Mtec LLC Warehouse Application

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Introduction

Welcome to the Mtec Cloud Solutions LLC Warehouse Application

The Warehouse Application serves as a comprehensive solution for managing consignment warehouses, which are facilities used to store and
manage inventory items on behalf of vendors and customers. Its primary purpose is to streamline the operations related to consignment inventory,
providing tools for efficient inventory management, tracking, and maintenance.

Warehouse Management Application Help File

Overview

This application allows vendors and their customers to manage warehouses at the customer sites. It provides tools to oversee inventory, manage stock, and ensure smooth operations across various types of warehouses.

User Roles

- **Vendors:** Manage multiple customers and their respective sites.
- **Customers:** Manage their sites and interact with warehouses.
- **Warehouse Personnel:** Handle day-to-day operations within the warehouses.

Warehouse Types

1. **Fully Managed Warehouse**
    - **Description:** A full-time employee is stationed in the warehouse to manage the receiving and dispatching of items.
    - **Stock Ownership:**

        - Consignment Stock (Vendor-owned)
        - Managed Stock (Customer-owned)

2. **Customer Managed Warehouse - Managed Stock**
    - **Description:** The customer manages the receipt and pulling of items using the warehouse application.
    - **Stock Ownership:** Customer-owned.
3. **Customer Managed Warehouse - Consignment Stock**
    - **Description:** The customer manages the receipt and pulling of items using the warehouse application.
    - **Stock Ownership:** Vendor-owned. The customer is invoiced when items are removed from the warehouse.
4. **Customer Unmanaged Warehouse - Managed Stock**
    - **Description:** The customer uses items without tracking, and the vendor manages the receipt and pulling of items through periodic cycle counts.
    - **Stock Ownership:** Customer-owned.
5. **Customer Unmanaged Warehouse - Consignment Stock**
    - **Description:** The customer uses items without tracking, and the vendor manages the receipt and pulling of items through periodic cycle counts.
    - **Stock Ownership:** Vendor-owned. The customer is invoiced when items are removed from the warehouse as per the cycle count.

Application Modules

The web application consists of two unique URLs with separate functionalities:

1. **Administration Module**
    - **Purpose:** Maintain administrative functions.
    - **Users:** Primarily used by vendors for high-level management tasks.
    - **Functions:**
        - User Management
        - Site and Warehouse Configuration
        - Inventory Control Settings
2. **User Module**
    - **Purpose:** Facilitate daily warehouse operations.
    - **Users:** Primarily used by customers and appointed warehouse personnel.
    - **Functions:**
        - Receiving Items
        - Dispatching Items
        - Inventory Tracking
        - Cycle Counts

Welcome

Welcome to Mtec LLC Warehouse Application

Welcome to the **Mtec LLC Warehouse Application**, an innovative tool designed to streamline the management of warehouses at your customer sites. This application is the result of our commitment to providing exceptional value and service to our vendors and their customers across various industries.

Purpose of This Application

The Mtec LLC Warehouse Application serves as a comprehensive solution for managing warehouse operations efficiently and effectively. Whether you are overseeing a fully managed warehouse or handling consignment stock, this application is tailored to meet your specific needs.

How This Guide Can Help

This help guide is designed to assist you in navigating through the application effortlessly. Whether you're a first-time user or looking to deepen your understanding of advanced features, this guide offers detailed instructions, tips, and insights to enhance your user experience.

Navigate Through Our Help Topics

Explore a wide range of topics in this guide to familiarize yourself with the application's functionality. From getting started with the basics to mastering the management of complex warehouse scenarios, our comprehensive topics will provide you with all the information you need.

Stay Updated

We continuously work on improving the Mtec LLC Warehouse Application to ensure it meets your evolving business needs. Keep an eye on the "What's New" section for the latest updates and features.

Get the Support You Need

Our dedicated support team is here to assist you with any queries or issues you may encounter. Detailed instructions on how to reach out for help are available under the "Getting Help" section.

We are excited to have you on board and look forward to supporting you in optimizing your warehouse operations with the Mtec LLC Warehouse Application.

Getting Started

Overview

Welcome to the Mtec LLC Warehouse Application help file. This document provides essential information to help you effectively use our application, manage warehouse operations, and resolve any issues you may encounter. Below are the key sections to get you started:

System Requirements

Ensure optimal performance by adhering to the following system requirements:

Supported Browsers:

- Google Chrome (latest version)
- Mozilla Firefox (latest version)
- Apple Safari (latest version)
- Microsoft Edge (latest version)

Mobile and Tablet Devices:

- iOS devices (latest two versions with Safari)
- Android devices (latest two versions with Google Chrome)

Barcode Scanners: Compatible with web-based applications using supported browsers.

Unsupported Browsers:

- Internet Explorer 11 and older versions

Hardware Requirements:

- Processor: Dual-core 1.6 GHz or higher
- RAM: 4 GB or more
- Display: 1024x768 resolution or higher

Network Requirements:

- Minimum internet speed of 5 Mbps

Getting Help

For support, contact us at:

- **Phone:** +1(281)-823-9698
- **Email:** Support@mtecdata.com
- **Address:** 1620 S Friendswood Dr, Friendswood, TX 77546, USA

Support Agreement Details: Refer to your organization's support agreement with Mtec Cloud Solutions LLC for specifics on response times and service commitments.

Preparing for Support: Provide the following details when seeking help:

- Contact information: Name, organization, role
- Description of the issue
- Steps to reproduce the issue
- Any error messages

Additional Resources: Refer to other sections of this guide for more information.

Barcode Formats

Mtec LLC Warehouse Application supports various barcode formats:

Code 128 (Default Format):

- Encodes all 128 ASCII characters
- High data density and error correction
- Common in logistics and transportation

Code 39:

- Encodes alphanumeric set and special characters
- Easy to print, widely used, and compatible with most scanners

Other Formats: Additional formats can be supported upon request. Contact support with your requirements.

By following these guidelines and recommendations, you'll be well-equipped to utilize the Mtec LLC Warehouse Application effectively. For further assistance, please refer to the detailed sections or contact our support team.

System requirements

System Requirements

To ensure the best performance and user experience, Mtec LLC Warehouse Application has specific system requirements. This page outlines the necessary software and hardware configurations to effectively use our application across various devices.

Supported Browsers

Mtec LLC Warehouse Application is designed to run on modern web browsers that support the latest web standards. For optimal performance, please ensure you are using one of the following supported browsers:

- Google Chrome (latest version)
- Mozilla Firefox (latest version)
- Apple Safari (latest version)
- Microsoft Edge (latest version)
- Our application is regularly tested to maintain compatibility and performance with the versions listed above.

Mobile and Tablet Devices

For users on the go, our application is fully functional on mobile and tablet devices. We support:

- iOS devices running the latest two versions of iOS with Safari.
- Android devices running the latest two versions of Android with Google Chrome.

This ensures that you can manage warehouse operations directly from your smartphone or tablet with the same efficiency as on a desktop.

Barcode Scanners

Mtec LLC Warehouse Application is compatible with barcode scanners that support web-based applications. Ensure that your device's browser is updated to one of the supported browsers mentioned above.

Unsupported Browsers

Please note that Internet Explorer 11 and older versions are not supported by Mtec LLC Warehouse Application. Users on these browsers may experience reduced functionality or inability to use certain features of the application.

Hardware Requirements

While our application is designed to be resource-efficient, we recommend the following minimum hardware specifications for a smooth experience:

Processor: Dual-core 1.6 GHz or higher
RAM: 4 GB or more
Display: 1024x768 resolution or higher

Network Requirements

A stable internet connection is required to access and operate Mtec LLC Warehouse Application effectively. We recommend a minimum internet speed of 5 Mbps for optimal performance.

Getting help

Getting Help

At Mtec LLC, we are committed to providing robust support to ensure your experience with our Warehouse Application is seamless and productive. Below you will find the essential contact details and guidelines on how to seek assistance for any queries or issues you may encounter.

Contact Information

For immediate assistance or to get in touch with our support team, please use the following contact details:

- **Phone:** +1(281)-823-9698
- **Email:** Support@mtecdata.com

Our support team is available between 8am and 5 pm CST, ready to help you resolve any issues or answer any questions regarding the Warehouse Application.

Support Agreement Details

The scope of support, response times, and any specific service commitments applicable to your use of the Mtec LLC Warehouse Application are detailed in the support agreement between Mtec Cloud Solutions LLC and your organization. Please refer to this agreement for detailed information on what to expect from our support services.

How to Prepare for Your Support Call or Email

To help us assist you more efficiently, please have the following information ready when you contact support:

- **Your contact information:** Name, organization, and your role.
- **Description of the issue:** What problem are you experiencing? Please provide as much detail as possible.
- **Steps to reproduce the issue:** What were you doing when the problem occurred? This information can be crucial for quickly identifying a solution.
- **Error messages:** If any error messages were displayed, please include them in your communication.

Additional Resources

For less urgent issues or to learn more about our application, we encourage you to refer to other sections of this help guide, which may address your questions or concerns.

Barcode Format

Barcode Formats

Mtec LLC Warehouse Application supports various barcode formats to accommodate the diverse needs of our users in managing inventory and warehouse operations. Below is an overview of the primary barcode formats supported, with a focus on Code 39 and Code 128, which are our standard offerings.

Code 128 (Default Format)

ABC-abc-1234

Code 128 is the default barcode format used in our application. It is highly versatile and capable of encoding all 128 characters of ASCII (from ASCII 0 to ASCII 127), making it suitable for a wide range of applications. This format is preferred for its high data density, which allows more information to be stored in a smaller barcode. Code 128 is commonly used in the logistics and transportation sectors for shipping and packaging.

Advantages:

- High data density allows it to encode a large amount of data in a small space.
- Supports the entire ASCII character set.
- Provides excellent data security with built-in error correction.

Code 39

ABC-1234

Code 39 is another barcode format supported by our application. It can encode an alphanumeric set (A-Z, 0-9) and seven special characters (-, ., space, $, /, +, %). Code 39 is known for its simplicity and wide industry acceptance, making it a reliable choice for non-space-constrained applications.

Advantages:

- Easy to print and does not require a checksum.
- Widely used and recognized in many industries.
- Can be decoded with virtually any barcode scanner.

Other Formats

Upon request, Mtec LLC Warehouse Application can support additional barcode formats tailored to specific needs or industry requirements. If you require a barcode format other than Code 128 or Code 39, please contact our support team to discuss your needs. Custom barcode format integration is subject to compatibility and additional development.

Requesting Additional Formats

If you need support for a barcode format not listed here, please reach out to our support team with the following information:

- **Desired barcode format**: The name and standard of the barcode format you wish to use.
- **Usage scenario:** How and where you intend to use this barcode format within your operations.
- **Volume and frequency:** Estimate how often you will be using this format.

Our development team will assess your request and provide you with feedback on the feasibility and any additional steps required to accommodate your needs.

Administration Portal

Introduction to the Administration Portal

Welcome to the Administration Portal of the Mtec LLC Warehouse Application. This central dashboard provides quick access to essential functions for efficiently managing your warehouse operations. From here, you can navigate to various sections, manage organizational details, branches, customers, items, warehouses, and user permissions.

This introduction provides a concise overview of the Administration Portal's functionalities and guides you through setting up and managing your organization's details effectively.

Overview

Overview of the Administration Portal

Welcome to the Administration Portal of Mtec LLC Warehouse Application. This portal is designed to empower administrators with comprehensive tools to manage and oversee all aspects of warehouse operations. From organizational setups to detailed warehouse management, this portal serves as your command center.

Key Features

The Administration Portal offers a wide range of functionalities tailored to streamline the administrative processes of warehouse management:

- **Organization Management:** Set up and manage all the organizational details, including branches and their respective sites.
- **Customer Management:** Maintain comprehensive records of all customers and manage their site-specific details to ensure tailored service delivery.
- **Item Management:** Oversee the catalog of items, manage stock levels, and handle stock distributions across various warehouse locations.
- **Warehouse Management:** Administer all warehouses under your oversight, including the configuration of warehouse-specific settings and operational rules.
- **User Management:** Control access permissions and manage user roles across the

organization, ensuring that each user has the right tools and permissions to perform their tasks effectively.

Navigation

Navigating through the Administration Portal is intuitive, with each section clearly labeled and structured to provide quick access to various management tools:

1. **Home Screen:** A dashboard view that provides a snapshot of the current status and key metrics of your warehouse operations.
2. **My Organization:** Manage organizational settings and details, accessible through a dedicated section for easy adjustments and updates.
3. **Branch Management**: A subsection devoted to managing the branches of your organization, including detailed site-specific configurations.
4. **Customer Management:** Access tools for managing customer information and their respective sites, facilitating better coordination and service.
5. **Item and Stock Management**: Comprehensive tools for managing inventory items and their distribution across warehouses.
6. **User Management:** Set up and manage user accounts, define roles, and assign permissions to ensure secure and efficient operation.

Getting Started

To get started with the Administration Portal:

1. **Log In**: Use your administrative credentials to access the portal.
2. **Familiarize Yourself:** Browse through the various sections to understand the layout and available tools.
3. **Configure Initial Settings:** Set up your organizational details and user roles as a first step to customizing the application for your needs.

Support

If you encounter any issues or have questions about specific functionalities within the Administration Portal, please refer to the 'Getting Help' section for guidance on contacting our support team.

Login

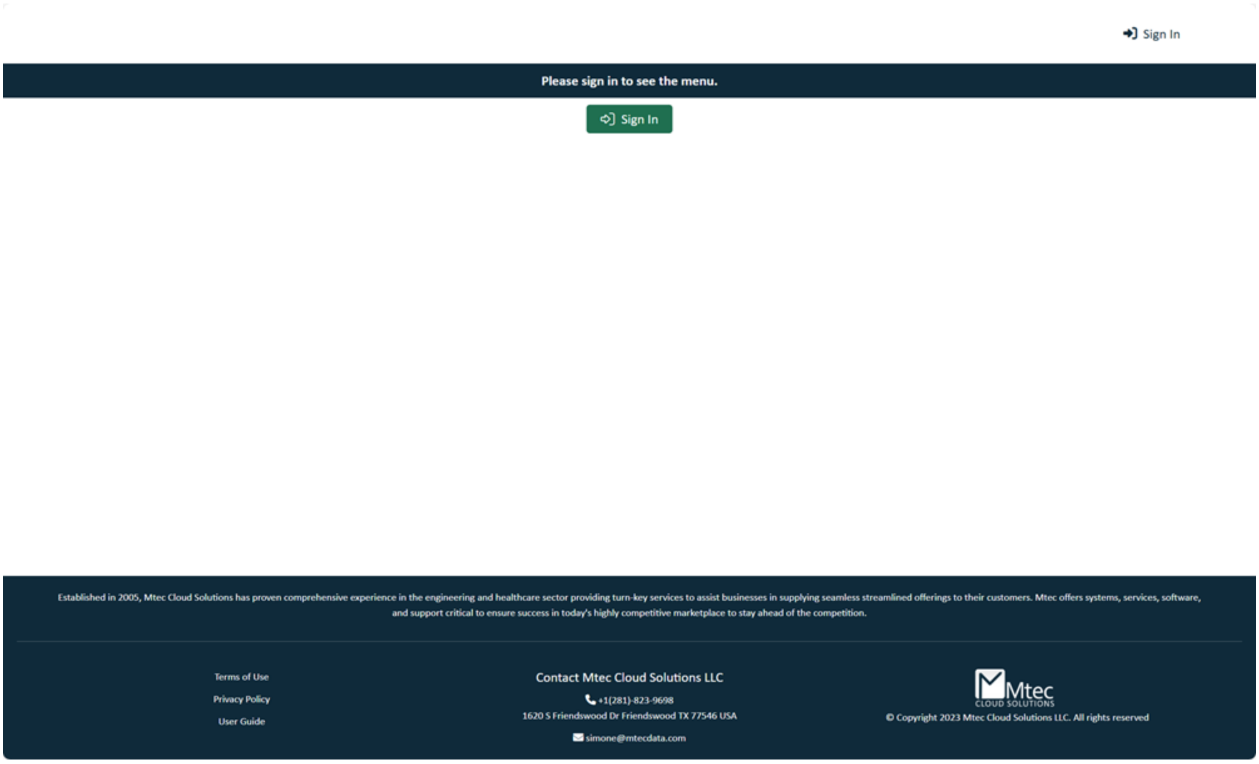
Secure Login

Ensuring the security of your data and operations is a priority for Mtec LLC. The login process for the Administration Portal incorporates multiple layers of security to protect against unauthorized access and ensure that only authorized users can manage and view sensitive information.

How to Log In

To access the Administration Portal, follow these steps:

1. **Open the Application URL:** Enter the application URL in your browser's address bar.
2. **Select 'Login':** Click on the 'Sign In' button on the homepage to proceed to the login screen.



Authentication Process

Mtec LLC uses a robust two-factor authentication (2FA) process to enhance the security of your login session:

Step 1: Username and Password: Enter your credentials, including your username and password. These credentials must have been set up beforehand by your system administrator.
Step 2: Two-Factor Authentication: After entering your credentials, you will be prompted to complete a second form of verification. This might include receiving a code on your registered mobile device or using an authentication app.

Administrator Access

For users with administrative privileges, access is managed through our Azure Entra instance, which provides comprehensive identity and access management:

- **Azure Entra Invitation:** Administrator users must be invited to join our Azure Entra instance. This invitation process is handled by your organization's Azure administrator.

- **Secure Access Management:** Azure Entra ensures that access rights are appropriately assigned and that all login activities are monitored and logged for security compliance.

Tips for Secure Login

- **Keep Your Credentials Confidential:** Never share your login details with anyone.
- **Update Your Password Regularly:** Change your password periodically to enhance account security.
- **Verify Your Security Settings:** Regularly check your security settings in the Azure Entra portal to ensure they meet your current needs.

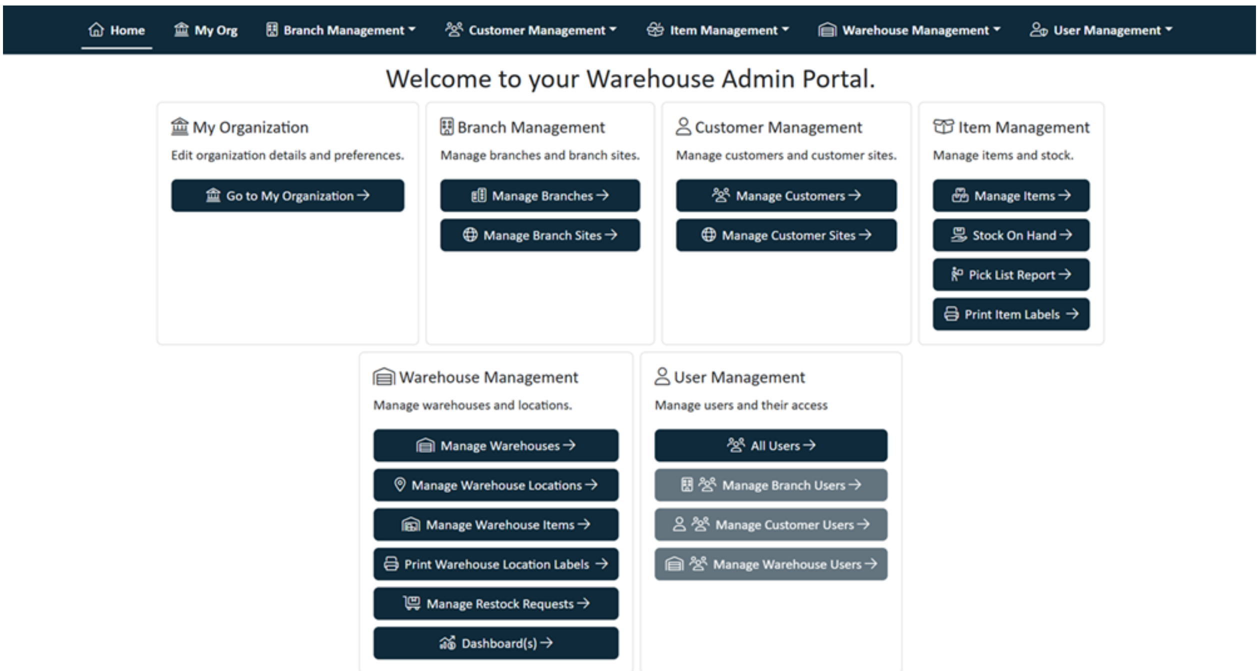
Troubleshooting

If you encounter issues during the login process, please contact our support team at Support@mtecdata.com for assistance. Be sure to provide a clear description of the problem, any error messages received, and the steps taken before encountering the issue.

Home Screen

Home Screen Overview

Welcome to the Home Screen of your Mtec LLC Warehouse Application's Administration Portal. This central dashboard is designed to provide you with quick access to all the major functions you need to manage your warehouse operations efficiently. From here, you can navigate to different sections of the portal, manage your organization's details, branches, customers, items, and warehouses, as well as oversee user permissions.



Key Features and Navigation

The Home Screen is structured to offer intuitive access to various administrative functionalities:

- **My Organization:** Click here to edit your organization's details and preferences. This is your starting point for setting up and customizing your organizational profile in the application.
- **Branch Management:** This section allows you to manage your branches and their specific sites. It's essential for organizations with multiple operating locations.
- **Customer Management**: Access tools to manage your customers and their sites. This feature is crucial for maintaining up-to-date customer information and ensuring service delivery is tailored to meet their needs.
- **Item Management:** Navigate to this area to manage your inventory items, stock levels, and generate stock reports. This section is vital for keeping your inventory data organized and easily accessible.
- **Warehouse Management:** Manage your warehouses and specific warehouse locations from this section. It provides the tools needed to oversee the physical storage and logistics aspects of your inventory.
- **User Management:** This section is designed to manage all user accounts associated with your administration. It allows you to control access permissions and manage user roles, ensuring secure and efficient operation.

Quick Access Buttons

Each section on the Home Screen features blue quick access buttons that take you directly to the respective management areas. These buttons are designed to save time and enhance your workflow by providing shortcuts to commonly used functions.

Getting Help

If you need assistance while navigating the Home Screen or require more information on the functionalities available, please refer to the 'Getting Help' section of this guide or contact our support team directly.

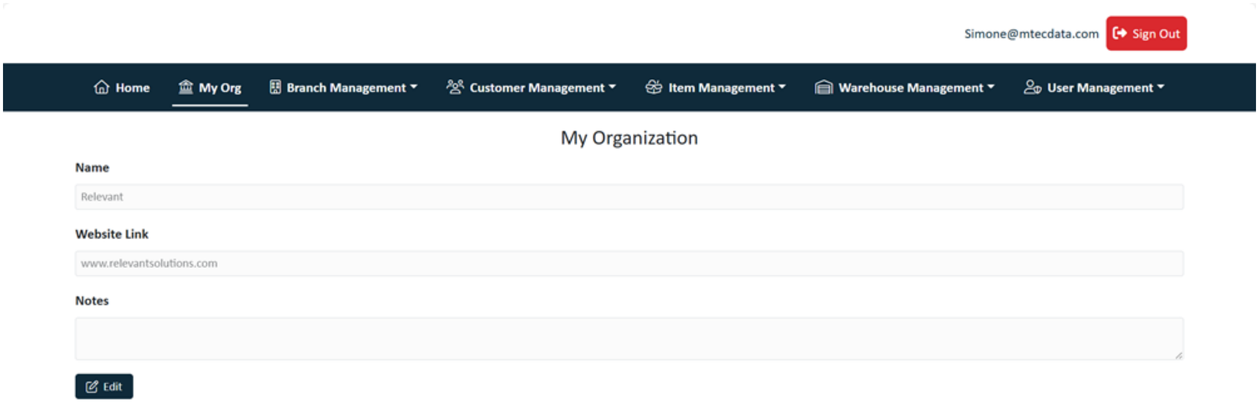
My Organization

The "My Organization" section of the Mtec LLC Warehouse Application's Administration Portal is your central hub for setting up and managing your organization's core details. This initial setup is a critical one-time operation that serves as the foundation for all subsequent configurations and operational management within the application.

Go to my Organization

My Organization

The "My Organization" section of the Mtec LLC Warehouse Application's Administration Portal is your central hub for setting up and managing your organization's core details. This initial setup is a critical one-time operation that serves as the foundation for all subsequent configurations and operational management within the application.



Overview

This section allows administrators to create a new organization, add the organization's official website URL, and provide additional notes that may be relevant to users or other administrators. It is essential to ensure that the information entered here is accurate and up-to-date, as it impacts the application's functionality and the customization of user experiences across your warehouses.

Fields and Descriptions

- **Name:** Enter the official name of your organization. This name will be used across the application and in all communications to identify your business.
- **Website Link:** Provide the URL for your organization's website. This link is useful for quick access to your corporate site and can assist users in finding more information about your company.
- **Notes:** Use this field to add any important notes or additional information about the organization that might be helpful for users navigating the application. This could include details about the organization's operations, special instructions, or policies.

Creating a New Organization

To set up a new organization within the Administration Portal, follow these steps:

1. **Access the My Organization Screen**: Navigate to this section by clicking on the 'My Org' tab from the Home Screen.
2. **Fill in the Details:** Enter all the necessary information in the fields provided. Ensure all data is accurate and reflects your current organizational setup.
3. **Save Changes**: After entering your information, click the ‘Edit’ button to switch to edit mode, make any adjustments, and then click ‘Save’ to finalize the details.

Importance of Accurate Setup

The initial setup of your organization's details is crucial as it:

- Establishes the identity of your organization within the application.
- Ensures that all related warehouse operations align with your organizational structure.
- Provides a point of reference for all administrative processes and user interactions.

Troubleshooting and Support

If you encounter any issues while setting up your organization or need further assistance with understanding how to input your details correctly, please refer to the 'Getting Help' section of this guide or contact our support team directly. Accurate setup helps prevent operational disruptions and ensures smooth management of your warehouses.

