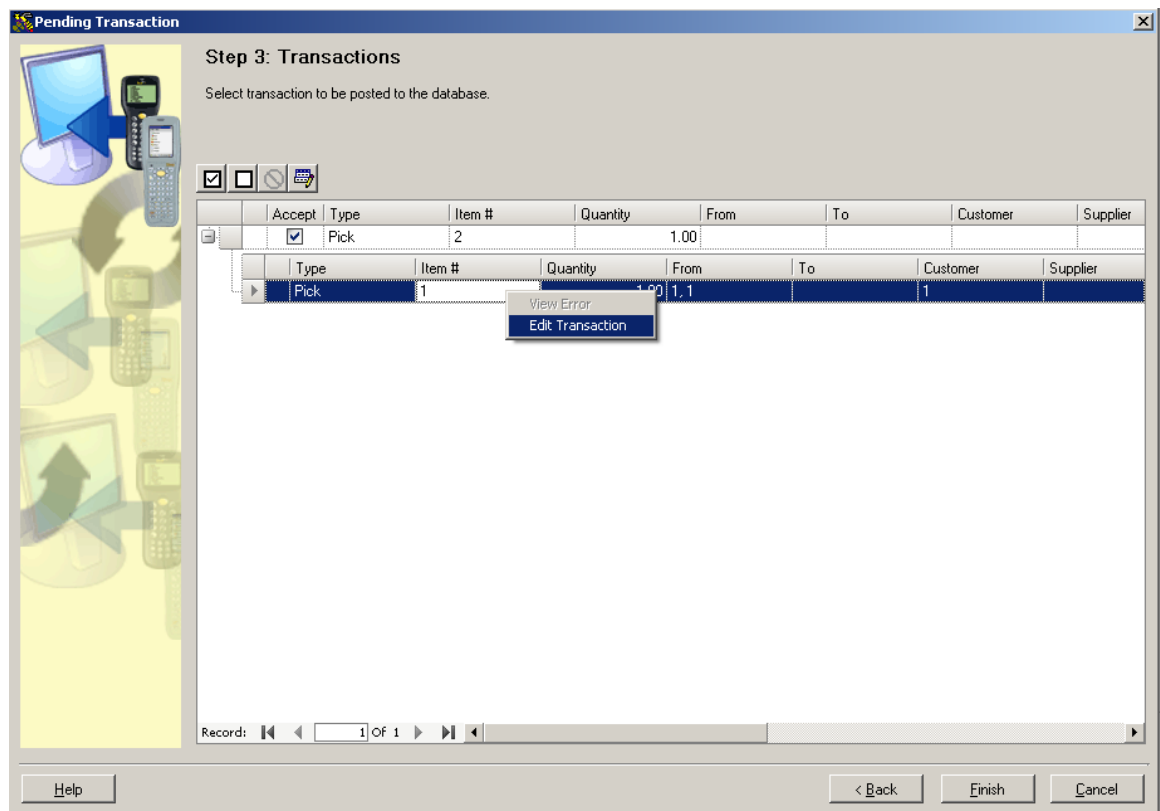
Field	Value
Trans Type	Receive
Item Number	1002
Location	Site 2, Location 1
Quantity	10.00
Trans Date	Thursday, May 31, 2007
Customer	
Supplier	
PO	00001
Pallet	
Date Code	
Lot	
Serial Number	
Cost	0.0000

2. Make changes to the enabled fields as necessary.
3. Click **OK** to save the changes or **Cancel** to return to the Pending Transactions screen without making changes.

Edit Transactions - Kit Items

The steps for editing **Pick** or **Remove Transactions** containing Kit Items is slightly different.

1. The process is the same for uploading these transactions. If you want to edit it, on the **Step 3 - Transactions** screen, click on the component item of the Kit item you want to edit and select Edit Transaction.



2. The **Edit Transactions** screen shown below appears:

Edit Transactions

Data

Pick kit item 2 : . The list below lists the transactions for this kit item.
Double click on a second level row if you wish to modify the transaction.
Uncheck the check box on the second level row if you wish to remove the transaction.

Pick Kit Quantity:
1.00

Type	Item Number	Quantity	Removed Qty	Stocking Unit	Description
Inventory	1	1.00	1.00		

Accept	Trans Type	Quantity	From	To	Customer	Supplier
<input checked="" type="checkbox"/>	Pick	1.00	1, 1		1	

Record: 1 Of 1

Component Details:

Item Number: 1

Description:

Quantity: 1.00

Location: 1, 1


Trans Date: Monday, September 29, 2008

Serial Number:

Lot:

Date Code:

Pallet:

 **Replace**

Pin All Unpin All

Help Save Cancel

Change the **Quantity** or **Location**, then click the **Replace** button (or **Remove**, in the case of a **Remove** transaction).

- The screen now shows your changes.

Edit Transactions

Data

Pick kit item 2 : . The list below lists the transactions for this kit item.
 Double click on a second level row if you wish to modify the transaction.
 Uncheck the check box on the second level row if you wish to remove the transaction.

Pick Kit Quantity:
 1.00

Type	Item Number	Quantity	Removed Qty	Stocking Unit	Description
Inventory	1	1.00	1.00		

Accept	Trans Type	Quantity	From	To	Customer	Supplier
<input checked="" type="checkbox"/>	Pick	1.00	1.1		1	

Record: 1 Of 1

Component Details:

Item Number: 1

Description:

Quantity: 1.00

Location: 1.1


Trans Date: Monday, September 29, 2008

Serial Number:

Lot:

Date Code:

Pallet:

 Replace

Pin All Unpin All

Help Save Cancel

- Click **Save** on the **Edit Transactions** screen to save your changes and return to the **Step 3 - Transactions** screen.

WDT2200

WDT2200 - Setup the Device

The Wasp WDT2200 Communication Wizard allows you to setup your Wasp WDT2200 PDT for use with InventoryControl, filter the database to be used on the PDT, and transfer data to and from the PDT.

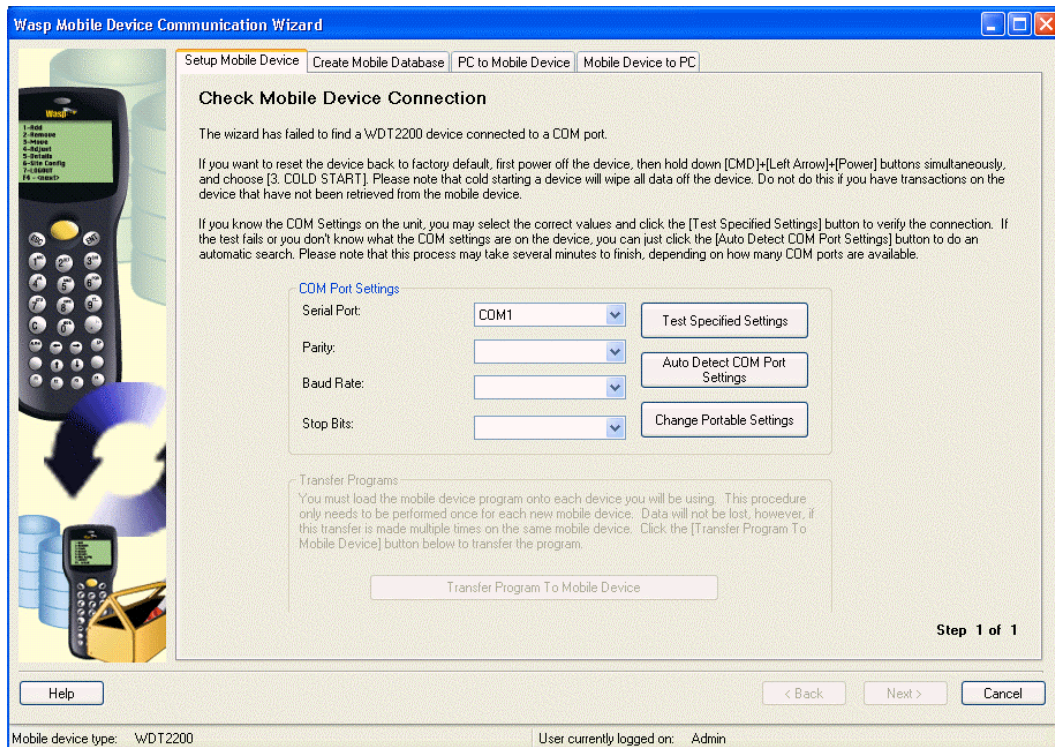
Note: The WDT2200 must be powered on and connected to the PC's serial port before proceeding.

Setting Up the Device:

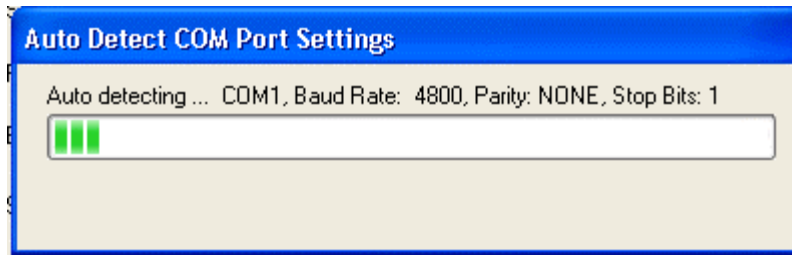
1. On the **InventoryControl Main Window**, click the **Mobility** icon. If you have more than one type of mobile device installed, a menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.
2. On the **Mobility Menu**, select **Setup Mobile**.



The **Wasp WDT2200 Communication Wizard** screen appear with the **Setup WDT2200** tab displayed.



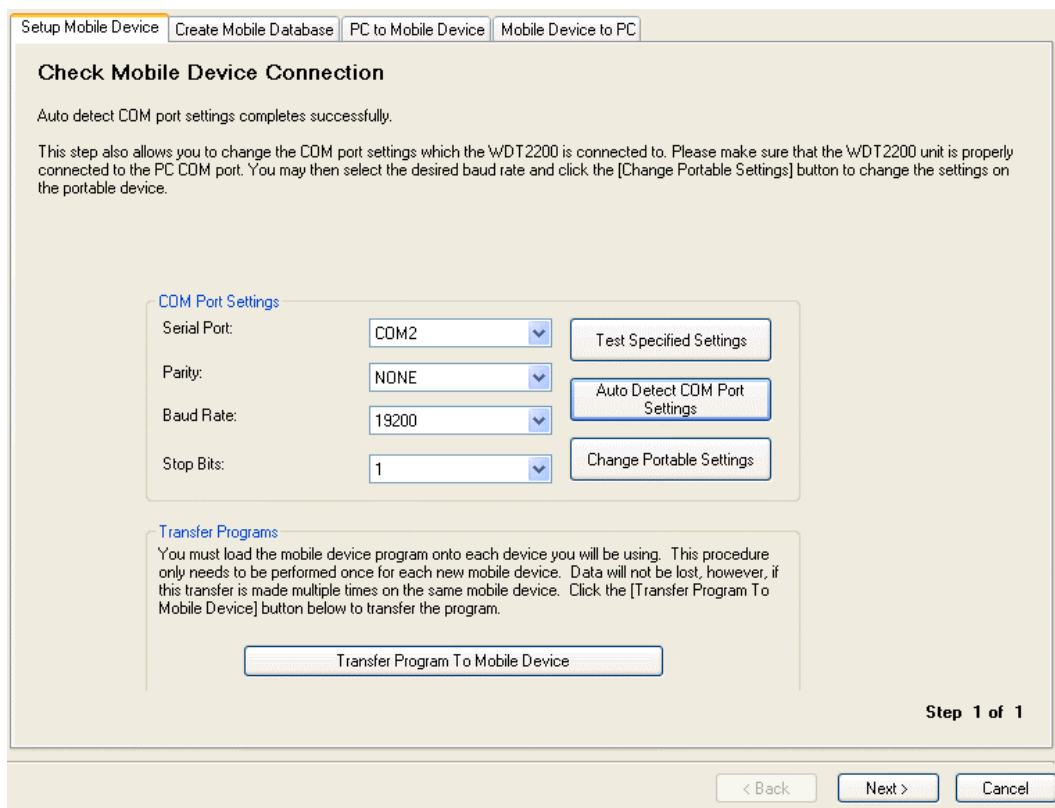
3. Click Auto Detect COM Port Settings. A status screen appears as the system is detecting the default settings:



The default settings are:

Parity: None
Baud Rate: 19200
Stop Bits: 1

When the system is finished looking for the settings, they will appear in the fields:



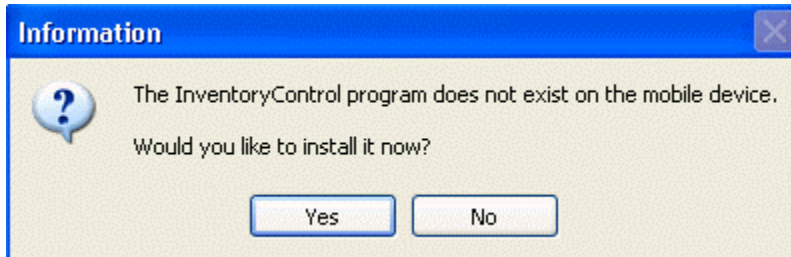
4. Normally, you should not have to make changes to the values set by the Auto Detect function, but changes can be made to the **COM Port Settings**, if necessary:

Specify the **Serial Port** to which your PDT is connected. The Serial Port drop list will display COM1 through COMn where 'n' is the highest address found on your system.

Specify the **Baud Rate** at which your PC is to communicate with the PDT. It is recommended that you use the default value of **19200**, reducing the Baud Rate to lesser values only if you encounter difficulty transferring files.

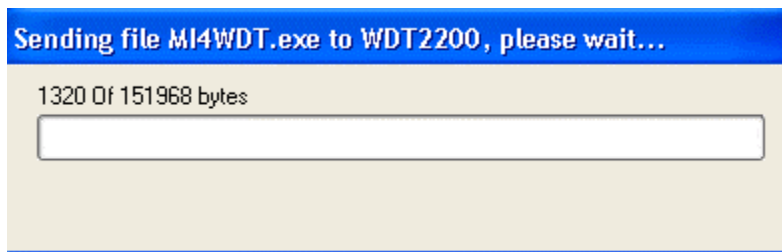
Specify the **Parity** and **Stop Bits** for the serial port if it is not defined with the defaults shown above (**None** and **1**, respectively.)

If InventoryControl is not already installed, you will receive the following message:

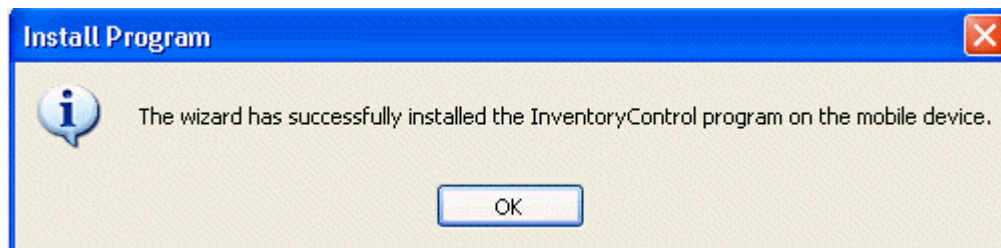


5. Click **Yes** to install the program.

While it is loading you will see a status bar and the device will beep occasionally.



When the install has completed, the following confirmation message will appear:



6. Click **OK** on the confirmation message.

After the first install of InventoryControl, you can resend the program at any time by connecting the device and clicking the **Transfer Program to Mobile Device** button.

7. Next you need to create the mobile database. For more information, please refer to the **WDT 2200 - Creating the PDT Database** topic.

WDT2200 - Creating the PDT Database

After you send the InventoryControl program to your mobile device, you will need to create a mobile version of the database so you can transfer the data from the pc to the mobile device.

You will also need to create a new database each time you want to send changes from the PC to the mobile device. **Create PDT Database** builds the database that will be transferred to the PDT.

Note: If there are inventory transactions on the PDT which have not yet been transferred to the PC, you should Receive the Data from PDT first. For more information on receiving data from the PDT, please refer to the **WDT2200 - Receiving Data from the PDT** topic. Sending a new database first will result in losing the data on the PDT.

Creating the Database:

1. If you are continuing the setup process, click the Next button at the bottom of the Setup WDT 2200 tab, or click the Create PDT Database tab. (You must send the InventoryControl program to the device before you can send the database.) Please refer to the **WDT 2200 - Setting Up the Device** topic for more information.

OR

If you are creating a database for a device that already has the program, from the **InventoryControl Main Window**, click the **Mobility** icon. If you have more than one type of mobile device installed, a menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.

On the **Mobility Menu**, select **Create Mobile**.



The **Create PDT Database** tab displays:


Setup Mobile Device | **Create Mobile Database** | PC to Mobile Device | Mobile Device to PC


Create Mobile Database For WDT2200

This step allows you to specify filters for a subset of the InventoryControl data. The filter will then be used to generate the mobile database which will be loaded onto the mobile device. The performance of the portable device is improved by sending down only the data you need for impending tasks.

Specify Filters:


Site:
Source:
Destination:


Location:
☒ All ☐ Specify Filter 
☐ Minimally Required

Item Number:
☒ All ☐ Specify Filter 
☐ Include Items not in a Location ☐

Customer:
☒ All ☐ Minimally Required

Supplier:
☒ All ☐ Minimally Required

Purchase Order:
☒ All ☐ Specify Filter 
☐ None

Pick Order:
☒ All ☐ Specify Filter 
☐ None

Step 1 of 2

Filter Records allows you to specify which data will be used to create the PDT database. By filtering the records to include only those that are needed at the PDT, memory is conserved as is the time necessary to do transfers between the PC and the PDT.

The default values, shown above, apply no filtering to your data. All Items will be selected, including those which are not yet in a Location.



If the specified filters produce no eligible Items or Sites, no data will be transmitted to the PDT when a Send Data to PDT is attempted. An error will display on the PDT to verify/send Data to PDT.

2. Select the **Site, Location, Item Numbers, Customers, Suppliers, Purchase Orders** (*Pro and Enterprise Versions Only*) and **Pick Orders** (*Pro and Enterprise Versions Only*) to be downloaded to the device, then click **OK**.

Select the **Specify Filter** button if you will be limiting the data. Click the **Hand** icon to access the **Find** screen to search for data. The data you select on the **Find** screen will be entered in the text box for that section and only that data will be sent to the mobile device. Please refer to the **Searching for Information** topic for more information on the **Find** screen.

Select the **Minimally Required** checkbox to only send data that is required for normal operation. For example, if you select to send all Items, but don't want to send all locations, only those locations designated as **Primary Locations** for individual items will be sent. Or, if you don't want to send all **Suppliers**, but some **Suppliers** are entered on the **Item screen/Managing Suppliers tab** for items, only those suppliers entered on the

Item screen will be sent.

Tips for Filtering Information

The default values apply no filtering to your data. All Items will be selected, including those which are not yet in a Location.

Site:

Source: Specify **<all>** or one of the Sites listed in the drop down list. This determines which Sites will be shown in the **Source Site** list on the WDT2200.

This is the Site for all inventory transactions to be performed by the device. If you want the device's database to include Items at more than one Site, select **<all>**. You can only select ALL or 1 specific site. For example, if you have 5 sites, you cannot select 2 to be a Source. You can either select 1 or all.

Destination: If more than one Site is defined on the system and you have selected a specific Site in the **Source Site** field, you can select one of the Sites listed in the **Destination** drop down list. This determines which Sites will be shown in the **Destination Site** list of the WDT2200 **Site Configuration** function and which locations will be listed in the **Move To** list.

This field will be grayed-out with a value of <all>, as shown above, if only one Site is defined in InventoryControl or if a value of <all> has been specified for the Source Site. If a specific Site has been selected for the Source Site, that same site will be the default value for Destination Site, but you can change the Destination Site to a different value using the drop down list.

Source Site:	Destination Site:	The Source Sites Listed in the WDT2200 Site Configuration will Include:	The Destination Sites Listed in the WDT2200 Site Configuration will Include:
<all> This value is forced to <all> when there is only one Site setup in the system.	<all> This value is forced to <all> when <all> is specified as the Source Site.	All Sites	All Sites
A Specific Site	Destination Site is the Same as the Source Site	The Specified Source Site	The Same Site
A Specific Site	A Different Site	The Specified Source Site	The Specified Destination

			Site
--	--	--	-------------



As an example, if you have more than two Sites and want to be able to move inventory from Site 1 to Site 2 -and- from Site 1 to Site 3 on the mobile device, you will have to create a mobile database for Source Site 1 and Destination Site 2, transfer the database to the mobile device, use the device for those Moves, send the information back to the PC, then repeat the entire process beginning with by creating a second database to do Moves from Source Site 1 to Destination Site 3. Alternately, if your device has enough memory to hold a database containing records for all of your Items, at all Sites, you can specify a Source value of <all> and then control Source Site and Destination Site on the mobile device (see WDT2200 - **Site Configuration** for more information.

Location:

From: Specify <all> or use <More> from the drop list to find a specific Location at the Source Site that denotes the **first** in a range of Locations that will be included in the mobile database. The last 10 Locations used will be also be listed in the **From** drop list.

Specifying <all> will include all Locations for the specified Source Site in the mobile Database.

To: Specify <all> or click the **Hand** icon to find a specific Location at the Source Site that denotes the **last** in a range of Locations that will be included in the mobile database. The last 10 Locations used will also be listed in the **To** drop list.

Specifying <all> will include all Locations for the specified Destination Site in the mobile Database.

A specific value can be used for **From** even though <all> is used for **To**: (For example, **From:** Bin 50 used with **To:**<all>, would select Bin 50 through whatever the largest Bin number is.)

Similarly, a specific value can be used for **To** in combination with **From:**<all>. (For example, **From:**<all> used with **To:** Bin 100, would select every bin up through Bin 100.)

Item Number:

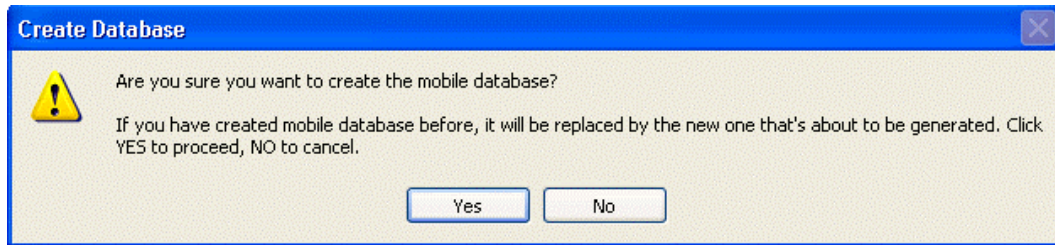
From: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **first** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **From** drop list.

To: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **last** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **To** drop list.

Include Items not in a Location: This is an option that is turned on and grayed-out when no filtering is applied. When filtering is applied in one or more of the above fields, this option becomes user-controllable. It allows you to include in the mobile database Items which are not yet in a Location, in addition to those selected via the filters specified.

(This can be employed when you expect to use the mobile device to Add quantity for Items that have never been inventoried before. The mobile device user can specify previously defined Locations or create new Locations while adding the previously "Location-less" Items.)

3. Click **OK** when you have finished specifying filter criteria. You will see this message:



4. Click **No** if you want to return to the Filter Records dialog. Click **Yes** if you want to proceed with creating the PDT database.

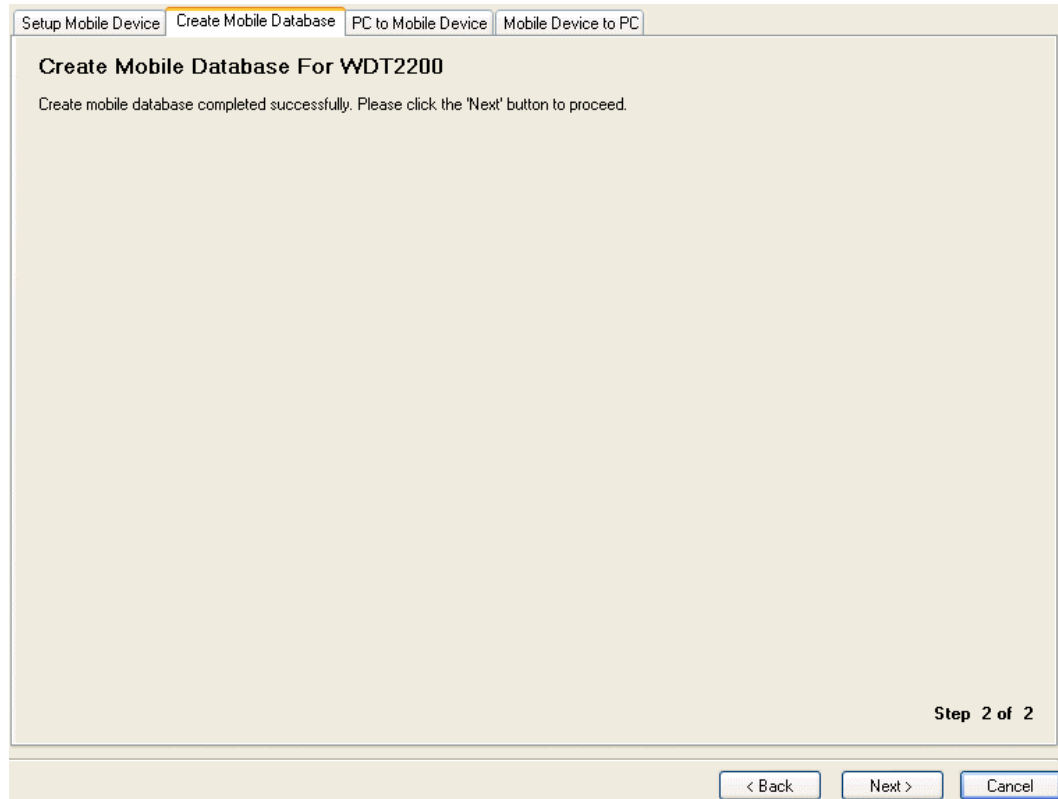
Several status bars will be displayed as the PDT database is created. Depending on the filter criteria, the database may take several minutes to create.