Branch Manament

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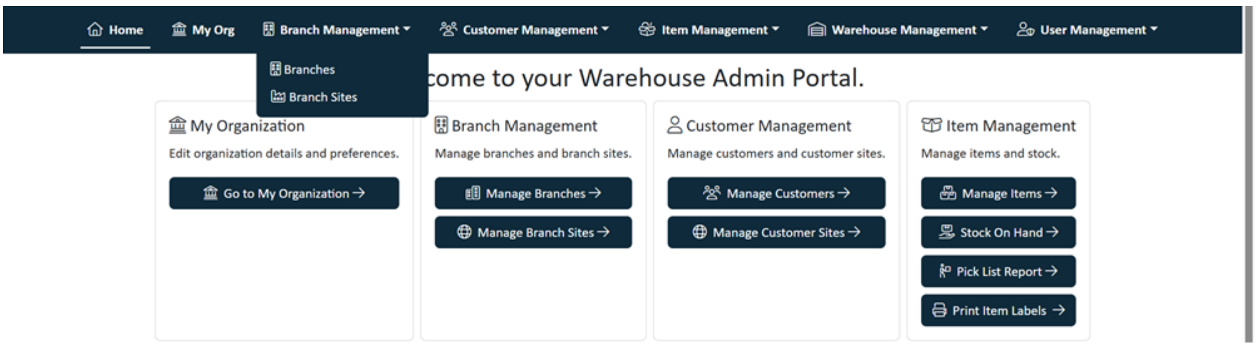


Manage Branches

The **"Manage Branches"** section of the Administration Portal provides a comprehensive tool for adding, editing, and maintaining detailed information about the various branches within your organization. This functionality is essential for organizations operating across multiple locations, ensuring that each branch's specific data is accurately reflected and managed within the system.

Manage Branch Sites

Note: Before creating a Branch-Site relationship, ensure that the site is added to the 'Customer Sites' template.

The "Manage Branch Sites" section of the Administration Portal provides the functionality to establish and manage relationships between branches and customer sites. This is crucial for organizations operating in multiple locations, enabling them to map their operations clearly and effectively.

Manage Branches

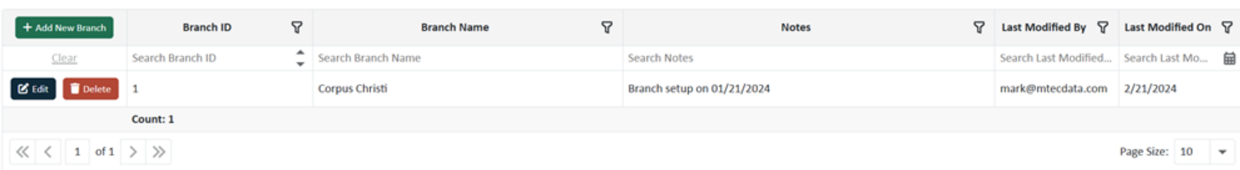
Manage Branches

The **"Manage Branches"** section of the Administration Portal provides a comprehensive tool for adding, editing, and maintaining detailed information about the various branches within your organization. This functionality is essential for organizations operating across multiple locations, ensuring that each branch's specific data is accurately reflected and managed within the system.

Overview

This interface allows you to view all your branches at a glance, add new branch details, and update existing information. Each entry provides details about the branch ID, branch name, associated notes, and the date and personnel responsible for the last modifications.

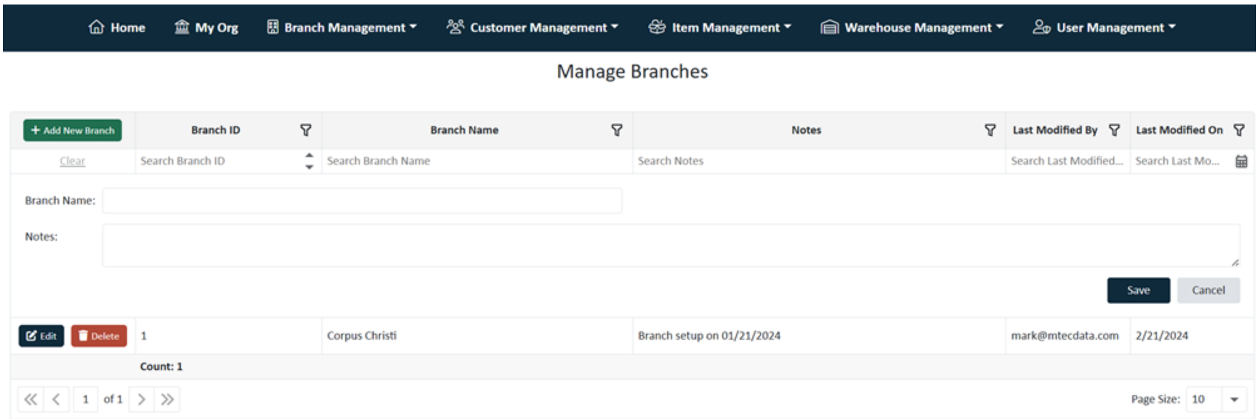
Manage Branches



Adding a New Branch

To add a new branch to your organization, follow these steps:

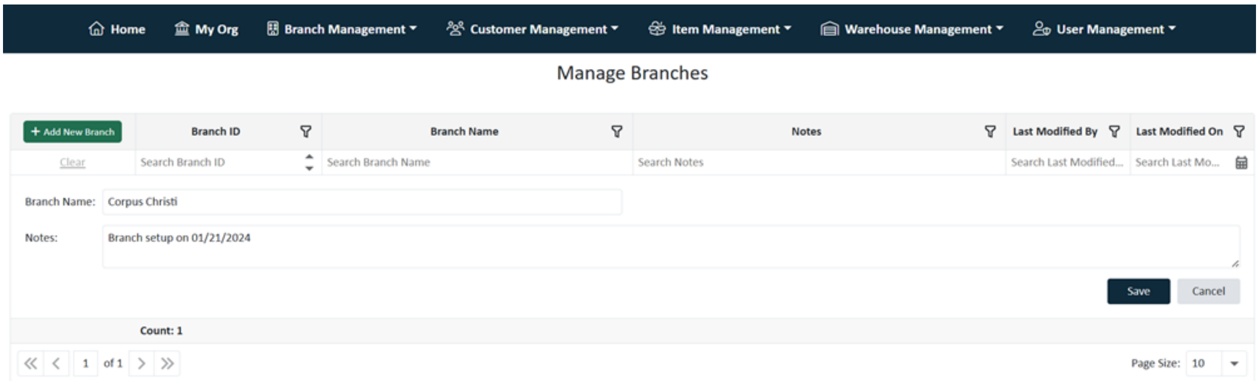
1. **Click the '+ New' Button:** This is located at the top of the branch list and will open a new entry row or form.
2. **Enter Branch Details:**
   - Branch Name: Input the official name of the branch.
   - Notes: Add any relevant notes such as the date of establishment, special focus of the branch, or other pertinent details.
3. **Save:** Click 'Save' to store the branch information in the system.



Editing an Existing Branch

To edit details of an existing branch:

1. **Select the Branch:** Click on the branch entry you wish to edit.
2. **Edit Details:**
   - You can change the branch name or modify the notes as required.
3. **Save Changes:** After making the necessary changes, click 'Save' to update the details.



Deleting a Branch

If you need to remove a branch:

1. **Select the Branch:** Click on the branch entry you wish to delete.
2. **Delete:** Click the 'Delete' button. You may be prompted to confirm this action to prevent accidental deletions.

Managing Branch Data

- **Sort and Search:** Utilize sorting and search functionalities to easily find branches, especially useful in organizations with multiple locations.
- **View Modifications:** The screen displays who last modified branch information and when, providing an audit trail for administrative changes.

Best Practices

- **Regular Updates**: Keep branch information up-to-date to reflect any changes in operations or location details.
- **Accurate Information:** Ensure that all data entered is accurate and complete, to maintain the integrity of organizational management within the application.

Troubleshooting and Support

If you encounter any issues while managing branch information or require further assistance with the functionalities provided, please refer to the 'Getting Help' section of this guide or contact our support team directly.

Manage Branch Sites

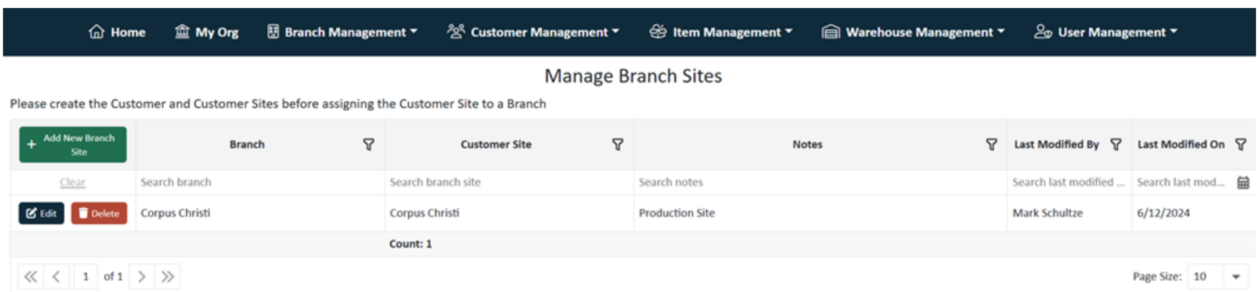
Manage Branch Sites

Note: Before creating a Branch-Site relationship, ensure that the site is added to the 'Customer Sites' template.

The "Manage Branch Sites" section of the Administration Portal provides the functionality to establish and manage relationships between branches and customer sites. This is crucial for organizations operating in multiple locations, enabling them to map their operations clearly and effectively.

Overview

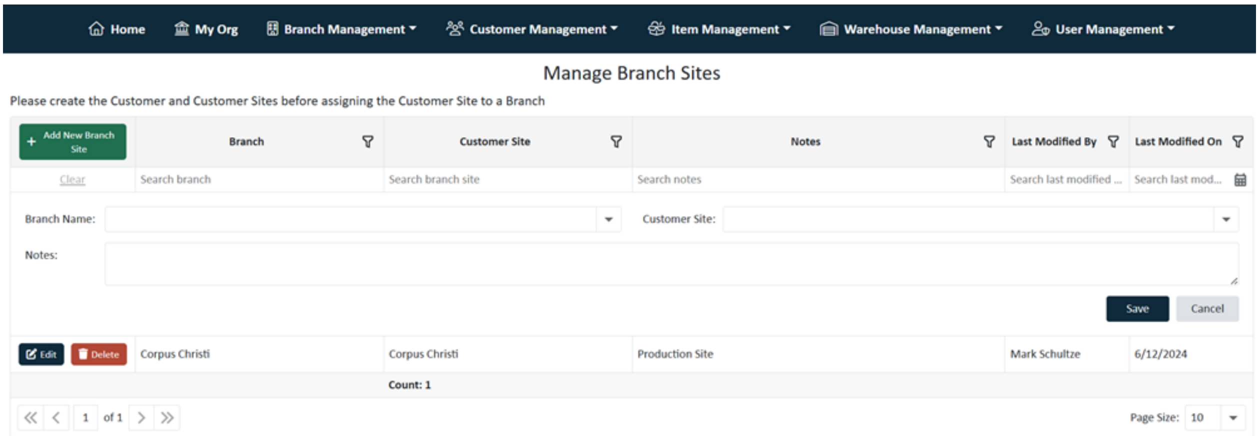
This interface allows administrators to define and maintain the association between branches and their respective customer sites. It includes the ability to view all existing branch-site relationships, add new relationships, and update or delete existing ones.



Adding a New Branch Site Relationship

To add a new branch-site relationship, follow these steps:

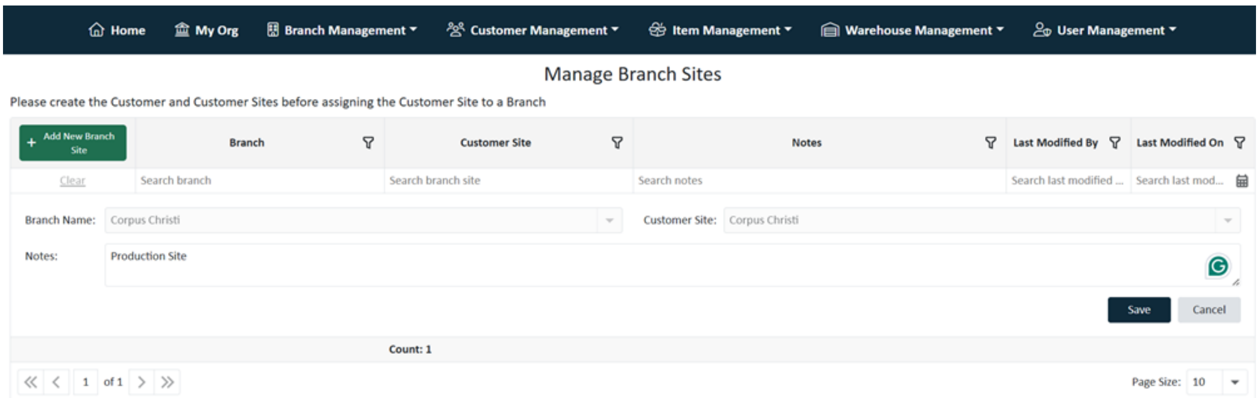
1. **Click the '+ New' Button:** This button is located at the top of the list and opens a form for entering new relationship details.
2. **Enter Relationship Details:**
    1. Branch Name: Select the branch from a drop-down menu.
    2. Customer Site: Choose the associated customer site from another drop-down menu.
    3. Notes: Add any relevant notes such as specific operations at the site, special instructions, or other pertinent details.
3. **Save:** Click 'Save' to store the new branch-site relationship in the system.



Editing an Existing Branch Site Relationship

To update details of an existing relationship:

1. **Select the Relationship:** Click on the 'Edit' button next to the relationship you wish to update.
2. **Modify Details:**
    - Update the branch or site selection and notes as necessary.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting a Branch Site Relationship

If you need to remove an existing relationship:

1. **Select the Relationship:** Click on the 'Delete' button next to the relationship you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

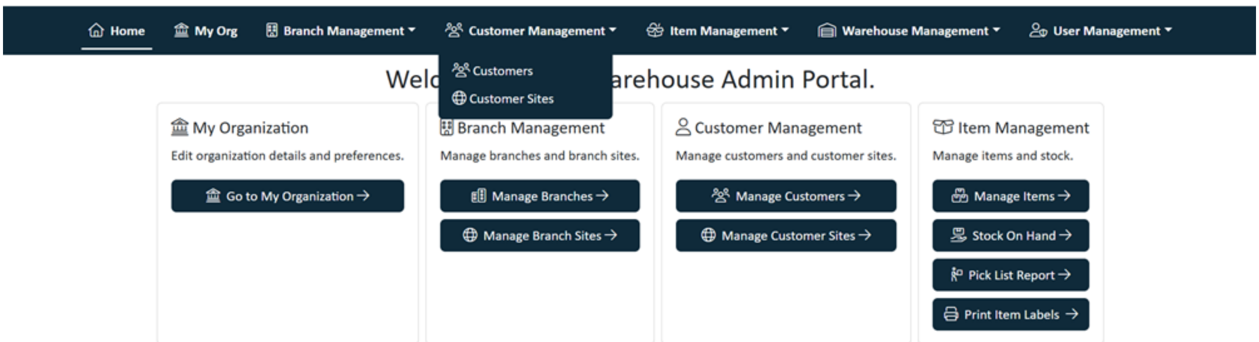
Best Practices

Regular Reviews: Periodically review and update the branch-site relationships to ensure they accurately reflect current business operations and site allocations.
Comprehensive Documentation: Maintain detailed notes within the relationship entries to provide clear context and instructions for managing specific sites.

Troubleshooting and Support

If you encounter any issues while managing branch-site relationships or require further assistance with the functionalities provided, please refer to the 'Getting Help' section of this guide or contact our support team directly.

Customer Management



Manage Customers

The **"Manage Customers"** section of the Administration Portal provides tools for adding, editing, and maintaining detailed information about the customers your organization serves.

Effective management of customer information ensures seamless service delivery and enhances the overall operational efficiency.

Manage Customer Sites

The "Manage Customer Sites" section of the Administration Portal enables you to add, edit, and maintain information about the various sites associated with each customer. This capability is crucial for businesses that operate across multiple locations and need to manage site-specific data efficiently.

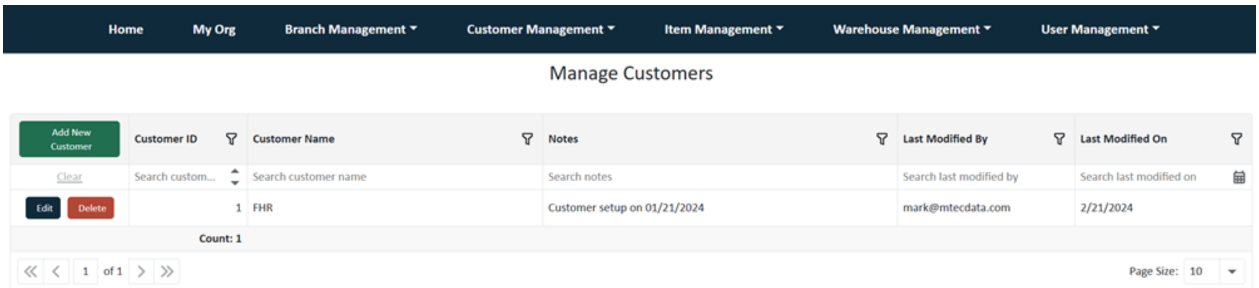
Manage Customers

Manage Customers

The **"Manage Customers"** section of the Administration Portal provides tools for adding, editing, and maintaining detailed information about the customers your organization serves. Effective management of customer information ensures seamless service delivery and enhances the overall operational efficiency.

Overview

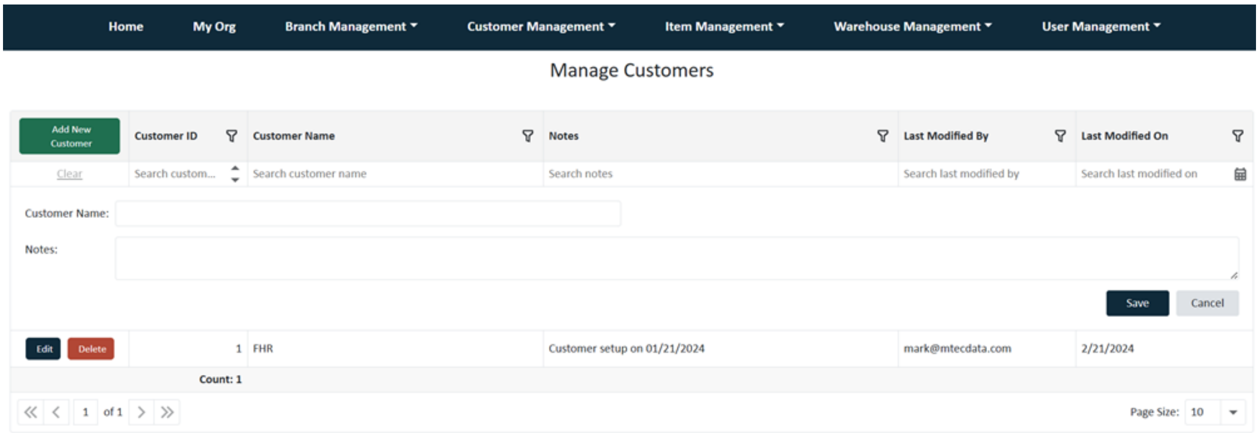
This interface allows administrators to view all customer entries, add new customers, and update existing information. Here you can manage essential details such as customer names, notes related to each customer, and track the modifications made to each entry.



Adding a New Customer

To add a new customer to your system, follow these steps:

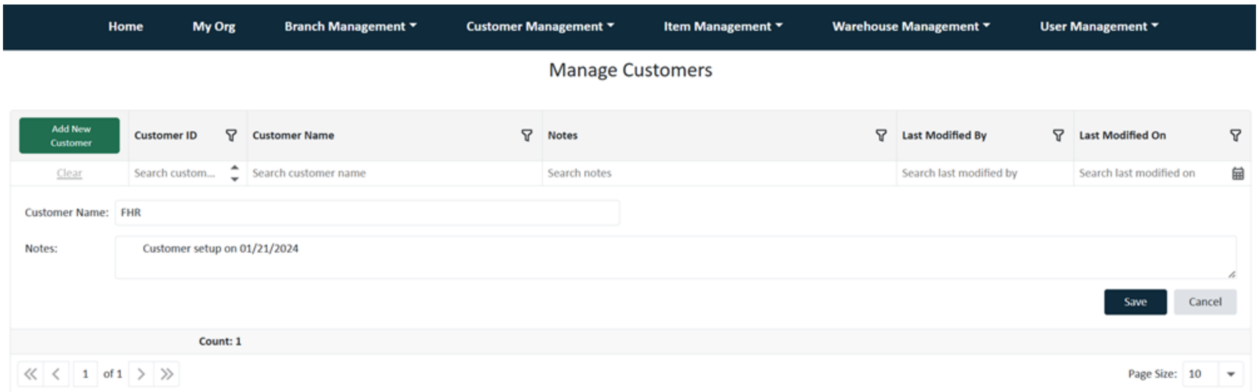
1. **Click the '+ New' Button**: Located at the top of the customer list, this button opens a form for entering new customer details.
2. **Enter Customer Details:**
   - **Customer Name**: Input the official name of the customer.
   - **Notes:** Add relevant notes such as the date the customer was added, special requirements, or other pertinent details.
3. **Save**: Click 'Save' to store the new customer information in the system.



Editing an Existing Customer

To update details of an existing customer:

1. **Select the Customer:** Click on the 'Edit' button next to the customer you wish to update.
2. **Modify Details:**
    - o Change the customer name or update the notes as necessary.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting a Customer

If you need to remove a customer from the system:

1. **Select the Customer:** Click on the 'Delete' button next to the customer you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

Best Practices

Regular Updates: Ensure that customer information is regularly updated to reflect any changes in their details or status.
Data Integrity: Maintain accuracy and completeness of all customer data to facilitate effective customer management and reporting.

Troubleshooting and Support

If you encounter any issues while managing customer information or require further assistance with the functionalities provided, please refer to the 'Getting Help' section of this guide or contact our support team directly.

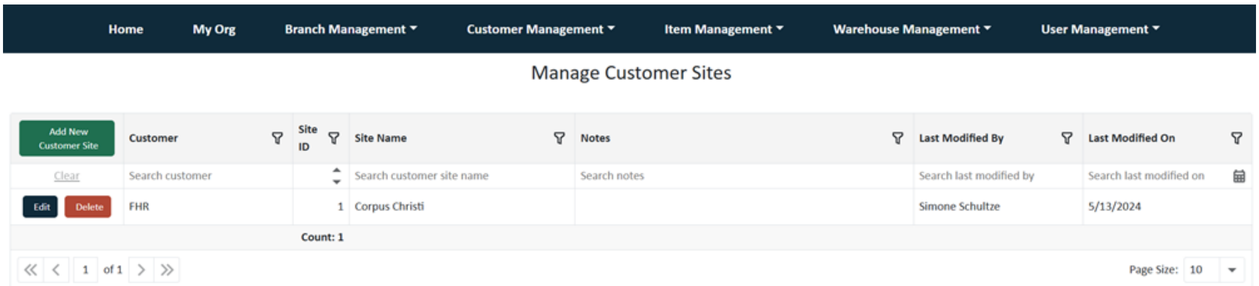
Manage Customer Sites

Manage Customer Sites

The "Manage Customer Sites" section of the Administration Portal enables you to add, edit, and maintain information about the various sites associated with each customer. This capability is crucial for businesses that operate across multiple locations and need to manage site-specific data efficiently.

Overview

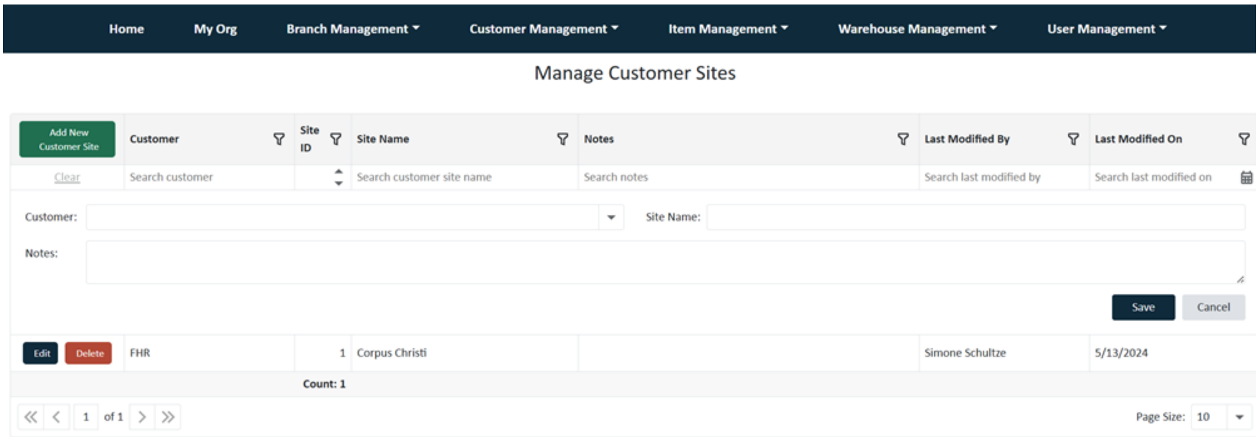
This interface allows administrators to view all customer sites, add new sites, and update existing site information. Here, you can manage essential details such as the customer associated with each site, site ID, site name, and notes about the site, including the date last modified and by whom.



Adding a New Customer Site

To add a new site for a customer, follow these steps:

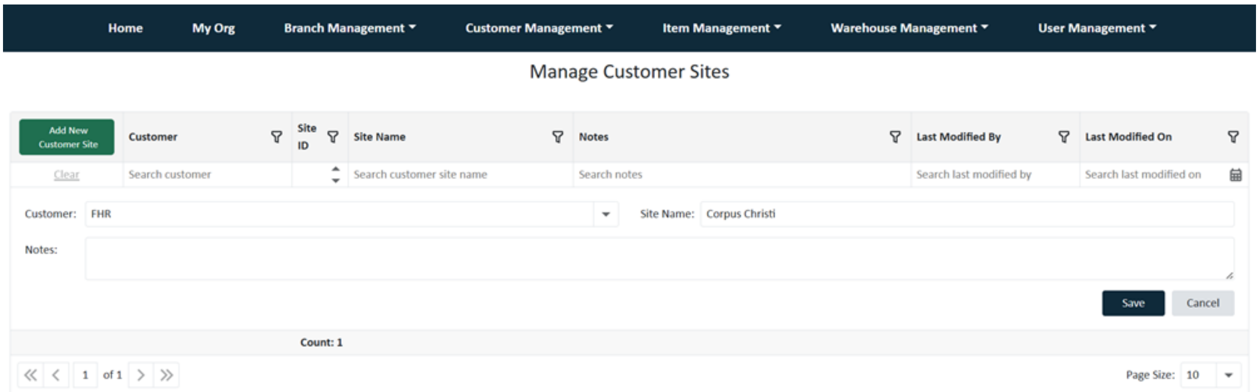
1.
2. **Click the '+ New' Button:** This button is located at the top of the list and opens a form for entering new site details.
3. **Enter Site Details:**
   - Customer: Select the customer from a dropdown menu to associate the site with.
   - Site Name: Input the name of the site.
   - Notes: Add relevant notes such as operational details, special requirements, or other pertinent information.
4. **Save**: Click 'Save' to store the new site information in the system.



Editing an Existing Customer Site

To update details of an existing customer site:

1. **Select the Site:** Click on the 'Edit' button next to the site you wish to update.
2. **Modify Details:**
   - Update the site name or notes as necessary.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting a Customer Site

If you need to remove a site:

1. **Select the Site:** Click on the 'Delete' button next to the site you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

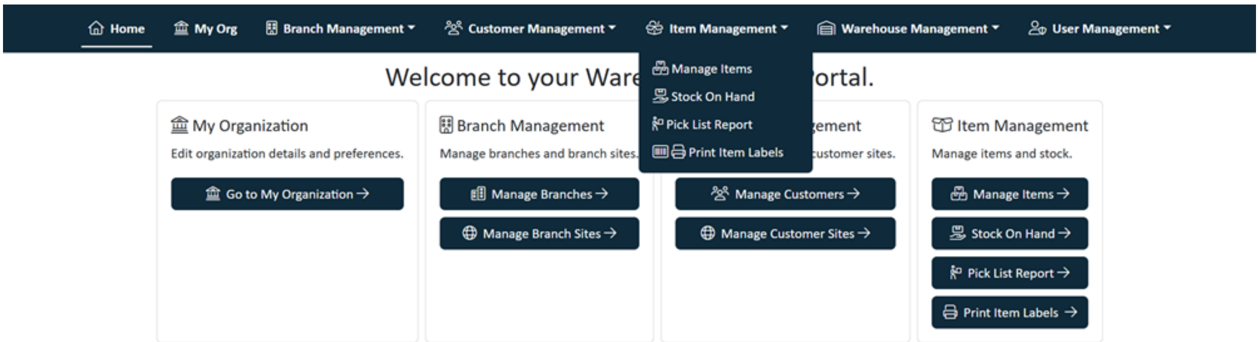
Best Practices

Regular Updates: Keep site information regularly updated to reflect any changes in operations or site status.
Data Integrity: Ensure the accuracy and completeness of all site data to facilitate effective management and operational clarity.

Troubleshooting and Support

If you encounter any issues while managing customer site information or require further assistance with the functionalities provided, please refer to the 'Getting Help' section of this guide or contact our support team directly.

Item Management



Manage Items

The "Manage Items" section of the Administration Portal allows you to manage vendor items, which can be associated with multiple warehouses. Changes made to an item will be reflected across all warehouses.

Stock on Hand

The "Stock on Hand" screen provides a comprehensive view of the stock available in various warehouses. It displays item details, manufacturer part numbers, images, descriptions, and prices, along with minimum and maximum quantities.

Pick List Report

The "Pick List Report" allows users to view items that have been picked in the Warehouse Users Portal. These items have been scanned into the Pick List Report using the Warehouse User Portal.

Print Item Labels

The "Print Item Labels" screen allows users to select required items and print their labels. This feature facilitates easy identification and organization of items within the warehouse.

Manage Items

Manage Items

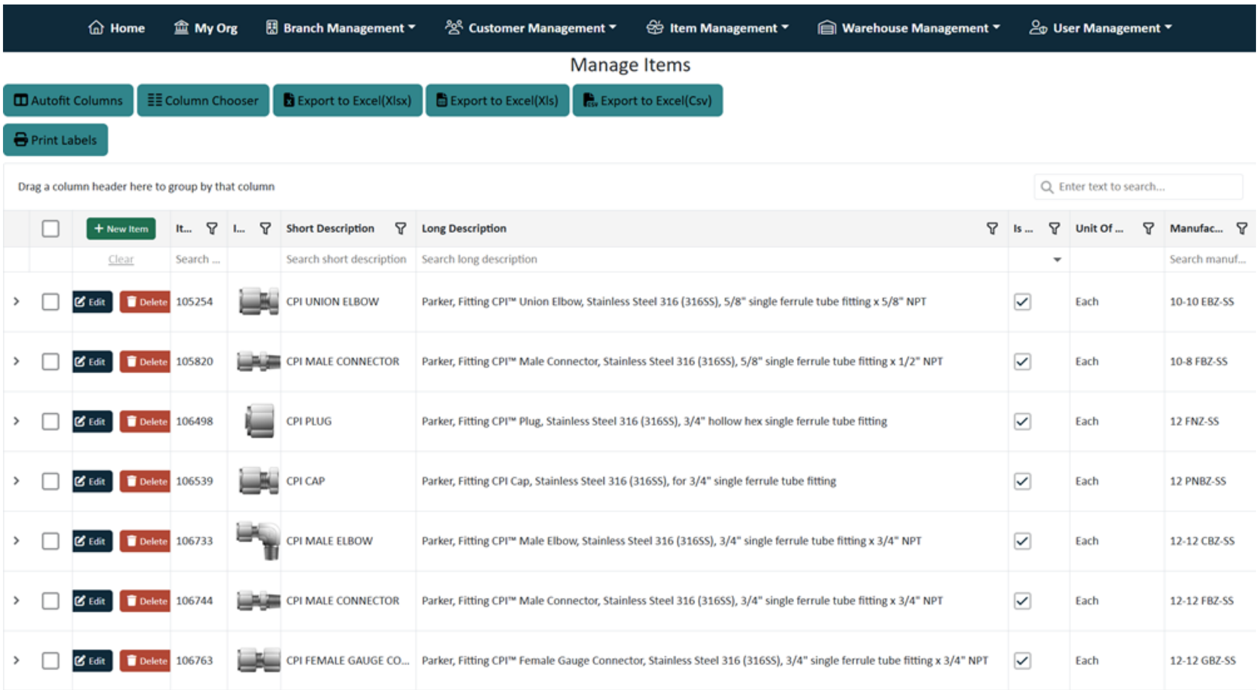
The "Manage Items" section of the Administration Portal allows you to manage vendor items, which can be associated with multiple warehouses. Changes made to an item will be reflected across all warehouses.

Overview

This interface lets administrators view, add, edit, and delete items. It includes options to autofit columns for better visibility and a column chooser to customize the displayed information.

Key Features and Navigation:

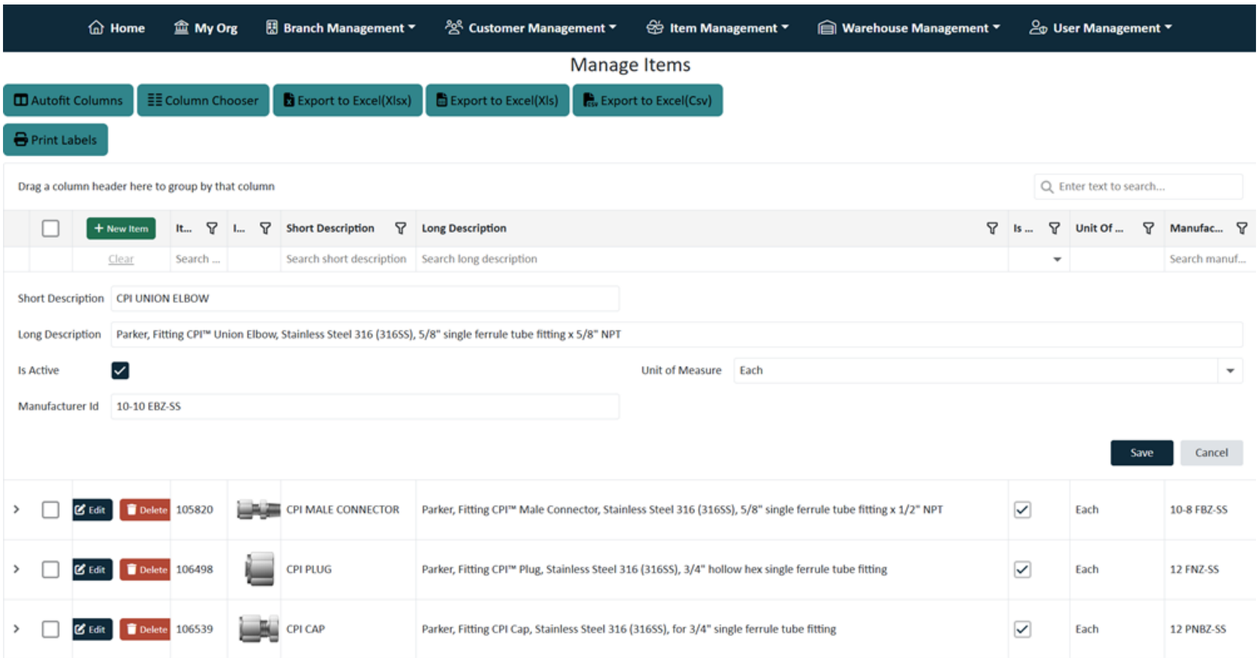
- **View Items:** The main grid displays all items with details like Item ID, Short Description, Long Description, Unit of Measure, Manufacturer ID, and more.
- **Add New Item:** Use the '+ New Item' button to add a new item.
- **Edit Item:** Click the 'Edit' button next to an item to modify its details.
- **Delete Item:** Click the 'Delete' button next to an item to remove it from the system.
- **Autofit Columns:** Adjusts the column widths to fit the content automatically.
- **Column Chooser:** Opens a popup to add or remove columns from the grid for a customized view.
- **Export to Excel (Xlsx/Csv):** Export the item list to Excel for offline analysis.



Adding a New Item

To add a new item, follow these steps:

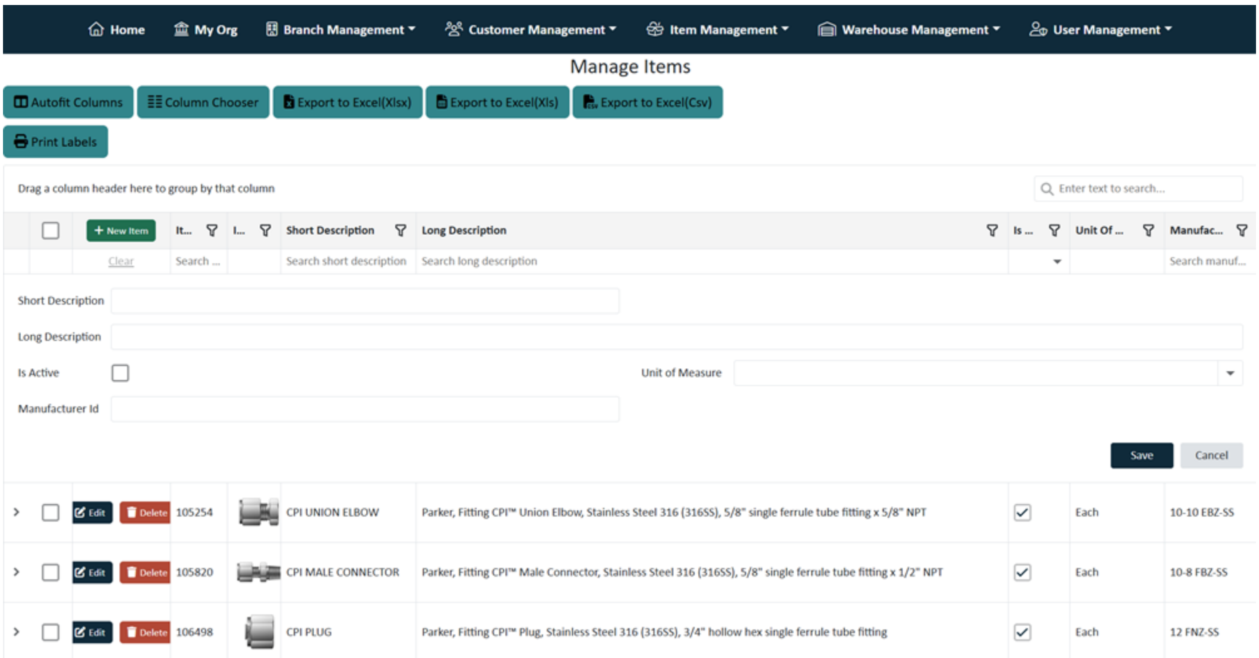
1. **Click the '+ New Item' Button:** Opens a form to enter new item details.
2. **Enter Item Details:**
    - **Short Description:** Brief description of the item.
    - **Long Description:** Detailed description of the item.
    - **Is Active:** Check to mark the item as active.
    - **Manufacturer ID:** Enter the manufacturer identification number.
    - **Unit of Measure:** Specify the unit of measure.
3. **Save:** Click 'Save' to store the new item in the system.



Editing an Existing Item

To update an item's details:

1. **Select the Item:** Click the 'Edit' button next to the item you wish to update.
2. **Modify Item Details:** Update the relevant fields.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting an Item

If you need to remove an item:

1. **Select the Item:** Click the 'Delete' button next to the item you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for better visibility.

Using the Column Chooser

- **Column Chooser Button:** Click this button to open a popup screen where you can select or deselect columns to be displayed in the grid. This allows for a customized view based on your preferences.

Exporting Items

- **Export to Excel (Xlsx/Csv) Buttons:** Use these buttons to export the list of items to Excel in either Xlsx or Csv format for offline analysis or reporting.

Best Practices

- **Regular Updates:** Keep item details up to date to ensure accurate inventory management across all warehouses.
- **Detailed Descriptions:** Provide comprehensive descriptions for each item to facilitate easy identification and usage.
- **Periodic Reviews:** Regularly review the item list to ensure that all items are active and relevant.

Troubleshooting and Support

If you encounter any issues while managing items or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively manage items within the Mtec LLC Warehouse Application, ensuring streamlined operations and accurate inventory management across all warehouses.

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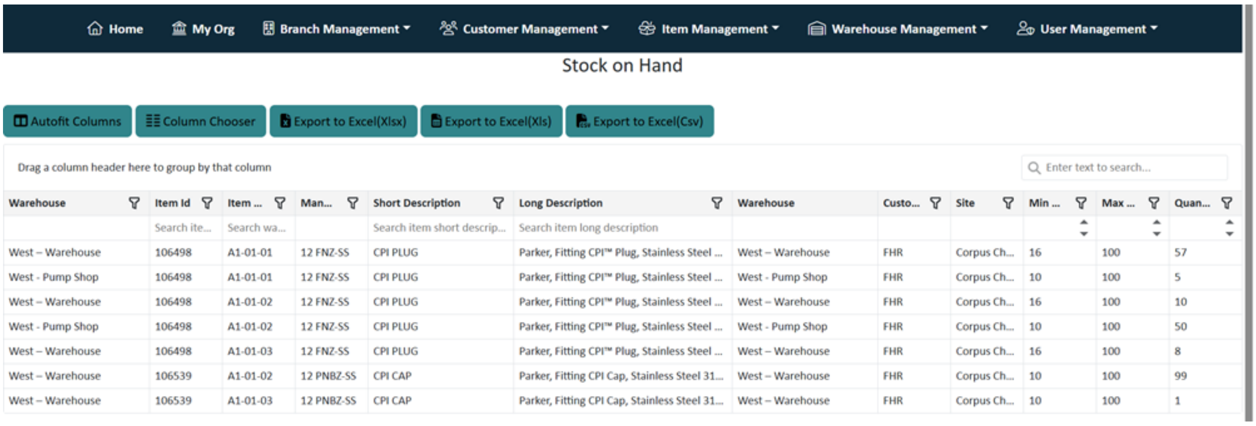
Stock on Hand

Stock on Hand

The "Stock on Hand" screen provides a comprehensive view of the stock available in various warehouses. It displays item details, manufacturer part numbers, images, descriptions, and prices, along with minimum and maximum quantities.

Overview

This interface allows users to monitor stock levels across different warehouses, helping ensure that inventory is managed efficiently. Users can filter the information, choose which columns to view, and export the results to Excel for further analysis.



Key Features and Navigation:

- **View Stock Details:** The main grid displays all stock items with details such as Warehouse, Item ID, Item Description, Manufacturer Part Number, Minimum Quantity, Maximum Quantity, and Quantity on Hand.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.
- **Choose Columns:** Click the 'Column Chooser' button to add or remove columns from the grid for a customized view.
- **Autofit Columns:** Adjusts the column widths to fit the content automatically for better visibility.
- **Export to Excel (Xlsx/Csv):** Export the stock details to Excel for offline analysis or reporting.

Viewing Stock Details

The stock details can be viewed directly on the main grid. Each column provides specific information about the stock items:

- **Warehouse:** Indicates the warehouse where the item is stored.
- **Item ID:** Unique identifier for the item.
- **Item Description:** Short and long descriptions of the item.
- **Manufacturer Part Number:** Part number assigned by the manufacturer.
- **Minimum Quantity:** Minimum quantity threshold for the item.
- **Maximum Quantity:** Maximum quantity threshold for the item.
- **Quantity on Hand:** Current quantity available in the warehouse.

Filtering Information

To filter the stock details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the items that match the entered criteria.

Choosing Columns

To customize the displayed columns:

1. **Column Chooser Button:** Click this button to open a popup screen.
2. **Select/Deselect Columns:** Check or uncheck the columns you want to display or hide.
3. **Apply Changes:** The grid will update to reflect your selections.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for improved visibility.

Exporting Stock Details

To export the stock details to Excel:

1. **Export to Excel Buttons:** Click either the 'Export to Excel (Xlsx)' or 'Export to Excel (Csv)' button.
2. **Download File:** The file will be generated and downloaded for offline analysis or reporting.

Best Practices

- **Regular Monitoring:** Regularly check the stock levels to ensure inventory is managed effectively.
- **Detailed Descriptions:** Maintain detailed item descriptions to facilitate easy identification and usage.
- **Custom Views:** Use the Column Chooser to create a view that best fits your operational needs.

Troubleshooting and Support

If you encounter any issues while viewing or managing stock details or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively monitor and manage stock levels within the Mtec LLC Warehouse Application, ensuring efficient inventory management across all warehouses.

Pick List Report

Pick List Report

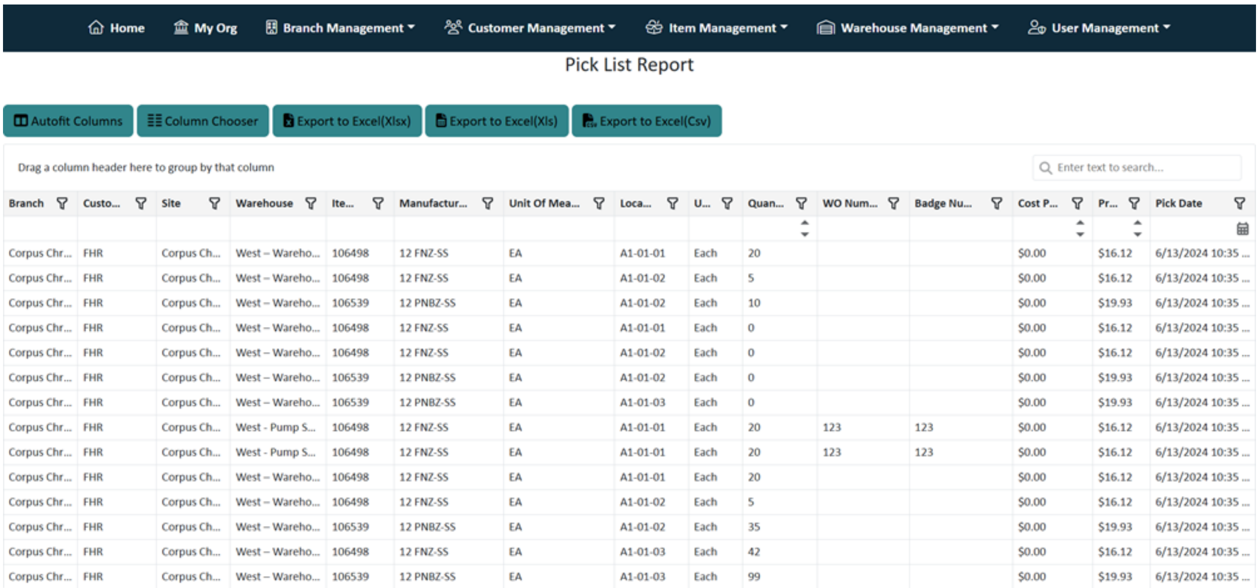
The "Pick List Report" allows users to view items that have been picked in the Warehouse Users Portal. These items have been scanned into the Pick List Report using the Warehouse User Portal.

Overview

This interface provides a detailed view of all picked items, including item details, warehouse information, user badge numbers, work order numbers, item prices, and pick dates.

Key Features and Navigation:

- **View Picked Items:** The main grid displays all picked items with relevant details such as Branch, Customer, Site, Warehouse, Item ID, Manufacturer, Unit of Measure, Location, Quantity, User Badge Number, Work Order Number, Cost Price, Price, and Pick Date.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.
- **Choose Columns:** Click the 'Column Chooser' button to add or remove columns from the grid for a customized view.
- **Autofit Columns:** Adjusts the column widths to fit the content automatically for better visibility.
- **Export to Excel (Xlsx/Csv):** Export the pick list details to Excel for offline analysis or reporting.



Branch	Custo...	Site	Warehouse	Ite...	Manufactur...	Unit Of Mea...	Loca...	U...	Quan...	WO Num...	Badge Nu...	Cost P...	Pr...	Pick Date
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-01	Each	20			$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-02	Each	5			$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106539	12 PNBZ-SS	EA	A1-01-02	Each	10			$0.00	$19.93	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-01	Each	0			$0.00	$16.12	6/13/2024 10:35 ...
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Corpus Chr...	FHR	Corpus Ch...	West - Pump S...	106498	12 FNZ-SS	EA	A1-01-01	Each	20	123	123	$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-01	Each	20			$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-02	Each	5			$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106539	12 PNBZ-SS	EA	A1-01-02	Each	35			$0.00	$19.93	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106498	12 FNZ-SS	EA	A1-01-03	Each	42			$0.00	$16.12	6/13/2024 10:35 ...
Corpus Chr...	FHR	Corpus Ch...	West – Wareho...	106539	12 PNBZ-SS	EA	A1-01-03	Each	99			$0.00	$19.93	6/13/2024 10:35 ...

Viewing Picked Items

The picked items can be viewed directly on the main grid. Each column provides specific information about the picked items:

- **Branch:** Indicates the branch where the item was picked.
- **Customer:** The customer associated with the picked item.
- **Site:** The specific site where the item was picked.
- **Warehouse:** The warehouse where the item was stored.
- **Item ID:** Unique identifier for the item.
- **Manufacturer:** The manufacturer of the item.
- **Unit of Measure:** The unit in which the item is measured.
- **Location:** The specific location within the warehouse where the item was picked.
- **Quantity:** The quantity of the item picked.
- **User Badge Number:** The badge number of the user who picked the item.
- **Work Order Number:** The work order associated with the picked item.
- **Cost Price:** The cost price of the item.
- **Price:** The selling price of the item.
- **Pick Date:** The date and time when the item was picked.

Filtering Information

To filter the pick list details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the items that match the entered criteria.

Choosing Columns

To customize the displayed columns:

1. **Column Chooser Button:** Click this button to open a popup screen.
2. **Select/Deselect Columns:** Check or uncheck the columns you want to display or hide.
3. **Apply Changes:** The grid will update to reflect your selections.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for improved visibility.

Exporting Pick List Details

To export the pick list details to Excel:

1. **Export to Excel Buttons:** Click either the 'Export to Excel (Xlsx)' or 'Export to Excel (Csv)' button.
2. **Download File:** The file will be generated and downloaded for offline analysis or reporting.

Best Practices

- **Regular Monitoring:** Regularly check the pick list report to ensure all picked items are accurately recorded.
- **Detailed Descriptions:** Maintain comprehensive item descriptions to facilitate easy identification and usage.
- **Custom Views:** Use the Column Chooser to create a view that best fits your operational needs.

Troubleshooting and Support

If you encounter any issues while viewing or managing pick list details or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively monitor and manage the picked items within the Mtec LLC Warehouse Application, ensuring efficient warehouse operations and accurate inventory tracking.