If you have not yet created any Location, Supplier or Item data in InventoryControl, or your Filter Records criteria exclude all the data, you will receive the following message:

"Create PDT database completed. The criteria entered has resulted in no items being selected for the mobile database. Please click Back button to modify the criteria and try again."

If the above message is displayed, click **OK** and then the **Back** button to restart the **Filter Records** dialog. Finish creating your PC database before attempting another transfer to the PDT.



5. Click **Next** if you want to proceed to the PC to Mobile Device tab where you can send the database you just created to the device.

Click **Back** to restart the Filter Records dialog.

Click **Cancel** if you want to avoid transferring the newly created PDT database to the PDT at this time. The Create PDT Database screen will close. The database you just created for the PDT can still be transferred later.

6. You are now ready to send the database to the PDT. For more information, please refer to the **WDT2200 - Sending Data to the PDT** topic.

WDT2200 - Sending Data to PDT

The **Send Data to PDT** function is used to transfer data from the PC to the PDT. You will need to create the mobile database first on the **Create PDT Database** tab before using this function. For more information on creating the database, please refer to the [WDT2200 - Creating the PDT Database](#) topic.

Sending Data to the PDT:

1. If you are continuing the setup process, click the **Next** button at the bottom of the **Create PDT Database** tab, or click the **PC to Mobile Device** tab. (You must create the mobile database before you can send it to the device.) Please refer to the [WDT 2200 - Creating the PDT Database](#) topic for more information.

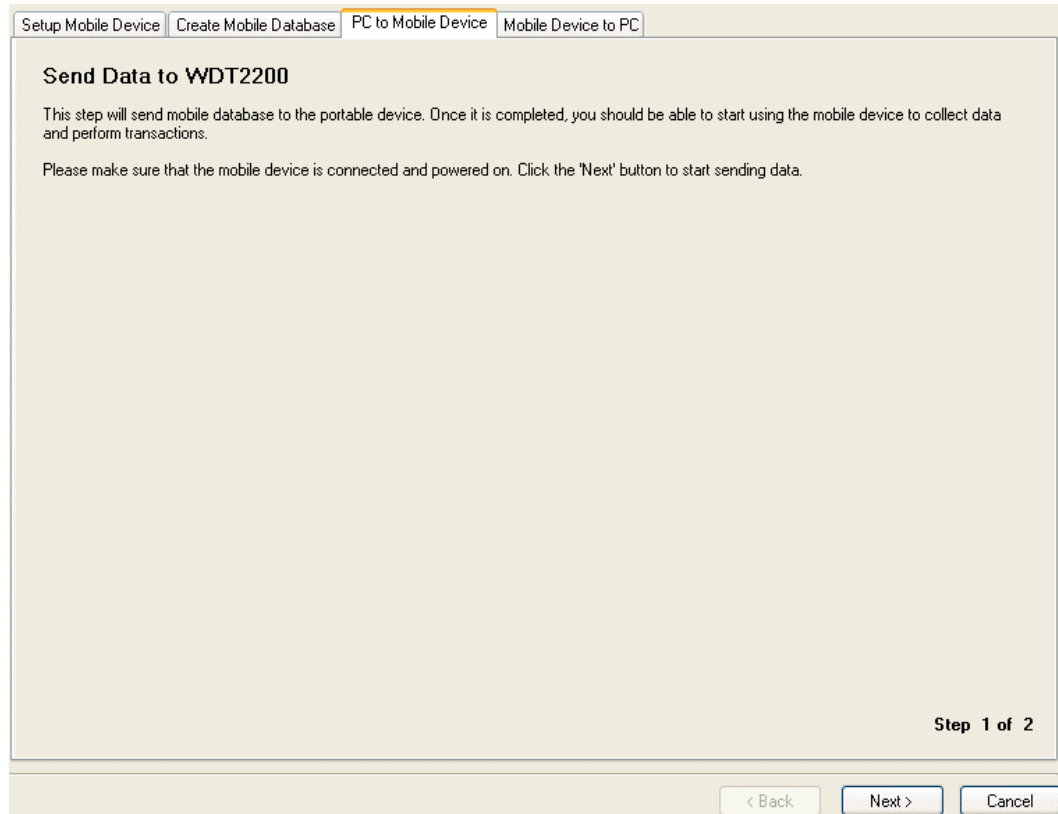
OR

If you are creating a database for a device that already has the program, from the **InventoryControl Main Window**, click the **Mobility** icon. If you have more than one type of mobile device installed, a menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.

On the **Mobility Menu**, select **Send Data To**.



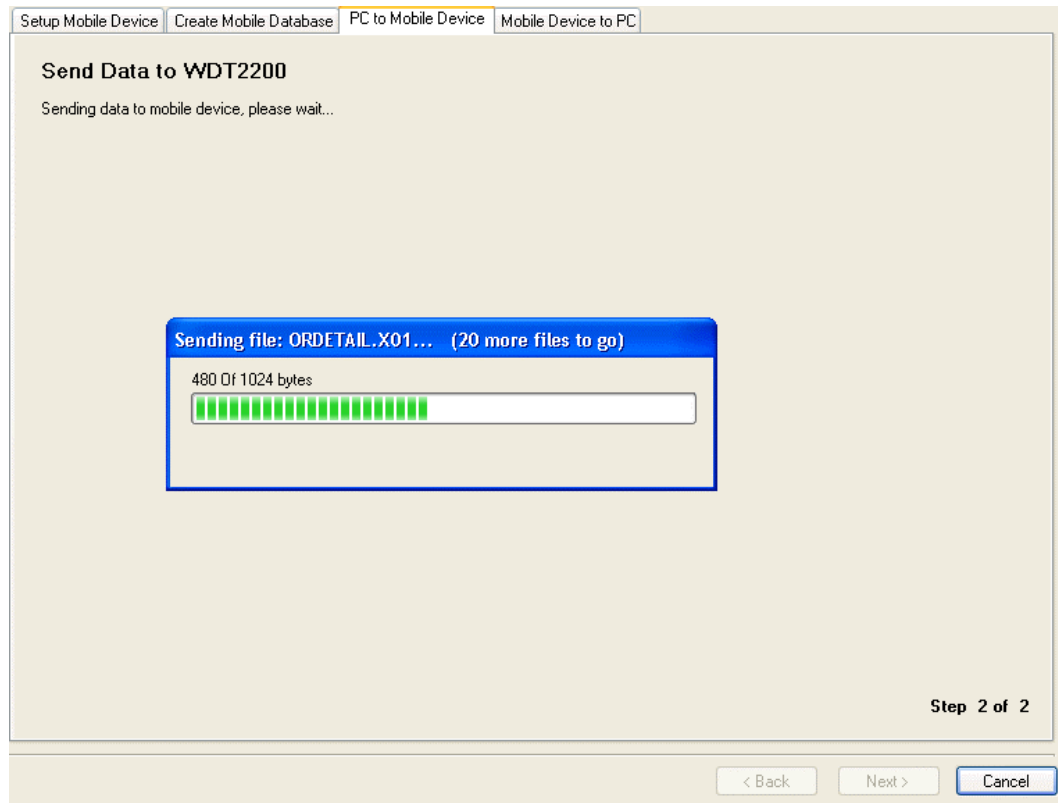
The **PC to Mobile Device** tab displays:



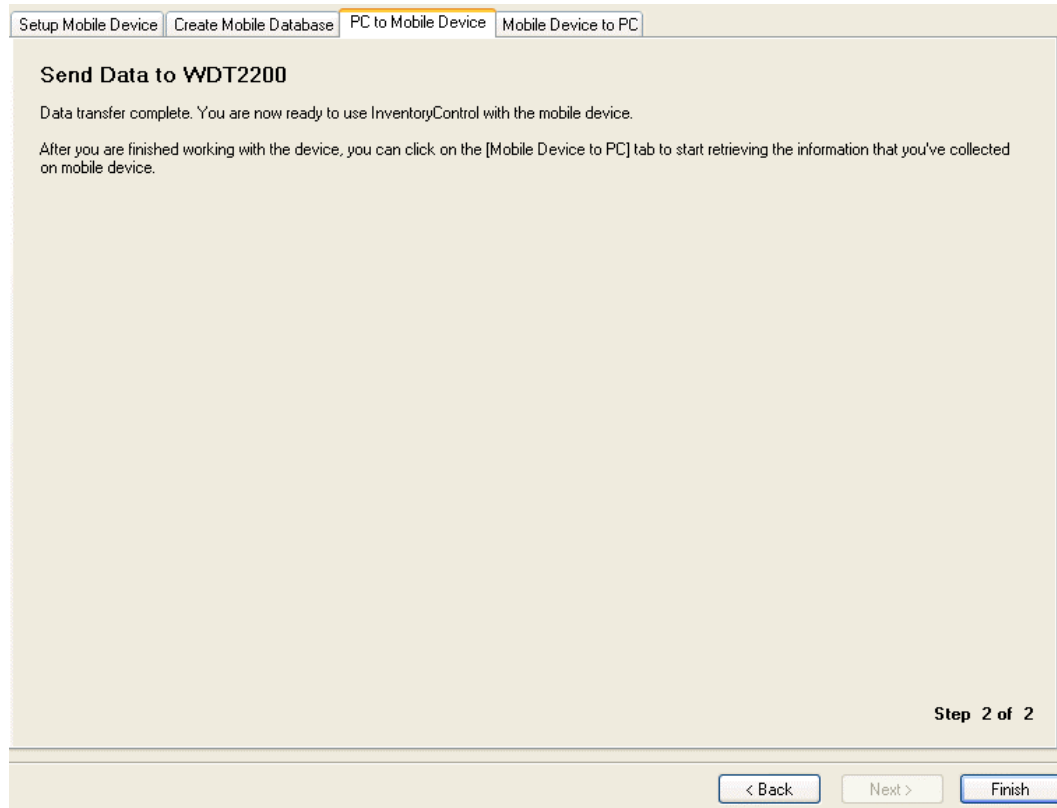
2. If the specified filters produce no eligible **Items** or **Sites**, no data will be transmitted to the PDT when a Send Data to PDT is attempted.
3. Make sure the WDT2200 is connected to the PC and powered on, then click the **Next** button on the PC screen to proceed.

Note: If you click the **Next** button while still logged in on the PDT, the PC screen will prompt you to log out of InventoryControl on the PDT before proceeding.

After clicking **Next**, the PC will transfer the database to the PDT:



When finished transferring the data, the following message will be displayed on the PC:



Having received both the InventoryControl program and a database, the PDT will now display the logon screen:

**InventoryControl
V4**

User:

Password

F1-About

Once you've entered values for **User** and **Password**, you'll be able to perform against the downloaded database.

4. After performing inventory transactions on the PDT, you can retrieve them on the **Mobile Device to PC** tab.

or

Click **Finish** now to close this dialog and return to the InventoryControl Main Menu.

or

Click the **Back** button to restart the Send Data to PDT dialog.

WDT2200 - Receiving Data from PDT

The **Receive Data from PDT** function is used to transfer data from the PDT to the PC.

Receiving Data from the PDT:

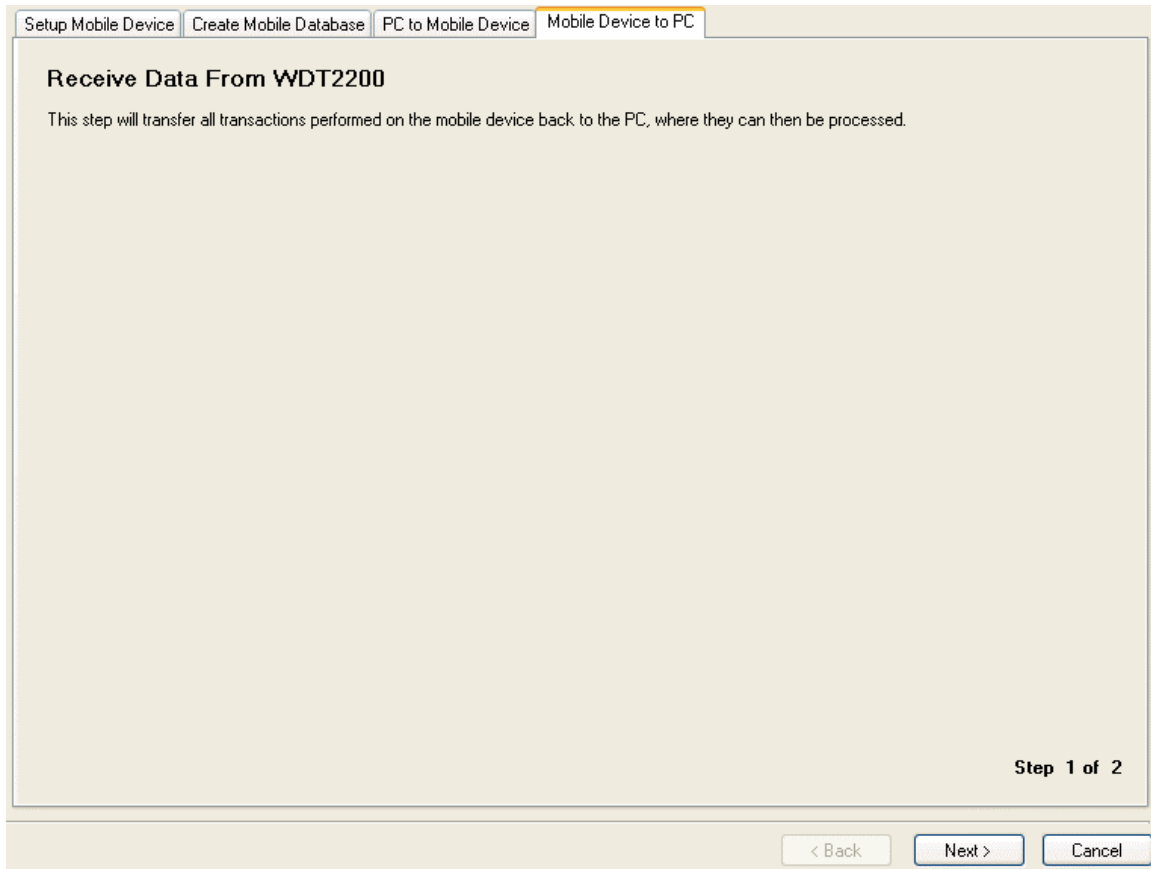
1. If you are continuing the setup process, click the **Next** button at the bottom of the **Create PDT Database** tab, or click the **PC to Mobile Device** tab. (You must create the mobile database before you can send it to the device.) Please refer to the **WDT 2200 - Creating the PDT Database** topic for more information.


OR

If you are creating a database for a device that already has the program, from the **InventoryControl Main Window**, click the **Mobility** icon. If you have more than one type of mobile device installed, a menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.

On the **Mobility Menu**, select **Retreive Data From**.

The **Receive Data from PDT** function can be accessed via the Mobile Devices > PDT > WDT2200 > Receive Data from PDT menu item:




 The following conditions must be true before proceeding:

- The WDT2200 must be powered on and connected to the PC's serial port.
- The InventoryControl Log On screen must be displayed on the PDT. Logout if the PDT is still running the InventoryControl program.

If you attempt to Receive Data From PDT while InventoryControl is running on the PDT, you will receive a message that you need to logout of the program on the PDT, then try again.

After logging out of inventoryControl on the PDT, click the **Back** button to restart the dialog.

Click the **Next** button to start the transfer.

 If no inventory transactions were performed on the PDT since the last time data was transferred to or from the PDT, the following message will be displayed:

Setup Mobile Device | Create Mobile Database | PC to Mobile Device | **Mobile Device to PC**

Receive Data From WDT2200

Download data failed with the following error(s):

Transaction file from mobile device is empty. This is normal only when no transactions have been performed on the mobile device since last successful data retrieval.

Step 2 of 2

If transactions were received from the PDT successfully, you will receive a confirmation message.

Click **Finish** to close this dialog and return to InventoryControl

or

Click the **Mobile Device to PC** tab or the **Back** button to restart the dialog if you want to receive data from another PDT.



When finished transferring data from one or more PDT's, proceed to **Upload From Mobile Devices.**

WDT2200 - Data Cycle

A Summary of the PDT Data Cycle:

1. The WDT2200's **Date and Time** should be set first, then **Setup Device** is used to define COM Port settings prior to transferring the InventoryControl program.
2. **Send Program to PDT** transfers the InventoryControl program to the PDT.
3. **Create PDT Database** builds a database for the PDT that can contain all the data in the PC database or a subset of the PC's records (via the Filter Records dialog.)
4. **Send Data to PDT** sends the InventoryControl **database** to the PDT.
5. **Use the PDT**. With both the InventoryControl program and the PDT database transferred to the PDT, the PDT User can now use the PDT for Add, Remove, Move, Adjust, Details, Receive (Pro and Enterprise Version only), Pick (Pro and Enterprise Version only) or Audit transactions (when Audit Mode is active).
6. **Receive Data from PDT** transfers all the PDT transactions to the PC along with any new Customers, Suppliers or Locations the PDT User has created.
7. **Upload From Mobile Devices** allows you to select and validate data for upload into the InventoryControl database. If you make mistakes on the PDT the data can be modified before being accepted into the PC database.



Steps 1 and 2 are typically done only once per PDT. From then on, steps 3 through 7 might be repeated multiple times.

WDT2200 - Logging On

When you turn on the device loaded with InventoryControl, the screen will appear as follows:

InventoryControl

Users:

Password:


Key in a valid **User** and **Password** for this PDT, pressing the Enter  key after each.


InventoryControl PC Users who have the appropriate security settings can log on to any InventoryControl PDT.

Successful log on will take you to the PDT Main Menu.

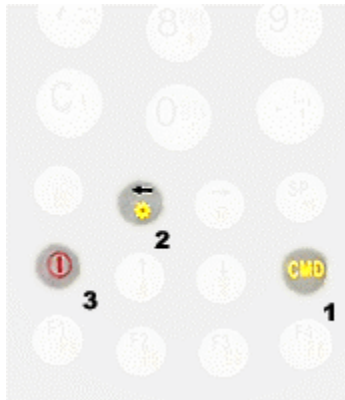
WDT2200 - Resetting the Device

The following steps can be performed to clear all data from the WDT2200.

 Any inventory transactions not yet uploaded to the PC will be lost if the PDT is reset per the following instructions:

1) Power off the WDT2200 by pressing and holding the power  key until no text is displayed on the screen.


2) With the WDT2200 powered off...



...hold down the **CMD** and **left-arrow** keys, then press the **power** key.

The **Start Menu** will be displayed:

```
<< START MENU >>
1.SUPERVISOR
2.WARM START
3.COLD START
```

 If you do not see the Start Menu shown above, power off the PDT and repeat the key sequence described above.

3) From the Start Menu, select **3. COLD START** by pressing the **3** key on the PDT.

```
WILL DELETE ALL
DATA ?
Are you Sure ?
1=YES/0=NO
```

4) Respond with **1=YES** to delete all data by pressing the **1** key on the PDT. The WDT2200 will be Cold Started and all data will be lost.

At the PC, with the WDT2200 connected to your PC and powered on, you must now perform a Setup Device on the PC, to set your COM Port Settings and then Send Program to PDT before you can proceed to Create PDT Database.

WDT2200 - Setting the Date and Time

If the InventoryControl program and a database have already been transferred to the WDT2200, the InventoryControl Log On screen will be displayed when you first power on the PDT:

InventoryControl

User:

Password:


If the WDT2200 displays the screen above when powered on, jump to Instructions for Setting Date and Time on a WDT2200 That Already Has InventoryControl Installed.

-OR-

If InventoryControl has not yet been loaded to the WDT2200, the default power-on prompt will be displayed, showing the ROM version and memory capacity:

```
WDT2200 V1.10
MEM 2560 KB
>
```

Instructions for Setting Date and Time on a Cold Started WDT2200:


- 1) Press and hold the Command  key until the following system menu is displayed:

1.RUN	2.TER
3.COM	4.DIR
5.ERA	6.TYP
7.CPY	8.SET

- 2) Press the **8** key to select **8.SET**

- 3) Press the **1** key to select **1.DATE & TIME**

- 4) Overwrite the Date shown with today's date in the format **mm-dd-yyyy**. You can use

the right-arrow key to correct any entry errors or press the Enter  key to accept the current date and advance to setting the Time of Day.

- 5) Overwrite the Time shown with the current time of day in the format **hh-mm-ss** using values of **0** through **12** for Midnight through Noon and **13** through **23** for the hours of 1:00 PM through 11:00 PM.

6) Press the **5** key to select **5.EXIT**



7) Press the Escape key to exit the system menu and return to the default power-on prompt.

You should now perform the Setup Device function to load the InventoryControl program to your WDT2200.

Instructions for Setting Date and Time on a WDT2200 That Already Has InventoryControl Installed:

1) If the InventoryControl Main Menu is currently displayed:

**1-Add
2-Remove
3-Move
4-Adjust
5-Details
6-Site Config
7-Stage
8-LOGOUT**

select **8-LOGOUT** to exit to the InventoryControl Log On screen:

InventoryControl

User:

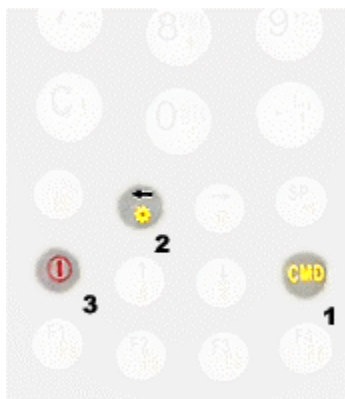
Password:

2) From the **Log On** screen, power off the WDT2200 by pressing and holding the power



key until no text is displayed on the screen.

3) With the WDT2200 powered off...



...hold down the **CMD** and **left-arrow** keys, then press the **power** key.

A **START MENU** will be displayed:

```
<< START MENU >>
1.SUPERVISOR
2.WARM START
3.COLD START
```




If you do not see the Start Menu shown above, power off the PDT and repeat the key sequence described above.

4) From the Start Menu, select **2. WARM START** by pressing the **2** key on the PDT.

5) The default power-on prompt will be displayed, showing the ROM version and memory capacity:

```
WDT2200 U1.10
MEM 2560 KB
>
```




Press and hold the Command  key until the following system menu is displayed:

```
1.RUN    2.TER
3.COM    4.DIR
5.ERA    6.TYP
7.CPY    8.SET
```

6) Press the **8** key to select **8.SET**

7) Press the **1** key to select **1.DATE & TIME**

8) Overwrite the Date shown with today's date in the format **mm-dd-yyyyy**.

You can use the right-arrow key to correct any entry errors or press the Enter  key to accept the current date and advance to setting the Time of Day.

9) Overwrite the Time shown with the current time of day in the format **hh-mm-ss** using values of **0** through **12** for Midnight through Noon and **13** through **23** for the hours of 1:00 PM through 11:00 PM.

10) Press the **5** key to select **5.EXIT**

11) Press the **1** key to select **1.RUN** from the system menu.

12) Use the left- and right-arrow keys, if necessary to select **MI3WDT.EXE** from the list of programs installed on the WDT2200.

< RUN PROGRAM >

MI3WDT.EXE



Press the Enter key when the screen above is displayed:

The InventoryControl Log On screen will then be displayed, allowing you to continue operations with the new date and time settings.

WDT2200 - Main Menu

The InventoryControl WDT2200 PDT Main Menu (not in Audit Mode):

1-Add
2-Remove
3-Move
4-Adjust
5-Details
6-Site Config
7-Logout
8-Receive
9-Pick
0-About

Press the appropriate number key on the PDT to perform that function.

To Logout, press the **8** key. You will be returned to the Log On screen.

The Audit function is disabled when InventoryControl is not in Audit Mode.

The WDT2200 PDT Main Menu in Audit Mode:

Audit Mode

1-Audit
2-Details
3-Site Config
4-About

8-LOGOUT

Press the appropriate number key on the PDT to perform that function.



To Logout, press the **8** key. You will be returned to the Log On screen.

The **Add**, **Remove**, **Move** and **Adjust** functions are disabled when in Audit Mode.


WDT2200 - Interface







The Wasp WDT2200 Keypad

- Press and hold the power  key to turn the unit On or Off.
- Press and release the Alpha  key to toggle between Alphabetic and Numeric input.

Cursor style in Alphabetic mode: 

Cursor style in Numeric mode: 

- Double- or triple-tap an alphabetic key to obtain the second or third character.
- Use the Space  key to input a blank space.
- Use the Clear  key to backspace over a character entered in error.
- Press and release the CMD  key just prior to accessing any of the secondary functions or characters shown in yellow.
- Press the large yellow Scan  key to activate the bar code scanner when input is needed for an **inventory transaction**.

WDT2200 - About Screen


The **About** screen can be accessed by selecting the **7** key on the PDT Main Menu or the **4** key when the PDT is in **Audit Mode**.

About displays the current User, the device's Serial Number, and the current state of the Allow Negative Quantities on Mobile Devices option.

InventoryControl
(C) 2008
Wasp Barcode
Technologies
Build #:
User:
Allow Negative:
ESC=Exit

Allow Negative: T (True) indicates that the User is allowed to **Remove** or **Move** more quantity than is shown in Details for that Item. This option is set on the Options screen on the PC. For more information on this option, please refer to the Options Screen topic.

Allow Negative: F (False) indicates that **Remove** and **Move** transactions are limited to the quantity shown in Details for that Item.


Press the Escape  key to return to the Main menu.

WDT2200 - Site Configuration

When data for multiple Sites has been included in the mobile database, the WDT 2200's **Site Config** screen allows the PDT User to specify which of those Sites is to be used for inventory transactions he or she is about to perform.

The **Source Site** will determine the locations available in the Location field of the **Add, Remove, Adjust** and **Audit** functions. It will also determine the locations available in the **From:** location field of the **Move** function.

The **Destination Site** will determine the locations available in the Move function's **To:** location field.

 No inventory transactions can be performed on the PDT until Source and Destination Sites have been selected in Site Config. This must be done at least once following after sending a new mobile database to the device.

Configuring Sites:

1. The **Site Config** function can be accessed by selecting the **6** key on the **PDT Main Menu**, or the **3** key if the PDT is in **Audit Mode**.

Site Config
Source/Dest Site
***(Select)**

***(Select)**

F1=Src F2=Dest
ESC=Menu

2. Select a **Source Site** by pressing the **F1** key.

Source Site:
Warehouse 1

Press Ent to accept.
ESC to cancel

F1=Prev F4=Next

Above, the site **WAREHOUSE 1** can be accepted as the **Source Site** by pressing the



key to accept the value.

or

Press the **F4** key to scroll to the next **Site** in the PDT database.

or

Press the **F1** key to scroll to the next **Site** in the PDT database.

or



Press the Escape key to cancel.

When a Source Site is selected, a screen similar to the one below will appear:

Site Config
Source/Dest Site
***Warehouse 2**

***(Select)**

F1=Src F2=Dest
ESC=Menu

3. Select a **Destination Site** by pressing the **F2** key.

Dest Site:
Warehouse 3

Press Ent to accept,
ESC to cancel

F1=Prev F4=Next

Above, the site **WAREHOUSE 3** can be accepted as the **Destination Site** by pressing the **ENT** key to accept the value.

or

Press the **F4** key to scroll to the next **Site** in the PDT database.

or

Press the **F1** key to scroll to the next **Site** in the PDT database.

or

Press the **ESC** key to cancel.

4. Use **F1** or **F2** again to change your **Site** selections or press **ESC** to return to the Main Menu if you are done making your **Site** selections.

Note: In this example, the Source and Destination Sites are different. *Every* inventory transaction will be for Items at the Source Site's Locations *except* for **Moves**, where the **To** Locations will be limited to those at the Destination Site: All Moves will be *from* **Warehouse 2** locations *to* **Warehouse 3** locations.

Had **Warehouse 2** been selected as *both* the **Source Site** *and* the **Destination Site**, all Moves would be from locations within Warehouse 2 to other locations within Warehouse 2.

WDT2200 - Adding Inventory

The **Add** function is used to add quantity to any item defined in the PDT database.

Notes:

- **Adds** can also be done at the PC.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- If Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

The following topics discussed in this section are:

Adding Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on a Track By

Tips for Speeding Up Data Entry

Adding Inventory:

1. From the **Main Menu**, press the 1 key. The **Add** screen appears.

**Add
Item #:
123**

**Scan or key in value
and press Ent.
Press ESC for Menu**

2. Press the **Ent** key after supplying an Item # or press the **ESC** key to return to the **Main Menu**.

Add
Item #:
9999999

Entry not found.
Scan or key in value
and press Ent.
ESC=Menu

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again, as shown above.

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #**.

3. Scan or key in a **Location** value. The **Location** field is required for all Add transactions.

Enter a **Location** and press **F4** to advance to the next data entry field.
Press **F1** to go back to the previous data entry field.
Press **ESC** to cancel transaction and return to the previous screen.

Add
123
Monitor
Location:
Warehouse1

ESC=Cancel
F1=Prev F4=Next

4. If you press **F4** to advance to the **Supplier** field, without first providing a **Location** value, the following message will be displayed:

Please scan or key
in location

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Location** value.

If you are prompted to confirm a new Location that you believe should already exist in the database, press the **ESC** key to cancel, then return to the **Main Menu** to check **Site Config**. If the **Location** you entered exists only at a **Site** other than the currently selected **Source Site**, InventoryControl must treat that value as a new Location for the **Source Site**. Select a different **Source Site** in **Site Config** if that's where you intended to perform this transaction.

When a **Location** value has been entered, press **F4** to advance to the next required field.

Add
123
Monitor
Supplier:

ESC=Cancel
F1=Prev F4=Next

6. PO and Supplier values might be required for this Item # if track bys were set when the item was created. If not, the fields can be left empty or values may be entered optionally. For more information on Track by fields, please refer to the topic **Creating New Items**.

Press **F4** to advance to the next data entry field.

Supplier:
ACME

New entry. Press **ENT**
to accept or **ESC** to
cancel.
Ent=OK
ESC=Cancel

As shown above, if you enter a **Location** or **Supplier** that's not currently in the PDT database, you will be prompted to accept or reject the entry as a new value to be added to the database. The currently selected Source Site will be displayed when you are about to create a new Location.

7. Press the **ENT** key to accept the new value or the **ESC** key to Cancel the creation of a new Location or Supplier.

Add
123
Monitor
Qty:

ESC=Cancel
F1=Prev F4=Next

Key in the inventory quantity being added and press **Enter** to complete the **Add** transaction. The **Qty** value entered must be numeric and it must be greater than zero.

NO TRACK BY FIELDS: If this Item *does not* have enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one above will be shown, prompting the entry of **Qty**.

TRACK BY FIELDS: If this Item *does* have enabled for **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, expecting input for each Tracked By field that's enabled. In this example, **Date Code** is required for this item:

Add
123
Monitor
Date Code:

ESC=Cancel
F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

Please scan or key
in Date Code

ESC=Exit

Press **ESC** to exit the error message and then provide the required **Tracked By** value (a Date Code, in this example).

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Add** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066
Qty:1

SN: *

Count:0
F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Add screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.

- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Add for this Item:

```
Add
123
Monitor
Location:  *

ESC=Cancel
F1=Prev F4=Next
```

An asterisk (*) indicates the intention to do more than one Add for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Add. **PO**, **Supplier** and Tracked By values, if any, for this second Add will be the same as those supplied at the beginning of the loop, if any.

```
123
Qty:
Location:

Total Qty:
10.00000
F4=Done
```

While looping on Location, all that is required for each Add are values for Qty and Location. The Total Qty field is incremented each time an Add is submitted while looping.

Press the **ENT** key to submit the Add transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Add
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Add:

Qty:

Item #:

Count:25
F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Add. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Add transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time an Add is done while looping.



Press the **ENT** key to submit the Add transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing an Add for this Item:

Add
123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Add for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Add:

123

Qty:

Pallet: *

Total Qty:

30.00000

F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Add, this screen is ready to receive inputs for another Add. **Item #**, **Location**, **PO** and **Supplier** values for this second Add will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Add are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Add is submitted while looping.



Press the **ENT** key to submit the Add transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

Tips for Speeding Up Data Entry:

- When you create a new item, if the Category, Manufacturer, UOM or any combination of pinnable fields will be used on a large number of items, create one item with those fields, then pin the fields. Now, the information will be retained in those fields so you don't have to keep re-entering it for each new item.
- Make sure you have the Close New Forms option turned off (on the InventoryControl Options screen) so the New Item screen, or any other screen where new information is added, stays open after each new item is saved.

WDT2200 - Details Screen

The **Details** function is used to display Location and Quantity information for any Item in the PDT's database for the Sites selected in Site Configuration.

Details is an abbreviated version of the functionality available in the PC's **Inventory List**.

Note: Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

Viewing Details for Items with Tracked By options disabled:

1. The **Details** function can be accessed by pressing the **5** key on the **PDT Main Menu** or the **2** key if the PDT is in **Audit Mode**. The screen shown below appears:

**Details
Item #:**

**Scan or key in value
and press Ent.
Press ESC for Menu**

2. Press the PDT's **ENT** key after supplying an **Item #** or press the PDT's **ESC** key to return to the **Main Menu**.

If the **Item #** you enter is not found in the PDT's database, you will be prompted to try again, as shown below:

**Details
Item #:
9999999**

**Entry not found.
Scan or key in
value and perss
Ent. ESC=Menu**

If the **Item #** entered is found in the database, the Item's **Description** will be displayed beneath the **Item #**.

Details
100007
Monitor
Location:

ESC=Cancel
F1=Prev F4=Next

3. The **Location** field is required for all **Details** transactions. Enter a **Location** and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel the transaction and return to the previous screen.

If you press **F4** to advance *without first providing a Location* value, the following message will be displayed:

Please scan or key
in Location

ESC=Exit

Press **Esc** to return and enter Location.

When a **Location** value has been entered, the screen will appear as shown below:

1000007

Monitor

Total Qty
626.00000

ENT=OK F4=Next

Details first reports the Item's Total Qty across *all* Locations at *every* Site.

4. Press **F4** to display the next **Details** screen for this item:

1000007
Loc: 1

Qty at Loc:
500.0000
TrackBy Qty:
0.0000
F1=Prev ENT=OK

In the example shown above, **Qty at Loc** has a value of **500.00000**, showing that 500 of

the 626 **Total Qty** are at Location **1**. The **TrackBy Qty** is **0.00000** because no **Tracked By** options are enabled, entered or valid for this **Item #**.

Viewing Details for Items with One or More Tracked By Options Enabled:

When a Location value has been entered for an **Item #** that has one or more **Tracked By** options enabled, you will be given the opportunity to narrow the Details display by entering values for any of the Tracked By fields displayed on the consecutive screens. Press **F4** to advance to each field.

If an item has all four Tracked By options enabled, all are available for inputting values which you can use to limit the **TrackBy Qty** that will shown in the Details display.

Input fields will only be displayed for those Tracked By options that are enabled for the Item specified.

1. The **Details** function can be accessed by pressing the **5** key on the **PDT Main Menu** or the **2** key if the PDT is in **Audit Mode**. The screen shown below appears:

Details

Item #:

Scan or key in value

and press Ent.

Press ESC for Menu

2. Press the PDT's **ENT** key after supplying an **Item #** or press the PDT's **ESC** key to return to the **Main Menu**.

If the **Item #** you enter is not found in the PDT's database, you will be prompted to try again, as shown below:

Details

Item #:

9999999

Entry not found.

Scan or key in

value and perss

Ent. ESC=Menu

If the **Item #** entered is found in the database, the Item's **Description** will be displayed beneath the **Item #**.

Details

10067

Mouse

Pallet:

33

ESC=Cancel

F1=Prev F4=Next

In the example above, the **Item #** specified has the **Tracked By Pallet** option enabled. Having previously supplied the **Item #** and a **Location**, the can supply a **Pallet** number, but doing so is optional.

Values you specify here will limit the **TrackBy Qty** shown on the Details display to some number less than or equal to the **Qty** value shown for the specified Location. Use of these fields is optional. If they are left blank, **TrackBy Qty** will equal **Qty at Loc** in the Details display.

In the example below, having specified a value for the Tracked By field **Pallet**, in addition to **Location**, Details is reporting a **Qty at Loc** of **17.00000** and a **TrackBy Qty** for the specified **Pallet** of **4.00000**.

10067
LOC: AISLE 1

Qty at Loc:
17.00000
TrackBy Qty:
4.00000
F1=Prev ENT=OK

If the **TrackBy Qty** is zero for an Item that has one or more Tracked By options enabled, no quantity matching the TrackBy values you just specified exists for the Item at the specified Location.

3. Press **F4** to advance to the next field.

or

Press **F1** to return to the previous field.

or

Press the **Enter** key to return to the Details function for another query.

WDT2200 - Adjusting Inventory

The **Adjust** function allows you to modify the quantity of existing items. **Adjust** is like a "mini" Audit and will update the quantity using FIFO (First In First Out) to make the total equal to the quantity you enter here. The **Adjust** function is useful if too much or too little quantity is accidentally entered for an item (on a mobile device, for example), inventory is lost, found, broken, etc. and you need to quickly correct the quantity for that item. Adjusting is different from an Audit in that the Audit function makes other functions of the software, such as adding inventory, unavailable to ensure inventory is not added or removed while you are doing the counts. All features are still available when adjusting inventory.

Notes:

- An item tracked by **Serial Number** which has been **Checked-Out** can not be **Adjusted**.
- Inventory adjustments can also be made at the PC using the **Adjust** screen.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

The following topics are covered in this section:

Adjusting Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on a Track By (other than Serial Number)

Adjusting Inventory:

1. From the **Main Menu**, press the **4** key.

**Adjust
Item #:**

123

Scan or key in
value and press
Ent. Press ESC
for Menu.

2. Press the **Enter** key after supplying an **Item #** or press the **ESC** key to return to the **Main Menu**.

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again, as shown below.

Adjust
Item #:
99999999

Entry not found.
Scan or key in value
and press Ent.
ESC=Menu.

If the **Item #** entered is found in the PDT's database, the Item's **Description** will be displayed beneath the **Item #**.

3. Scan or key in a **Location value**. If the **Item #** entered is found in the database, the Item's **Description** will be displayed beneath the **Item #**.

Adjust
100007
Monitor
Location:
AREA 2

ESC=Cancel
F1=Prev F4=Next

The **Location** field is required for all Adjust transactions.

4. After entering a **Location** and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel transaction and return to the previous screen.

If you press **F4** to advance to the next data entry field, without first providing a **Location** value, the following message will be displayed:

Please scan or key
in Location

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Location** value.

As shown below, if you enter a **Location** that's not currently in the PDT database, you will be prompted to accept or reject the entry as a new value to be added to the database.

The currently selected **Source Site** will be displayed when you are about to create a new **Location**.

Site:
Warehouse2

New Location:
Area 7

Ent=OK
ESC=Cancel

If you are prompted to confirm a new **Location** that you believe should already exist in the database, press the **ESC** key to cancel, then return to the **Main Menu** to check **Site Config**. If the **Location** you entered exists only at a Site other than the currently selected **Source Site**, InventoryControl must treat that value as a new Location for the **Source Site**. Select a different **Source Site** in Site Config if that's where you intended to perform this transaction.

Press the **ENT** key to accept the new location or the **ESC** key to cancel the creation of a new **Location**.

5. If this Item *does not have* **Tracked By** enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, prompting the entry of **Qty**.

Adjust
100007
Monitor
Qty:

ESC=Cancel
F1=Prev F4=Next

Key in the inventory quantity at this **Location** and press **F4** to complete the Adjust transaction. The **Qty** value entered must be numeric and it must be greater than or equal to zero.

If this Item *does have* **Tracked By** enabled for **Date Code**, **Pallet** or **Lot** fields, screens like the one below will be shown, expecting input for each Tracked By field that's enabled. A **Date Code** is required for this Item:

Adjust
100007
Monitor
Date Code:

ESC=Cancel

F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

**Please scan or key
in Date Code**

ESC=Exit

Press **ESC** to exit the error message and then provide the required Tracked By value (a **Date Code**, in this example).

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Adjust** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066
Qty:1

SN: *

Count:0
F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Adjust screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Adjust for this Item:

Add
123
Monitor
Location: *

ESC=Cancel
F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Adjust for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Adjust. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Adjust. **PO**, **Supplier** and Tracked By values, if any, for this second Adjust will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Adjust are values for Qty and Location. The Total Qty field is incremented each time an Adjust is submitted while looping.

Press the **ENT** key to submit the Adjust transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Adjust
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Adjust:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Add. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Adjust transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time an Adjust is done while looping.



Press the ENT key to submit the Adjust transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing an adjust for this Item:

Adjust

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one adjust for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first adjust:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first adjust, this screen is ready to receive inputs for another adjust. **Item #**, **Location**, **PO** and **Supplier** values for this second adjust will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each adjust are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an adjust is submitted while looping.



Press the ENT key to submit the adjust transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Auditing Inventory

Audit allows you to count the Quantity of one or more Items in your inventory when in **Audit Mode**. Before you can conduct an audit using the mobile device, you must download a new database created while InventoryControl is in audit mode. For more information on turning on the audit mode on the PC, please refer to the topic **Auditing Your Inventory**. For more information on creating the database, please refer to the topic **WDT2200 - Creating the PDT Database**.

Notes:

- **Audits** can also be done at the PC.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- If Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

Topics discussed in this section:

Auditing Inventory


Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on Track Bys (Other than Serial Number)

Auditing Inventory:

1. The **Audit** function can be accessed by selecting the **1** key on the **PDT Main Menu**.
2. Press the Enter  key after supplying an **Item #** or press the **ESC** key to return to the **Main Menu**

**Audit
Item #:
123**

**Scan or key in value
and press Ent.
Press ESC for Menu**

If the **Item #** you entered *is not found* in the PDT's database, you will be prompted to try again.

**Audit
Item #:
9999999**

**Entry not found.
Scan or key in value
and press Ent.
ESC=Menu**

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the Item #:

3. Scan or key in a **Location** value. The Location field is required for all **Audit** transactions.

**Audit
10007
Monitor
Location:
AREA 2**

**ESC=Cancel
F1=Prev F4=Next**

Enter a **Location** and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel transaction and return to the previous screen.

If you press **F4** to advance to the next data entry field, without first providing a **Location** value, the following message will be displayed:

**Please scan or key
in Location**

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Location** value.

As shown below, if you enter a **Location** that's not currently in the PDT database, you will be prompted to accept or reject the entry as a new value to be added to the database. The currently selected Source Site will be displayed when you are about to create a new **Location**.

Site:
Warehouse 2

New Location:
Area 7

ENT=OK
ESC=Cancel

If you are prompted to confirm a new **Location** that you believe should already exist in the database, press the **ESC** key to cancel, then return to the **Main Menu** to check **Site Config**. If the **Location** you entered exists only at a Site other than the currently selected **Source Site**, InventoryControl must treat that value as a new **Location** for the **Source Site**. Select a different **Source Site** in Site Config if that's where you intended to perform this transaction.

Press the **ENT** key to accept the new value or the **ESC** key to Cancel the creation of a new **Location**.

4. If this Item *does not* have Tracked By enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one above will be shown, prompting the entry of **Qty**.

Audit
100007
Monitor
Qty:

ESC=Cancel
F1=Prev F4=Next

Key in the inventory quantity at this **Location** and press **ENT** or **F4** to complete the Audit transaction. The **Qty** value entered must be numeric and it must be greater than or equal to zero.

If this Item *does* have **Tracked By** enabled for **Date Code**, **Pallet** or **Lot** fields, screens like the one below will be shown, expecting input for each Tracked By field that's enabled.

Audit
100007
Monitor
Date Code:

ESC=Cancel
F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

Please scan or key
in Date Code

ESC=Exit

Press **Esc** to Exit the error message and then provide the required Tracked By value (a **Date Code**, in this example).

5. When the you are finished doing Audits, even just for an afternoon of counting during a week-long Audit, the Counts can be uploaded to the PC (please refer to the topic **WDT2200 - Receiving Data from the PDT** for more information). Multiple PDTs can upload their counts multiple times throughout the Audit Mode period.
6. When the PC is no longer in Audit Mode, you can create another mobile database to send to the PDT. This will return the PDT to its normal mode.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Audit** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066

Qty:1

SN: *

Count:0

F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Audit screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Audit for this Item:

Audit
123
Monitor
Location: *

ESC=Cancel
F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Audit for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Audit. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Audit. **PO**, **Supplier** and Tracked By values, if any, for this second Audit will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Audit are values for Qty and Location. The Total Qty field is incremented each time an Audit is submitted while looping.

Press the **ENT** key to submit the Audit transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Audit
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Audit:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Audit. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Audit transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time an Audit is done while looping.



Press the ENT key to submit the Audit transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing an Audit for this Item:

Audit

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Audit for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Audit:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Audit, this screen is ready to receive inputs for another Audit. **Item #**, **Location**, **PO** and **Supplier** values for this second Audit will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Audit are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Audit is submitted while looping.



Press the ENT key to submit the Audit transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Moving Inventory

The **Move** function allows you to move inventory quantity for an item from one Location to another. When you create an item, you can add which locations it may be. When you then add inventory (quantity) to the item, you select in which location that quantity will reside. The Move function allows you to move that inventory from the originally assigned location to another. By moving inventory in the software, you can easily keep accurate records of where all of your inventory is currently located.

Note:

- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- Move transactions can also be performed on the PC's **Move** screen.
- Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites.**

The following topics are discussed in this section:

Moving Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on Track Bys (Other than Serial Number)

Moving Inventory:

1. The **Move** function can be accessed by pressing the **3** key on the **PDT Main Menu**.
2. Press the PDT's Enter key after supplying an **Item #** or press the PDT's **ESC** key to return to the **Main Menu**.

Move
Item #:
123

Scan or key in value
and press Ent.
Press ESC for Menu

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again, as shown below.

Move
Item #:
99999999

Entry not found.
Scan or key in value
and press Ent.
ESC=Menu

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #**.

3. Scan or key in a **From** location value.

Move
1000052
Fence-Rail
From:
A1

ESC=Cancel
F1=Prev F4=Next

The **From** and **To** fields are required for all Move transactions.

Enter a **From** Location and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel transaction and return to the previous screen.



If you press **F4** to advance to the **To** location field without first providing a **From** location value, the following message will be displayed:

Please scan or key
in From

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **From** location value.

Note: If the **Allow Negative Quantities on Mobile Devices Option** is disabled on the **Options** screen, you will receive a warning message if you attempt to **Move** quantity from a location that does not exist in the PDT database. The **Allow Negative** option must be set on the PC prior to creating the mobile database. You can check the state of this option on the PDT by viewing the PDT **About** screen.

New Source Site **From** locations can only be created during Move when the **Allow Negative Quantities on Mobile Devices** option is enabled. Please see the **Options Screen** topic for more information on this option.

When a **From** location value has been entered, press **F4** or **ENT** to advance to the **To** location field.

4. Provide the required **To** location value.

Move
1000052
Fence-Rail
To:
A2

ESC=Cancel
F1=Prev F4=Next

As shown below, if a **From** or **To** Location value is entered that's not currently in the database, you will be prompted to accept or reject the entry as a new value to be added to the database for the Source or Destination Site shown.

Site:
Warehouse 2

New Location:
Area 2

ENT=OK
ESC=Cancel

If you are prompted to confirm a new **Location** that you believe should already exist in the database at that Site, press **ESC** to cancel, then return to the **Main Menu** to check **Site Config**. If the **From** location you entered exists only at a Site other than the currently selected Source Site, InventoryControl must treat that value as a new Location for the Source Site. Select a different Source Site in Site Config if that's where you intended to perform this transaction.

Press the **ENT** key to accept the new value or the **ESC** key to Cancel the creation of a new **Location**.

5. If this Item does not have **Tracked By** enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, prompting the entry of **Qty**.

Move
1000052

Fence-Rail

Qty:

ESC=Cancel

F1=Prev F4=Next

Key in the inventory **Qty** being Moved and press **F4** or **ENT** to complete the Move transaction. The **Qty** value entered must be numeric and it must be greater than zero.

If the **Allow Negative Quantities on Mobile Devices** option is disabled, you will see the following message if you attempt to Move more quantity than that which is available for this **Item** at the specified **From** location.

Available:

15.0000

**Not enough qty avail
able to complete the
transaction.**

ESC=Exit

Press **ESC** and enter a value that does not exceed the **Available** amount.

6. If the Item *does* have **Tracked By** enabled for **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, expecting input for each Tracked By field that's enabled before entering a value for Qty.

Move

100068

Paint Can

Pallet:

ESC=Cancel

F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

**Please scan or key
in Pallet**

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Tracked By** value (a **Pallet**, in this example).

Note: If the **Allow Negative Quantities on Mobile Devices** option is disabled, any entered Tracked By value that *does not* match a value associated with inventory available at the previously specified **From** location, the following screen display will be displayed:

No item with this tr

ackby specific in stock

ESC=Exit

If **Allow Negative Quantities on Mobile Devices** is enabled, any Tracked By value is allowed.

Press **ESC** to exit the error message and then provide a Tracked By value that matches inventory in stock at the **From** location.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Add** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066

Qty:1

SN: *

Count:0

F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Move screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Move for this Item:

Move
123
Monitor
Location: *

ESC=Cancel
F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Move for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Add. **PO**, **Supplier** and Tracked By values, if any, for this second Add will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Move are values for Qty and Location. The Total Qty field is incremented each time a Move is submitted while looping.

Press the **ENT** key to submit the Move transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Move
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Move:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Move. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Move transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time an Move is done while looping.



Press the ENT key to submit the Move transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing an Move for this Item:

Move

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Move for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Move:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Move, this screen is ready to receive inputs for another Move. **Item #, Location, PO** and **Supplier** values for this second Move will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Move are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Move is submitted while looping.



Press the ENT key to submit the Move transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Removing Inventory

The **Remove** function allows you to remove quantity from any item in the database. Inventory is the amount or quantity of a particular item. Items must first be imported or entered on the **Add Item** screen before you can add quantity or remove quantity.

Inventory is also removed when you pick items for a Pick Order (***Applies to Pro and Enterprise Versions only***). For further information on Picking Orders, please refer to the topic **WDT2200 - Picking Orders**.

Notes:

- **Removes** can also be done at the PC using the **Remove** screen.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

Topics discussed in this section are:

Removing Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number


Looping on Track Bys (Other than Serial Number)

Removing Inventory:

1. The **Remove** function can be accessed by pressing the **2** key on the **Main Menu**.

**Remove
Item #:
123**

**Scan or key in value
and press Ent.
Press ESC for Menu**

2. Press the PDT's Enter  key after supplying an Item # or press the PDT's **ESC** key to return to the **Main Menu**.

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again, as shown below:

**Remove
Item #:
9999999**

**Entry not found.
Scan or key in value
and press Ent.
ESC=Menu**

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #**.

3. Scan or key in a **Location** value:

**Remove
123
Monitor
Location:
AREA 2**

**ESC=Cancel
F1=Prev F4=Next**

The **Location** field is required for all Remove transactions.

Enter a **Location** and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel transaction and return to the previous screen.

If you press **F4** to advance to the **Customer** field, without first providing a **Location** value, the following message will be displayed:

**Please scan or key
in Location**

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Location** value.

Note: If the **Allow Negative Quantities on Mobile Devices** option is disabled, you will see a warning message if you attempt to Remove quantity from a Location that does not exist in the PDT database. The Allow Negative option must be set on the PC prior to creating the database. You can check the state of this option on the PDT by using the 7 key on the Main Menu to go to the PDT **About** screen.