Print Item Labels

Print Item Labels

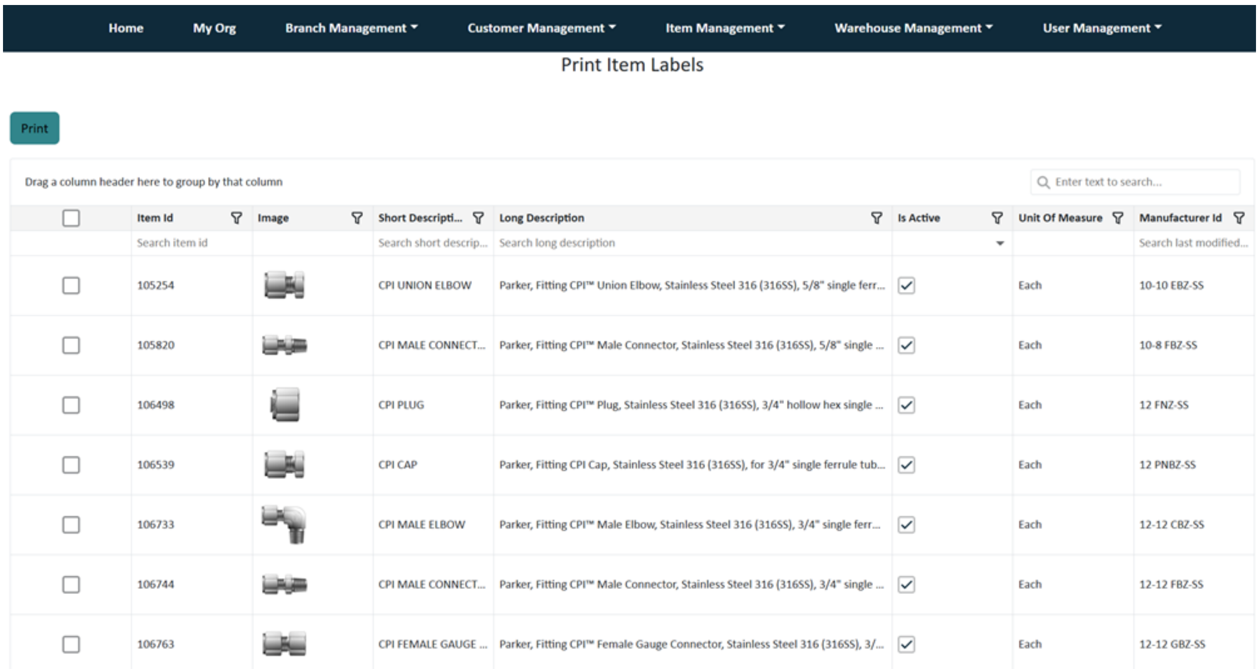
The "Print Item Labels" screen allows users to select required items and print their labels. This feature facilitates easy identification and organization of items within the warehouse.

Overview

This interface lets users choose specific items and print their labels. The labels include essential item details such as the item ID, description, unit of measure, and manufacturer ID.

Key Features and Navigation:

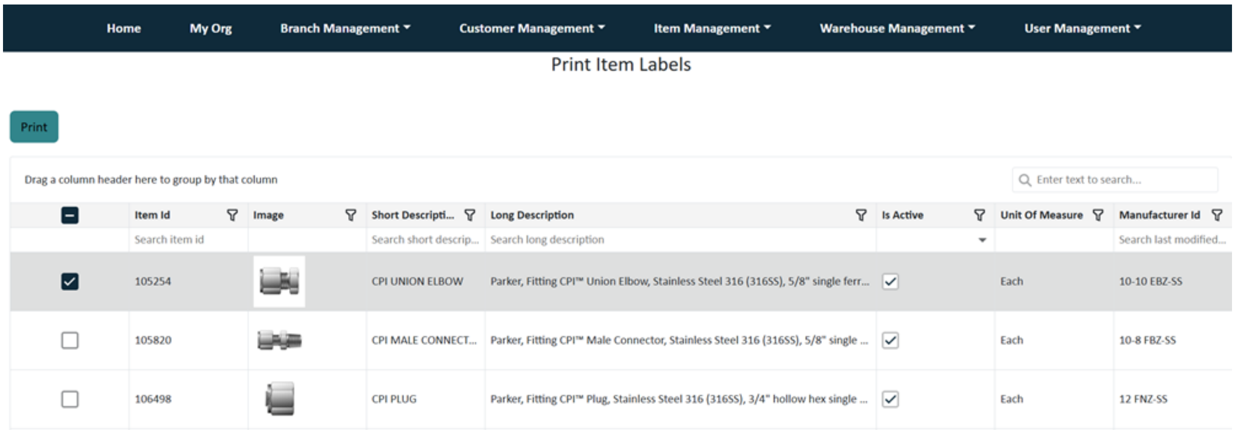
- **View Items:** The main grid displays all items with details like Item ID, Image, Short Description, Long Description, Unit of Measure, and Manufacturer ID.
- **Select Items:** Users can select the items they wish to print labels for.
- **Print Labels:** A 'Print' button initiates the label printing process.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.
- **Choose Columns:** Click the 'Column Chooser' button to add or remove columns from the grid for a customized view.
- **Autofit Columns:** Adjusts the column widths to fit the content automatically for better visibility.



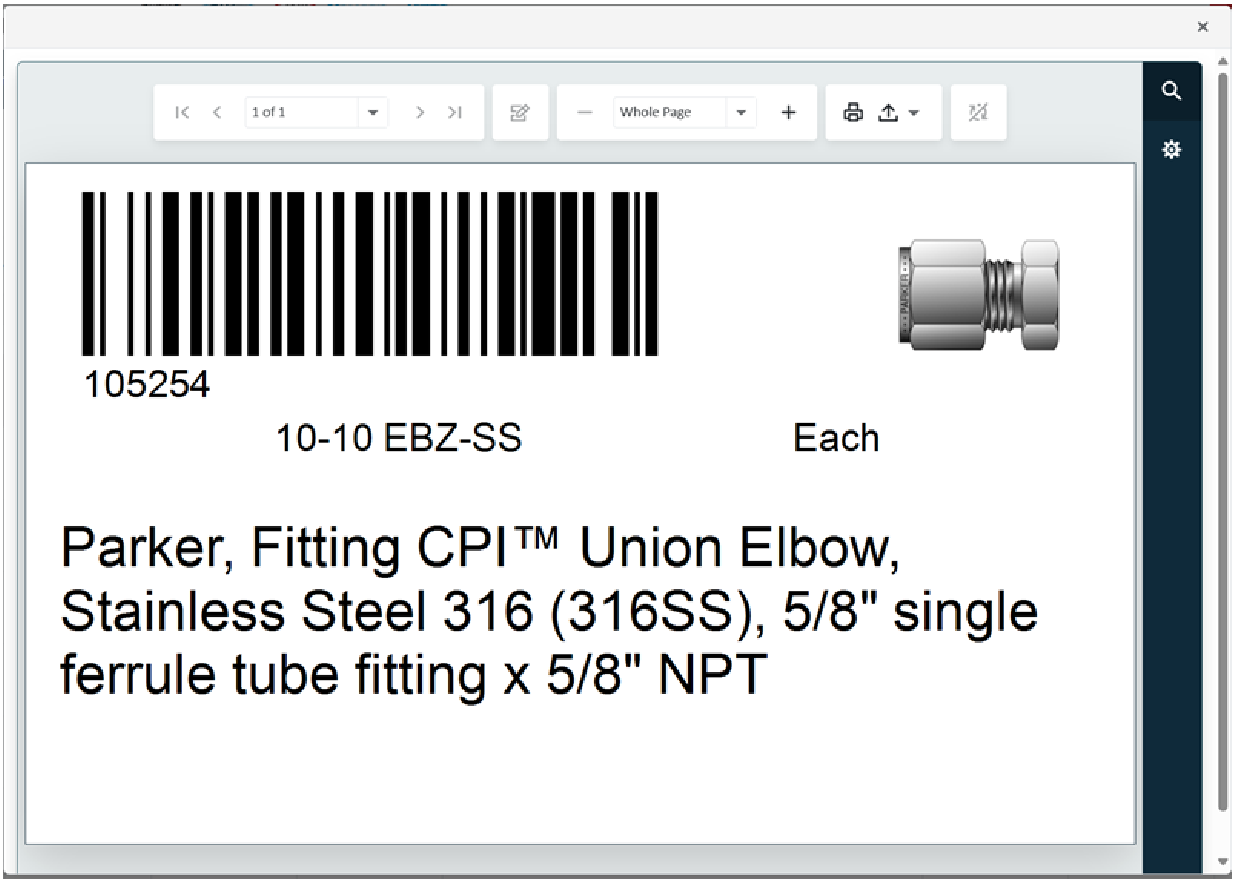
Printing Item Labels

To print item labels, follow these steps:

1. **Select Items:**
   - **Checkbox Selection:** Use the checkboxes next to each item to select the items you wish to print labels for.



2. **Print Labels:**
   - **Click 'Print' Button:** Once the items are selected, click the 'Print' button.
   - **Label Preview:** A pop-up box will open, displaying the item labels in the label printing format.
   - **Print or Save:** From the pop-up, you can choose to print the labels directly or save them for later printing.



Viewing Item Details

The item details can be viewed directly on the main grid. Each column provides specific information about the items:

- **Item ID:** Unique identifier for the item.
- **Image:** Image of the item.
- **Short Description:** Brief description of the item.
- **Long Description:** Detailed description of the item.
- **Unit of Measure:** The unit in which the item is measured.
- **Manufacturer ID:** Identification number assigned by the manufacturer.

Filtering Information

To filter the item details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the items that match the entered criteria.

Choosing Columns

To customize the displayed columns:

1. **Column Chooser Button:** Click this button to open a popup screen.

2. **Select/Deselect Columns:** Check or uncheck the columns you want to display or hide.
3. **Apply Changes:** The grid will update to reflect your selections.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for improved visibility.

Best Practices

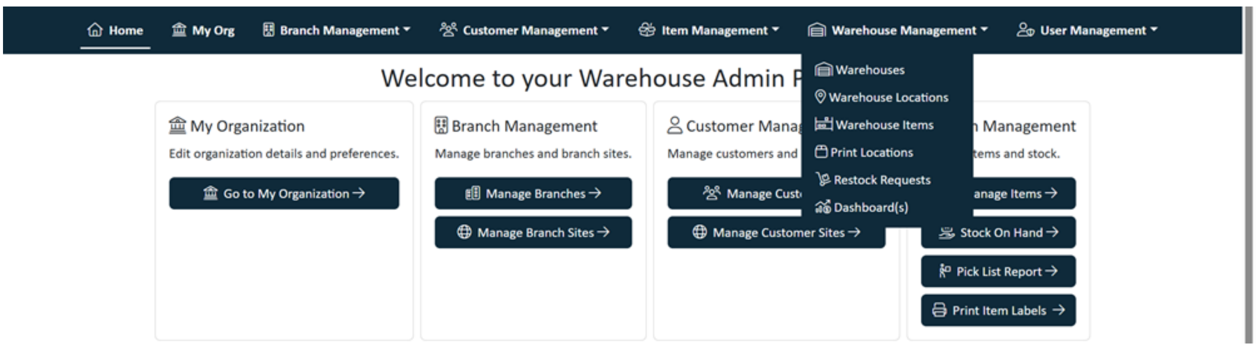
- **Regular Updates:** Keep item details up to date to ensure accurate label printing.
- **Detailed Descriptions:** Provide comprehensive descriptions for each item to facilitate easy identification and usage.
- **Custom Views:** Use the Column Chooser to create a view that best fits your operational needs.

Troubleshooting and Support

If you encounter any issues while printing item labels or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively print item labels within the Mtec LLC Warehouse Application, ensuring accurate and organized inventory management.

Warehouse Management



Manage Warehouses

The "Manage Warehouses" screen is used to manage customer warehouses within the Mtec LLC Warehouse Application. This interface allows administrators to add new warehouses, edit existing ones, and view detailed information about each warehouse.

Warehouse Locations

The "Warehouse Locations" screen is used to manage locations within a warehouse. Users can view, create, and edit warehouse locations, as well as switch between different warehouses.

Manage Warehouse Items

The "Manage Warehouse Items" screen allows users to manage items and their quantities within different warehouse locations. Users can view, add, edit, and delete items, as well as switch between different warehouses.

Print Warehouse Locations

The "Print Warehouse Locations" screen allows users to print location labels. Users can select locations and print corresponding labels.

Restock Requests

The "Restock Requests" feature allows users to manage restock requests for each warehouse. Users can create new requests, edit existing ones, add items to requests, and calculate ordered quantities.

Manage Warehouses

Manage Warehouses

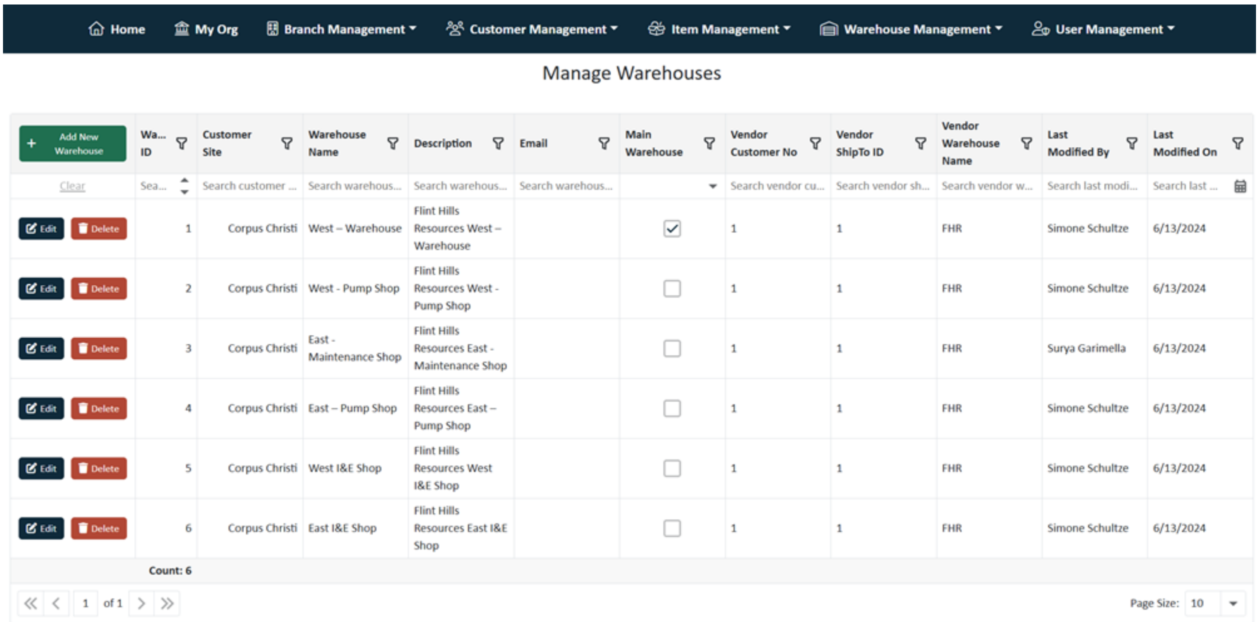
The "Manage Warehouses" screen is used to manage customer warehouses within the Mtec LLC Warehouse Application. This interface allows administrators to add new warehouses, edit existing ones, and view detailed information about each warehouse.

Overview

This section provides tools to manage warehouse details, including customer site associations, warehouse names, descriptions, emails, and vendor information.

Key Features and Navigation:

- **View Warehouses:** The main grid displays all warehouses with details such as Warehouse ID, Customer Site, Warehouse Name, Description, Email, Main Warehouse, Vendor Customer No, Vendor ShipTo ID, Vendor Warehouse Name, Last Modified By, and Last Modified On.
- **Add New Warehouse:** Use the '+ Add New Warehouse' button to add a new warehouse.
- **Edit Warehouse:** Click the 'Edit' button next to a warehouse to modify its details.
- **Delete Warehouse:** Click the 'Delete' button next to a warehouse to remove it from the system.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.

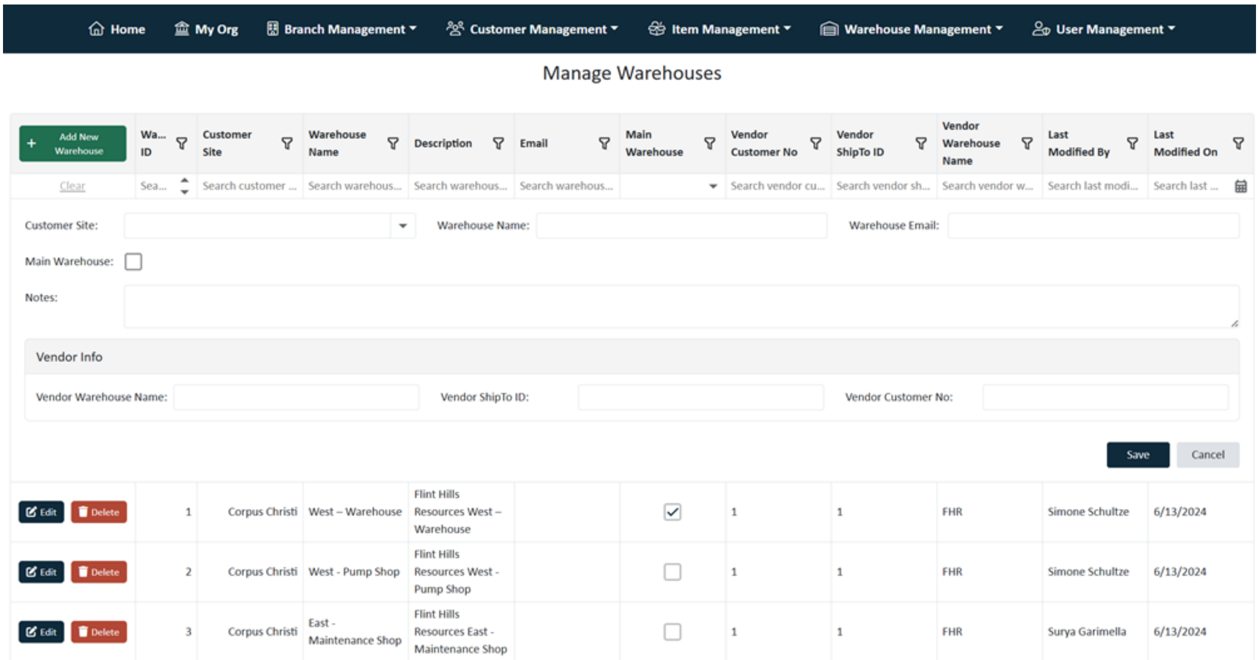


Adding a New Warehouse

To add a new warehouse, follow these steps:

1. **Click the '+ Add New Warehouse' Button:** Opens a form to enter new warehouse details.
2. **Enter Warehouse Details:**
   - **Customer Site:** Select the customer site from a dropdown menu.
   - **Warehouse Name:** Enter the name of the warehouse.
   - **Warehouse Email:** Provide the email address associated with the warehouse.
   - **Main Warehouse:** Check this box if it is the main warehouse.
   - **Notes:** Add any relevant notes about the warehouse.
3. **Enter Vendor Info:**
   - **Vendor Warehouse Name:** Provide the vendor warehouse name.
   - **Vendor ShipTo ID:** Enter the vendor ShipTo ID.
   - **Vendor Customer No:** Enter the vendor customer number.

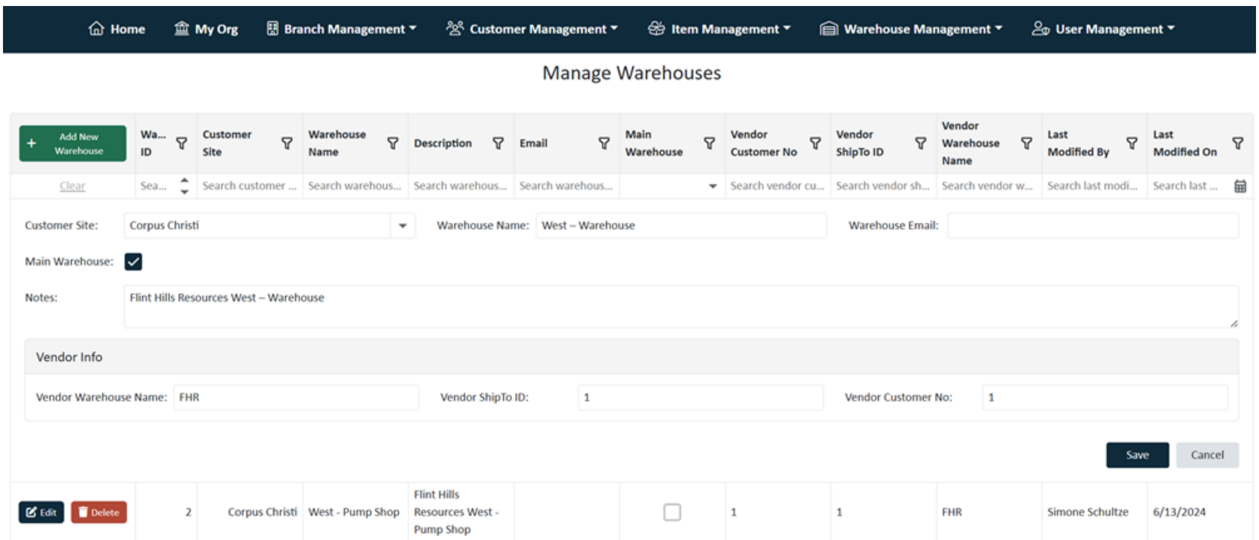
4. **Save:** Click 'Save' to store the new warehouse details in the system.



Editing an Existing Warehouse

To update a warehouse's details:

1. **Select the Warehouse:** Click the 'Edit' button next to the warehouse you wish to update.
2. **Modify Warehouse Details:** Update the relevant fields.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting a Warehouse

If you need to remove a warehouse:

1. **Select the Warehouse:** Click the 'Delete' button next to the warehouse you wish to

remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

Viewing Warehouse Details

The warehouse details can be viewed directly on the main grid. Each column provides specific information about the warehouses:

- **Warehouse ID:** Unique identifier for the warehouse.
- **Customer Site:** The customer site associated with the warehouse.
- **Warehouse Name:** The name of the warehouse.
- **Description:** Description of the warehouse.
- **Email:** Email address associated with the warehouse.
- **Main Warehouse:** Indicates if it is the main warehouse.
- **Vendor Customer No:** The vendor customer number.
- **Vendor ShipTo ID:** The vendor ShipTo ID.
- **Vendor Warehouse Name:** The name of the vendor warehouse.
- **Last Modified By:** The user who last modified the warehouse details.
- **Last Modified On:** The date and time when the warehouse details were last modified.

Filtering Information

To filter the warehouse details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the warehouses that match the entered criteria.

Best Practices

- **Regular Updates:** Keep warehouse details up to date to ensure accurate inventory and operations management.
- **Detailed Descriptions:** Provide comprehensive descriptions for each warehouse to facilitate easy identification and management.
- **Custom Views:** Use the search fields to create a view that best fits your operational needs.

Troubleshooting and Support

If you encounter any issues while managing warehouses or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively manage warehouses within the Mtec LLC Warehouse Application, ensuring streamlined operations and accurate warehouse information.

Manage Warehouse Locations

Warehouse Locations

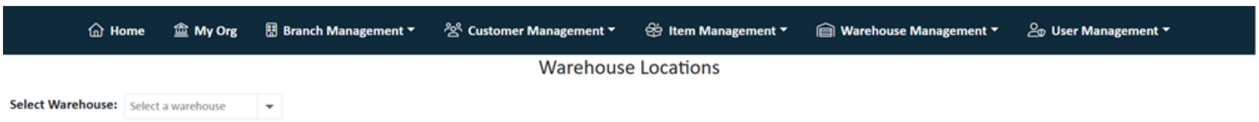
The "Warehouse Locations" screen is used to manage locations within a warehouse. Users can view, create, and edit warehouse locations, as well as switch between different warehouses.

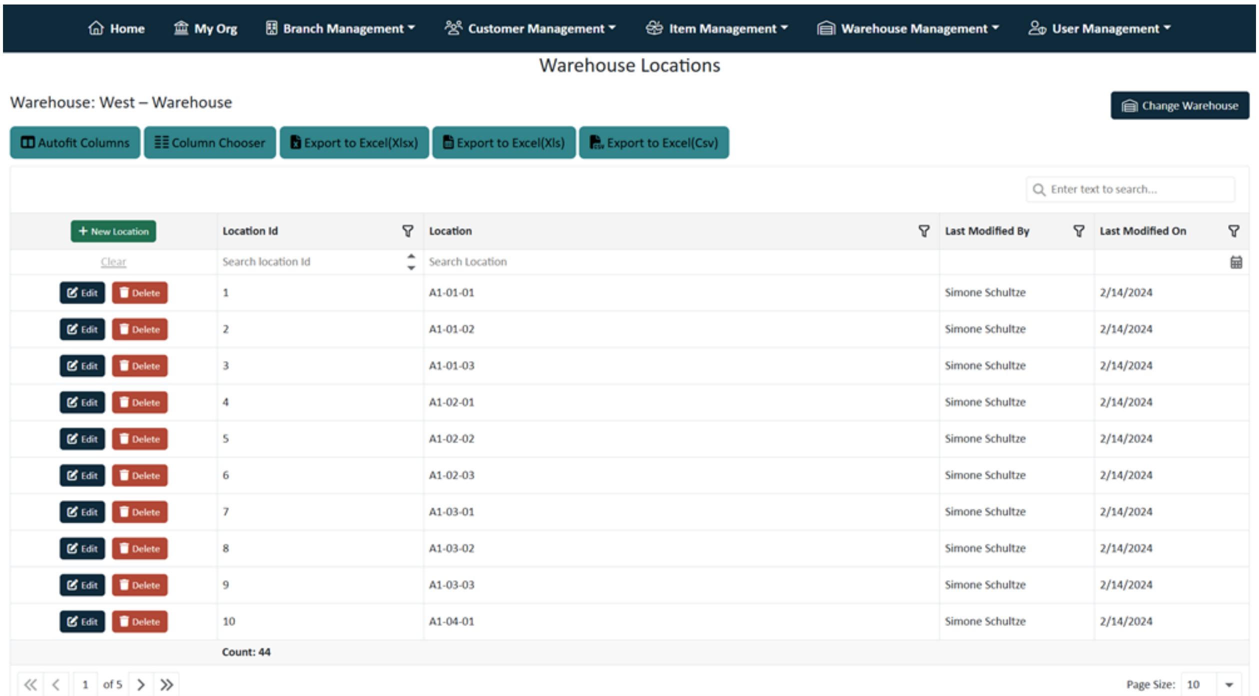
Overview

This interface provides tools to manage warehouse locations, ensuring efficient organization and tracking of items within the warehouse.