New **Locations** can only be created during Remove when the **Allow Negative Quantities on Mobile Devices** option is enabled. If you are prompted to confirm a new **Location** that you believe should already exist in the database, press **ESC** to cancel, then return to the Main Menu to check **Site Config**. If the **Location** you entered exists only at a **Site** other than the currently selected Source Site, InventoryControl must treat that value as a new **Location** for the Source Site. Select a different Source Site in Site Config if that's where you intended to perform this transaction.

4. Enter a **Customer Number**, then press F4.

Remove

123

Monitor

Customer:

00001

ESC=Cancel

F1=Prev F4=Next

A **Customer** value might be required for this Item #. If not, the Customer field can be left empty or a value may be entered optionally.

As shown below, if a **Customer** value is entered that's not currently in the PDT database, you will be prompted to accept or reject the entry as a new value to be added to the database. The currently selected Source Site will be displayed when you are about to create a new Location.

Customer:

ACME

New entry. Press Ent

To accept or ESC to

Cancel.

ENT=OK

ESC=Cancel

5. If this **Item** *does not* have **Tracked By** enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, prompting the entry of **Qty**.

Remove

100007

Paint Can

Qty:

ESC=Cancel

F1=Prev F4=Next

Key in the inventory quantity being Removed and press **ENT** to complete the Remove transaction. The **Qty** value entered must be numeric and it must be greater than zero.

If the **Allow Negative Quantities on Mobile Devices** option is disabled, you will see the following message if you attempt to Remove more quantity than that which is available for this Item at the specified Location.

Available:
83.0000

**Not enough qty avail
able to complete the
transaction
ESC=Exit**

Press **ESC** and enter a value that does not exceed the **Available** amount.

If this Item *does* have **Tracked By** enabled for **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, expecting input for each Tracked By field that's enabled.

Remove
100006
Paint Can
Pallet:

ESC=Cancel
F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

**Please scan or key
in Pallet**

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Tracked By** value (a **Pallet**, in this example).

If the **Allow Negative Quantities on Mobile Devices** options is disabled, and a Tracked By value that *does not* match a value associated with inventory available at the previously specified **Location** is entered, the following screen will be displayed:

**No item with this tr
ackby specific in st
ock**

ESC=Exit

If **Allow Negative Quantities on Mobile Devices** is enabled, any Tracked By value is allowed.

Press **Esc** to Exit the error message and then provide a Tracked By value that matches inventory in stock at the specified **Location**.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Add** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066

Qty:1

SN: *

Count:0

F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Remove screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing a Remove for this Item:

Add

123

Monitor

Location: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Remove for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while

looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Add. **PO**, **Supplier** and **Tracked By** values, if any, for this second Remove will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Remove are values for Qty and Location. The Total Qty field is incremented each time a Remove is submitted while looping.

Press the **ENT** key to submit the Remove transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Remove
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Remove:

Qty:

Item #:

Count:25
F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Remove. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Remove transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time a Remove is done while looping.



Press the ENT key to submit the Remove transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing a Remove for this Item:

Remove

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Remove for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Remove:

123

Qty:

Pallet: *

Total Qty:

30.00000

F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Remove, this screen is ready to receive inputs for another Remove. **Item #, Location, PO** and **Supplier** values for this second Remove will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Remove are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time a Remove is submitted while looping.



Press the ENT key to submit the Remove transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Removing Kit Items

This function applies to Pro and Enterprise Version users only.

The **Remove Kit** function allows you to remove a kit item from the database. This can be considered the same as shipping inventory. You can designate which customer this inventory was shipped to on this screen.

Notes:

- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

Topics discussed in this section are:

Removing Kit Items

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on Track Bys (Other than Serial Number)


Removing Kit Items:

1. The **Remove Kit** function can be accessed by pressing the **2** key on the **Main Menu**. The **Remove** screen appears

**Remove
Item #:
123**

**Scan or key in value
and press Ent.**

Press ESC for Menu

2. Press the PDT's Enter  key after supplying an Item # or press the PDT's **ESC** key to return to the **Main Menu**.

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again, as shown below:

Remove
Item #:
9999999

Entry not found.
Scan or key in value
and press Ent.
ESC=Menu

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #**.

3. Enter the **Quantity** you want to remove. This is the how many Kits you want to remove.

Remove Kit
123
123 Description
QTY:
12

ESC=Cancel
F1=Prev F4=Next

4. Next a screen will appear allowing you to scan or enter the component items for this kit item. Scan the **Item Number**, or use the **F1/F4** keys or the arrow keys to browse through a list of the component items. Press **F2** to clear your selection.

Scan/Select Item #:
1001

Rem Qty: 12
Total Qty: 30

ESC=Cancel Ent= OK
F1/F4 Browse F2=CLR

Rem Qty represents how many Kits you have removed so far and the Total Qty is how many of that component item you have removed. For example, if you have 5 of item 1001 contained in Kit 123, then the Total Qty would be $12 \times 5 = 60$.

5. Scan or key in a **Location** value (Note: If this is a non-inventory item, you will be taken directly to the **Quantity** screen - See Step 6):

Remove
123
Item Description

Location:
AREA 2

ESC=Cancel
F1=Prev F4=Next

The **Location** field is required for all Remove transactions.

Enter a **Location** and press **F4** to advance to the next data entry field.

or

Press **F1** to go back to the previous data entry field.

or

Press **ESC** to cancel transaction and return to the previous screen.

If you press **F4** to advance to the next field, without first providing a **Location** value, the following message will be displayed:

Please scan or key
in Location

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Location** value.

Note: If the **Allow Negative Quantities on Mobile Devices** option is disabled, you will see a warning message if you attempt to Remove quantity from a Location that does not exist in the PDT database. The Allow Negative option must be set on the PC prior to creating the database. You can check the state of this option on the PDT by using the **7** key on the Main Menu to go to the PDT **About** screen.

New **Locations** can only be created during Remove when the **Allow Negative Quantities on Mobile Devices** option is enabled. If you are prompted to confirm a new **Location** that you believe should already exist in the database, press **ESC** to cancel, then return to the Main Menu to check **Site Config**. If the **Location** you entered exists only at a **Site** other than the currently selected Source Site, InventoryControl must treat that value as a new **Location** for the Source Site. Select a different Source Site in Site Config if that's where you intended to perform this transaction.

6. If this **Item** *does not* have **Tracked By** enabled for the **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, prompting the entry of **Qty**.

Remove
100007
Paint Can
Qty:

ESC=Cancel
F1=Prev F4=Next

Key in the inventory quantity being Removed and press **ENT** to complete the Remove transaction. The **Qty** value entered must be numeric and it must be greater than zero.

If the **Allow Negative Quantities on Mobile Devices** option is disabled, you will see the following message if you attempt to Remove more quantity than that which is available for this Item at the specified Location.

Available:
83.0000

**Not enough qty avail
able to complete the
transaction
ESC=Exit**

Press **ESC** and enter a value that does not exceed the **Available** amount.

If this Item *does* have **Tracked By** enabled for **Date Code**, **Pallet** or **Lot** fields, a screen like the one below will be shown, expecting input for each Tracked By field that's enabled.

Remove
100006
Paint Can
Pallet:

ESC=Cancel
F1=Prev F4=Next

Key in or scan values for each of the Tracked By fields, pressing **F4** to advance to the next data entry field.

If you press **F4** to advance to the next data entry field, without first inputting a required Tracked By value, a screen similar to the following will be displayed:

**Please scan or key
in Pallet**

ESC=Exit

Press **ESC** to Exit the error message and then provide the required **Tracked By** value (a **Pallet**, in this example).

Note: You can press the F2 key to view the last Serial Number entered.

If the **Allow Negative Quantities on Mobile Devices** options is disabled, and a Tracked By value that *does not* match a value associated with inventory available at the previously specified **Location** is entered, the following screen will be displayed:

**No item with this tr
ackby specific in st
ock**

ESC=Exit

If **Allow Negative Quantities on Mobile Devices** is enabled, any Tracked By value is allowed.

Press **Esc** to Exit the error message and then provide a Tracked By value that matches inventory in stock at the specified **Location**.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Add** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066

Qty:1

SN: *

Count:0

F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Remove screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
 - When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.
-

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing a Remove for this Item:

Add

123

Monitor

Location: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Remove for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Add. **PO**, **Supplier** and **Tracked By** values, if any, for this second Remove will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Remove are values for Qty and Location. The Total Qty field is incremented each time a Remove is submitted while looping.

Press the **ENT** key to submit the Remove transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Remove
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Remove:

Qty:

Item #:

Count:25
F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Remove. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Remove transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time a Remove is done while looping.



Press the ENT key to submit the Remove transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing a Remove for this Item:

Remove

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Remove for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Remove:

123

Qty:

Pallet: *

Total Qty:

30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Remove, this screen is ready to receive inputs for another Remove. **Item #, Location, PO** and **Supplier** values for this second Remove will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Remove are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time a Remove is submitted while looping.



Press the ENT key to submit the Remove transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Picking Inventory for Orders

This function applies to Pro and Enterprise Version users only.

When a pick order is actually being picked, that is, the inventory is being readied for shipping to the customer, the quantities that are removed from inventory for each item on the order are entered in the **Pick** screen.

Notes:

- **Picks** can also be done at the PC.
- **Manual** items cannot be picked on the mobile devices. Please refer to **Creating a Pick Order** for more information on **Manual** items.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- If Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

The topics discussed in this section are:

Picking Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on Track Bys (Other than Serial Number)

Picking Inventory:

1. From the **Main Menu**, press **9**. The **Pick** screen appears:

**Pick
Order #:**

Scan or key in value

and press Ent.
Press ESC for Menu

2. Enter the **Pick Order** number, then press the **Ent** key. Press **ESC** to return to the **Main Menu**.

Pick
Order #:
00001

Scan or key in value
and press Ent.
Press ESC for Menu

3. Enter the Item Number you are picking, then press **Ent**. Press **ESC** to return to the **Main Menu**.

Pick
Item #:
1002

Scan or key in value
and press Ent.
Press ESC for Menu

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again after you press **Ent**.

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #** after you press **Ent**.

4. Enter the **Location** of this item, then press **F4**. Press **F1** to return to the previous screen and select a different item.

Pick
1002
Monitor

Location:
001

ESC=Cancel
F1=Prev F4=Next

5. Picks are always calculated in Eaches, meaning the quantity in which you stock them (as opposed to the quantity in which they are shipped to you, which may differ). Enter how many of this item you will be picking.

Pick
1002
Monitor

EA.Qty
1

ESC=Cancel
F1=Prev F4=Next

Note: If this item has any track bys set (serial number, date code, pallet, etc.), you will required to enter those prior to entering a quantity. If this item is tracked by Serial Number, the quantity is limited to 1.

6. Press **F4** to complete the transaction.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Pick** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066
Qty:1

SN: *

Count:0
F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Pick screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Pick for this Item:

Pick
123
Monitor
Location: *

ESC=Cancel
F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Pick for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Pick. **PO**, **Supplier** and Tracked By values, if any, for this second Pick will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Pick are values for Qty and Location. The Total Qty field is incremented each time a Pick is submitted while looping.

Press the **ENT** key to submit the Pick transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Pick
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Pick:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Pick. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Pick transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time a Pick is done while looping.



Press the ENT key to submit the Pick transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing a Pick for this Item:

Pick

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Pick for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Pick:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Pick, this screen is ready to receive inputs for another Pick. **Item #**, **Location**, **PO** and **Supplier** values for this second Pick will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Pick are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Pick is submitted while looping.



Press the ENT key to submit the Pick transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Picking Kit Items

This function applies to Pro and Enterprise Version users only.

When a pick order is actually being picked, that is, the inventory is being readied for shipping to the customer, the quantities that are removed from inventory for each item on the order are entered in the **Pick** screen.

Notes:

- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- If Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

The topics discussed in this section are:

Picking Inventory

Looping on Serial Number

Looping on Location

Looping on Item Number

Looping on Track Bys (Other than Serial Number)

Picking Inventory:

1. From the **Main Menu**, press **9**. The **Pick** screen appears:

**Pick
Order #:**

**Scan or key in value
and press Ent.
Press ESC for Menu**

2. Enter the **Pick Order** number, then press the **Ent** key. Press **ESC** to return to the **Main Menu**.

**Pick
Order #:
00001**

**Scan or key in value
and press Ent.
Press ESC for Menu**

3. Enter the Item Number you are picking, then press **Ent**. Press **ESC** to return to the **Main Menu**.

**Pick
Item #:
123**

**Scan or key in value
and press Ent.
Press ESC for Menu**

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again after you press **Ent**.

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #** after you press **Ent**.

4. Enter the **Quantity**: This is how many Kits you want to pick.

**Pick Kit
123
123 Description
Qty:
12**

**ESC=Cancel
F1=Prev F4=Next**

5. Next a screen will appear allowing you to scan or enter the component items for this kit item. Scan the **Item Number**, or use the **F1/F4** keys to browse through a list of the component items. Press **F2** to clear your selection.

**Scan/Select Item #:
1001**

**Rem Qty: 12
Total Qty: 30**

**ESC=Cancel Ent= OK
F1/F4 Browse F2=CLR**

Rem Qty represents how many Kits you have picked so far and the Total Qty is how many of that component item you have picked. For example, if you have 5 of item 1001 contained in Kit 123, then the Total Qty would be $12 \times 5 = 60$. Continuing this example, if

you pick more than 60, a warning will appear that you are picking more than indicated on the Pick Order. You can continue, but the discrepancy will be caught when you sync that data back to the PC and you will have to correct the quantity on the **Edit Transaction** screen.

6. Enter the **Location** of this item, then press **F4**. Press **F1** to return to the previous screen and select a different item.

Pick
1001
Monitor

Location:
001

ESC=Cancel
F1=Prev F4=Next

7. If a track by other than **Serial Number** is required, you will enter it now.

Pick
1001
Monitor
Date Code:
DC-1234

ESC=Cancel
F1=Prev F4=Next

8. Picks are always calculated in Eaches, meaning the quantity in which you stock them (as opposed to the quantity in which they are shipped to you, which may differ). Enter how many of this item you will be picking.

Pick
1001
Monitor

EA.Qty
1

ESC=Cancel
F1=Prev F4=Next

9. If this item is tracked by Serial Number or Lot, you will be required to enter the numbers/codes now.

1001
EA. QTY:1

SN:
100023021

Qty:4/100
F4=Done F2=Last SN

When looping on serial number, note that the **Qty** field displays how many serial numbers

exist for this item and how many you have entered so far. In the example above, 4 serial numbers have been entered out of a possible 100 (4/100). You can press **F2** to display the last serial number entered.

10. Press **F4** to complete the transaction.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Pick** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066

Qty:1

SN: *

Count:0

F4=Done F2=Last SN

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number. When looping on serial number, note that the **Qty** field displays how many serial numbers exist for this item and how many you have entered so far. In the example above, 4 serial numbers have been entered out of a possible 100 (4/100). You can press **F2** to display the last serial number entered.

Press **F4** after entering the last **Serial Number** to the **Pick** screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing an Pick for this Item:

Pick

123

Monitor

Location: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Pick for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Pick. **PO**, **Supplier** and Tracked By values, if any, for this second Pick will be the same as those supplied at the beginning of the loop, if any.

123

Qty:

Location:

Total Qty:

10.00000

F4=Done

While looping on Location, all that is required for each Pick are values for Qty and Location. The Total Qty field is incremented each time a Pick is submitted while looping.

Press the **ENT** key to submit the Pick transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Pick

Item #: *

**Scan or key in value
and press Ent.**

Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Pick:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Pick. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Pick transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time a Pick is done while looping.



Press the ENT key to submit the Pick transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing a Pick for this Item:

Pick

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Pick for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Pick:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Pick, this screen is ready to receive inputs for another Pick. **Item #**, **Location**, **PO** and **Supplier** values for this second Pick will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Pick are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Pick is submitted while looping.



Press the ENT key to submit the Pick transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

WDT2200 - Receiving Inventory

This function applies to Pro and Enterprise Versions only.

This screen allows you to select which purchase order you are receiving on and to mark individual items on that purchase order as received into a specific location.

Notes:

- **Picks** can also be done at the PC.
- **Manual** items cannot be received on the mobile devices. Please refer to **Creating a Purchase Order** for more information on **Manual** items.
- Make sure the PDT's date and time are set correctly before performing inventory transactions.
- If Source and/or Destination sites are not specified during on the database you sent to the PDT, the following message will be displayed the first time you attempt to perform an inventory transaction on the PDT:

**Please use the Site
Config function to
Select Source and
Destination Sites.**

ESC=Exit

Press the Escape key to return to the **Main Menu**, then select the **6** key to go to the Site Config function. For more information on configuring sites on the PDT, please refer to the topic, **WDT2200 - Configuring Sites**.

The topics discussed in this section are:

Receiving Inventory

Looping on Serial Number

Looping on Item Number

Looping on Location

Looping on Track Bys (Other than Serial Number)

Tips for Speeding Up Data Entry

Receiving Inventory:

1. From the **Main Menu**, press the **9** key. The **Receive** screen appears:

Receive
PO:

Scan or key in value
and press Ent.
Pres ESC for Menu

2. Enter the PO number that contains the items you are receiving:

Receive
PO:
10007

Scan or key in value
and press Ent.
Pres ESC for Menu

3. Enter the Item Number you are receiving:

Receive
Item:
1001

Scan or key in value
and press Ent.
Pres ESC for Menu

If the **Item #** entered *is not found* in the PDT's database, you will be prompted to try again after you press **Ent**.

If the **Item #** entered *is found* in the database, the Item's **Description** will be displayed beneath the **Item #** after you press **Ent**.

4. Enter the **Location** into which you will be receiving the item. **Note:** If this item has a designated primary location (setup on the **Create New Item** or **Edit Item** screen on the PC), then that location will appear by default. You can change this location, if needed.

A location must be entered.

Receive
1001
Monitor
Location:
Location 1

ESC=Cancel
F1=Prev F4=Next

5. The quantity ordered for this item on the PO will appear followed by the order unit quantity. The order unit quantity is the unit of measure used by this supplier for shipping purposes. In the example below, 100 boxes were ordered, each box contains 10 items and 1 is being received.

Receive
1001
Monitor

PO Qty: 100.0000
box/10.0000:
1

ESC=Cancel
F1=Prev F4=Next

Note: If this item has any track bys set (serial number, date code, pallet, etc.), you will required to enter those prior to entering a quantity. If this item is tracked by Serial Number, the quantity is limited to 1.

6. Press **F4** to complete the transaction.

Looping on Serial Number:

Fields can be looped, or pinned, by pressing the **F3** key. An asterisk displays next to the looped field.

If track by **Serial Number** is enabled for this Item, the **Qty** field will be set to 1. A quantity of one is assumed for each **Serial Number**. Looping will determine the final count for this **Receive** transaction, as you scan (or key in) one or more **Serial Numbers** for this Item:

1000066
Qty:1

SN: *

Count:0
F4=Done

As each **SN** is keyed in or scanned, the **Count** will be increased. Press **ENT** after inputting each serial number.

Press **F4** after entering the last **Serial Number** to the Receive screen.

Notes:

- When an Item is tracked by Serial Number, you can only loop on Serial Number.
- When an Item *is not* Tracked By Serial Number, you can use **F3** to designate a field that will be used for looping. The values in every field except **Qty** will remain locked while looping.

Looping on Location:

Fields can be looped, or pinned, by pressing the **F3** key.

In the example below the **F3** key was pressed when prompted for **Location** while doing a Receive for this Item:

Receive
123
Monitor
Location: *

ESC=Cancel
F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Receive for this **Item #**, to more than one **Location**. Values entered for **Item #**, **PO** and **Supplier**, if any, will remain locked while looping on **Location** after entering them for the first Add. Tracking fields are needed only for any Tracked By options enabled for the Item entered.

In the example below **F3** was pressed when prompted for Location and then values for **Location**, **PO**, **Supplier**, any Tracked By's, and a **Qty** of **10** were entered, this screen is ready to receive inputs for another Pick. **PO**, **Supplier** and Tracked By values, if any, for this second Pick will be the same as those supplied at the beginning of the loop, if any.

123
Qty:
Location:

Total Qty:
10.00000
F4=Done

While looping on Location, all that is required for each Receive are values for Qty and Location. The Total Qty field is incremented each time a Receive is submitted while looping.

Press the **ENT** key to submit the Receive transaction and continue looping or press the **F4** key to exit the loop.

Looping on Item Number:

Fields can be looped, or pinned, by pressing the **F3** key.

In the following example, **F3** was pressed when prompted for **Item #**:

Receive
Item #: *

Scan or key in value
and press Ent.
Press ESC for Menu

Above, the asterisk (*) indicates the intention to loop on **Item #**. Values entered for **Location**, **PO**, **Supplier** and any Tracked By fields (other than Serial Number) will remain locked after entering them for the first Receive:

Qty:

Item #:

Count:25

F4=Done

Above, having pressed **F3** when prompted for **Item #** and then having entered the item number and values for **Location**, **PO**, **Supplier**, any Tracked By's, and a value of **25** for **Qty**, this screen is ready to receive **Qty** and **Item #** inputs for the second Receive. The **Location**, **PO**, **Supplier**, and any Tracked By values just specified will be used with every Receive transaction entered until **F4** is used to exit the loop.

While looping on **Item #**, all that is required for each transaction here are values for **Qty** and **Item #**. The **Count** is incremented each time a Receive is done while looping.



Press the ENT key to submit the Receive transaction and continue looping

or

Press the **F4** key to exit the loop.



When looping on **Item #**, all items entered should have the same **Tracked By** requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be reset.

Looping on a Tracked By (other than Serial Number)

Here, for example, **F3** was pressed when prompted for **Pallet** while doing a Receive for this Item:

Receive

123

Monitor

Pallet: *

ESC=Cancel

F1=Prev F4=Next

An asterisk (*) indicates the intention to do more than one Receive for this **Item #**, for more than one **Pallet**. Values entered for **Item #**, **Location**, **PO**, **Supplier**, and any other Tracked By fields will remain locked while looping on **Pallet**, after entering them for the first Receive:

123
Qty:
Pallet: *

Total Qty:
30.00000
F4=Done

Above, having entered a value for **Pallet** and a value of **30** for **Qty** on the previous screen for the first Receive, this screen is ready to receive inputs for another Receive. **Item #**, **Location**, **PO** and **Supplier** values for this second Receive will be the same as those supplied at the beginning of the loop.

While looping on this Tracked By field, all that is required for each Receive are values for **Qty** and **Pallet**. The **Total Qty** is incremented each time an Receive is submitted while looping.



Press the ENT key to submit the Receive transaction and continue looping

or

Press the **F4** key to exit the loop.

When looping on a Tracked By field, all items entered should have the same Tracked By requirements. If a different Tracked By field is required, you will be prompted to enter the information before continuing. Looping will need to be restarted.

Tips for Speeding Up Data Entry:

- When you create a new item, if the Category, Manufacturer, UOM or any combination of pinnable fields will be used on a large number of items, create one item with those fields, then pin the fields. Now, the information will be retained in those fields so you don't have to keep re-entering it for each new item.
 - Make sure you have the Close New Forms option turned off (on the InventoryControl Options screen) so the New Item screen, or any other screen where new information is added, stays open after each new item is saved.
-

Windows Mobile Device

Windows Mobile Device Synchronization

The synchronization process involves actions on both the PC and the mobile device side. Whenever data is added or edited on the PC, it is necessary to synchronize the PC database with the mobile database before the updated data will be reflected on the mobile device. The same is true for additions and changes made on the mobile device. The databases on the mobile device and the PC must be synchronized before the changes made on the mobile device database will be reflected in the PC database.

The following topics will guide you through the different required synchronization procedures.

- **Setup Mobile Device**
- **Create Database**
- **Send Data to PC**

Windows Mobile Device

Windows Mobile Device - Data Cycle

PC:

1. [Windows Mobile Device Setup: Setup Device](#)
3. [Create Mobile Database: Created on PC](#)
4. [Synchronize Pocket PC: Download PC to Pocket PC](#)

Pocket PC:

5. [Get Data from PC on Pocket PC](#)
6. Use Pocket PCs
7. [Send Data to PC from Pocket PC](#)

PC:

8. [Synchronize Pocket PC: Upload Pocket PC to PC](#)
 9. [Process Mobile Device Data](#)
-

Windows Mobile Device - Rebooting

If your device locks up, you can perform a warm reboot. This will reset the device and should return it to normal functioning. A warm reboot will not affect your data.

To perform a warm reboot, gently insert a pin into the Reset hole on the back of the device, then remove the pin.

The device will reset.

Windows Mobile Device - Setup the Mobile Device

This is the first step in sending the InventoryControl database to your mobile device.

Note: Before setting up the device, be sure that it is connected to the PC.

Setting Up the Mobile Device:

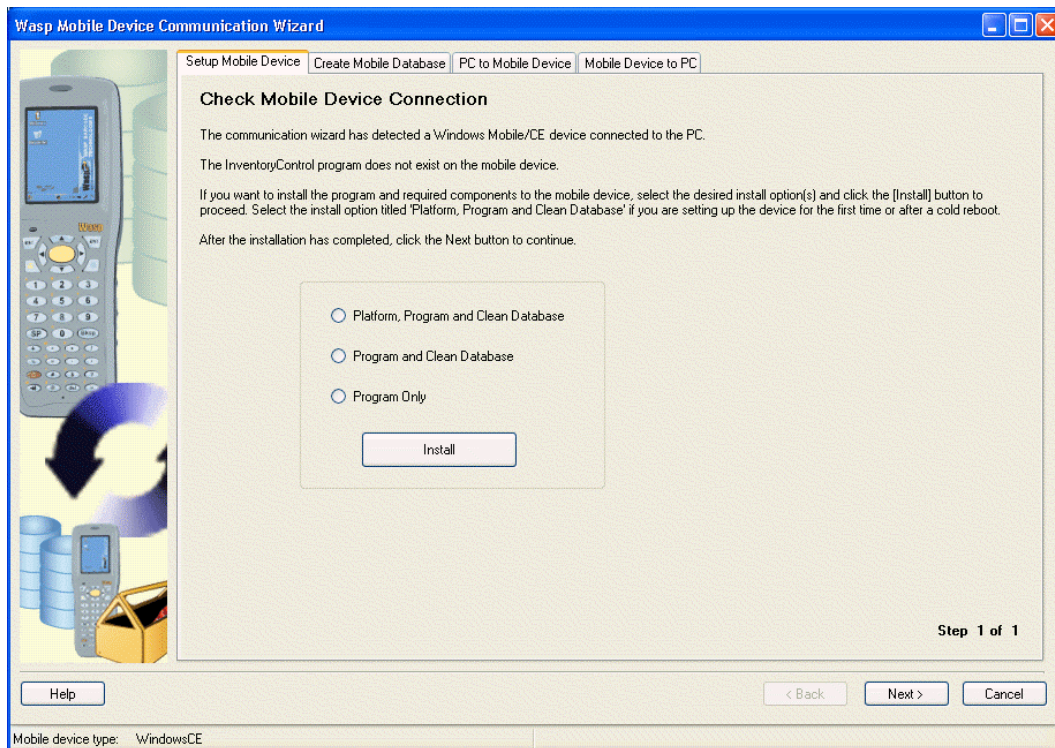
1. On the **InventoryControl Main Window**, click the **Mobility** icon. A menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.
2. On the **Mobility Menu**, select **Setup Mobile**.



The **Wasp Mobile Device Communication Wizard** opens with the **Mobile Device Setup** tab selected.

If this is the first install of the program on the mobile device, the software will automatically send the Platform, Program and a Clean Database to the mobile device.

Once the mobile device has been found, the **Setup Mobile Device** tab displays the following information:

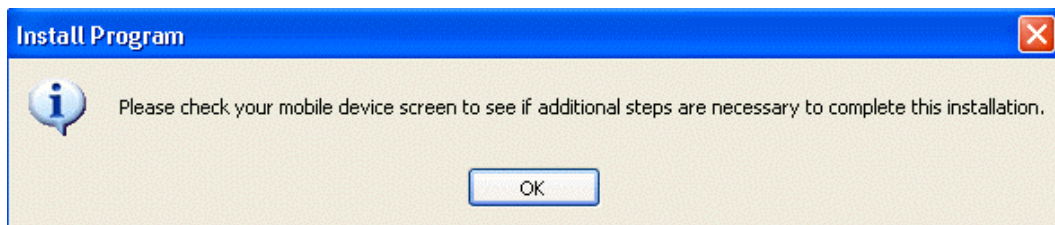


- If this is the first time you are setting up the device, you can skip this screen by clicking the **Next** button. The platform, program and a clean database are automatically sent to the device.
- If there was a problem with the initial setup, you can select **Platform, Program and Clean Database**.
- If you already have a platform set up, select either **Program** or **Program and Clean Database**.
- If you click the **Install Programs** button, the **Add/Remove Programs** screen will display.

2. Click the **Install** button. A message displays:

"You have chosen to send an empty database to the mobile device. This will wipe out any data that currently resides on the mobile device. Lost data cannot be recovered!"

3. Click **Yes** to send the database. A message displays regarding additional steps on the Pocket PC.



4. If you are using Windows CE 5, you can click **OK** on this message and disregard it. If you are using any other version, you will need to click **OK** on this screen and follow the steps on the mobile device to continue. You may receive this message again during the

install. Each time you receive it, you will need to check the mobile device for additional instructions.

5. After the install is complete, click the **Next** button at the bottom of the screen. The **Create Mobile Database** tab displays.

This tab allows you to filter the information that will be sent to the mobile device, if desired. Filtering helps save memory space on the mobile device by allowing you to select only the data you need to load onto the device as opposed to loading all available data. You can load all data, if desired.

6. Select the **Site**, **Location**, **Item Numbers**, **Customers**, **Suppliers**, **Purchase Orders** (*Pro and Enterprise Versions Only*) and **Pick Orders** (*Pro and Enterprise Versions Only*) to be downloaded to the device, then click **Next**.

Select the **Specify Filter** button if you will be limiting the data. Click the **Hand** icon to access the **Find** screen to search for data. The data you select on the **Find** screen will be entered in the text box for that section and only that data will be sent to the mobile device. Please refer to the **Searching for Information** topic for more information on the **Find** screen.

Select the **Minimally Required** checkbox to only send data that is required for normal operation. For example, if you select to send all Items, but don't want to send all locations, only those locations designated as **Primary Locations** for individual items will be sent. Or, if you don't want to send all **Suppliers**, but some **Suppliers** are entered on the **Item screen/Managing Suppliers tab** for items, only those suppliers entered on the **Item** screen will be sent.

Tips for Filtering Information

The default values apply no filtering to your data. All Items will be selected, including those which are not yet in a Location.

Site:

Source: Specify **<all>** or one of the Sites listed in the drop down list. This determines which Sites will be shown in the **Source Site** list on the mobile device.

This is the Site for all inventory transactions to be performed by the device. If you want the device's database to include Items at more than one Site, select **<all>**. You can only select ALL or 1 specific site. For example, if you have 5 sites, you cannot select 2 to be a Source. You can either select 1 or all.

Destination: If more than one Site is defined on the system and you have selected a specific Site in the **Source Site** field, you can select one of the Sites listed in the **Destination** drop down list. This determines which Sites will be shown in the **Destination Site** list of the mobile device's **Site Configuration** function and which locations will be listed in the **Move To** list.

This field will be grayed-out with a value of **<all>**, as shown above, if only one Site is defined in InventoryControl or if a value of **<all>** has been specified for the Source Site. If a specific Site has been selected for the Source Site, that same site will be the default value for Destination Site, but you can change the Destination Site to a different value using the drop down list.

Source Site:	Destination Site:	The Source Sites Listed in the Mobile Device Site Configuration will Include:	The Destination Sites Listed in the Mobile Device Site Configuration will Include:
<p><all></p> <p>This value is forced to <all> when there is only one Site setup in the system.</p>	<p><all></p> <p>This value is forced to <all> when <all> is specified as the Source Site.</p>	<p>All Sites</p>	<p>All Sites</p>
<p>A Specific Site</p>	<p>Destination Site is the Same as the Source Site</p>	<p>The Specified Source Site</p>	<p>The Same Site</p>
<p>A Specific Site</p>	<p>A Different Site</p>	<p>The Specified Source Site</p>	<p>The Specified Destination Site</p>



As an example, if you have more than two Sites and want to be able to move inventory from Site 1 to Site 2 -and- from Site 1 to Site 3 on the mobile device, you will have to create a mobile database for Source Site 1

and Destination Site 2, transfer the database to the mobile device, use the device for those Moves, send the information back to the PC, then repeat the entire process beginning with by creating a second database to do Moves from Source Site 1 to Destination Site 3. Alternately, if your device has enough memory to hold a database containing records for all of your Items, at all Sites, you can specify a Source value of <all> and then control Source Site and Destination Site on the mobile device (see **Windows Mobile Device - Configuring Sites** for more information).

Location:

From: Specify <all> or use <More> from the drop list to find a specific Location at the Source Site that denotes the **first** in a range of Locations that will be included in the mobile database. The last 10 Locations used will be also be listed in the **From** drop list.

Specifying <all> will include all Locations for the specified Source Site in the mobile Database.

To: Specify <all> or click the **Hand** icon to find a specific Location at the Source Site that denotes the **last** in a range of Locations that will be included in the mobile database. The last 10 Locations used will also be listed in the **To** drop list.

Specifying <all> will include all Locations for the specified Destination Site in the mobile device Database.

A specific value can be used for **From** even though <all> is used for **To**: (For example, **From:** Bin 50 used with **To:<all>**, would select Bin 50 through whatever the largest Bin number is.)

Similarly, a specific value can be used for **To** in combination with **From:<all>**. (For example, **From:<all>** used with **To:** Bin 100, would select every bin up through Bin 100.)

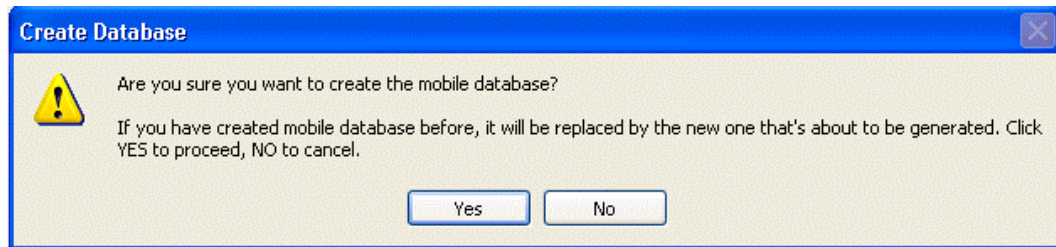
Item Number:

From: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **first** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **From** drop list.

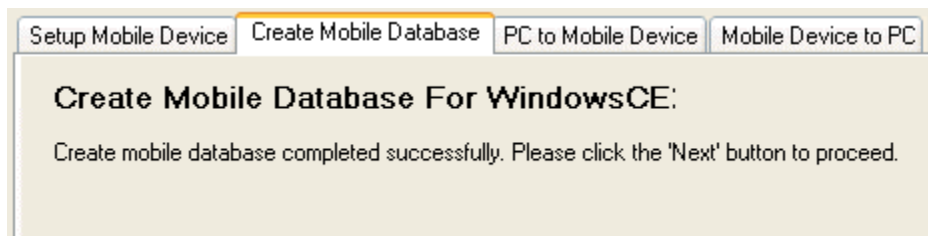
To: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **last** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **To** drop list.

Include Items not in a Location: This is an option that is turned on and grayed-out when no filtering is applied. When filtering is applied in one or more of the above fields, this option becomes user-controllable. It allows you to include in the mobile database Items which are not yet in a Location, in addition to those selected via the filters specified. (This can be employed when you expect to use the mobile device to Add quantity for Items that have never been inventoried before. The mobile device user can specify previously defined Locations or create new Locations while adding the previously "Location-less" Items.)

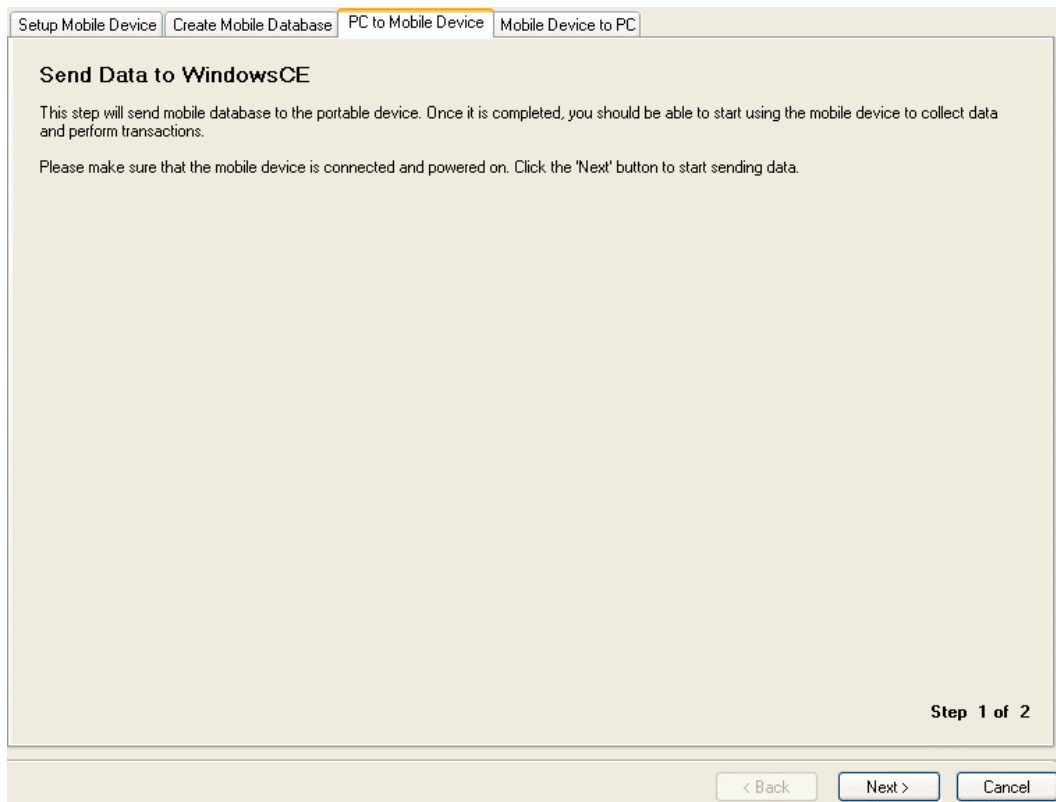
- After you have made your filter selections, click the **Next** button. The following message appears:



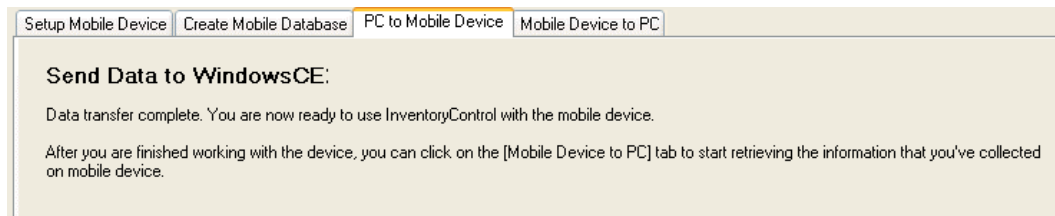
- Click **Yes** to create the database. The wizard displays a confirmation message that the database has been successfully created.



- Click the **Next** button. The **PC to Mobile Device** tab displays. Note at the bottom of the screen the wizard indicates there are two steps on this tab.



10. After checking to make sure the device is connected to your PC, click **Next**. A status bar will appear as the data is transferred. A confirmation message appears after the transfer is complete:



11. Click **Finish** to close the **Wizard** screen.
12. On the mobile device, you will see a message similar to the following:



Click **OK** to insert the records into the mobile database. InventoryControl will start automatically on the device after the transfer.

You can now perform transactions on the mobile device.

After you have performed transactions on the mobile device, you need to send the data back to the PC.

➡ The next step is to perform the [Get Data from PC](#) function on the Pocket PC.

Windows Mobile Device Synchronization

The synchronization process involves actions on both the PC and the mobile device side. Whenever data is added or edited on the PC, it is necessary to synchronize the PC database with the mobile database before the updated data will be reflected on the mobile device. The same is true for additions and changes made on the mobile device. The databases on the mobile device and the PC must be synchronized before the changes made on the mobile device database will be reflected in the PC database.

The following topics will guide you through the different required synchronization procedures.

- [Setup Mobile Device](#)
- [Create Database](#)
- [Send Data to PC](#)

Windows Mobile Device - Sending the Database from the PC

As you add, change or remove data from the InventoryControl database, you will need to create and send a new database to your mobile devices. Follow the instructions below to do this.

There are two separate procedures you must complete to successfully send data from the PC to the mobile device. You must first complete the procedure on the PC side before you can finish the procedure on the mobile device side.

- [PC Procedure](#)
 - [Mobile Device Procedure](#)
-

PC Procedure

1. On the **InventoryControl Main Window**, click the **Mobility** icon. A menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.
2. On the **Mobility Menu**, select **Create Mobile**.



The **Wasp Mobile Device Communication Wizard** opens with the **Create Mobile Database** tab selected.

This tab allows you to filter the information that will be sent to the mobile device, if desired. Filtering helps save memory space on the mobile device by allowing you to select only the data you need to load onto the device as opposed to loading all available data. You can load all data, if desired.

3. Select the **Site**, **Location**, **Item Numbers**, **Customers**, **Suppliers**, **Purchase Orders** (*Pro and Enterprise Versions Only*) and **Pick Orders** (*Pro and Enterprise Versions Only*) to be downloaded to the device, then click **OK**.

Select the **Specify Filter** button if you will be limiting the data. Click the **Hand** icon to access the **Find** screen to search for data. The data you select on the **Find** screen will be entered in the text box for that section and only that data will be sent to the mobile device. Please refer to the **Searching for Information** topic for more information on the **Find** screen.

Select the **Minimally Required** checkbox to only send data that is required for normal operation. For example, if you select to send all Items, but don't want to send all locations, only those locations designated as **Primary Locations** for individual items will be sent. Or, if you don't want to send all **Suppliers**, but some **Suppliers** are entered on the **Item screen/Managing Suppliers** tab for items, only those suppliers entered on the **Item** screen will be sent.

Tips for Filtering Information

The default values apply no filtering to your data. All Items will be selected, including those which are not yet in a Location.

Site:

Source: Specify **<all>** or one of the Sites listed in the drop down list. This determines which Sites will be shown in the **Source Site** list on the mobile device.

This is the Site for all inventory transactions to be performed by the device. If you want the device's database to include Items at more than one Site, select **<all>**. You can only select ALL or 1 specific site. For example, if you have 5 sites, you cannot select 2 to be a Source. You can either select 1 or all.

Destination: If more than one Site is defined on the system and you have selected a specific Site in the **Source Site** field, you can select one of the Sites listed in the **Destination** drop down list. This determines which Sites will be shown in the **Destination Site** list of the mobile device **Site Configuration** function and which locations will be listed in the **Move To** list.

This field will be grayed-out with a value of **<all>**, as shown above, if only one Site is defined in InventoryControl or if a value of **<all>** has been specified for the Source Site. If a specific Site has been selected for the Source Site, that same site will be the default value for Destination Site, but you can change the Destination Site to a different value using the drop down list.

Source Site:	Destination Site:	The Source Sites Listed in the Mobile Device Site Configuration will Include:	The Destination Sites Listed in the Mobile Device Site Configuration will Include:
<all> This value is forced to <all> when there is only one Site setup in the system.	<all> This value is forced to <all> when <all> is specified as the Source Site.	All Sites	All Sites
A Specific Site	Destination Site is the Same as the Source Site	The Specified Source Site	The Same Site
A Specific Site	A Different Site	The Specified Source Site	The Specified Destination Site



As an example, if you have more than two Sites and want to be able to move inventory from Site 1 to Site 2 -and- from Site 1 to Site 3 on the mobile device, you will have to create a mobile database for Source Site 1 and Destination Site 2, transfer the database to the mobile device, use the device for those Moves, send the information back to the PC, then repeat the entire process beginning with by creating a second database to do Moves from Source Site 1 to Destination Site 3. Alternately, if your device has enough memory to hold a database containing records for all of your

Items, at all Sites, you can specify a Source value of <all> and then control Source Site and Destination Site on the mobile device (see **Windows Mobile Device - Configuring Sites** for more information).

Location:

From: Specify <all> or use <More> from the drop list to find a specific Location at the Source Site that denotes the **first** in a range of Locations that will be included in the mobile database. The last 10 Locations used will be also be listed in the **From** drop list.

Specifying <all> will include all Locations for the specified Source Site in the mobile Database.

To: Specify <all> or click the **Hand** icon to find a specific Location at the Source Site that denotes the **last** in a range of Locations that will be included in the mobile database. The last 10 Locations used will also be listed in the **To** drop list.

Specifying <all> will include all Locations for the specified Destination Site in the mobile device Database.

A specific value can be used for **From** even though <all> is used for **To**: (For example, **From:** Bin 50 used with **To:**<all>, would select Bin 50 through whatever the largest Bin number is.)

Similarly, a specific value can be used for **To** in combination with **From:**<all>. (For example, **From:**<all> used with **To:** Bin 100, would select every bin up through Bin 100.)

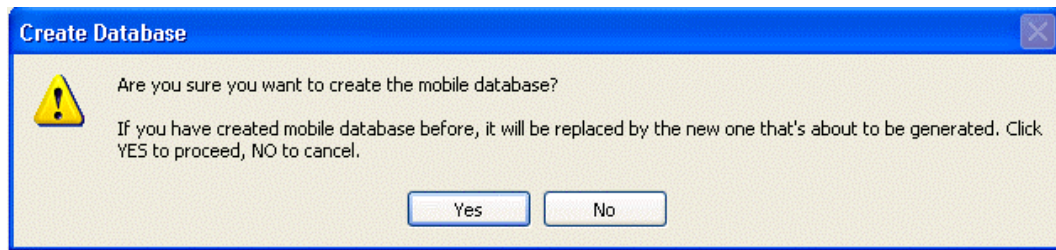
Item Number:

From: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **first** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **From** drop list.

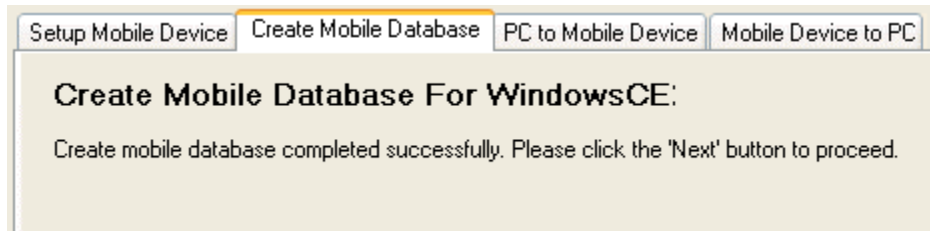
To: Specify <all> or click the **Hand** icon to find a specific Item Number that will establish the **last** valid value in a range of Item Numbers. The last 10 Item Numbers used will be also be listed in the **To** drop list.

Include Items not in a Location: This is an option that is turned on and grayed-out when no filtering is applied. When filtering is applied in one or more of the above fields, this option becomes user-controllable. It allows you to include in the mobile database Items which are not yet in a Location, in addition to those selected via the filters specified. (This can be employed when you expect to use the mobile device to Add quantity for Items that have never been inventoried before. The mobile device user can specify previously defined Locations or create new Locations while adding the previously "Location-less" Items.)

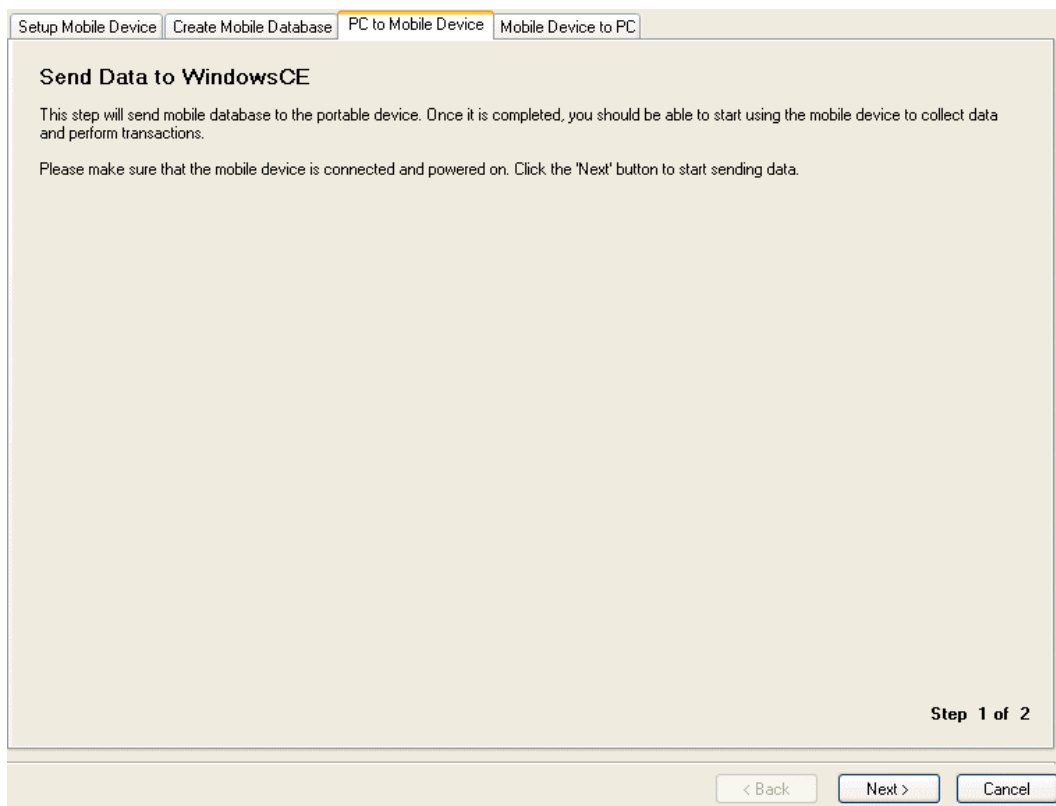
4. After you have made your filter selections, click the **Next** button. The following message appears:



5. Click **Yes** to create the database. The wizard displays a confirmation message that the database has been successfully created.

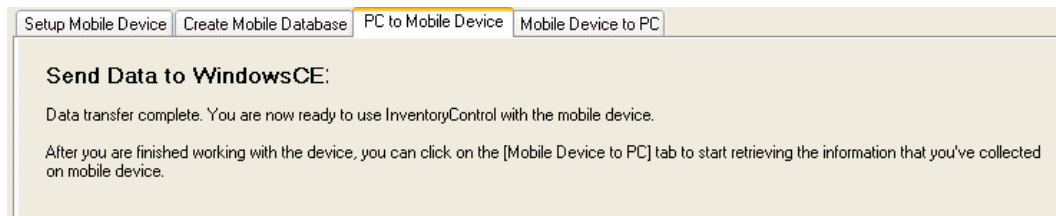


6. Click the **Next** button. The **PC to Mobile Device** tab displays. Note at the bottom of the screen the wizard indicates there are two steps on this tab.



Note: Make sure you have the InventoryControl application closed on the mobile device before clicking **Next** on this tab. Otherwise you will receive a warning message that you need to exit the InventoryControl application on the mobile device before proceeding.