Key Features and Navigation:

- **Select Warehouse:** Use the dropdown menu to select the warehouse you want to manage.
- **View Locations:** The main grid displays all locations within the selected warehouse, including details like Location ID, Location, Last Modified By, and Last Modified On.
- **Add New Location:** Use the '+ New Location' button to add a new location.
- **Edit Location:** Click the 'Edit' button next to a location to modify its details.
- **Delete Location:** Click the 'Delete' button next to a location to remove it from the system.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.
- **Change Warehouse:** Use the 'Change Warehouse' button to switch between different warehouses.

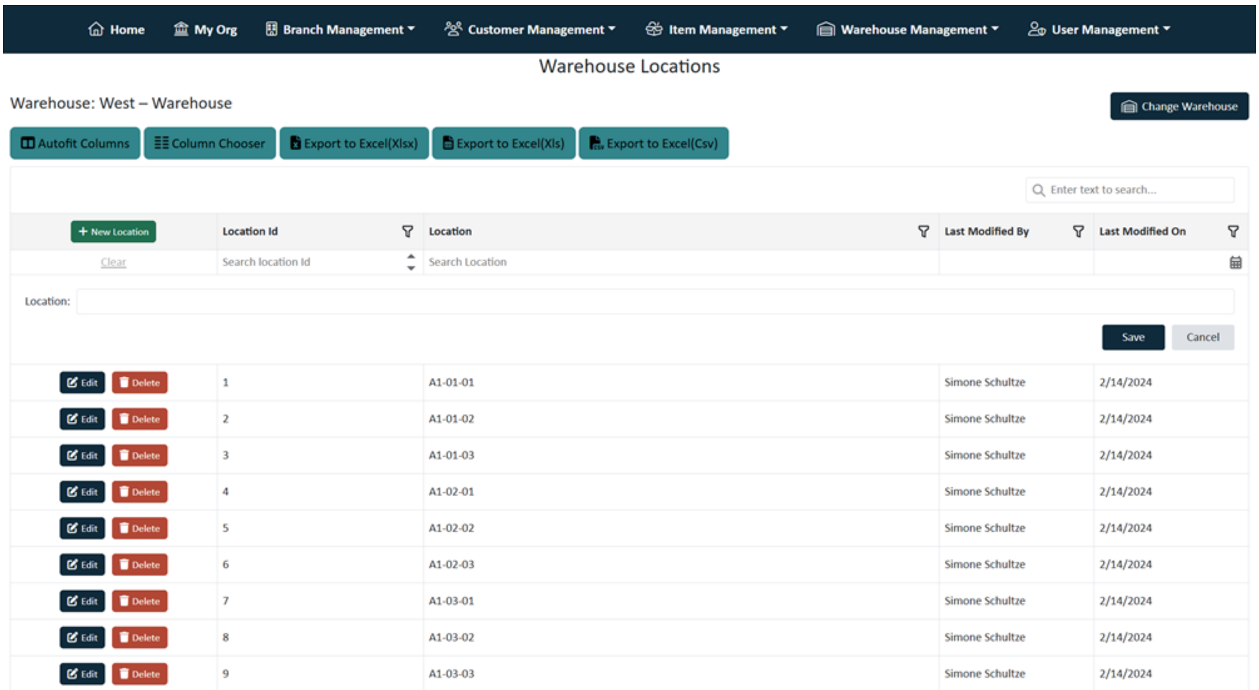




Adding a New Location

To add a new location, follow these steps:

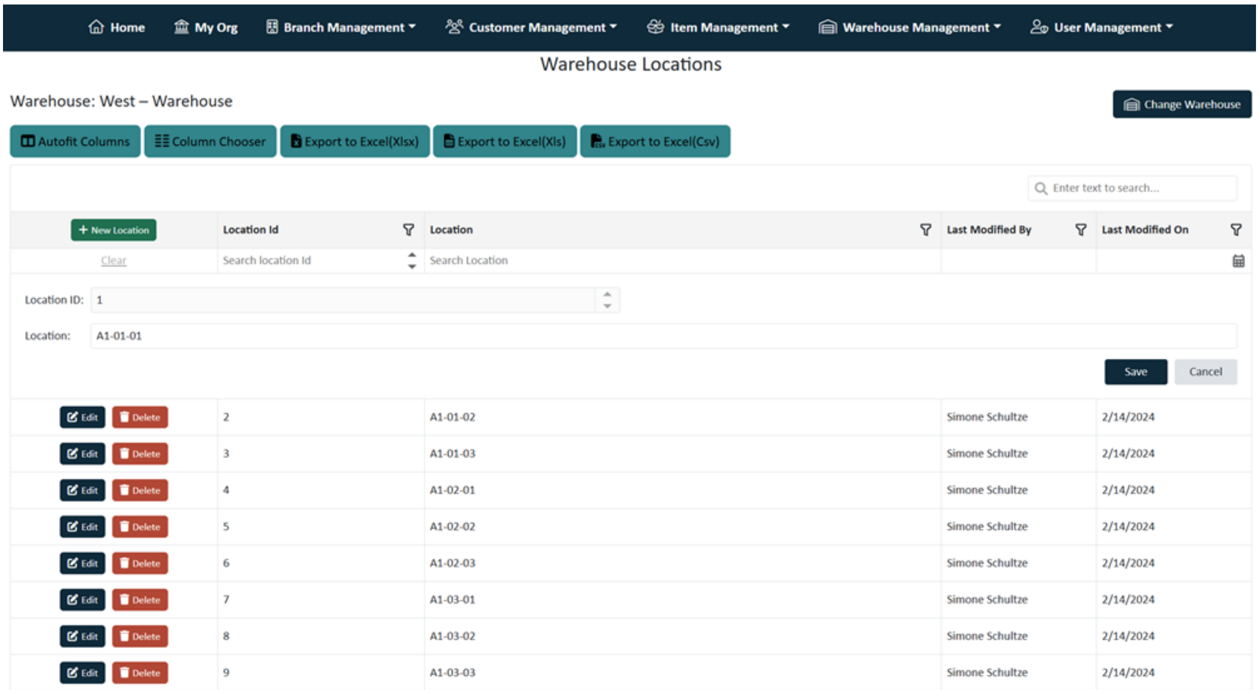
1. **Select Warehouse:** Choose the warehouse where you want to add a location from the dropdown menu.
2. **Click the '+ New Location' Button:** Opens a form to enter new location details.
3. **Enter Location Details:**
   - **Location:** Enter the name or code of the location.
4. **Save:** Click 'Save' to store the new location details in the system.



Editing an Existing Location

To update a location's details:

1. **Select the Location:** Click the 'Edit' button next to the location you wish to update.
2. **Modify Location Details:** Update the relevant fields.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting a Location

If you need to remove a location:

1. **Select the Location:** Click the 'Delete' button next to the location you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

Viewing Location Details

The location details can be viewed directly on the main grid. Each column provides specific information about the locations:

- **Location ID:** Unique identifier for the location.
- **Location:** The name or code of the location.
- **Last Modified By:** The user who last modified the location details.
- **Last Modified On:** The date and time when the location details were last modified.

Filtering Information

To filter the location details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the locations that match the entered criteria.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for improved visibility.

Using the Column Chooser

- **Column Chooser Button:** Click this button to open a popup screen where you can select or deselect columns to be displayed in the grid.

Exporting Location Details

To export the location details to Excel:

1. **Export to Excel Buttons:** Click either the 'Export to Excel (Xlsx)' or 'Export to Excel (Csv)' button.
2. **Download File:** The file will be generated and downloaded for offline analysis or reporting.

Changing Warehouses

To switch between different warehouses:

1. **Change Warehouse Button:** Click the 'Change Warehouse' button.
2. **Select Warehouse:** Choose the desired warehouse from the dropdown menu.

Best Practices

- **Regular Updates:** Keep location details up to date to ensure accurate tracking of items within the warehouse.
- **Detailed Descriptions:** Provide comprehensive descriptions for each location to facilitate easy identification and management.
- **Custom Views:** Use the search fields and Column Chooser to create a view that best fits your operational needs.

Troubleshooting and Support

If you encounter any issues while managing warehouse locations or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively manage warehouse locations within the Mtec LLC Warehouse Application, ensuring efficient organization and accurate location tracking.

Warehouse Items

Manage Warehouse Items

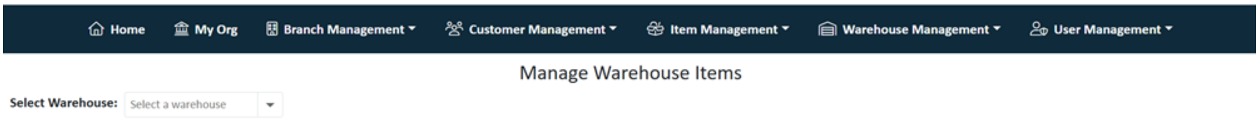
The "Manage Warehouse Items" screen allows users to manage items and their quantities within different warehouse locations. Users can view, add, edit, and delete items, as well as switch between different warehouses.

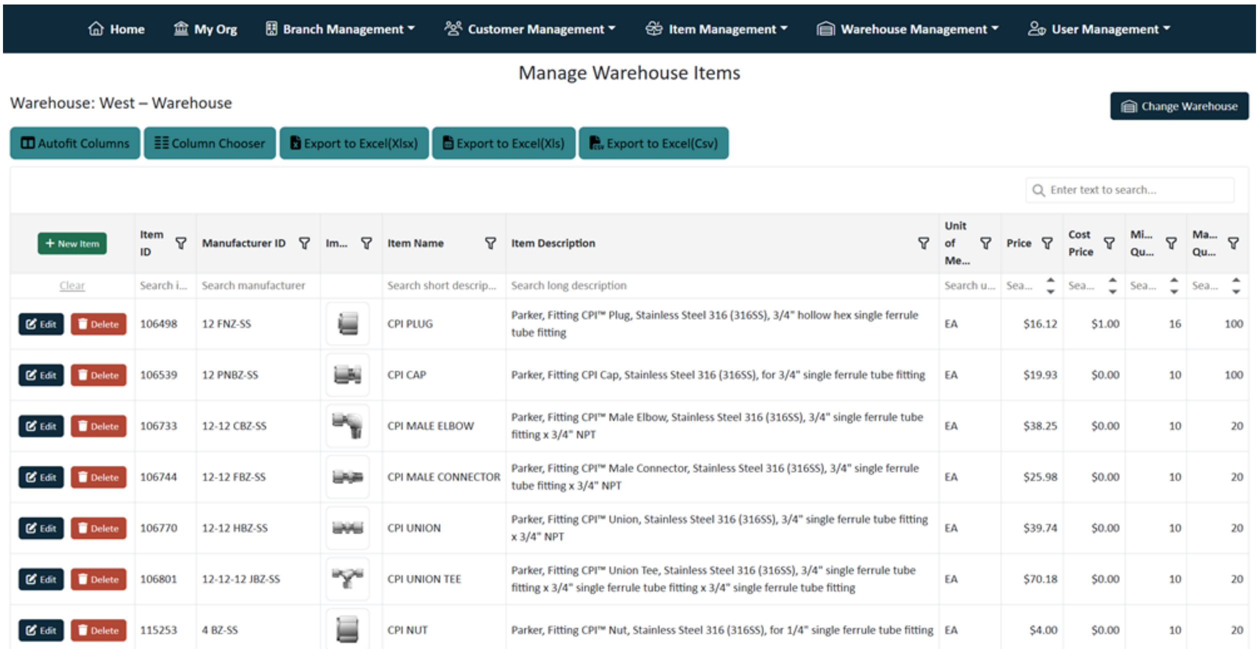
Overview

This interface provides tools to manage items within a warehouse, ensuring efficient inventory tracking and management.

Key Features and Navigation:

- **Select Warehouse:** Use the dropdown menu to select the warehouse you want to manage.
- **View Items:** The main grid displays all items within the selected warehouse, including details like Item ID, Manufacturer ID, Image, Item Name, Item Description, Unit of Measure, Price, Cost Price, Minimum Quantity, and Maximum Quantity.
- **Add New Item:** Use the '+ New Item' button to add a new item.
- **Edit Item:** Click the 'Edit' button next to an item to modify its details.
- **Delete Item:** Click the 'Delete' button next to an item to remove it from the system.
- **Filter Information:** Use the search fields at the top of each column to filter the displayed data based on specific criteria.
- **Change Warehouse:** Use the 'Change Warehouse' button to switch between different warehouses.



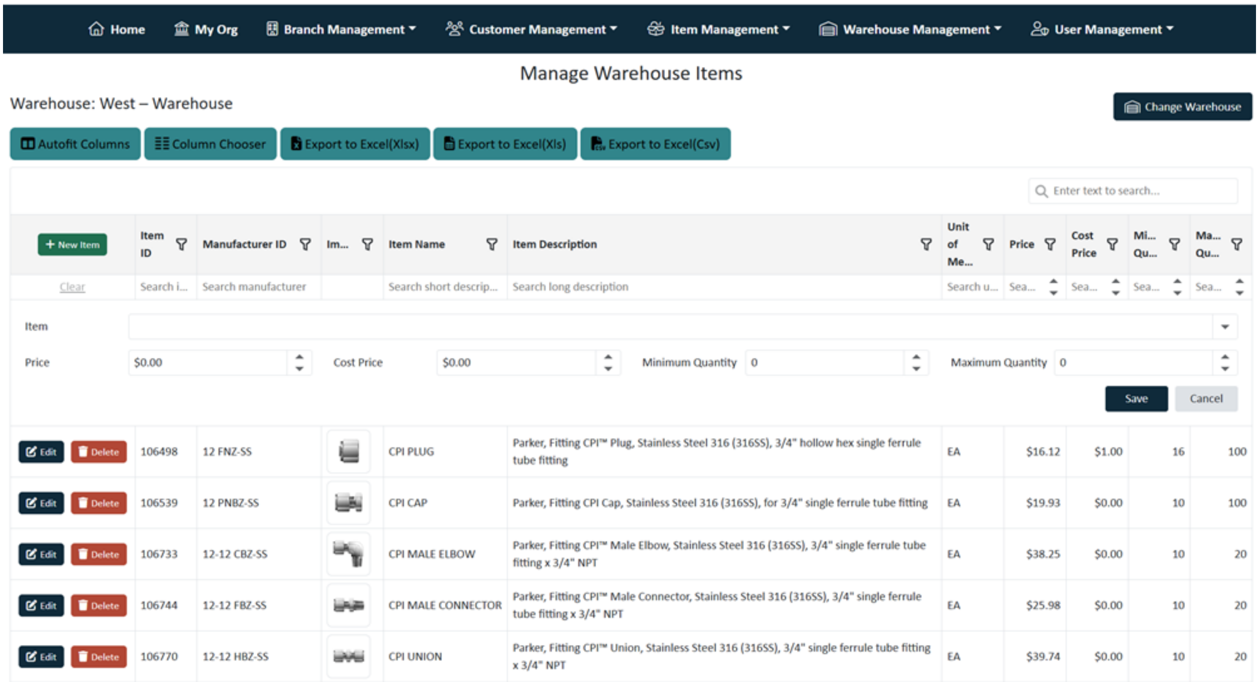


+ New Item	Item ID	Manufacturer ID	Im...	Item Name	Item Description	Unit of Me...	Price	Cost Price	Mi... Qu...	Ma... Qu...
Clear	Search i...	Search manufacturer		Search short descrip...	Search long description	Search u...	Sea...	Sea...	Sea...	Sea...
Edit Delete	106498	12 FNZ-SS		CPI PLUG	Parker, Fitting CPI™ Plug, Stainless Steel 316 (316SS), 3/4" hollow hex single ferrule tube fitting	EA	$16.12	$1.00	16	100
Edit Delete	106539	12 PNBZ-SS		CPI CAP	Parker, Fitting CPI Cap, Stainless Steel 316 (316SS), for 3/4" single ferrule tube fitting	EA	$19.93	$0.00	10	100
Edit Delete	106733	12-12 CBZ-SS		CPI MALE ELBOW	Parker, Fitting CPI™ Male Elbow, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	EA	$38.25	$0.00	10	20
Edit Delete	106744	12-12 FBZ-SS		CPI MALE CONNECTOR	Parker, Fitting CPI™ Male Connector, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	EA	$25.98	$0.00	10	20
Edit Delete	106770	12-12 HBZ-SS		CPI UNION	Parker, Fitting CPI™ Union, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	EA	$39.74	$0.00	10	20
Edit Delete	106801	12-12-12 JBZ-SS		CPI UNION TEE	Parker, Fitting CPI™ Union Tee, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" single ferrule tube fitting x 3/4" single ferrule tube fitting	EA	$70.18	$0.00	10	20
Edit Delete	115253	4 BZ-SS		CPI NUT	Parker, Fitting CPI™ Nut, Stainless Steel 316 (316SS), for 1/4" single ferrule tube fitting	EA	$4.00	$0.00	10	20

Adding a New Item

To add a new item, follow these steps:

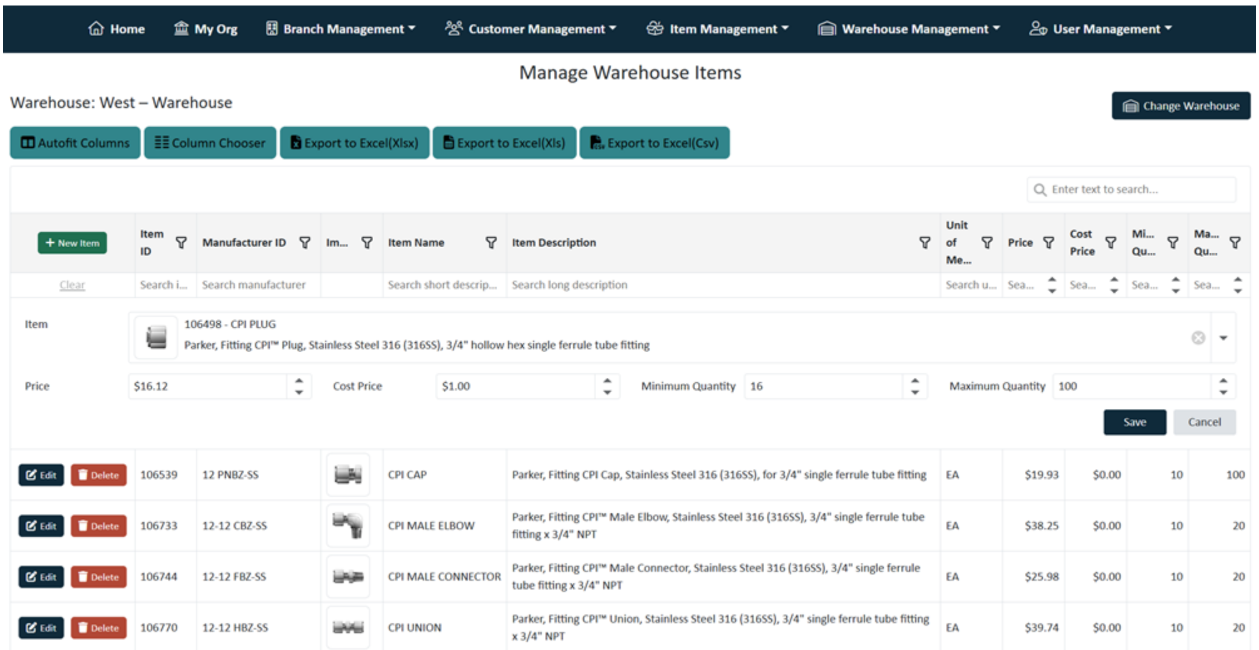
1. **Select Warehouse:** Choose the warehouse where you want to add an item from the dropdown menu.
2. **Click the '+ New Item' Button:** Opens a form to enter new item details.
3. **Enter Item Details:**
   - **Item Name:** Enter the name of the item.
   - **Item Description:** Provide a detailed description of the item.
   - **Manufacturer ID:** Enter the manufacturer identification number.
   - **Unit of Measure:** Specify the unit of measure for the item.
   - **Price:** Set the selling price of the item.
   - **Cost Price:** Set the cost price of the item.
   - **Minimum Quantity:** Specify the minimum quantity threshold for the item.
   - **Maximum Quantity:** Specify the maximum quantity threshold for the item.
4. **Save:** Click 'Save' to store the new item details in the system.



Editing an Existing Item

To update an item's details:

1. **Select the Item:** Click the 'Edit' button next to the item you wish to update.
2. **Modify Item Details:** Update the relevant fields.
3. **Save Changes:** Click 'Save' to apply the updates.



Deleting an Item

If you need to remove an item:

1. **Select the Item:** Click the 'Delete' button next to the item you wish to remove.
2. **Confirm Deletion:** You will be prompted to confirm this action to prevent accidental deletions.

Viewing Item Details

The item details can be viewed directly on the main grid. Each column provides specific information about the items:

- **Item ID:** Unique identifier for the item.
- **Manufacturer ID:** The manufacturer's identification number.
- **Image:** Image of the item.
- **Item Name:** The name of the item.
- **Item Description:** Detailed description of the item.
- **Unit of Measure:** The unit in which the item is measured.
- **Price:** The selling price of the item.
- **Cost Price:** The cost price of the item.
- **Minimum Quantity:** The minimum quantity threshold for the item.
- **Maximum Quantity:** The maximum quantity threshold for the item.

Filtering Information

To filter the item details:

1. **Search Fields:** Use the search fields at the top of each column to enter specific criteria.
2. **Apply Filters:** The grid will automatically update to display only the items that match the entered criteria.

Using Autofit Columns

- **Autofit Columns Button:** Click this button to automatically adjust the column widths based on the content for improved visibility.

Using the Column Chooser

- **Column Chooser Button:** Click this button to open a popup screen where you can select or deselect columns to be displayed in the grid.

Exporting Item Details

To export the item details to Excel:

1. **Export to Excel Buttons:** Click either the 'Export to Excel (Xlsx)' or 'Export to Excel (Csv)' button.
2. **Download File:** The file will be generated and downloaded for offline analysis or reporting.

Changing Warehouses

To switch between different warehouses:

1. **Change Warehouse Button:** Click the 'Change Warehouse' button.
2. **Select Warehouse:** Choose the desired warehouse from the dropdown menu.

Best Practices

- **Regular Updates:** Keep item details up to date to ensure accurate inventory tracking.
- **Detailed Descriptions:** Provide comprehensive descriptions for each item to facilitate easy identification and usage.
- **Custom Views:** Use the search fields and Column Chooser to create a view that best fits your operational needs.

Troubleshooting and Support

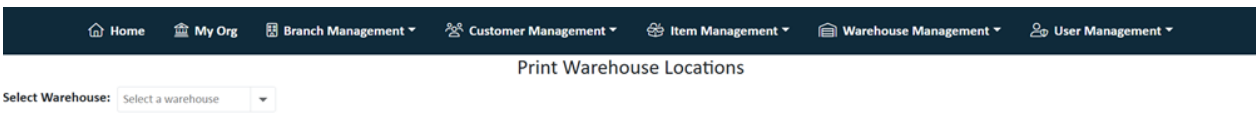
If you encounter any issues while managing warehouse items or require further assistance, please refer to the 'Getting Help' section of this guide or contact our support team directly.

By following these instructions, you'll be able to effectively manage items within the Mtec LLC Warehouse Application, ensuring efficient inventory management and accurate item tracking.

Print Locations

Print Warehouse Locations

Overview The "Print Warehouse Locations" screen allows users to generate and print location labels for various warehouse locations. These labels can be used for organizing and identifying different areas within the warehouse, ensuring efficient navigation and inventory management.



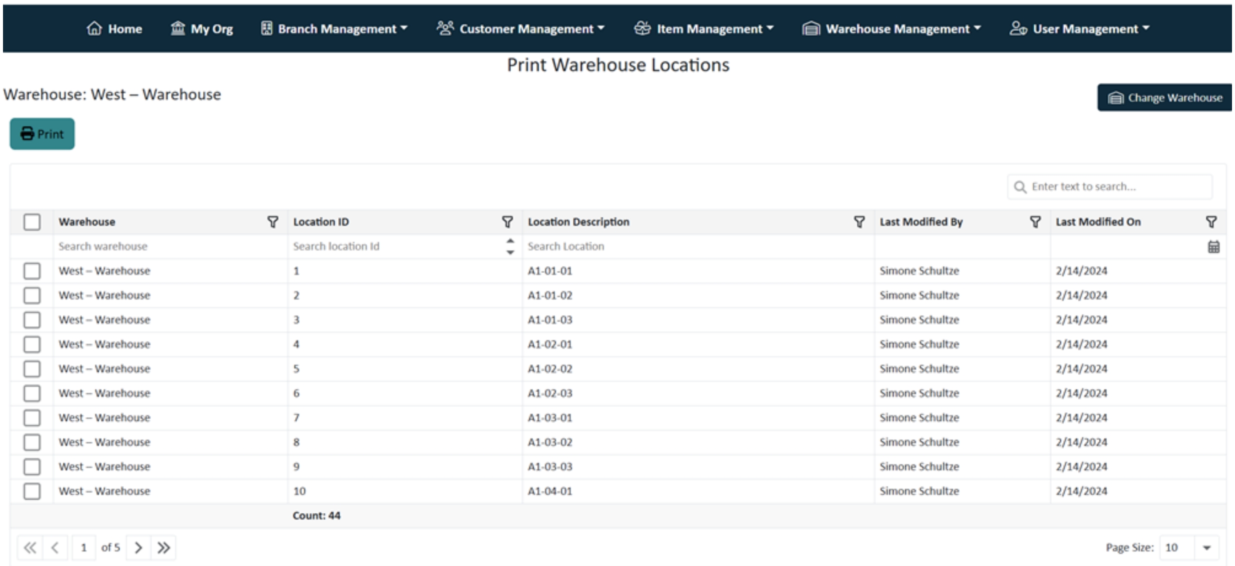
Features

- **Select Warehouse**: Dropdown to choose the warehouse for which you want to print location labels.
- **Location List**: Displays the list of all locations within the selected warehouse.

- **Print Labels**: Option to print labels for the selected locations.