7. After checking to make sure the device is connected to your PC, click **Next**. A status bar will appear as the data is transferred. A confirmation message appears after the transfer is complete:



8. Click **Finish** to close the **Wizard** screen.

Mobile Device Procedure

On the mobile device, you will see a message similar to the following:



Click **OK** to insert the records into the mobile database. InventoryControl automatically starts on the device after the transfer.

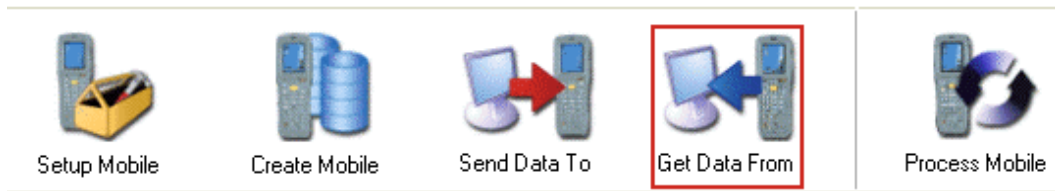
See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Retrieving Data from the Device

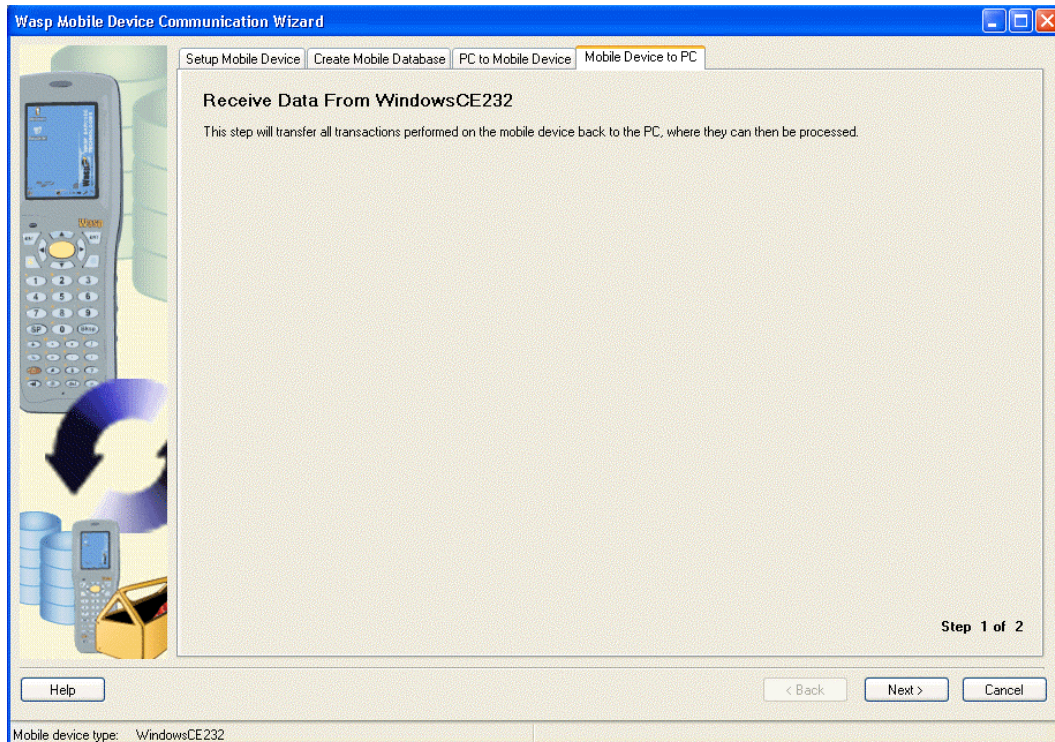
The **Send Data to PC** function enables you to send data from the mobile device to your PC. You will use this function after you have performed transactions (add, move, etc.) and need to send the data back to the PC.

Sending Data to the PC:

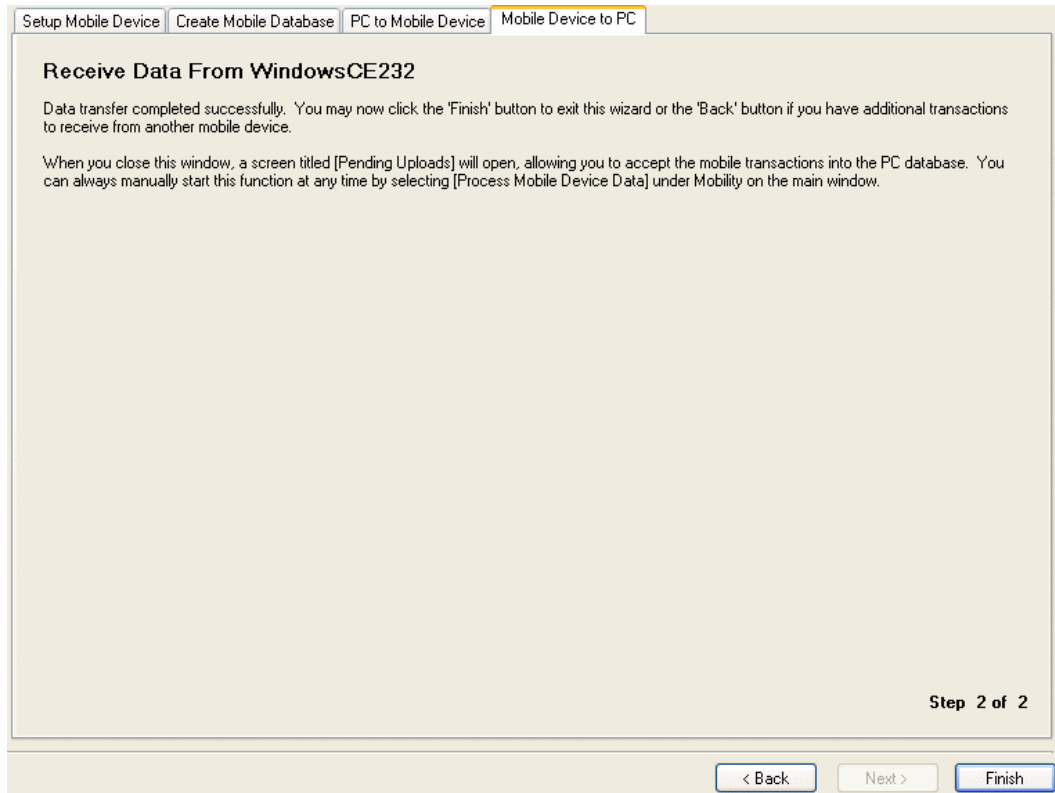
1. On the **InventoryControl Main Window**, click the **Mobility** icon. If you have more than one type of mobile device installed, a menu will appear allowing you to select which device you will be working with. If you have only one type, the **Mobility Menu** for that device will appear at the bottom of the screen.
2. On the **Mobility Menu**, select **Get Data From**.



The **Wasp Mobile Device Communication Wizard** screen displays with the **Mobile Device to PC** tab displayed:



3. The data uploaded from the Pocket PC is sent to an XML file.



The [Pending Uploads](#) screen will display to allow you to process the uploaded data in the XML file.

See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Default Settings

The Windows Mobile version of **InventoryControl** offers several time-saving features:

Site Configuration: If your company uses the same two Sites for all inventory purpose, in the **Site Configuration** screen, you can set up your device to automatically include these Sites in the appropriate fields in **InventoryControl**.

Pinning: Pinning can be used to lock the values in any field. This enables you to enter repeated information rapidly without having to manually re-enter repetitive data.

Windows Mobile Device - Interface



Once the database has been sent to the mobile device, it will be ready for conducting inventory operations. For more information on setting up your device, please refer to the [Windows Mobile Device - Setup Mobile Device](#) topic.


Tap the device's **InventoryControl** icon with the stylus to start the application.



An hour glass icon displays while the application opens.

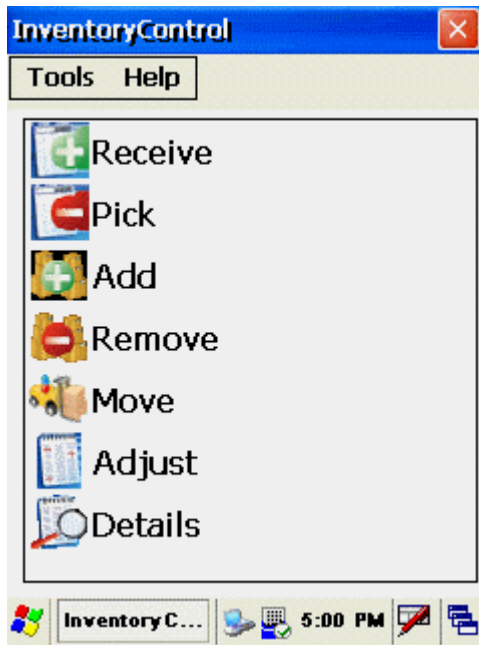
The **Logon** screen displays.

Enter your user name and password, then tap **OK**.

 The first time you log on to **InventoryControl** on your mobile device, enter *Admin* in the **User Name** field and leave the **Password** field blank. After you have sent the database from the PC to the mobile device, user names and passwords that are stored on the PC will be downloaded to the mobile device. Once this has occurred, you must use your normal user name and password to log on to the mobile version of **InventoryControl**. For more information on sending the

database to the mobile device, please refer to the [Windows Mobile Device - Sending New Data from the PC](#) topic.

Below is an example of the **InventoryControl Main Menu**.



Windows Mobile Device - Entering Alphanumeric Data

You can enter letters and numbers in fields on the mobile device by using the device's key pad, using the keyboard or by scanning barcodes.

➡ Regardless of the method you use to enter data, note that once you enter data in the first field and move to the next field, only the fields that are relevant to the data you entered will display. For example, if you enter an Item that is tracked by serial number, the **Serial #** field would remain on the screen, but other fields such as **Date Code** and **Pallet** would no longer display. If you enter an Item that is not tracked, all tracking fields - **PO**, **Supplier**, **Lot**, **Date Code**, **Serial #** and **Pallet** - will no longer display.

Using the Device's Key Pad

The method for using your device's numeric or alphanumeric keypad is documented in the user manual for that device. Please refer to that documentation for full details.

Using the Software Keyboard

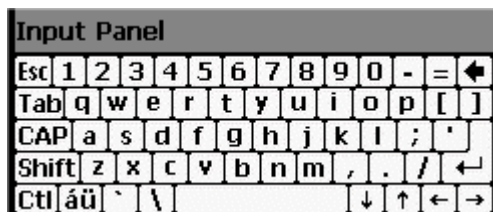
Tap the keyboard icon  at the bottom of the screen.

The keyboard options menu displays.



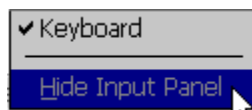
To open the keyboard, select **Keyboard**.

The keyboard (**Input Panel**) displays.



Tap in the field in which you want to enter data, then use your stylus to select the characters on the keyboard.

To close the keyboard, tap the keyboard icon  at the bottom of the screen.



Select **Hide Input Panel**.

Scanning

If you have information -- such as an Item Number, Site or Location -- in barcode format, and your mobile device has a barcode scanner, you can scan the barcode to enter the data in a chosen field.

Tap in the field in which you want to enter data, then scan the barcode by aiming the scanner at the barcode and pressing the scan button.



If you find that the scanner is not responding, you may need to [enable the scanner](#).

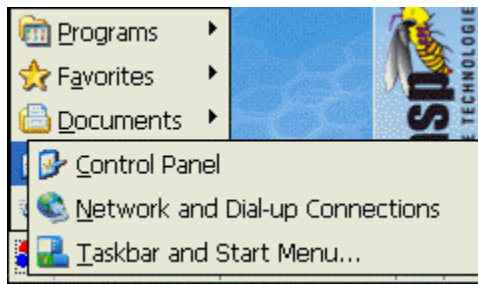
Windows Mobile Device - Enabling the Scanner

Before you use InventoryControl on your Windows Mobile Device for the first time, you may need to enable the scanner.

If at any time the scanner on your mobile device stops functioning, this procedure should also restore its functionality.

Enabling the Scanner:

1. Tap the **Start** icon at the bottom left corner of the device screen.
2. Select **Settings > Control Panel**.



The **Control Panel** screen displays.

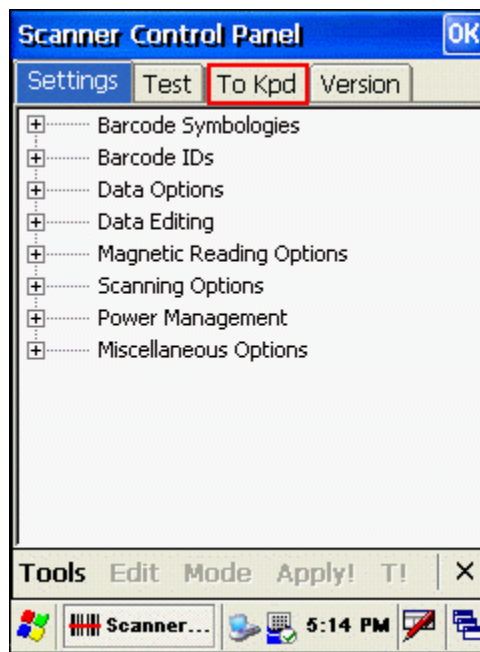


3. Scroll down to locate the **Scanner Settings** icon. Double-tap the **Scanner Settings** icon.

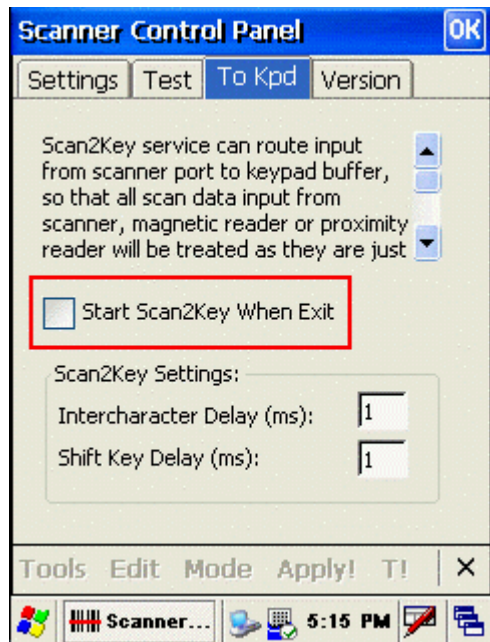


The **Scanner Control Panel** displays.

4. Tap the **To Kpd** tab.



The **To Kpd** tab displays.



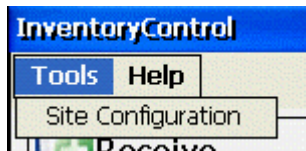
5. Select the **Start Scan2Key When Exit** check box. Make sure the check box has a check in it.
 6. Tap the **OK** button in the upper right corner of the screen to apply the setting and close the **Scanner Control Panel** screen.
-

Windows Mobile Device - Site Configuration

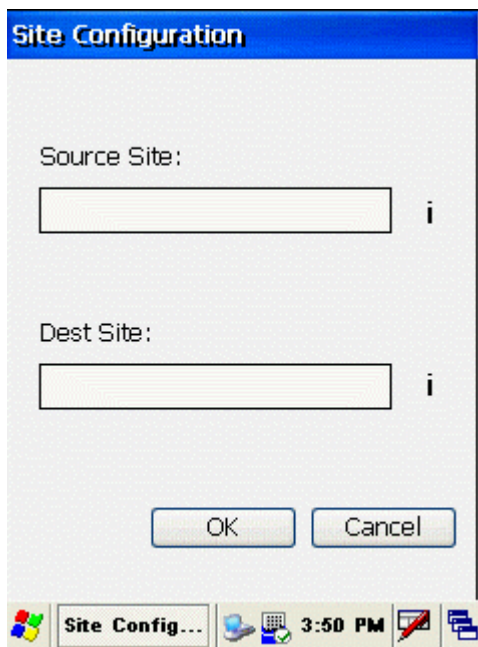
InventoryControl provides a time-saving feature for companies who use the same two Sites for all inventory transactions on the mobile device. On the **Site Configuration** screen, you can set up your device to automatically include these Sites in the appropriate fields in **InventoryControl**

Configuring Site:

1. To access the **Site Configuration** screen, select **Tools > Site Configuration**.



The **Site Configuration** screen displays.



You can enter the data by scanning, using the device's key pad, or using the device's keyboard. [Click here](#) for more information about entering data.

2. Enter the **Source Site**. The **Source Site** field is used as the default for Add, Remove, Move (from), Adjust and Details fields.
3. Enter the **Destination Site**. The **Dest Site** field is used as the default for Move (to).
4. Tap **OK**.

After you have configured the Sites, you will see that the appropriate fields are pre-populated with the selected sites in all the device's **InventoryControl** screens.

Windows Mobile Device - About Screen

The **About** screen displays basic information about the version of InventoryControl installed on your device.

Viewing the About Screen:

To open the **About** screen, select **Help > About**.



The **About** screen displays:



Information on this screen includes:

- Application title (**InventoryControl**)
- Version number and build number
- Setting for the **Allow Negative Numbers on the Mobile Device** option. This option is set on the **Options** screen in the PC version of InventoryControl. For more information on this option, please refer to the Options Screen topic.
- **Source Site** and **Destination Site**. These are the sites and locations to which the mobile device will default when moving, adding, etc. inventory. These are set on the PC. For more information on setting the Source and Destination Sites, please refer to the **Selecting Sites** topic.
- Copyright information
- The Wasp Barcode website address.

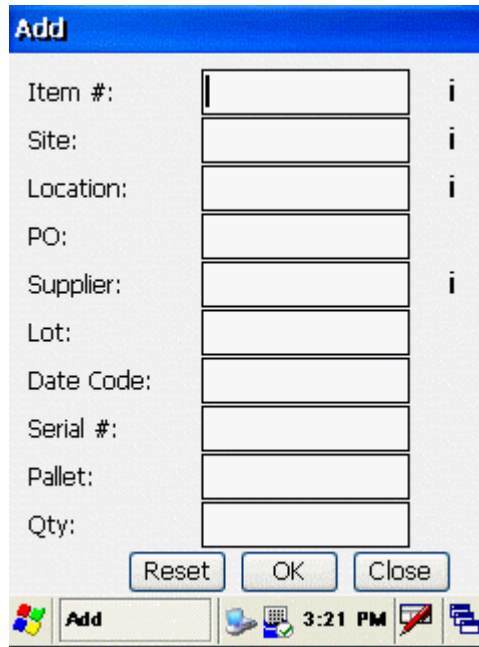
Windows Mobile Device - Adding Inventory

The **Add** inventory function is used to add quantity to any item setup in the database.

Inventory can also be added at the PC. See the Adding Inventory and Importing into the Database topics for more information.

Adding Inventory:

1. From the **Main Menu**, click the **Add** icon. The **Add** screen displays.



- Note:** On the **Add** screen, you can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.
2. Enter the number of the item to which you want to add inventory in the **Item #** field.

Add

Item #:	1001	i
Site:		i
Location:		i
PO:		
Supplier:		i
Qty:		

Reset OK Close

Add 3:23 PM

In the example above, one Item (1001) is being added to Site 2, Location 1.

After the Item Number is entered, the **Add** screen displays only the fields that are necessary for adding this particular Item. For example, if you enter an Item that is tracked by serial number, the **Serial No** field will remain on the screen, but other fields such as **Date Code** and **Pallet** will no longer display. **Exception:** The **PO** and **Supplier** fields will always display in the **Add** screen, even if the Item you entered is not tracked by these fields.

3. Enter the **Site** and **Location** to which the Item is to be added.

Add

Item #:	1001	i
Site:	Site 2	i
Location:	Location 1	i
PO:		
Supplier:		i
Qty:		

Reset OK Close

Add 3:26 PM

4. Enter the **Quantity** of the Item to be added.

Note: If the Item Number you are adding is tracked by serial number, the quantity (**Qty** field) must be 1.

5. When all required information is entered, tap **OK**. The Item is added and the **Add** screen resets, ready for the next Item to be added.

Tapping the **Reset** button clears all fields and restores all available fields to the **Add** screen display.

6. When you are finished with the **Add** screen, tap **Close** to return to **InventoryControl** main menu.

See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Tips for Speeding Up Data Entry:

- When you create a new item, if the Category, Manufacturer, UOM or any combination of pinnable fields will be used on a large number of items, create one item with those fields, then pin the fields. Now, the information will be retained in those fields so you don't have to keep re-entering it for each new item.
- Make sure you have the Close New Forms option turned off (on the InventoryControl Options screen) so the New Item screen, or any other screen where new information is added, stays open after each new item is saved.

Windows Mobile Device - Pinning Fields

"Pinning" can be used to lock values you have entered in any field. Pinning enables you to enter repeated information rapidly without having to re-enter repetitive data. After a field is pinned, you can manually enter data, or you can use a scanner to rapidly Add, Remove, Move, Adjust, etc. by repeatedly scanning barcodes.

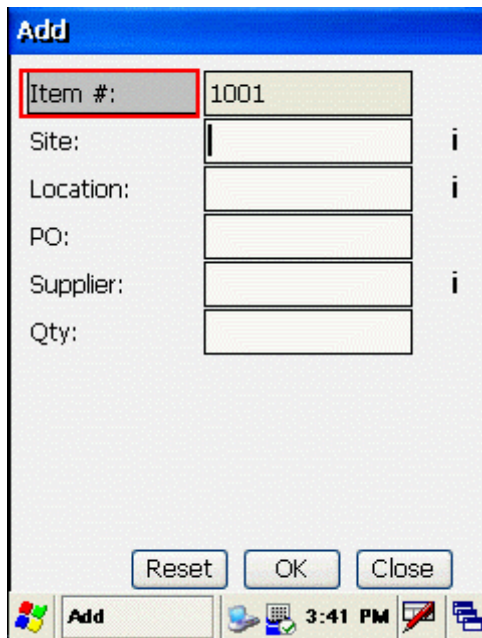
For example, if you need to add the same inventory Item Number multiple times, you can pin the **Item #** field and perform continuous Adds without having to re-enter the Item Number for each Add.

Note: Before pinning a field, make sure the data you want pinned in the field is entered. Once you pin the field, you cannot change the data entered in the field until the field is unpinned.

Remember that once you close a screen, the field will no longer be pinned when you re-open that screen.

Pinning Fields:

To pin a field, tap the field name.



The screenshot shows a Windows Mobile application window titled "Add". Inside, there is a form with several input fields. The first field, labeled "Item #:", contains the text "1001" and is highlighted with a grey background and a red border, signifying it is pinned. Below it are fields for "Site:", "Location:", "PO:", "Supplier:", and "Qty:", each with an empty input box. To the right of the "Site:", "Location:", and "Supplier:" labels, there is a small lowercase "i" icon. At the bottom of the form area are three buttons: "Reset", "OK", and "Close". The very bottom of the screen shows a Windows Mobile taskbar with a "Start" button, an "Add" button, a calendar icon, the time "3:41 PM", and other standard icons.

The entire field turns grey. This indicates the field is now pinned. Whatever information that has been entered in this field will remain until the screen is closed.

Unpinning Fields:

To unpin the field, click the field name again. The field will no longer be grey, and you may now change the information in the field.

Windows Mobile Device - Adding New Customers

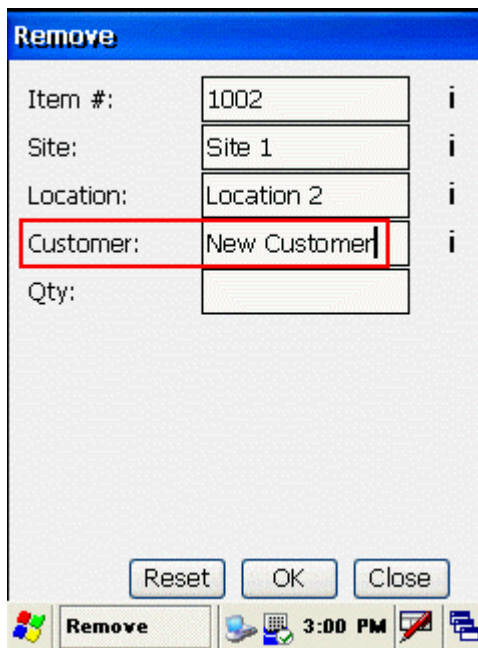
You can add new **Customers** in **InventoryControl** on the Windows Mobile Device only in the **Remove** screen.

The new **Customer** will not be added unless the data for all other fields is completed correctly and the inventory is successfully removed.

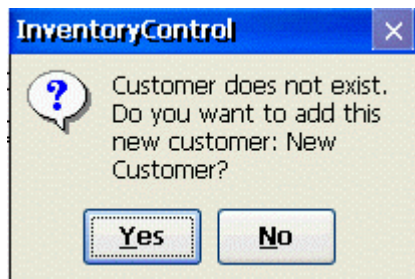
Adding a Customer on the Remove Screen:

In this example, a new **Customer** will be added and an **Item** will be removed.

1. On the [Remove](#) screen, enter the data for the **Item** you want to remove.
2. In the **Customer** field, enter the new **Customer** you want to add.



3. Click **OK**. The message below appears:



4. Click **Yes**.

The fields are now reset in the **Remove** screen.

5. If no errors display, this indicates that both the removal of the **Item** and the addition of the **Customer** were successful. To check, tap the **Search** icon **i** next to the **Customer** field.
6. The **Search Customers** screen displays, and the **Customer** you added displays in the **Customer** list.

See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Adding a New Location

You can add new **Locations** in **InventoryControl** on the mobile device. However, you **cannot** add new **Sites**. New **Locations** can be added in the **Add**, **Remove**, **Move**, **Adjust**, **Pick (Pro and Enterprise Versions Only)** and **Receive (Pro and Enterprise Versions Only)** screens on the mobile device.

Notes:

- You can only add a new **Location** if the **Allow Negative Quantities on the Mobile Device** option is enabled on the **Options** screen (on the PC). For more information on this option, please refer to the Options Screen topic.
- The new **Location** will not be added unless the data for all other fields is completed correctly and the function (**Add**, **Remove**, **Move**, etc.) is successfully completed.

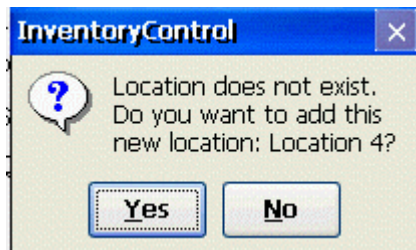
Adding a New Location:

In this example, a new Location - **Location 4** - will be added in the **Add** screen. The steps are the same for the **Remove**, **Move**, **Adjust** and **Receive (Pro and Enterprise Versions Only)** screens.

1. On the **Add** screen, enter the data for the Item you want to add.
2. In the **Location** field, enter the new Location you want to add.


The screenshot displays the 'Add' screen of the InventoryControl application on a Windows Mobile device. The screen features a blue header with the word 'Add'. Below the header, there are several input fields arranged in a list: 'Item #' with the value '1001', 'Site' with the value 'Site 2', 'Location' with the value 'Location 4' (highlighted by a red rectangular box), 'PO' (empty), 'Supplier' (empty), and 'Qty' (empty). To the right of each field is a small 'i' icon. At the bottom of the screen, there are three buttons: 'Reset', 'OK', and 'Close'. The Windows Mobile status bar at the very bottom shows the time as '2:40 PM' and the word 'Add'.

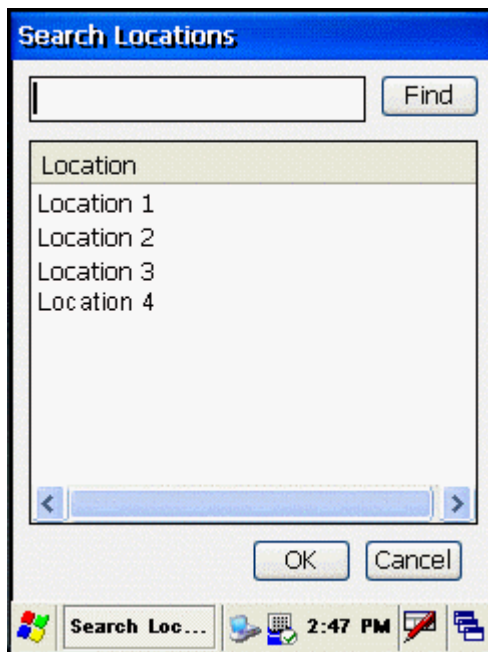
3. Click **OK**. The following message displays.



4. Click **Yes**. The fields are now reset in the **Add** screen.

If no errors display, this indicates that both the addition of the Location and the Item were successful.

5. To verify that the addition was successful, enter the Site with which the Location you added is associated, then tap the **Search** icon  next to the **Location** field.
6. The **Search Locations** screen displays, and the Location you added displays in the **Location** list.



See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Adding New Suppliers

You can add new Suppliers in **InventoryControl** on the Windows Mobile Device. New **Suppliers** can only be added in the **Add** screen.

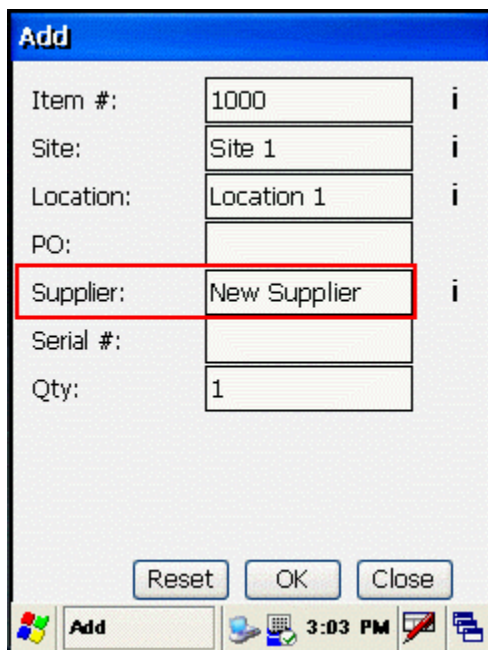
Notes:

- You will only be able to add a **Supplier** for an **Item** that is tracked by supplier.
- The new **Supplier** will not be added unless the data for all other fields is completed correctly and the **Add** is successfully completed.

Adding New Suppliers:

In this example, a new **Supplier** will be added to the database while an **Item** is added.

1. On the **Add** screen, enter the data for the **Item** you want to add.
2. In the **Supplier** field, enter the new **Supplier** you want to add.




3. Click **OK**. The following message displays.



4. Click **Yes**. The Item and the new Supplier are added, and the fields are now reset in the **Add** screen.

If no errors display, this indicates that both the addition of the **Supplier** and the **Item** were successful.

5. To verify the supplier was added, tap the **Search** icon  next to the **Supplier** field.

The **Search Suppliers** screen displays, and the Supplier you added displays in the **Supplier #** list.

See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Details Screen

The **Details** screen is used to display **Location** and **Quantity** information for any **Item** in the mobile database for the **Site** selected. You can also view transactions on this screen.

Details is an abbreviated version of the functionality available in the PC's **Inventory** and **Transactions Lists**.

To View Details:

1. From the **Main Menu**, tap **Details**. The **Details** screen appears.

Note: You can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.

2. This screen consists of two sections: **Filter** and **Search Results**. The **Filter** section is expanded by default. To open or close a section, click on the blue arrow that precedes the section name.

If the arrow is pointing down, **Filter** that section is expanded, as the **Filter** section is in the **Details** screen example, above.

If the arrow is pointing right, **Search Results**, that section is collapsed, as the **Search Results** section is in the **Details** screen example, above.

Select the data you want to view by entering **Filter** information, then tapping the **Inventory** or **Transactions** buttons. Keep in mind that after you enter an item number, the fields on the screen may change. For instance, if you enter an item number that is tracked only by Serial Number, Lot, Date Code and Pallet fields will disappear because you do not need to information in those fields for this particular item.

If you want to view all **Inventory** or all **Transaction** in the database, click the **Inventory**

or **Transactions** button without entering any filter information. Transactions displays all events that have been performed on this device since the last sync. Transactions can be used to verify if certain actions have been completed or to check that counts are correct.

Inventory can be used to locate items, check quantity or determine where to move an item.

The **Search Results** section automatically expands displaying the requested data:



You can view details for only one field, or for a combination of fields. For example, if you select only an Item Number and leave all other fields blank, the **Details** screen will display the total quantity of the Item Number in all Sites and Locations. If you select an Item Number and a specific Site, the **Details** screen will display the quantity of that Item at the specified Site only.

You can scroll right to left through the data using the bar at the bottom of the results grid.

3. You can expand the **Filter** section again by tapping the blue arrow or by clicking the **Show Filter** button. Enter new **Filter** information, then click **Inventory** or **Transactions** to view the search results.

To clear the fields and find details for another Item, select the **Reset** button.

4. To close the **Details** screen and return to the **InventoryControl** main menu, click the **Close** button.

See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Adjusting Inventory Quantities

The **Adjust** function is used to modify the inventory quantity for existing Items.

Inventory amounts can also be adjusted at the PC. See the Adjusting Inventory topic for more information.

Adjusting Inventory:

1. From the **Main Menu**, tab the **Adjust** icon.

The **Adjust** screen displays.

Adjust

Item #:		i
Site:		i
Location:		i
Lot:		
Date Code:		
Serial #:		
Pallet:		
Trans Code:		
Reason:	Positive	i
By Count:		

Reset OK Close

Adjust 3:06 PM

Note: You can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.

2. Enter the Item Number in the **Item #** field. In the example below, quantity for item 1001 at Site 1, Location 3, is being adjusted because one of these items is broken.

Adjust

Item #:	1001	i
Site:		i
Location:		i
Trans Code:		
Reason:		i
By Diff:		

Reset OK Close

Adjust 3:08 PM

Note that once the **Item Number** is selected, the **Adjust** screen displays only the fields that are necessary for adding this particular Item. For example, if you enter an Item that is tracked by serial number, the **Serial #** field will remain on the screen, but other fields such as **Date Code** and **Pallet** will no longer display. If you enter an Item that is not tracked, all tracking fields - **PO**, **Supplier**, **Lot**, **Date Code**, **Serial #** and **Pallet** - will no longer display.

3. Enter the **Site** and **Location** for the Item you want to adjust.

Adjust

Item #:	1001	i
Site:	Site 2	i
Location:	Location 3	i
Trans Code:		
Reason:		i
By Diff:		

Reset OK Close

Adjust 3:08 PM

4. Enter the **Transaction Code** in the **Trans Code** field. You can type any code directly into this field. Enter the code your company has defined for this transaction.

Adjust

Item #:	1001	i
Site:	Site 2	i
Location:	Location 3	i
Trans Code:	55	
Reason:		i
By Diff:	<input type="button" value="v"/>	

Reset OK Close

Adjust 3:09 PM

5. Select either **By Count** or **By Diff** and enter an amount. Click the down arrow in the **By Count/By Difference** field to select one of these options. **By Count** is used when a literal count has been made of inventory. **By Difference** is used when you want to indicate the amount by which the inventory has increased or decreased. For example, if you have counted 15 of an item, but the software indicates you have 16, select **By Count** and enter 15. If, however, the software indicates you have 16 items and you break one, you can indicate this by entering **By Diff** and selecting a reason code that indicates breakage. Keep in mind that you cannot enter negative numbers. You must indicate whether the system should add or subtract quantity by selecting the appropriate Reason code. Reason codes are defined for you later in this topic.

Adjust

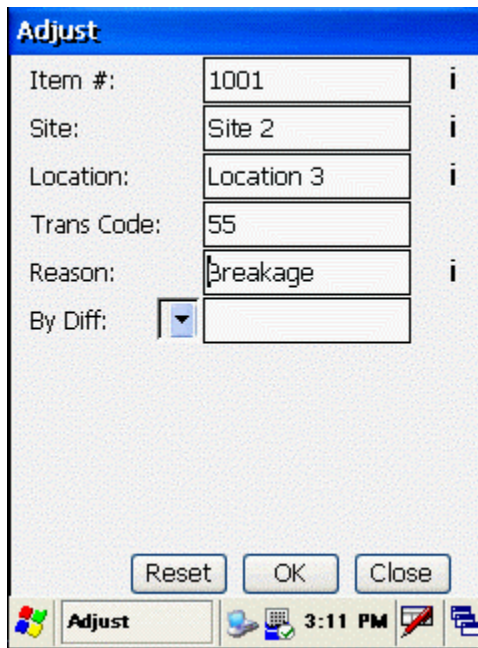
Item #:	1001	i
Site:	Site 2	i
Location:	Location 3	i
Trans Code:	55	
Reason:		i
By Diff	<input type="button" value="v"/>	
By Count		
By Diff		

Reset OK Close

Adjust 3:10 PM

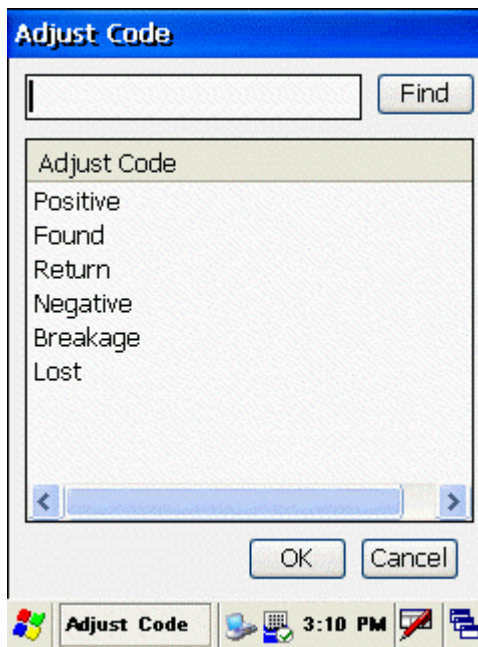
6. The **Reason** field is only used when the adjustment is **By Difference**. You do not need to use this field if you choose **By Count**. If you do select **By Difference** in the **Reason**

field, you must enter a **Reason Code**.



The 'Adjust' screen is a Windows-style dialog box with a blue title bar. It contains several input fields: 'Item #' with '1001', 'Site' with 'Site 2', 'Location' with 'Location 3', 'Trans Code' with '55', 'Reason' with 'Breakage', and 'By Diff' with a dropdown arrow. To the right of the 'Reason' field is a search icon (a lowercase 'i' in a circle). At the bottom are 'Reset', 'OK', and 'Close' buttons. The taskbar at the bottom shows the 'Adjust' icon, system icons, and the time '3:11 PM'.

To search for a Reason Code, select the **Search** icon  by the **Reason** field. The **Adjust Code** screen displays.



The 'Adjust Code' screen is a Windows-style dialog box with a blue title bar. It features a search input field at the top with a 'Find' button. Below is a list box containing the following items: 'Adjust Code', 'Positive', 'Found', 'Return', 'Negative', 'Breakage', and 'Lost'. At the bottom are 'OK' and 'Cancel' buttons. The taskbar at the bottom shows the 'Adjust Code' icon, system icons, and the time '3:10 PM'.

The first three codes in the screen are used when quantities are being added. The second three codes are used when quantities are subtracted.

- **Positive:** Indicates inventory was added.
- **Found:** Indicates inventory previously missing has been found.
- **Return:** Indicates the inventory is a returned item.
- **Negative:** Indicates inventory was removed.

- **Breakage:** Indicates inventory is broken.
- **Lost:** Indicates inventory is missing.

Select a code and tab **OK**.

1. When all required information is entered, tap **OK**. The item's quantity is adjusted and the **Adjust** screen resets, ready for the next Item to be adjusted.

Tapping the **Reset** button clears all fields and restores all available fields to the **Adjust** screen display.

2. When you are finished with the **Adjust** screen, tap **Close** to return to **InventoryControl** main menu.

See the [Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Auditing Inventory

Audit allows you to count the quantity of one or more items in your inventory when in **Audit Mode**. Before you can conduct an audit using the mobile device, you must download a new database created while InventoryControl is in audit mode. For more information on turning on the audit mode on the PC, please refer to the topic Auditing Your Inventory. For more information on creating the database, please refer to the topic [Windows Mobile Device - Setup Mobile Device](#).

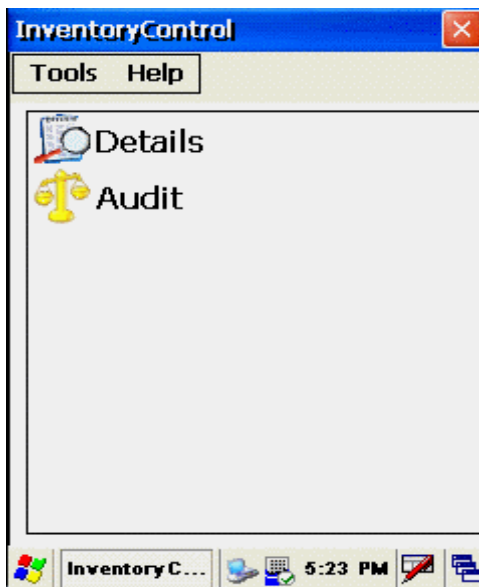
Inventory can also be audited at the PC.

-
- [Switching to Audit Mode on the Pocket PC](#)
 - [Returning to Normal Mode on the Pocket PC](#)
-

Switching to Audit Mode on the Windows Mobile Device

1. To switch the device to Audit mode, you must first start an Audit on the PC side and send the new database to the mobile device. For information on this, please refer to the topic Auditing Your Inventory.
2. Next, create a new Pocket PC database, then synchronize the database with the Pocket PC.

The Pocket PC version of **InventoryControl** opens in Audit mode.



To perform an Audit, select **Audit**.

The **Audit** screen displays.

Audit

Item #: i

Site: i

Location: i

Lot:

Date Code:

Serial #:

Pallet:

Trans Code:

Qty:

Reset OK Close

Audit 5:23 PM

[Enter](#) an Item Number, Site and Location.

Audit

Item #: 1001 i

Site: Site 1 i

Location: Location 1 i

Trans Code:

Qty:

Reset OK Close

Audit 5:24 PM

➔ Note that once the Item Number is selected, the **Audit** screen displays only the fields that are necessary for Auditing this particular Item. For example, if you enter an Item that is tracked by serial number, the **Serial #** field will remain on the screen, but other fields such as **Date Code** and **Pallet** will no longer display. If you enter an Item that is not tracked by anything, all tracking fields - **Lot**, **Date Code**, **Serial #** and **Pallet** - will no longer display.

- Enter the Transaction Code in the **Trans Code** field. This is a free form text field. Enter the code your company has defined for this transaction.

- Enter the **Quantity**.

Tap **OK**.

The Audit Item is entered and the screen resets, ready for the next Item.

Note that when the screen resets, only the fields used for the Item you just entered display. To reset the screen so that all available fields display, tap **Reset**.

When you have finished entering Items for the Audit, close the **Audit** screen by tapping the **Close** button.

To send the Audit information to the PC, use the **Send PC Data** option. See [Pocket PC Send PC Data](#) for full details on this process.

Returning to normal mode on the Pocket PC

1. After [sending the Audit data to the PC](#) and processing the data on the PC side, on the PC, select **Tools > Audit > End Audit**.

A confirmation message displays.

2. Select **Yes** on the confirmation screen.

InventoryControl returns to normal mode on the PC.

3. Next, create a new [mobile database](#), then [synchronize](#) the database with the Pocket PC.
4. Close the mobile version of **InventoryControl**, then restart the application.


The mobile version of **MobileInventory** opens in normal mode.

See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Moving Inventory

The **Move** function is used to move inventory quantity from one Location to another. This allows you to move inventory quantity for an item from one Location to another. When you create an item, you can add which locations it may be. When you then add inventory (quantity) to the item, you select in which location that quantity will reside. The Move function allows you to move that inventory from the originally assigned location to another. By moving inventory in the software, you can easily keep accurate records of where all of your inventory is currently located.

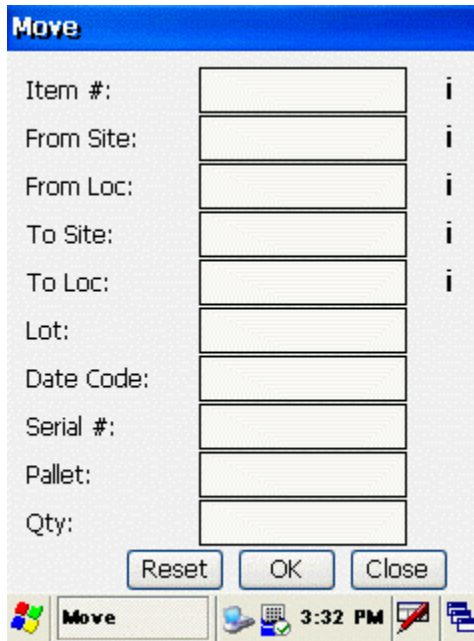
If the **Allow Negative Quantities on Mobile Devices** option is enabled on the **Options** screen, you can also move more quantity than is available at the source **Location**. For more information on this option, please refer to the Options Screen topic.

 When moving an Item, the From Site and the To Site must be different. For example, you cannot move an Item **from** Site 100, Location 13 **to** Site 100, Location 13.

Inventory can also be moved at the PC. See the Moving Inventory topic for more information.

Moving Inventory:

1. From the **Main Menu**, tap the **Move** icon. The **Move** screen displays.



Note: You can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Pocket PC** for details) or use the Search function.

2. In this example, a quantity of Item (1001) is being moved **from** Site 1, Location 2 **to** Site 2, Location 3.

Enter the Item Number in the **Item** field.

Move

Item #: 1001 i

From Site: i

From Loc: i

To Site: i

To Loc: i

Qty: i

Reset OK Close

Move 3:35 PM

Note that once the Item Number is selected, the **Move** screen displays only the fields that are necessary for adding this particular Item. For example, if you enter an Item that is tracked by serial number, the **Serial #** field will remain on the screen, but other fields such as **Date Code** and **Pallet** will no longer display. If you enter an Item that is not tracked, all tracking fields - **PO**, **Supplier**, **Lot**, **Date Code**, **Serial #** and **Pallet** - will no longer display.

3. Enter the Site and Location **from** which the Item will be moved.

Move

Item #: 1001 i

From Site: Site 1 i

From Loc: Location 2 i

To Site: i

To Loc: i

Qty: i

Reset OK Close

Move 3:35 PM

4. Enter the Site and Location **to** which the Item will be moved.

The screenshot shows the 'Move' screen with the following fields and values:

Field	Value	Icon
Item #:	1001	i
From Site:	Site 1	i
From Loc:	Location 2	i
To Site:	Site 2	i
To Loc:	Location 3	i
Qty:		

At the bottom, there are three buttons: 'Reset', 'OK', and 'Close'. Below the buttons is a taskbar with a 'Move' button, a clock showing '3:36 PM', and other system icons.

5. Indicate the Quantity of the Item that will be moved.

The screenshot shows the 'Move' screen with the 'Qty' field now containing the value '1'. All other fields and values remain the same as in the previous screenshot.

6. When all required information is entered, tap **OK**.

The Item is moved and the **Move** screen resets, ready for the next Item to be moved.

Tapping the **Reset** button clears all fields and restores all available fields to the **Move** screen display.

7. When you are finished with the **Move** screen, tap **Close** to return to the **InventoryControl** main menu.

 See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Removing Inventory

The **Remove** function is used to remove quantity from any Item that has quantity recorded in the database. Inventory is the amount or quantity of a particular item.

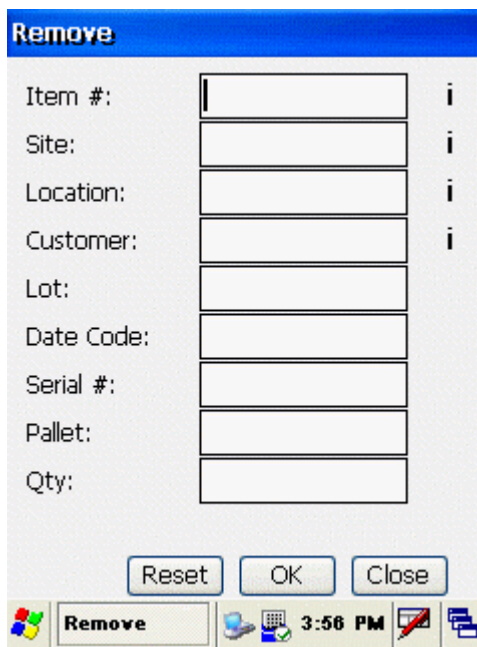
Notes regarding the Allow Negative Quantities option:

- If this option is enabled (on the PC's **Options Screen**), you can enter a **Quantity** larger than the actual amount currently shown in the mobile database for that inventory Item. If the option is not enabled, you will **not** be allowed to enter a **Quantity** larger than the amount shown in the database.
- The **Allow Negative Quantities** option also must be enabled before you can add a new Location in this screen.
- For more information on this option, please refer to the **Options Screen** topic.

Inventory can also be removed at the PC. See the Removing Inventory topic for more information.

Removing Inventory:

1. From the **Main Menu**, tap the **Remove** icon. The **Remove** screen appears.



You can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Pocket PC** for details) or use the Search function.

2. In this example, Mouse 1001 is being removed from Site 1, Location 2.
2. Enter the Item Number to be removed in the **Item** field.

Remove

Item #: 1001 i

Site: i

Location: i

Customer: i

Qty: i

Reset OK Close

Remove 3:56 PM

- Note that once the Item Number is selected, the **Remove** screen displays only the fields that are necessary for adding this particular Item. For example, if you enter an Item that is tracked by serial number, the **Serial #** field will remain on the screen, but other fields such as **Date Code** and **Pallet** will no longer display. If you enter an Item that is not tracked, all tracking fields - **PO**, **Supplier**, **Lot**, **Date Code**, **Serial #** and **Pallet** - will no longer display.
3. Enter the Site and Location from which this Item should be removed.

Remove

Item #: 1001 i

Site: Site 1 i

Location: Location 2 i

Customer: i

Qty: i

Reset OK Close

Remove 3:57 PM

4. Optionally enter a Customer.

5. Enter the Quantity of the Item to be removed.

6. When all required information is entered, tap **OK**. The Item is removed and the **Remove** screen resets, ready for the next Item to be removed.

Tapping the **Reset** button clears all fields and restores all available fields to the **Remove** screen display.

7. When you are finished with the **Remove** screen, tap **Close** to return to the **InventoryControl** main menu.

➡ See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Removing a Kit Item

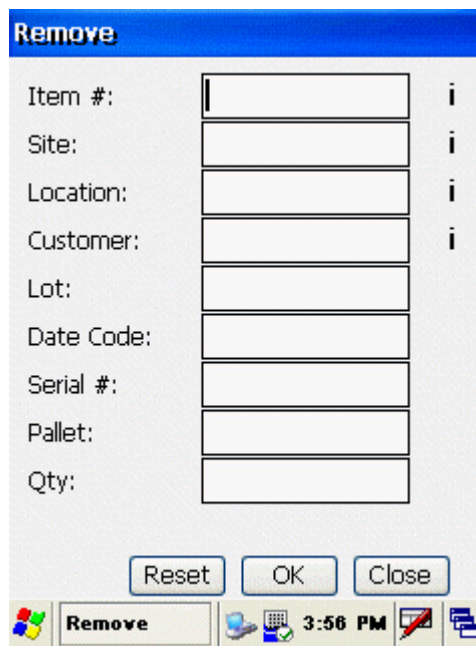
This function applies to Pro and Enterprise Version users only.

The **Remove Kit** function allows you to remove a kit item, which means removing quantity from the component items from your database.. This can be considered the same as shipping inventory. You can designate which customer this inventory was shipped to on this screen.

Kit Items can also be removed at the PC. See the Removing Kit Items topic for more information.

Removing Kit Items:

1. From the **Main Menu**, tap the **Remove** icon. The **Remove** screen appears.



You can enter characters manually, scan in data (see [Entering Alphanumeric Data](#) for details) or use the Search function.