Using the Print Warehouse Locations Screen

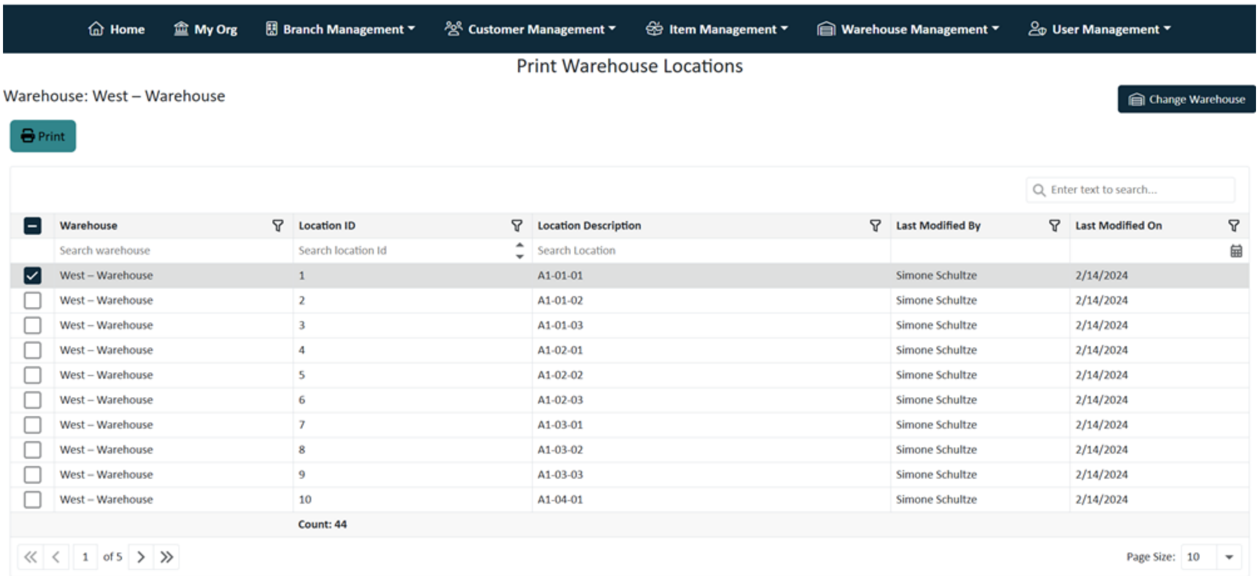
1. **Accessing the Screen**:
   - Navigate to the "Print Warehouse Locations" screen from the main menu of the Warehouse User Portal application.



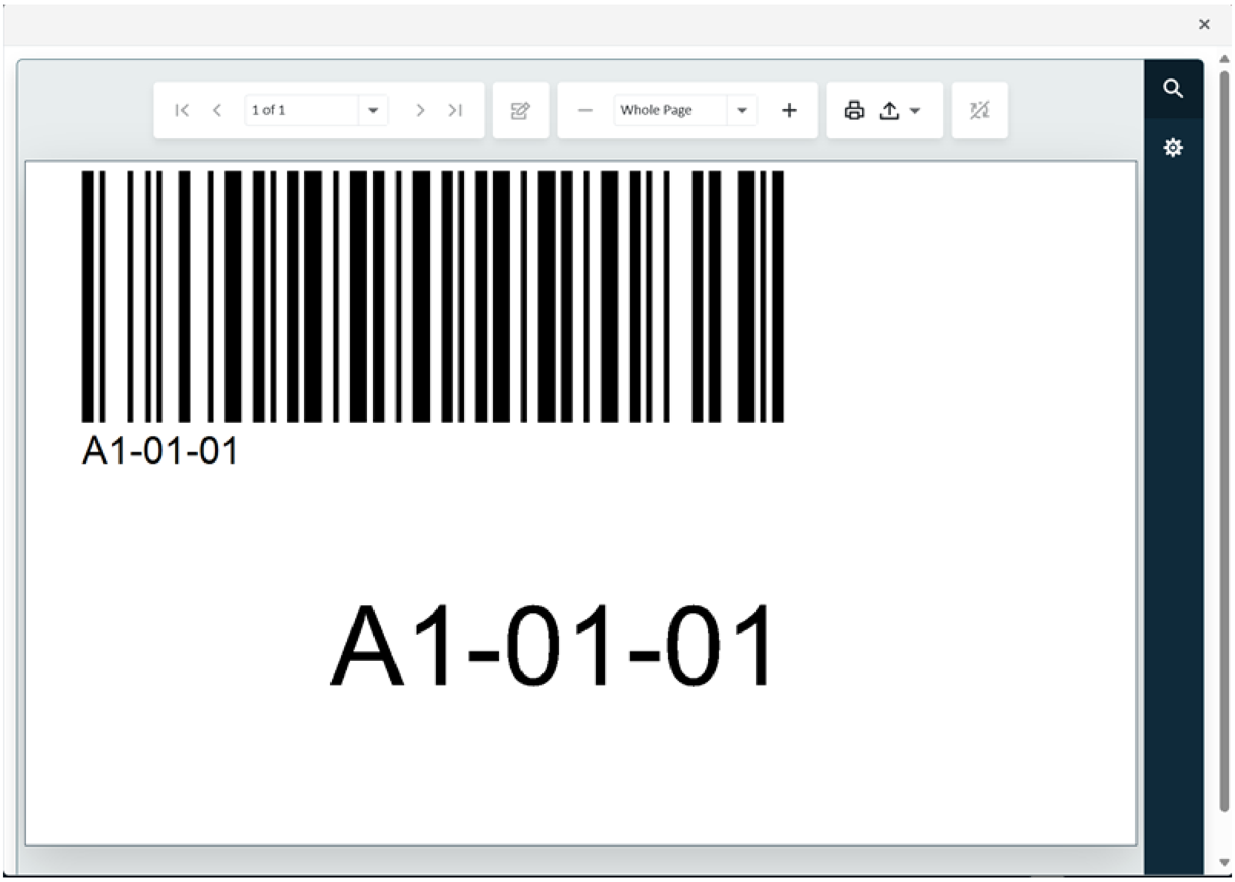
2. **Selecting a Warehouse**:
   - Use the dropdown menu at the top of the screen to select the warehouse for which you need to print location labels.

3. **Viewing Locations**:
   - After selecting a warehouse, the list of locations within that warehouse will be displayed.
   - Each entry shows the Warehouse Name, Location ID, Location Description, Last Modified By, and Last Modified On.

4. **Selecting Locations for Printing**:
   - Check the boxes next to the locations you wish to print labels for.
   - You can select multiple locations if needed.



5. **Printing Labels**:
   - Once the locations are selected, click on the "Print" button.
   - A pop-up box will appear showing the labels in the printing format.
   - You can choose to print or save the labels from this pop-up.



Practical Tips

- Ensure that the printer is properly connected and set up before printing the labels.

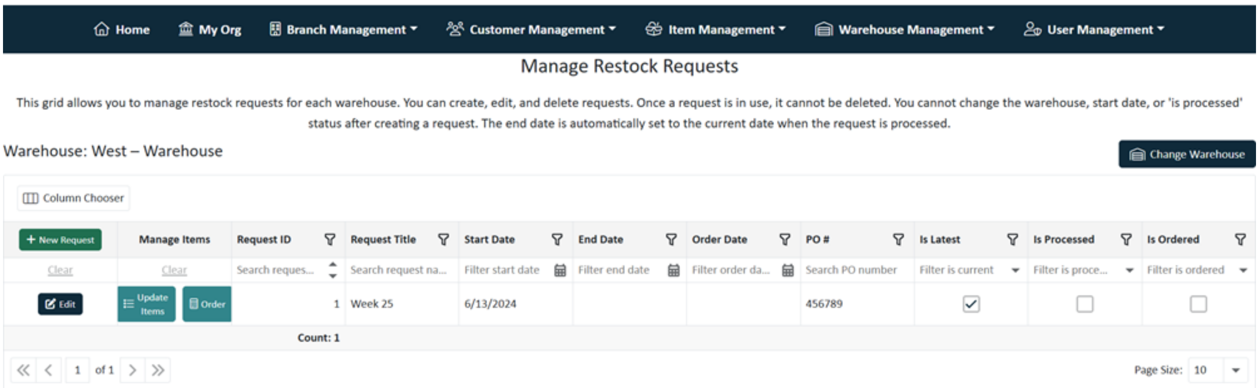
- Verify the selected locations and their details before proceeding with printing.
- Use high-quality label paper for better durability and readability of the printed labels.

Conclusion The "Print Warehouse Locations" feature simplifies the process of generating and printing labels for warehouse locations. This helps in maintaining an organized and efficient warehouse environment, making it easier to locate and manage inventory.

Re-Stock Requests

Restock Requests

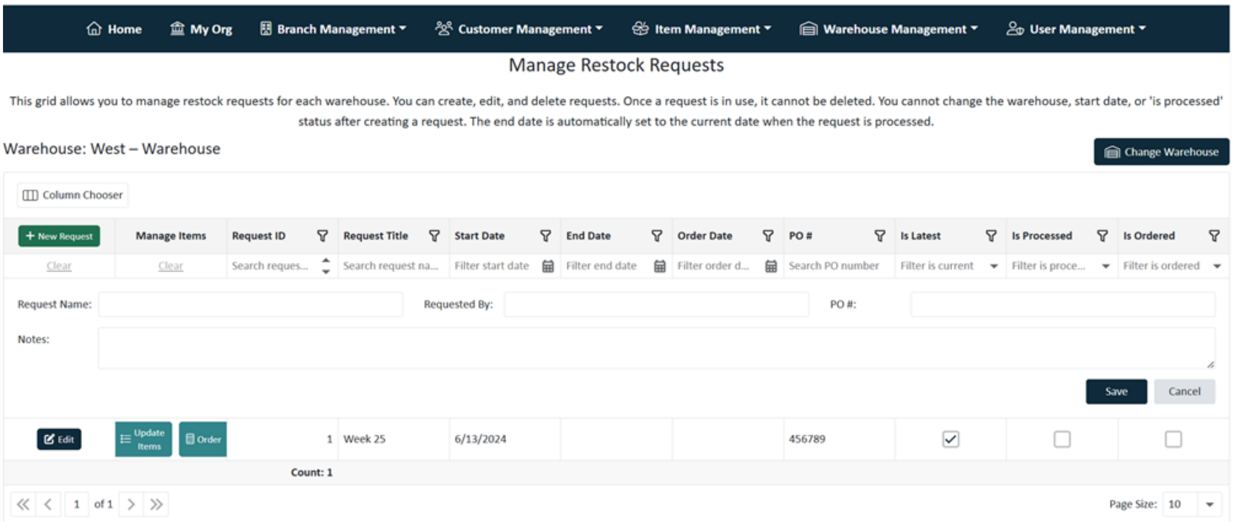
Overview: The "Restock Requests" feature allows users to manage restock requests for each warehouse. Users can create new requests, edit existing ones, add items to requests, and calculate ordered quantities.



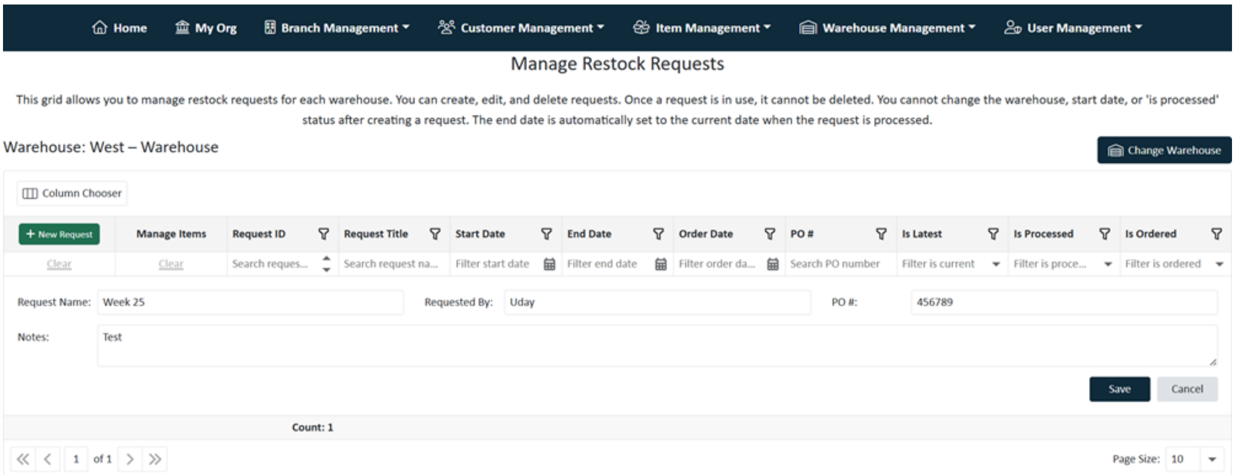
Instructions:

Part 1: Creating New and Editing Existing Restock Requests

1. **Creating a New Restock Request:**
   - Navigate to the "Restock Requests" screen from the main menu.
   - Click on "New Request" to open the restock request creation form.
   - Fill in the necessary details such as Request Name, Requested By, Notes, Start Date, End Date, and PO #.
   - Click "Save" to create the new restock request.



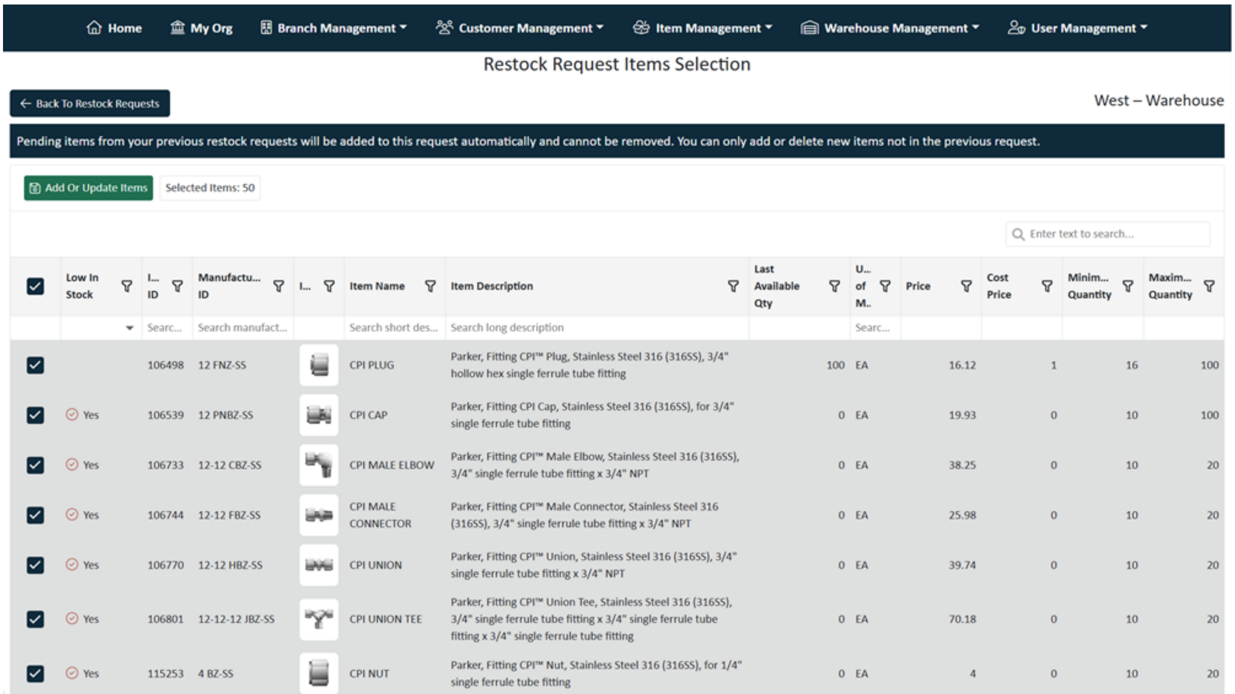
2. **Editing an Existing Restock Request:**
   - Locate the restock request to edit in the list.
   - Click the "Edit" button next to the request entry.
   - Update the restock request details as needed and click "Save."



3. **Deleting a Restock Request:**
   - Locate the restock request to delete in the list.
   - Click the "Delete" button next to the request entry.
   - Confirm the deletion when prompted.

Part 2: Adding Items to the Restock Request

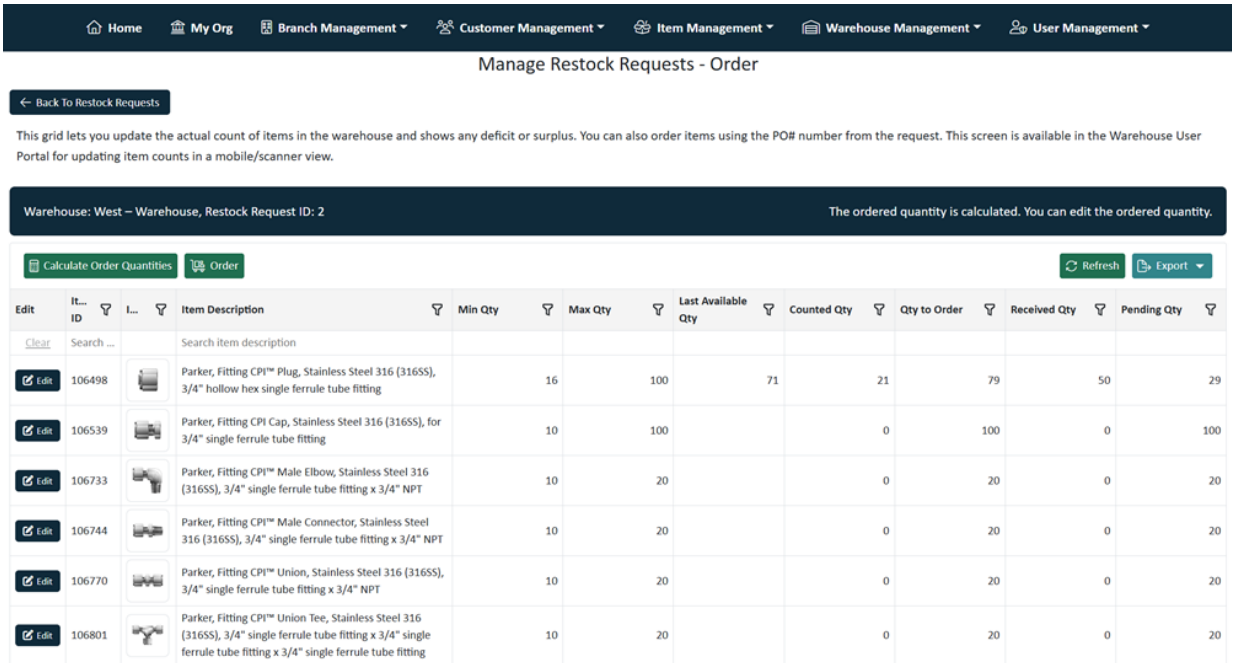
1. **Selecting a Restock Request:**
   - Navigate to the "Restock Requests" screen from the main menu.
   - Locate the restock request to which items need to be added.
2. **Adding Items:**
   - Click on the "Update Items" button next to the restock request entry.
   - Use the checkboxes to select the items to be added to the restock request.
   - Click "Add or Update Items" to add the selected items to the restock request.



	Low In Stock	I... ID	Manufactu... ID	I...	Item Name	Item Description	Last Available Qty	U... of M..	Price	Cost Price	Minim... Quantity	Maxim... Quantity
		Searc...	Search manufact...		Search short des...	Search long description		Searc...				
☑		106498	12 FNZ-SS		CPI PLUG	Parker, Fitting CPI™ Plug, Stainless Steel 316 (316SS), 3/4" hollow hex single ferrule tube fitting	100	EA	16.12	1	16	100
☑	Yes	106539	12 PNBZ-SS		CPI CAP	Parker, Fitting CPI Cap, Stainless Steel 316 (316SS), for 3/4" single ferrule tube fitting	0	EA	19.93	0	10	100
☑	Yes	106733	12-12 CBZ-SS		CPI MALE ELBOW	Parker, Fitting CPI™ Male Elbow, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	0	EA	38.25	0	10	20
☑	Yes	106744	12-12 FBZ-SS		CPI MALE CONNECTOR	Parker, Fitting CPI™ Male Connector, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	0	EA	25.98	0	10	20
☑	Yes	106770	12-12 HBZ-SS		CPI UNION	Parker, Fitting CPI™ Union, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" NPT	0	EA	39.74	0	10	20
☑	Yes	106801	12-12-12 JBZ-SS		CPI UNION TEE	Parker, Fitting CPI™ Union Tee, Stainless Steel 316 (316SS), 3/4" single ferrule tube fitting x 3/4" single ferrule tube fitting x 3/4" single ferrule tube fitting	0	EA	70.18	0	10	20
☑	Yes	115253	4 BZ-SS		CPI NUT	Parker, Fitting CPI™ Nut, Stainless Steel 316 (316SS), for 1/4" single ferrule tube fitting	0	EA	4	0	10	20

Part 3: Calculating the Counted Items in the Restock Request and Placing the Order

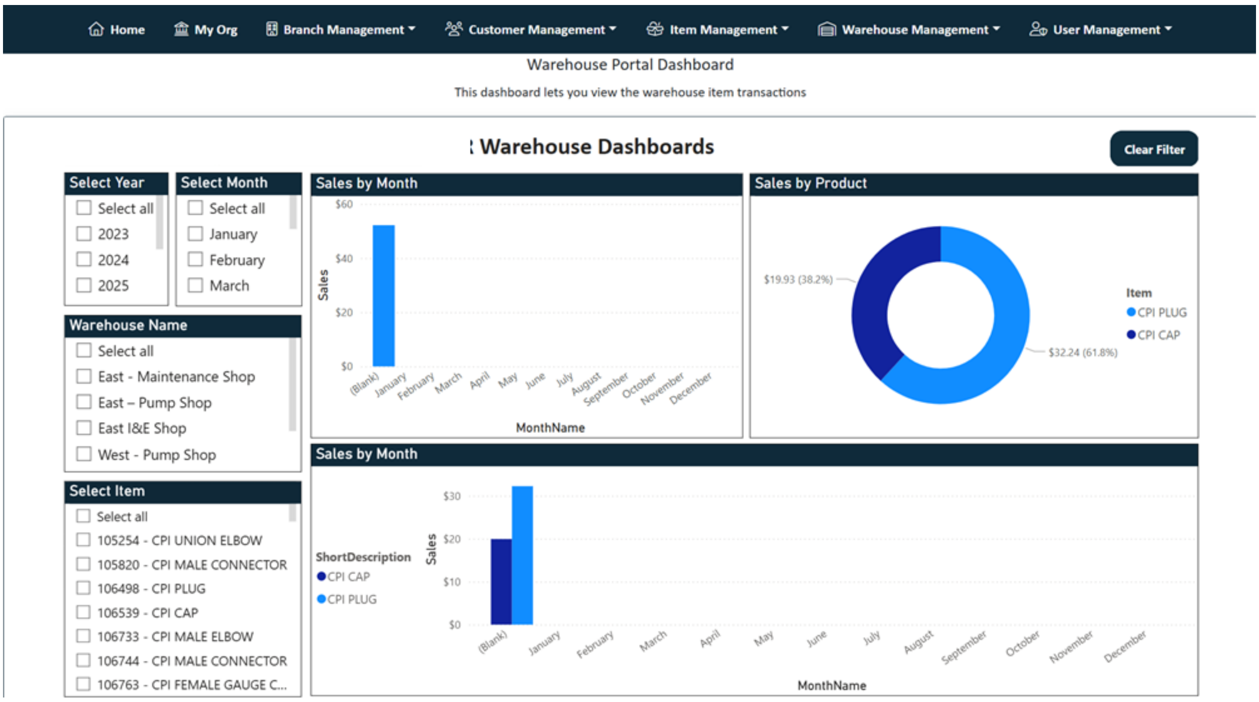
1. **Counting Items:**
   - Navigate to the "Restock Requests" screen from the main menu.
   - Locate the restock request to be counted and click on the "Order" button.
   - The "Manage Restock Requests - Order" screen will appear, showing the items in the request.
2. **Updating Counted Quantities:**
   - Update the "Counted Qty" column for each item with the actual counted quantities.
   - The "Qty to Order" column will be automatically calculated based on the counted quantities and minimum/maximum quantities set for each item.
3. **Placing the Order:**
   - Click the "Calculate Order Quantities" button to ensure all quantities are correctly calculated.
   - Click the "Order" button to place the restock order.
   - Confirm the order when prompted.



Dashboards

Warehouse Dashboards

Overview The Warehouse Dashboards screen provides users with a comprehensive view of warehouse item transactions and statistics through various Power BI dashboards. These dashboards help in analyzing sales data and product usage within the warehouse.



Features

- **Sales by Month**: Visual representation of sales data on a monthly basis.
- **Sales by Product**: Breakdown of sales by individual products.
- **Warehouse Pick List**: Detailed list of items picked within the selected time frame.

Using the Warehouse Dashboards

1. **Accessing the Dashboards**:
   - Navigate to the Warehouse Dashboards screen from the main menu of the Warehouse User Portal application.
2. **Filtering Data**:
   - Use the available filters to select the year, month, warehouse name, and specific items you want to analyze.
   - The dashboard will automatically update based on the selected filters.
3. **Interpreting the Data**:
   - **Sales by Month**: Analyze the monthly sales trends to understand peak periods and adjust inventory accordingly.
   - **Sales by Product**: Identify the top-performing products and those that need promotional efforts.
   - **Warehouse Pick List**: Review the detailed list of picked items to manage restocking and order fulfillment processes.

Practical Tips

- Regularly check the dashboards to stay updated with the latest sales and inventory data.
- Use the filters to focus on specific data points that are critical for your decision-making process.
- Share relevant insights from the dashboards with your team to enhance overall warehouse performance.

Conclusion The Warehouse Dashboards provide valuable insights into the warehouse operations, enabling better inventory management and sales analysis. Utilizing these dashboards effectively can lead to improved decision-making and operational efficiency.

If you provide the images, we can tailor this template to better match the visual elements and specifics of your application.