2. Enter the **Item** number you want to remove in the **Item #** field, or tap the **i** icon to access the **Find** screen. Please refer to the [Search Function](#) topic for information on using the **Find** screen.

The **Remove** screen changes when a Kit item is selected:

Remove

Item #: 107 i

Customer: i

Qty: i

Reset OK Close

Remove 11:29 AM

3. You can optionally enter a customer number or search for a customer.
4. Enter the quantity you want to remove and click **OK**. The quantity is the number of Kits you want to remove. The **Remove Kit** screen appears.

Remove Kit

Kit #: 107 i

Item #: i

Site: 1 i

Location: i

Lot: i

Date Code: i

Serial #: i

Pallet: i

Qty: i

Kit Info Reset OK Close

Remove ... 11:32 AM

This is where you will select the Kit's component items to remove.

5. Enter the **Item #** of the component item, or tap the **i** icon to view the Kit Info screen. Only items contained in this Kit will appear.

Kit Info

Find

Item #	Total Qty	Proc Qty
104	10	0
106	10	0

Undo Cancel

Kit Info 11:33 AM

The **Kit Info** screen displays all component items for this Kit item.

The **Item #** is the item number of the component item.

The **Total Qty** is the total quantity of this item in this kit multiplied by the quantity you want to remove. If there are 5 items in the kit and you have indicated you want to remove 12, 60 will display here ($5 \times 12 = 60$). If there are 10 items in the kit and you want to remove 12, 120 will display here ($10 \times 12 = 120$).

Undo will "undo" all of the transactions for that component item and reset the quantity processed back to zero.

Doubleclick on the desired item. The **Remove Kit** screen will reappear with the selected item populated in the **Item #** field.

6. Enter the **Site**, **Location** and any **Track Bys** for this item.
7. Enter the **Quantity** you want to remove.
8. Click **OK** to remove the item. Now you can select another component item to remove.

Windows Mobile Device - Receiving Inventory

The **Receive** inventory function is used to add quantity to an item from a purchase order. Purchase Orders are created on the PC. For more information on creating Purchase Orders, please refer to the Creating a Purchase Order topic.

Inventory can also be received at the PC. **Manual** items cannot be received on the mobile devices. Please refer to **Creating a Purchase Order** for more information on **Manual** items.

Receiving Inventory on the Windows Mobile Device:

1. From the **Main Menu**, tap the **Receive** icon. The **Receive** screen displays.

Receive

PO: i

Item #: i

► **Details**

Site: i

Location: i

Date Code:

Pallet:

Lot:

Serial #:

Quantity:

Reset OK Close

Windows Mobile taskbar: Receive icon, 11:57 AM, and other icons.

Note: On the **Receive** screen, you can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.

2. Enter or search for the **PO** number that contains the item you are receiving.

Receive

PO: 00001 i

Item #: i

► **Details**

Site: i

Location: i

Date Code:

Pallet:

Lot:

Serial #:

Quantity:

Reset OK Close

Receive 11:59 AM

3. Enter the number of the item you are receiving in the **Item #** field.

Receive

PO: 00001 i

Item #: 1002 i

► **Details** box/10 10

Site: i

Location: i

UOM.Qty:

Reset OK Close

Receive 12:03 PM

In the example above, Item 1002 is being received.

The **Details** section displays the shipping unit of measure, how many of the item is contained in the shipping unit of measure (eaches) and the cost information. Cost only displays if the **Show Costing Information During Receive** option is enabled on the PC **Options** screen. For more information on this option, please refer to the Options Screen topic.

You can expand the Details section by tapping the blue arrow next to word Details. If

there is more than one possible order unit, the Details section will open automatically and you must pick one of the UOM entries to receive. An example of the expanded section is shown below:

Receive

PO: 00001 i

Item #: 1002 i

▼ Details box/10 10

UOM	Eaches	Cost
box	10	10

Reset OK Close

Receive 12:09 PM

In this example, each box contains 10 items and costs 10 per item (\$100.00 per box).

4. Enter the **Site** and **Location** into which the Item is to be received.

Receive

PO: 00001 i

Item #: 1002 i

► Details box/10 10

Site: Site 1 i

Location: Location 2 i

UOM.Qty:

Reset OK Close

Receive 12:08 PM

5. Enter the Quantity of the Item to be received. Keep in mind that you should enter the Order Unit of measure here. For instance, if you are receive 1 box of 10, enter 1 rather than 10. InventoryControl will do the math behind the scenes and break the shipment down to 10 for you.

Note: If this item were tracked by serial number, the quantity would be entered in eaches since you can only have 1 item per serial number.

If you enter a quantity that is higher than the quantity entered on the Purchase Order, a warning will appear. You can continue with the higher quantity if you so choose.

6. When all required information is entered, tap **OK**. The Item(s) is marked as Received and the **Receive** screen resets, ready for the next Item to be received.

Tapping the **Reset** button clears all fields and restores all available fields to the **Receive** screen display.

7. When you are finished with the **Add** screen, tap **Close** to return to **InventoryControl** main menu.

See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Tips for Speeding Up Data Entry:

- When you create a new item, if the Category, Manufacturer, UOM or any combination of pinnable fields will be used on a large number of items, create one item with those fields, then pin the fields. Now, the information will be retained in those fields so you don't have to keep re-entering it for each new item.
- Make sure you have the Close New Forms option turned off (on the InventoryControl Options screen) so the New Item screen, or any other screen where new information is added, stays open after each new item is saved.

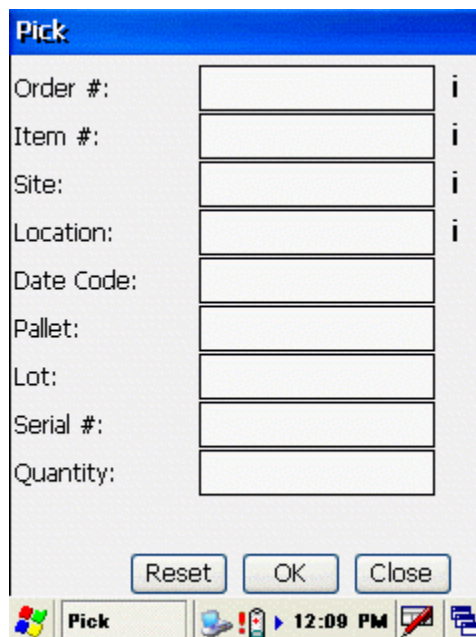
Windows Mobile Device - Picking Items for Orders

The **Pick** inventory function is used to remove quantity from an item as it is added to a pick order. Pick Orders are created on the PC when an order comes in from a customer requesting inventory. For more information on creating Pick Orders, please refer to the Creating a Pick Order topic.

Inventory can also be picked at the PC. **Manual** items cannot be picked on the mobile devices. Please refer to **Creating a Pick Order** for more information on **Manual** items.

Picking Inventory on the Windows Mobile Device:

1. From the **Main Menu**, tap the **Pick** icon. The **Pick** screen displays.



- Note:** On the **Pick** screen, you can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.
2. Enter or search for the **Order #** that contains the item you are picking.

The screenshot shows a Windows-style application window titled "Pick". It contains a list of input fields on the left and a column of small 'i' icons on the right. The fields are: Order # (containing "00001"), Item #, Site, Location, Date Code, Pallet, Lot, Serial #, and Quantity. All fields except Order # are empty. At the bottom are three buttons: "Reset", "OK", and "Close". The Windows taskbar at the bottom shows the "Pick" application icon, a system tray with a clock showing "12:13 PM", and other standard icons.

Order #:	00001	i
Item #:		i
Site:		i
Location:		i
Date Code:		
Pallet:		
Lot:		
Serial #:		
Quantity:		

Buttons: Reset, OK, Close

Taskbar: Pick, 12:13 PM

3. Enter the number of the item you are picking in the **Item #** field.

This screenshot shows the same "Pick" window after the "Item #" field has been populated with the value "1001". The "Order #" field remains "00001". The "EA.Qty" field is now visible at the bottom of the list. The "i" icons are still present next to the first four fields. The buttons and taskbar remain the same.

Order #:	00001	i
Item #:	1001	i
Site:		i
Location:		i
EA.Qty:		

Buttons: Reset, OK, Close

Taskbar: Pick, 12:13 PM

In the example above, one Item 1001 is being picked.

4. Enter the **Site** and **Location** from which the item is being picked. If you have selected a **Primary Location** for this item (on the **Add/Edit Item** screen) the Site and Location fields will automatically populate. You can change these fields if needed.

Pick

Order #: 00001 i

Item #: 1001 i

Site: Site 1 i

Location: Location 2 i

EA.Qty:

Reset OK Close

Pick 12:14 PM

5. Enter the Quantity of the Item to be picked. If you enter a higher quantity than is indicated on the Pick Order, a warning will appear, but you will be allowed to enter the higher quantity if you so choose.

Pick

Order #: 00001 i

Item #: 1001 i

Site: Site 1 i

Location: Location 2 i

EA.Qty: 1

Reset OK Close

Pick 12:15 PM

Note: Notice that this is in eaches.

6. When all required information is entered, tap **OK**. The Item(s) is marked as Received and the **Receive** screen resets, ready for the next Item to be received.

Tapping the **Reset** button clears all fields and restores all available fields to the **Receive** screen display.

7. When you are finished with the **Add** screen, tap **Close** to return to **InventoryControl** main menu.

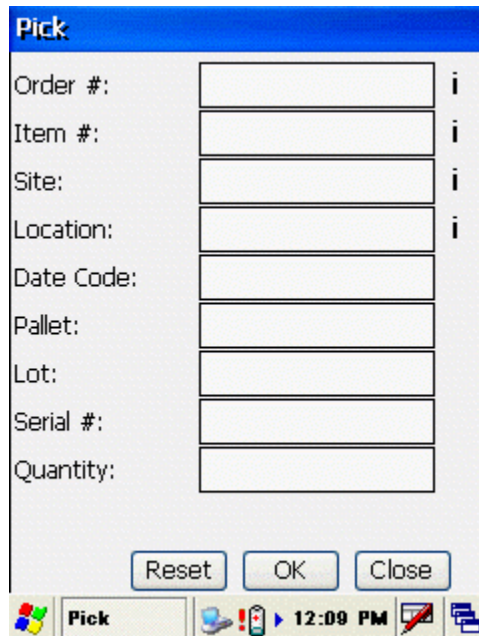
See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device - Picking Kit Items

The **Pick** inventory function is used to remove quantity from an item as it is added to a pick order. Pick Orders are created on the PC when an order comes in from a customer requesting inventory. For more information on creating Pick Orders, please refer to the Creating a Pick Order topic.

Picking Inventory on the Windows Mobile Device:

1. From the **Main Menu**, tap the **Pick** icon. The **Pick** screen displays.



- Note:** On the **Pick** screen, you can enter characters manually, scan in data (see **Entering Alphanumeric Data on the Windows Mobile Device** for details) or use the Search function.
2. Enter or search for the **Order #** that contains the item you are picking.

Pick

Order #:	00001	i
Item #:		i
Site:		i
Location:		i
Date Code:		
Pallet:		
Lot:		
Serial #:		
Quantity:		

Reset OK Close

Pick 12:13 PM

3. Enter the number of the item you are picking in the **Item #** field or click the **i** icon to search..

Pick

Order #:	00001	i
Item #:	1001	i
Site:		i
Location:		i
EA.Qty:		

Reset OK Close

Pick 12:13 PM

4. Enter the Quantity you want to pick. This is the number of kits you want to pick.

Pick

Order #: 00001 i

Item #: 107 i

EA.Qty:

Reset OK Close

Pick 1:14 PM

5. On the **Pick Kit** screen, enter the **Item number** of the component item you want to pick or click the **i** icon to search.

Pick Kit

Kit #: 107

Item #: i

Site: 1 i

Location: i

Date Code:

Pallet:

Lot:

Serial #:

EA.Qty:

Kit Info Reset OK Close

Pick Kit 1:11 PM

If you click the search icon, the following Kit Info screen will appear allowing you to select a component item. Only items contained in the selected Kit will appear on this screen.

The screenshot shows a window titled "Kit Info". At the top is a search bar with a "Find" button. Below is a table with three columns: "Item #", "Total Qty", and "Proc Qty". The table contains two rows of data. At the bottom of the table are navigation arrows. Below the table are "Undo" and "Cancel" buttons. The Windows taskbar at the bottom shows the "Kit Info" icon, system icons, and the time "1:17 PM".

Item #	Total Qty	Proc Qty
104	1	0
106	1	0

The **Kit Info** screen displays all component items for this Kit item.

The **Item #** is the item number of the component item.

The **Total Qty** is the total quantity of this item in this kit multiplied by the quantity you want to pick. If there are 5 items in the kit and you have indicated you want to pick 12, 60 will display here ($5 \times 12 = 60$). If there are 10 items in the kit and you want to pick 12, 120 will display here ($10 \times 12 = 120$).

Undo will "undo" all of the transactions for that component item and reset the quantity processed back to zero.

Doubleclick on the desired item. The **Remove Kit** screen will reappear with the selected item populated in the **Item #** field.

6. Enter the **Site** and/or **Location** from which the item is being picked. If you have selected a **Primary Location** for this item (on the **Add/Edit Item** screen) the Site and Location fields will automatically populate. You can change these fields if needed.

Pick

Order #: 00001 i

Item #: 1001 i

Site: Site 1 i

Location: Location 2 i

EA.Qty:

Reset OK Close

Pick 12:14 PM

7. Enter the **Quantity** of the Item to be picked. If you enter a higher quantity than is indicated on the Pick Order, a warning will appear, but you will be allowed to enter the higher quantity if you so choose.

Pick

Order #: 00001 i

Item #: 1001 i

Site: Site 1 i

Location: Location 2 i

EA.Qty: 1

Reset OK Close

Pick 12:15 PM

Note: Notice that this is in eaches.

8. When all required information is entered, tap **OK**. The Item(s) is marked as Received and the **Receive** screen resets, ready for the next Item to be received.

Tapping the **Reset** button clears all fields and restores all available fields to the **Receive** screen display.

9. When you are finished with the **Add** screen, tap **Close** to return to **InventoryControl** main menu.

See the [Windows Mobile Device Troubleshooting](#) topic if you encounter errors while using this function.

Windows Mobile Device Troubleshooting

This topic covers error messages and issues that may arise while using the Windows Mobile Device.

The subjects currently covered in this Troubleshooting topic are listed below. Click the subject that most closely matches what you are searching for.

Click the subject you want to troubleshoot:

Error/Alert Messages (listed in alphabetical order):

- [Customer does not exist. Do you want to add this new customer?](#)
- [Customer is not valid](#)
- [Item doesn't exist](#)
- [Location doesn't exist. Do you want to add this new location?](#)
- [Location is not valid](#)
- [Pallet is not valid](#)
- [Please select one record from the list and click OK button to return to previous form](#)
- [Quantity is not valid](#)
- [Serial is not valid](#)
- [Site does not exist](#)
- [Source and destination sites are set to be the same...](#)
- [Supplier does not exist. Do you want to add this new supplier?](#)
- [The Adjust reason you entered is not valid](#)
- [The mobile device has unprocessed transactions...](#)
- [There is not enough quantity in stock to complete the transaction...](#)

Issues

- [Search screen is empty \(no choices\)](#)

"The Adjust Reason You Entered is not Valid"

This message displays when you have selected **By Difference** and you have not entered a **Reason** code. You must either choose a **Reason** code or change your selection to **By Count**.

"Quantity is not valid."

This message displays when you have either not entered a number in the **Quantity** field, or you have enter alpha characters in the **Quantity** field.

Customer

"Customer is Not Valid"

This message displays if you leave the **Customer** field empty when it is a required field. You must enter a Customer in the **Customer** field.

"Customer does not exist. Do you want to add this new customer: <CUSTOMER NAME>?"

This message displays if you enter a Customer in the **Customer** field that does not currently exist in the mobile database. For more information on adding customers, please refer to the [Windows Mobile Device - Adding Customers](#) topic.

Get Data from PC

"The mobile device has unprocessed transactions. Please process them on the PC database first, then you can get new database records from the PC side."

This message indicates there are database records that have been sent from the device to the PC, but the data has not been processed on the PC side. Be sure you have completed the entire [Send PC Data](#) process, including processing the mobile device data in the [Pending Uploads](#) wizard.

Items

Messages

"Item doesn't exist. Hard Drive 500."

This message displays under the following circumstances.:

- **Entering an Item Number that does not exist.**
You cannot add Item Numbers on the mobile device. You can only add Item Numbers on the PC side. You must either select another item, or add the Item Number on the PC side, [download this new data to the device](#), and then select it on in the appropriate screen on your mobile device.
- **Leaving the Item Number screen blank.**
In screens where an Item Number is required, you will receive this message if you leave

the Item Number field blank and tap **OK**.

Locations

Messages

"Location is not valid."

This message displays if you do not enter a Location in the **Location** field or too many characters have been entered in the **Location** field. You must enter a Location in the **Add**, **Remove**, **Move**, **Adjust** and **Stage** screens. You can [add a new Location](#) on the mobile device if the one you need is not currently in the mobile device database.

"Location does not exist. Do you want to add this new location: <LOCATION NAME>?"

This message displays if you enter a Location that does not exist in the mobile device database. [Click here](#) if you want to add this Location to the database.

Move

Messages

"Source and Destination sites are set to be the same. Destination site and location needs to be different than the Source Site and Location."

This message indicates you selected the same Site and Location for both the Source from which you were moving the Item and the Destination to which you were moving the Item. You cannot have the same Site and Location for both the Source and the Destination.

You must either change the Site and Location in the **From Site** and **From Loc** fields, or change the Site and Location in the **To Site** and **To Loc** fields.

For example, if you entered Site 201 and Location A20 in both the Source and Destination Site/Location fields, you are trying to move an Item **from** its current Location **to** its current Location.

If the Item is currently located at Site 201, Location A20, to move it to another site you must enter a different Destination, such as Site 100, Location B13.

Pallet

Messages

"Pallet is not valid."

This message displays if:

- The Item Number you entered is tracked by Pallet and you have not entered a Pallet in the **Pallet** field.
- The Pallet you entered is not the correct Pallet by which the Item you entered is tracked.
- A Pallet that does not exist has been entered in the **Pallet** field.

If a Pallet is required, you must enter the Pallet by which the entered Item Number is tracked.

Search


Messages

"Please select one record from the list and click OK button to return to previous form."

This message displays if you do not select any record in the **Search** screen and then tap **OK**.

You must either select a record in the **Search** screen, then tap **OK**, or tap **Cancel** to exit the **Search** screen without selecting a record.

List area in Search screen is empty (no choices presented).

If you click the **Search** icon  next to a field in any screen in the mobile version of **InventoryControl** and the **Search** screen offers no list of choices, then no data for this field has been downloaded from the PC. You can add three types of records on the mobile device: [Locations](#), [Suppliers](#) and [Customers](#).

For other records, you must add data from the PC side, then [send the new data to the mobile device](#).

Topics Related to Adding Data from the PC Side:

- Create New Purchase Order
- Create New Pick Order
- Create New Item
- Create New Manufacturer
- Create New Site

Serial Number

Messages

"Serial # is not valid."

This message displays if:

- The Item Number you entered is tracked by Serial Number and you have not entered a Serial Number in the **Serial #** field.
- The Serial Number you entered is not the correct Serial Number by which the Item you

entered is tracked.

- A Serial Number that does not exist has been entered in the **Serial #** field.
- If a Serial Number is required, you must enter the Serial Number by which the entered Item Number is tracked.

Sites

"Site does not exist."

This message displays if you enter a Site that is not in the database.

You cannot create Sites on the mobile device. You can only create Sites on the PC side. You must either select another Site, or create the new Site on the PC side, [download this new data to the device](#), and then select it on in the appropriate screen on your mobile device.

Stock

Messages

"There is not enough quantity in stock to complete the transaction. Quantity remaining: 0."

This message will display if you attempt to Remove, Move or Adjust a greater quantity of an Item than is currently in stock.

If there is an adequate quantity of the Item at a different Site and Location, you can select the Item from that Site and Location. If the quantity in all Sites and Locations is less than the amount you are trying to Remove, Move or Adjust, you will not be able to process this Item until enough a large enough quantity of the Item has been stocked.

Supplier

"Supplier does not exist. Do you want to add this new supplier: <SUPPLIER NAME>?"

This message displays when you enter a Supplier that is not currently in the mobile device database in the **Supplier** field. For more information on adding suppliers on the mobile device, please refer to [Windows Mobile Device - Adding Suppliers](#).

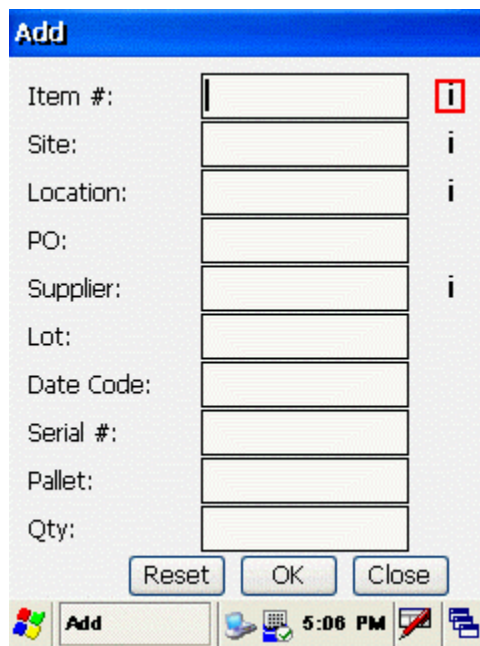
Windows Mobile Device - Searching for Information

You can use the **Search** function to enter data in many of the **Inventory Control** fields.

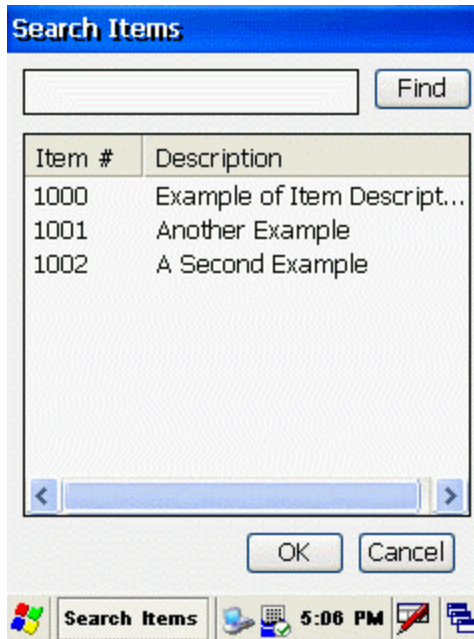
Whenever the **Search** function is available, the **Search** icon **i** displays next to a field.

To Search:

1. Tap the **Search** icon to open the **Search** screen.



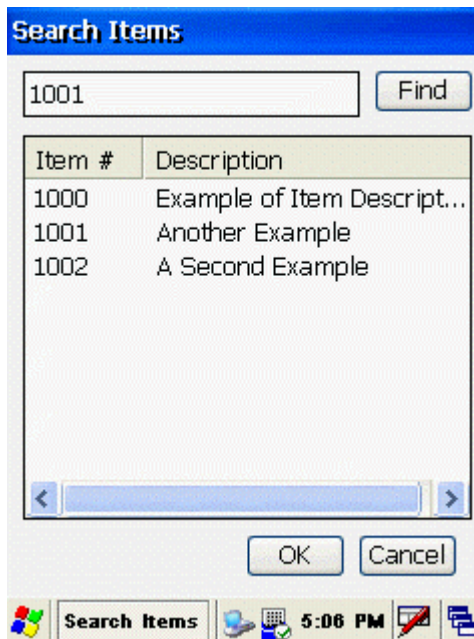
The **Search** screen opens.



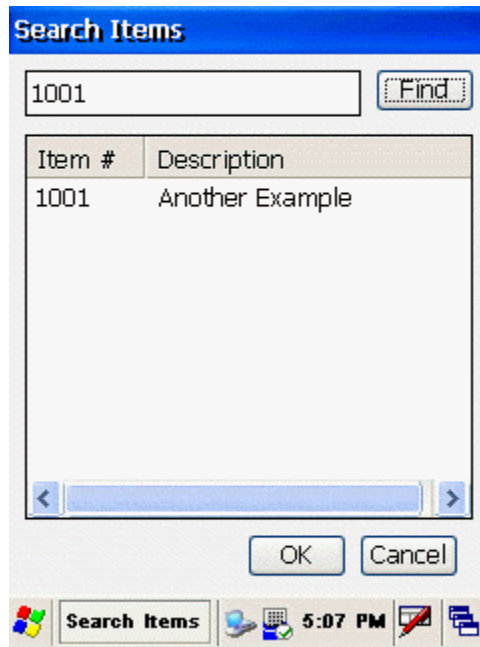
The title of the screen is specific to the field you select. For example, if you select the **Search** icon next to the **Item** field, the **Search Items** screen opens. If you select the **Search** icon next to the **Site** field, the **Search Sites** screen opens.

When searching for a Location, note that you must **first** select a Site, then the Location. If you do not select a Site first, the **Search Location** screen will be empty.

2. You can either select an Item from the list that displays in this screen, or enter search criteria in the top field, then tap **Find**.



If you use the **Find** button, the Items that match the criteria you specified display.



Please note that InventoryControl contains partial search capability. For example, if you are searching for item 1234, and enter 123, the application will return all items that contain the numbers 123 in the Item Number field.

If your entry returns no results, you can clear the search field, then tap **Find** to display all records.

Select the Item you want, then tap **OK**.

The **Search** screen closes and the Item you selected displays in the field you selected.

Item #:	1001	i
Site:		i
Location:		i
PO:		
Supplier:		i
Qty:		

Technical Support



[Wasp Technical Support, Knowledge Base and Downloads](#)



[Wasp BarCode Online Store](#)

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