User Management

User Management

The User Management screen allows administrators to manage user accounts within the warehouse application. This includes creating new users, editing existing users, and assigning user roles. Users must be set up in the Microsoft Azure Entra ID access system to be visible in this portal.

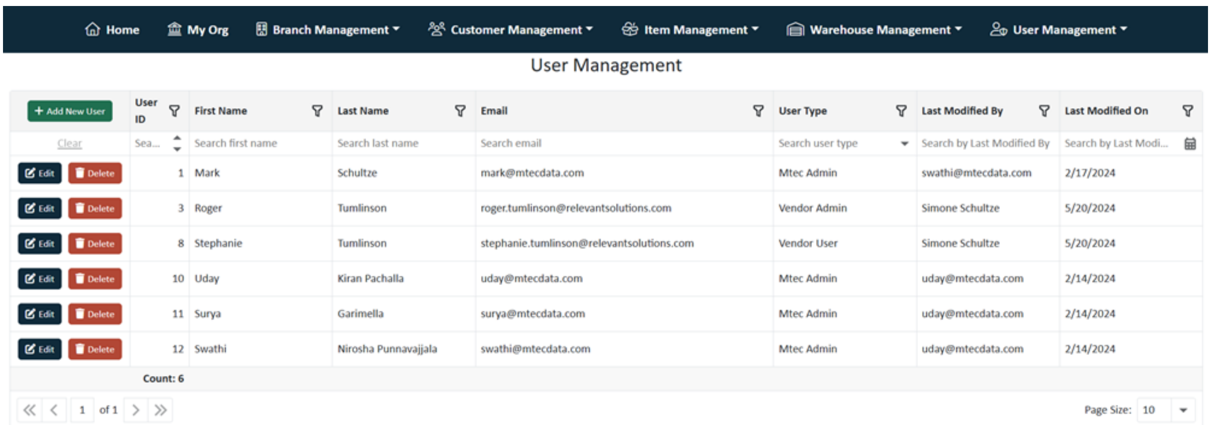
All Users

User Management

The User Management screen allows administrators to manage user accounts within the warehouse application. This includes creating new users, editing existing users, and assigning user roles. Users must be set up in the Microsoft Azure Entra ID access system to be visible in this portal.

Features

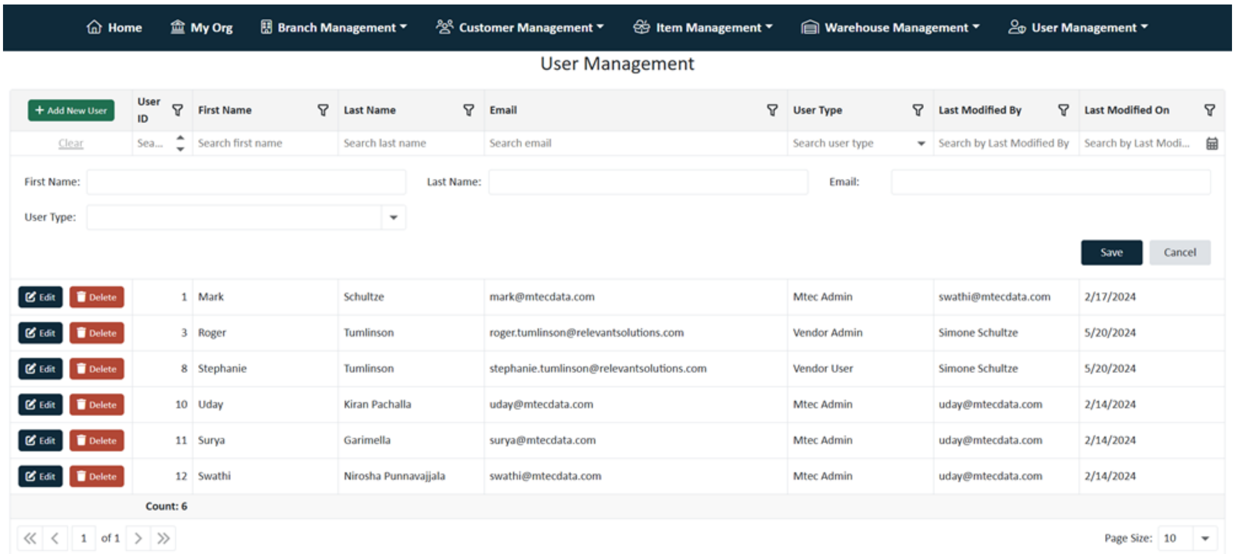
- **Add New User**: Create a new user account.
- **Edit User**: Modify details of an existing user.
- **Delete User**: Remove a user account from the system.
- **User Roles**: Assign specific roles to users, determining their access level within the application.



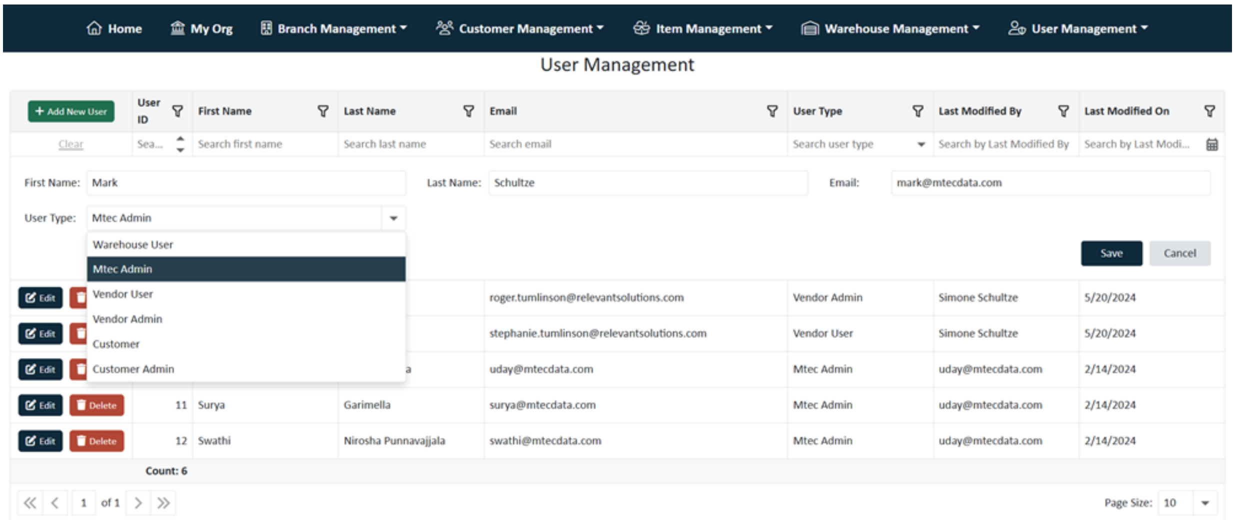
How to Use

1. **Accessing User Management**:
   - Navigate to the User Management screen from the main menu.

2. **Creating a New User**:
   - Click on the **Add New User** button.
   - Fill in the user details such as First Name, Last Name, Email, and User Type.
   - Ensure the user is set up in Microsoft Azure Entra ID access.
   - Click **Save** to create the new user.



3. **Editing an Existing User**:
   - Click on the **Edit** button next to the user you want to modify.
   - Update the necessary fields.
   - Click **Save** to apply the changes.



4. **Deleting a User**:
   - Click on the **Delete** button next to the user you want to remove.
   - Confirm the deletion when prompted.
5. **Assigning User Roles**:
   - Select the appropriate User Type from the dropdown menu. User types include:
     - Warehouse User
     - Mtec Admin

        - Vendor User
        - Vendor Admin
        - Customer
        - Customer Admin
    - The selected role will determine the screens and functionalities the user can access.

Practical Tips

- **Search and Filter**: Use the search and filter options at the top of each column to quickly find users based on specific criteria.
- **Role Assignment**: Assign roles carefully to ensure users have the appropriate access level for their responsibilities.
- **Azure Entra ID Setup**: Make sure all users are set up in Microsoft Azure Entra ID access before attempting to add them in the User Management screen.

Conclusion

The User Management functionality is crucial for maintaining the security and efficiency of the warehouse application. By properly managing user accounts and roles, administrators can ensure that the right people have access to the right tools and information.

This concludes the help file for the User Management screen. If you have any further questions or need assistance, please refer to the additional support resources provided by Mtec Cloud Solutions LLC.

User Portal

Mtec CLOUD SOLUTIONS

Warehouse User Portal

The User Portal is designed for personnel working directly on the warehouse or factory floor. This mobile application enables barcode scanning through smartphones or dedicated scanner devices, streamlining the process of picking, moving, and receiving stock within warehouses. The portal also allows users to accept and process restock requests. Any items scanned and updated in the Warehouse User Portal are automatically reflected in the Warehouse Admin Portal, ensuring real-time synchronization and accuracy in inventory management.

Login

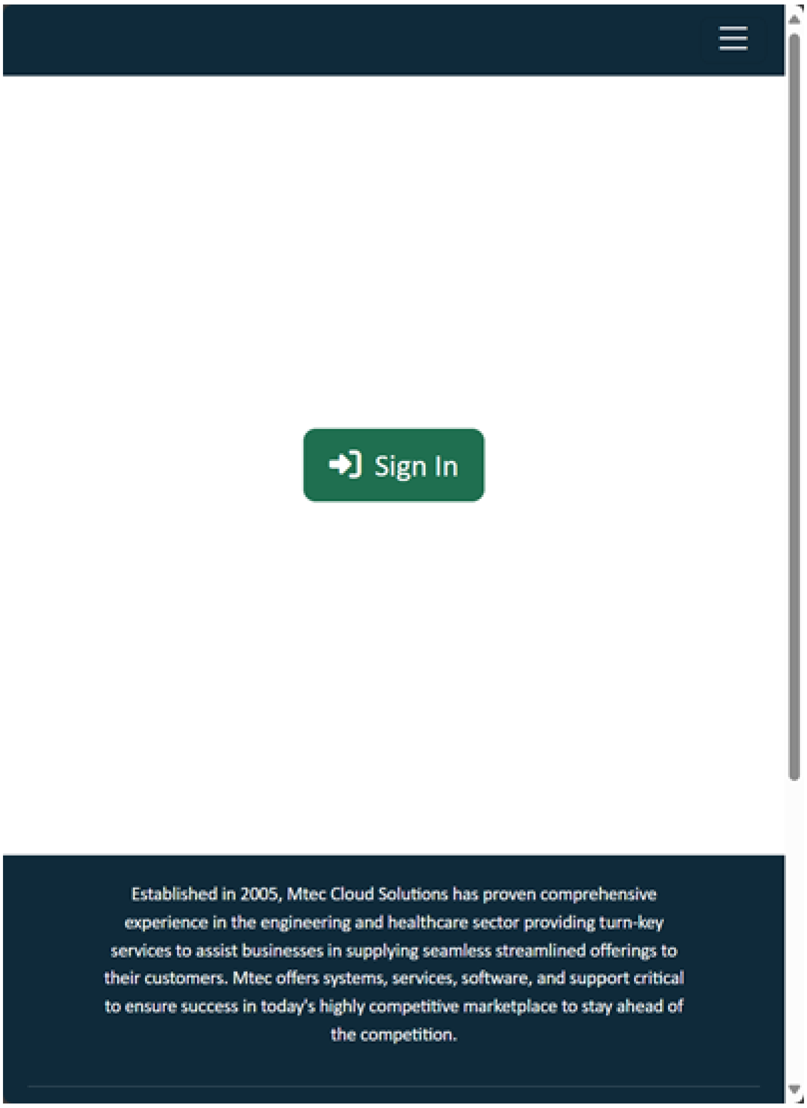
Secure Login

Ensuring the security of your data and operations is a priority for Mtec LLC. The login process for the Administration Portal incorporates multiple layers of security to protect against unauthorized access and ensure that only authorized users can manage and view sensitive information.

How to Log In

To access the Administration Portal, follow these steps:

1. **Open the Application URL:** Enter the application URL in your browser's address bar.
2. **Select 'Login':** Click on the 'Sign In' button on the homepage to proceed to the login screen.



Authentication Process

Mtec LLC uses a robust two-factor authentication (2FA) process to enhance the security of your login session:

Step 1: Username and Password: Enter your credentials, including your username and password. These credentials must have been set up beforehand by your system administrator.
Step 2: Two-Factor Authentication: After entering your credentials, you will be prompted to complete a second form of verification. This might include receiving a code on your registered mobile device or using an authentication app.

Administrator Access

For users with administrative privileges, access is managed through our Azure Entra instance, which provides comprehensive identity and access management:

- **Azure Entra Invitation:** Administrator users must be invited to join our Azure Entra instance. This invitation process is handled by your organization's Azure administrator.
- **Secure Access Management:** Azure Entra ensures that access rights are appropriately

assigned and that all login activities are monitored and logged for security compliance.

Tips for Secure Login

- **Keep Your Credentials Confidential:** Never share your login details with anyone.
- **Update Your Password Regularly:** Change your password periodically to enhance account security.
- **Verify Your Security Settings:** Regularly check your security settings in the Azure Entra portal to ensure they meet your current needs.

Troubleshooting

If you encounter issues during the login process, please contact our support team at Support@mtecdata.com for assistance. Be sure to provide a clear description of the problem, any error messages received, and the steps taken before encountering the issue.

Select Warehouse

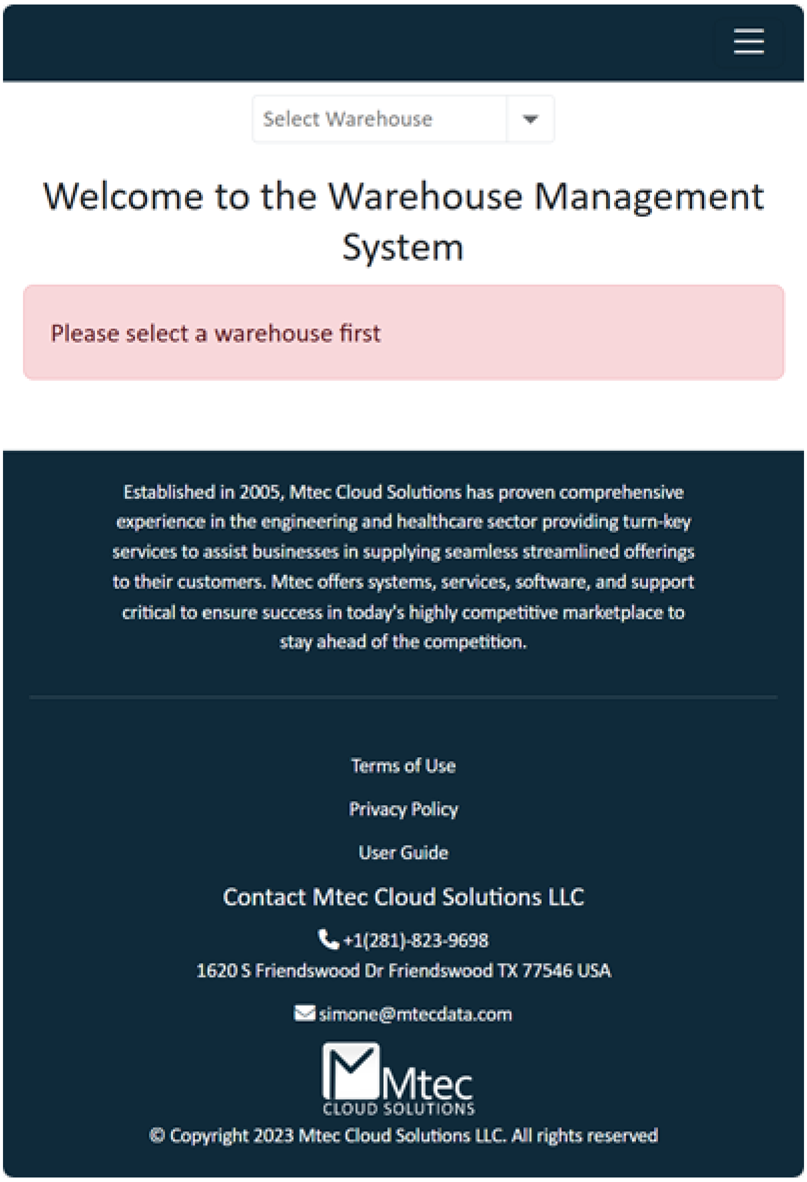
Select Warehouse Screen

Select Warehouse

The "Select Warehouse" screen is the first screen users encounter when accessing the Warehouse Management System. This screen is designed to let users choose the specific warehouse location they will be working with. Each warehouse listed represents a different physical location.

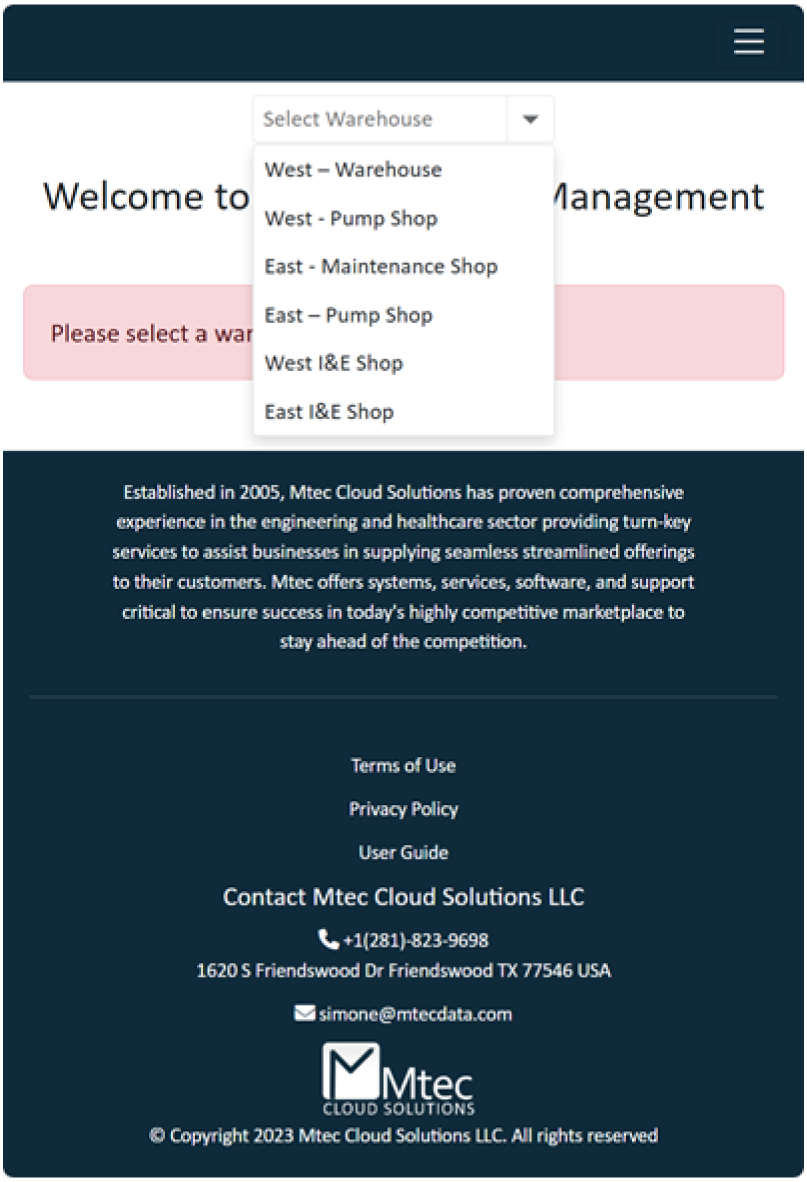
Accessing the Select Warehouse Screen

1. Open the Warehouse Management System application on your smart device.
2. You will be greeted with the "Select Warehouse" screen.



Selecting a Warehouse

1. **Dropdown Menu**:
   - At the top of the screen, there is a dropdown menu labeled "Select Warehouse."
   - Tap on this dropdown menu to view the list of available warehouses.
2. **Warehouse List**:
   - The list displays all the warehouses that are managed within the system.
   - Each warehouse name corresponds to a specific physical location.
3. **Choosing a Warehouse**:
   - Scroll through the list to find the desired warehouse.
   - Tap on the warehouse name to select it.
   - Once selected, you will be redirected to the main dashboard of the selected warehouse, where you can start performing various tasks such as picking, moving, or receiving stock.



Important Notes

- **Creating New Warehouses**:
  - If a new warehouse needs to be added, it must be created in the "Manage Warehouse" section of the User Admin Portal.Create a New Warehouse
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Warehouse Availability**:
  - Only the warehouses that are active and configured in the admin portal will be displayed in the dropdown list.
  - If a warehouse is not appearing, check the admin portal settings to ensure it is active and properly configured.

Help and Support

- For any issues with selecting a warehouse or if the required warehouse is not listed,

contact the Mtec Cloud Solutions LLC support team at:
  - **Phone**: +1 (281)-823-9698
  - **Email**: simone@mtecdata.com
- Additional resources and user guides are available in the "User Guide" section at the bottom of the screen.

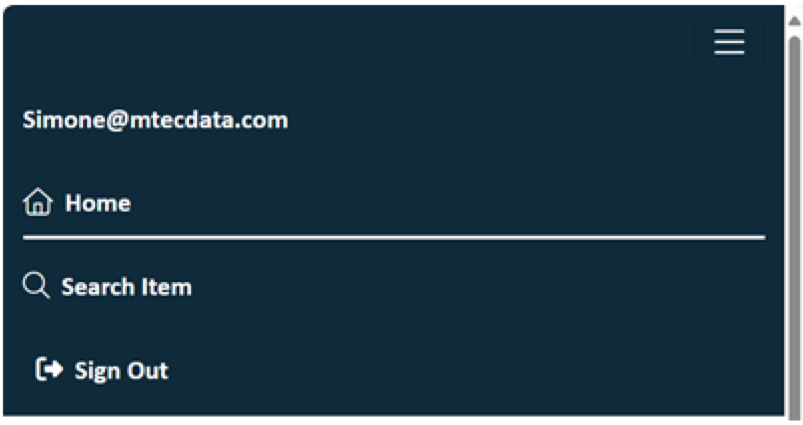
By following these instructions, users can efficiently select the appropriate warehouse and proceed with their tasks in the Warehouse Management System.

Navigation

Help Screen for In-App Navigation

Overview

The Warehouse User Portal app features an intuitive navigation system to help users efficiently move between different sections of the application. The navigation menu is accessible through the three-line icon (often referred to as the "hamburger menu") located at the top right corner of the screen.



Accessing the Navigation Menu

1. **Open the Menu**:
   - Tap on the three-line icon at the top right corner of the screen.
   - The navigation menu will expand, displaying the available options.
2. **Menu Options**:
   - **Home**: Takes you back to the main screen where you can select your scanning method (Phone Scanner or Scanner Device).
   - **Search Item**: Allows you to search for specific items within the warehouse.
   - **Sign Out**: Logs you out of the application.

Navigating the App

- **Return to Home**:
  - At any point, if you need to return to the main screen, you can expand the navigation menu and tap on the "Home" option.
- **Search for Items**:
  - Use the "Search Item" option to quickly find items without navigating through different sections.
- **Sign Out**:
  - When you are done using the app, ensure to sign out for security purposes by selecting the "Sign Out" option from the menu.

Example Use Case

- **Switching Between Tasks**:
  - If you are picking items and need to check an item's details, tap the three-line icon, select "Search Item," and enter the item details. After checking the item, you can return to the home screen by expanding the menu and selecting "Home."

This navigation structure ensures that you can easily switch between different functions of the app without losing your place or progress in the workflow.

Phone Scanner

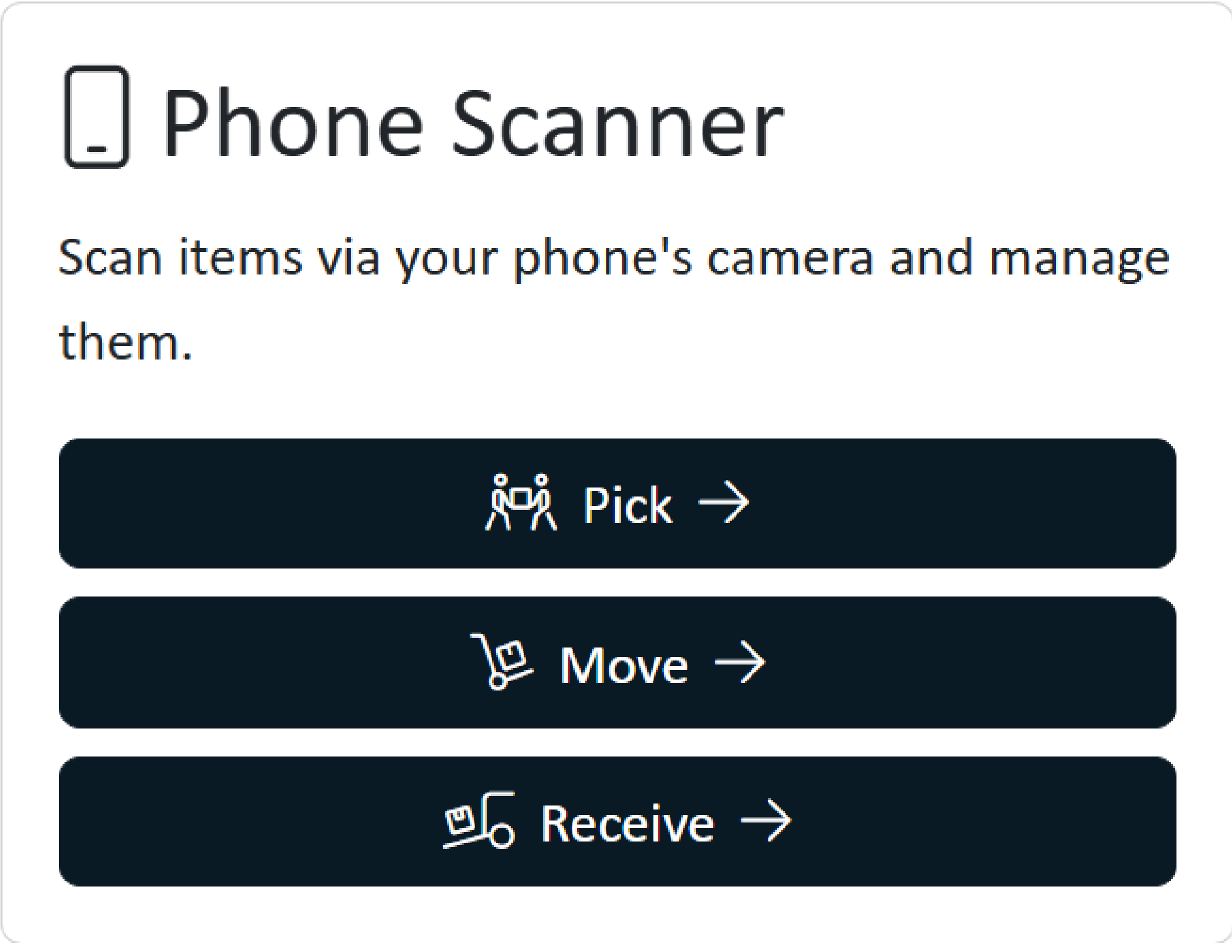
Phone Scanner

Overview

The Phone Scanner screen in the Warehouse User Portal application allows users to manage warehouse inventory tasks directly from their smartphone by scanning barcodes. This screen provides options to Pick, Move, or Receive stock within the warehouse.

Features

- **Pick**: This option enables users to scan and pick items from the warehouse shelves for order fulfillment or internal movement.
- **Move**: This feature allows users to move items from one location to another within the warehouse by scanning the relevant barcodes.
- **Receive**: The receive option is used for scanning and receiving incoming stock into the warehouse inventory.



Using the Phone Scanner

1. **Accessing the Phone Scanner**:
   - Navigate to the Phone Scanner screen from the main menu of the Warehouse User Portal application.
2. **Selecting an Action**:
   - Choose from Pick, Move, or Receive based on the task you need to perform.
3. **Scanning Barcodes**:
   - Use your smartphone's camera to scan the barcodes of the items you are picking, moving, or receiving. Ensure that the barcode is clearly visible and properly aligned within the camera frame for accurate scanning.
4. **Managing Inventory**:
   - Once the barcodes are scanned, the application will update the inventory records accordingly, reflecting the changes in the Warehouse Admin Portal in real-time.

Practical Tips

- Ensure adequate lighting when scanning barcodes for better accuracy.
- Hold your smartphone steady and position the barcode within the camera frame.
- Verify the scanned information on the screen before proceeding to the next item.

Conclusion

The Phone Scanner functionality simplifies the process of managing warehouse inventory by enabling users to perform essential tasks using their smartphones. This not only enhances mobility and efficiency but also ensures real-time inventory updates, improving overall warehouse management.

Pick Item

Pick Screen

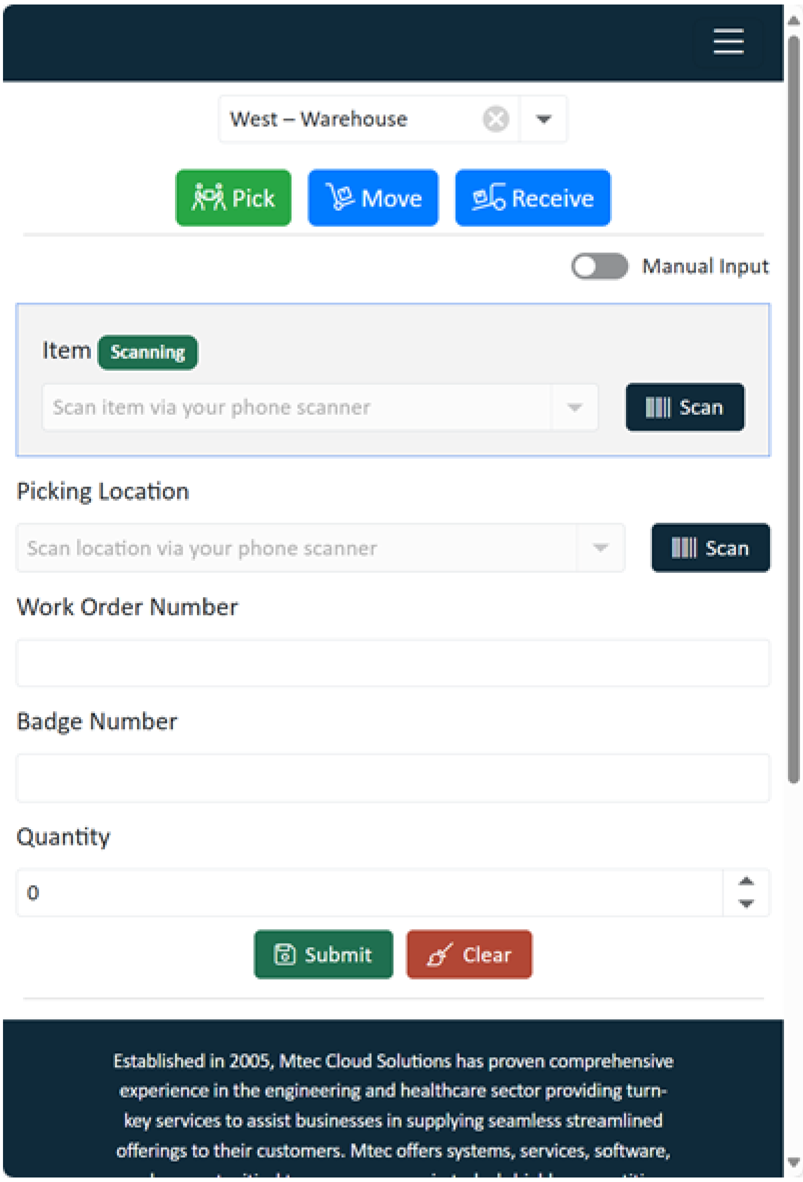
Overview

The Pick screen in the Warehouse User Portal application is designed for users to efficiently pick items from the warehouse using a smartphone as a barcode scanner. This process ensures that items are accurately identified and recorded in the system during the picking process.

Steps to Pick an Item

1. **Select the Warehouse**:
   - From the dropdown menu at the top, select the warehouse where you will be picking the items.
2. **Choose the 'Pick' Action**:
   - Ensure the 'Pick' button is highlighted. This indicates that you are in the picking mode.
3. **Scan the Item**:
   - Position your smartphone's camera over the barcode of the item you want to pick.
   - Tap the 'Scan' button next to the 'Item' field to activate the scanner.
   - Once the item's barcode is scanned, the item details will appear in the 'Item' field.
4. **Scan the Picking Location**:
   - Scan the barcode of the picking location using the same process as scanning the item.
   - Tap the 'Scan' button next to the 'Picking Location' field to activate the scanner.
   - The location details will be filled in automatically.
5. **Enter Work Order Number**:
   - Manually enter the work order number in the 'Work Order Number' field, if applicable.
6. **Enter Badge Number**:
   - Enter the badge number of the user performing the pick in the 'Badge Number' field.
7. **Enter Quantity**:
   - Specify the quantity of the items being picked in the 'Quantity' field.
8. **Submit the Pick**:

- Review the details entered.
- Tap the 'Submit' button to record the picking action in the system.
- If you need to clear the entries and start over, tap the 'Clear' button.



Manual Input

- If needed, toggle the 'Manual Input' switch to manually enter item and location details instead of scanning barcodes.

Practical Tips

- Ensure barcodes are well-lit and clearly visible when scanning.
- Double-check the entered details before submission to avoid errors.
- Use the 'Clear' button if any mistakes are made during the input process.

Important Notes

- **Creating New Items**:
  - If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Items
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Creating New Locations**:
  - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Locations
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Conclusion

The Pick screen streamlines the process of selecting and recording items for orders within the warehouse, leveraging the smartphone's scanning capabilities to enhance accuracy and efficiency.

Move Item

Move Screen

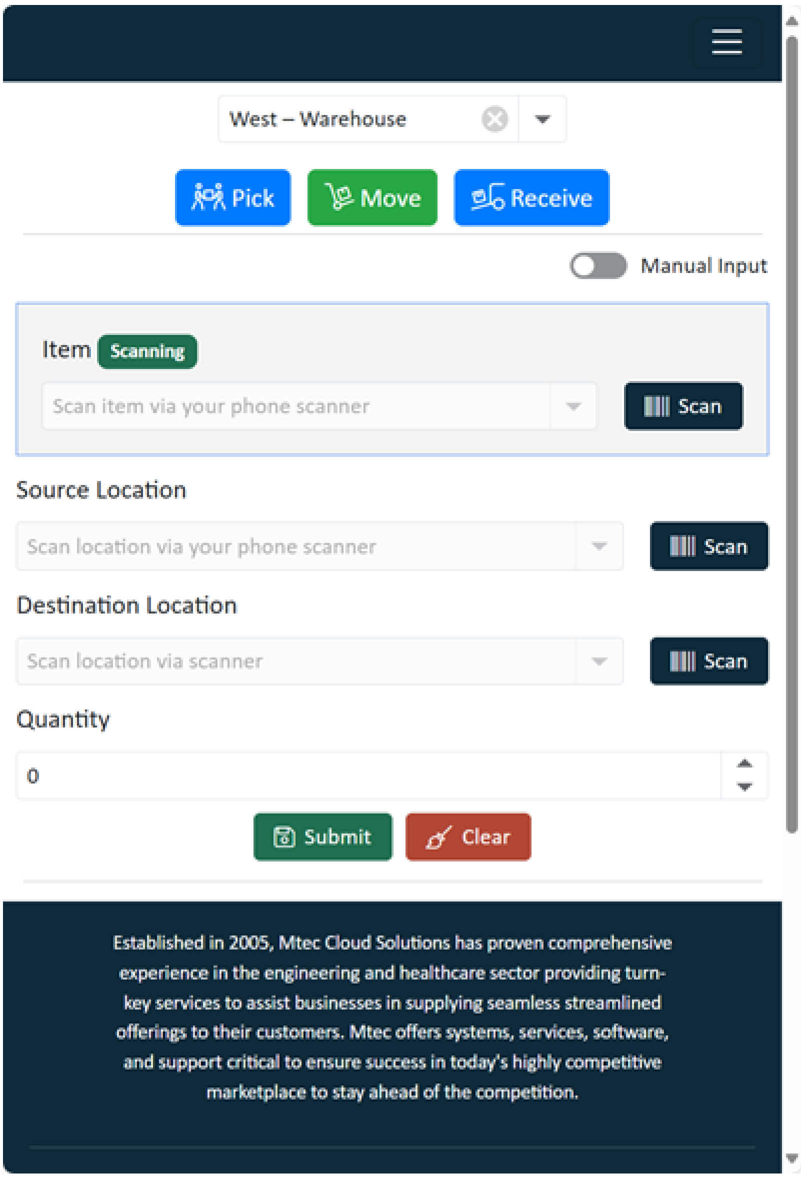
Overview

The Move screen in the Warehouse User Portal application is designed to facilitate the movement of stock from one location to another within the warehouse using a smartphone as a barcode scanner. This process ensures accurate tracking and updating of stock locations.

Steps to Move Stock

1. **Select the Warehouse**:
   - From the dropdown menu at the top, select the warehouse where you will be moving the stock.
2. **Choose the 'Move' Action**:
   - Ensure the 'Move' button is highlighted. This indicates that you are in the stock moving mode.
3. **Scan the Item**:
   - Position your smartphone’s camera over the barcode of the item you want to move.
   - Tap the 'Scan' button next to the 'Item' field to activate the scanner.
   - Once the item’s barcode is scanned, the item details will appear in the 'Item' field.

4. **Scan the Source Location**:
   - Scan the barcode of the current location of the item using the same process as scanning the item.
   - Tap the 'Scan' button next to the 'Source Location' field to activate the scanner.
   - The source location details will be filled in automatically.
5. **Scan the Destination Location**:
   - Scan the barcode of the new location where the item will be moved.
   - Tap the 'Scan' button next to the 'Destination Location' field to activate the scanner.
   - The destination location details will be filled in automatically.
6. **Enter Quantity**:
   - Specify the quantity of the items being moved in the 'Quantity' field.
7. **Submit the Move**:
   - Review the details entered.
   - Tap the 'Submit' button to record the movement of stock in the system.
   - If you need to clear the entries and start over, tap the 'Clear' button.



Manual Input

- If needed, toggle the 'Manual Input' switch to manually enter item and location details instead of scanning barcodes.

Practical Tips

- Ensure barcodes are well-lit and clearly visible when scanning.
- Double-check the entered details before submission to avoid errors.
- Use the 'Clear' button if any mistakes are made during the input process.

Important Notes

- **Creating New Items**:
    - If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Items
    - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Creating New Locations**:
    - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Locations
    - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Conclusion

The Move screen streamlines the process of relocating items within the warehouse, leveraging the smartphone's scanning capabilities to enhance accuracy and efficiency. This ensures that stock movements are correctly recorded and updated in the system.

Receive Item

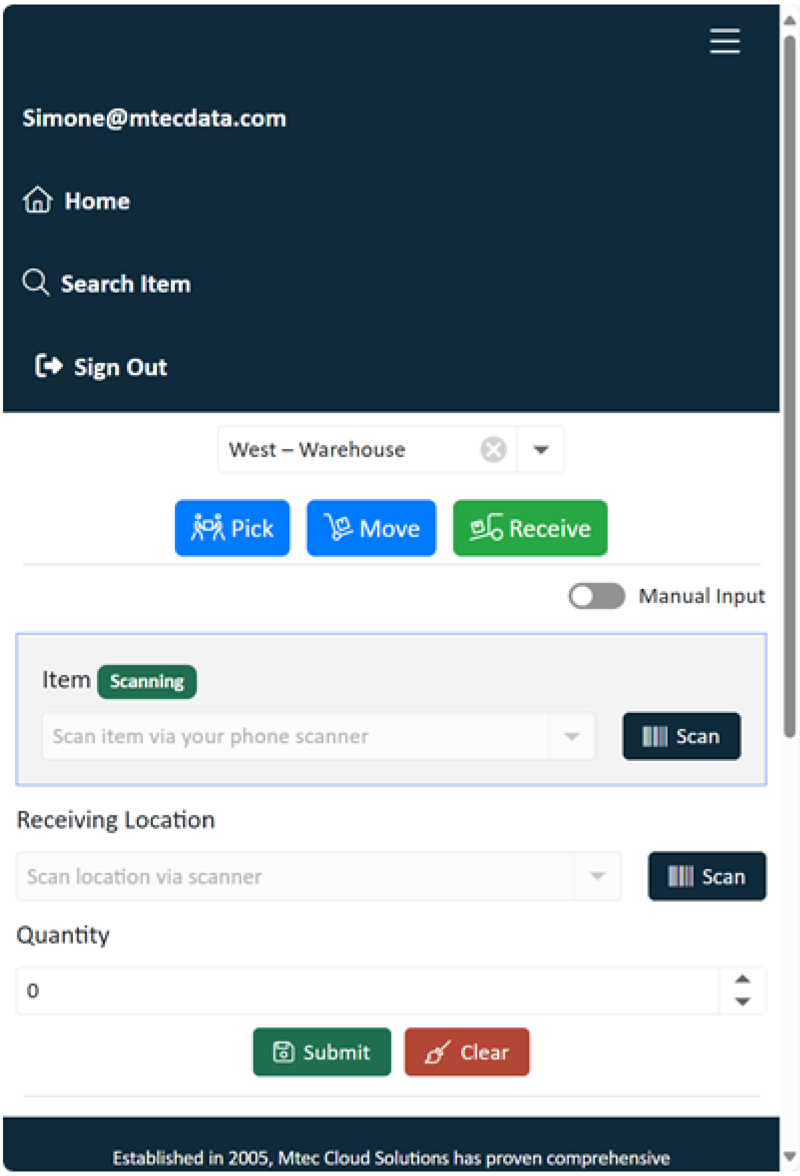
Receive Screen

Overview

The Receive screen in the Warehouse User Portal allows users to record the receipt of items into the warehouse. This is essential for maintaining accurate inventory levels and ensuring that received stock is logged correctly.

Steps to Receive Items

1. **Open the Receive Screen**:
    - Navigate to the main menu and select "Receive" from the options available.
2. **Selecting the Item**:
    - Use the phone's camera to scan the barcode of the item you are receiving.
    - Alternatively, you can manually input the item information by toggling the "Manual Input" switch.
3. **Receiving Location**:
    - Scan the barcode of the location where the item will be stored.
    - If scanning is not possible, toggle the "Manual Input" switch and select the receiving location from the dropdown menu.
4. **Quantity**:
    - Enter the quantity of the item being received.
5. **Submit**:
    - Once all fields are filled, click the "Submit" button to complete the receipt transaction.
    - If you need to clear the form, click the "Clear" button.



Important Notes

- **Creating New Items**:
  - If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.[Manage Items]
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Creating New Locations**:
  - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.[Manage Locations]
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Example Workflow

1. **Start Receive Process**:
   - Open the Receive screen and scan the item barcode.

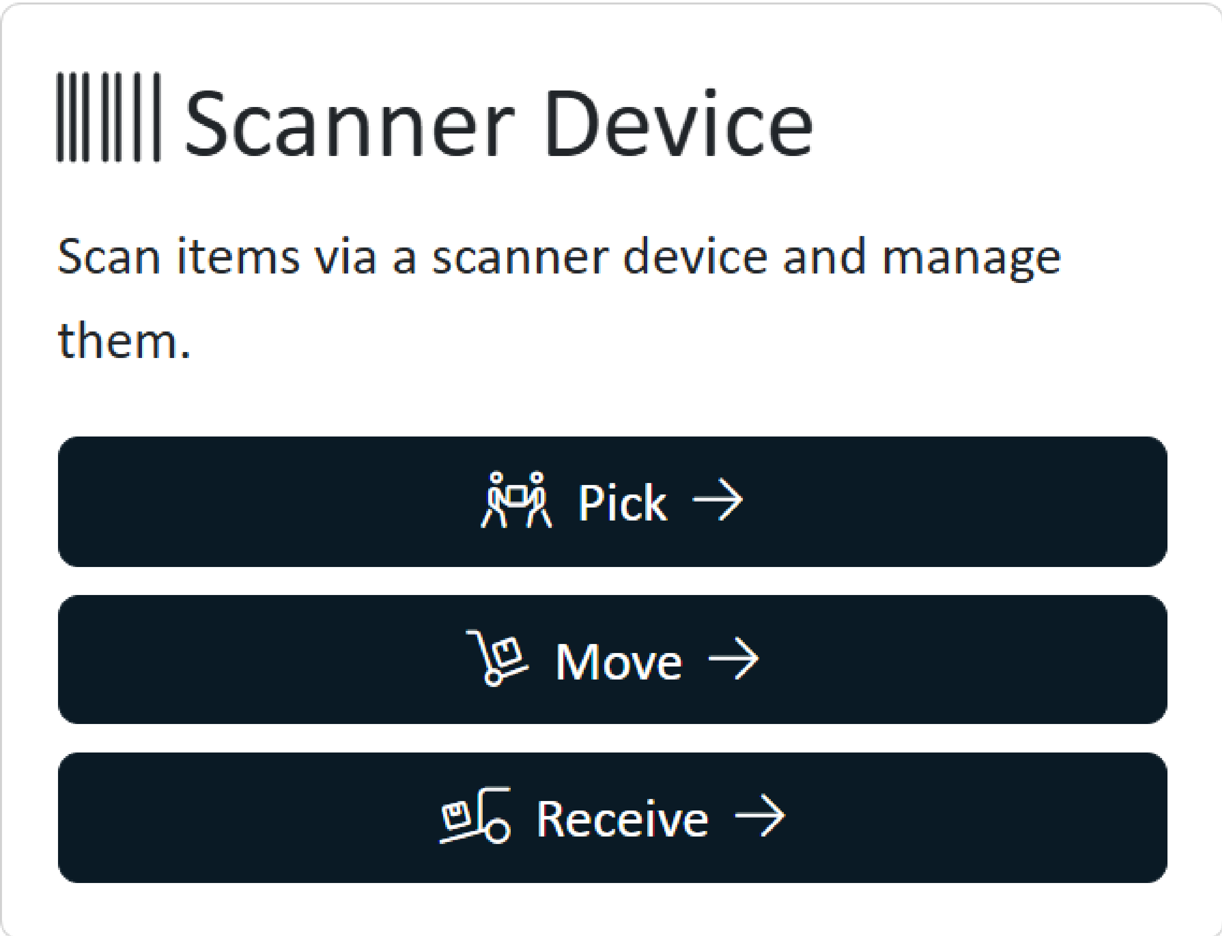
2. **Scan Receiving Location**:
   - Scan the barcode of the location where the item will be stored.
3. **Enter Quantity**:
   - Input the number of items received.
4. **Submit Transaction**:
   - Press "Submit" to record the receipt.

This process ensures that all incoming stock is accurately recorded and integrated into the warehouse's inventory system, reflecting real-time stock levels and locations.

Scanner Device

Scanner Device

Overview The Scanner Device screen in the Warehouse User Portal application allows users to manage warehouse inventory tasks using a dedicated scanner device. This screen provides options to Pick, Move, or Receive stock within the warehouse, ensuring precise and efficient handling of inventory.



Features

- **Pick**: This option enables users to scan and pick items from the warehouse shelves for order fulfillment or internal movement.
- **Move**: This feature allows users to move items from one location to another within the warehouse by scanning the relevant barcodes.
- **Receive**: The receive option is used for scanning and receiving incoming stock into the warehouse inventory.

Using the Scanner Device

1. **Accessing the Scanner Device Screen**:
   - Navigate to the Scanner Device screen from the main menu of the Warehouse User Portal application.
2. **Selecting an Action**:
   - Choose from Pick, Move, or Receive based on the task you need to perform.
3. **Scanning Barcodes**:
   - Use the scanner device to scan the barcodes of the items you are picking, moving, or receiving. Ensure that the barcode is clearly visible and properly aligned for accurate scanning.
4. **Managing Inventory**:
   - Once the barcodes are scanned, the application will update the inventory records accordingly, reflecting the changes in the Warehouse Admin Portal in real-time.

Practical Tips

- Ensure the scanner device is fully charged before use.
- Hold the scanner steady and position the barcode correctly to ensure accurate scanning.
- Verify the scanned information on the screen before proceeding to the next item.

System Requirements

For detailed information on the types of scanner devices supported and their configuration, please refer to the System Requirements section. Ensure that your scanner device meets the necessary specifications to integrate seamlessly with the Warehouse User Portal.

Conclusion The Scanner Device functionality streamlines the process of managing warehouse inventory by enabling users to perform essential tasks using a dedicated scanner. This enhances efficiency, accuracy, and ensures real-time inventory updates, improving overall warehouse management. For more information on scanner requirements, refer to the System Requirements section.

Pick Item

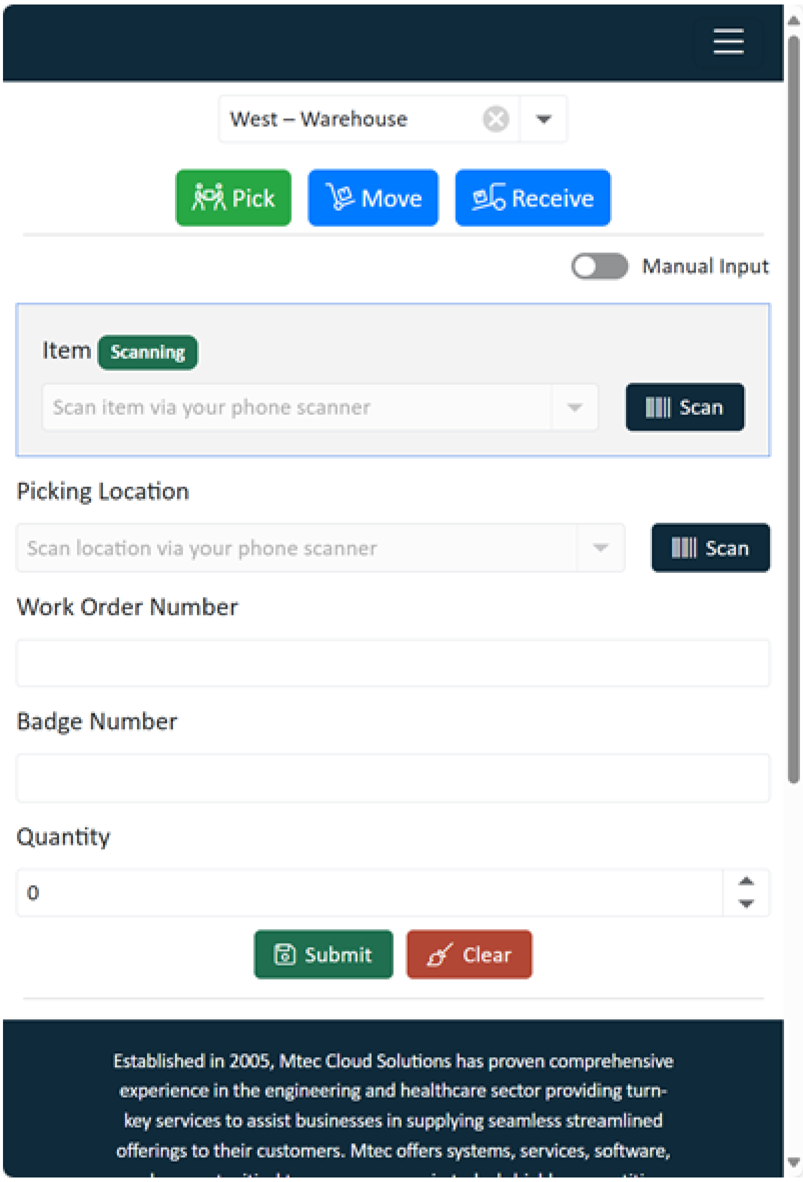
Pick Screen

Overview

The Pick screen in the Warehouse User Portal application is designed for users to efficiently pick items from the warehouse using a barcode scanner. This process ensures that items are accurately identified and recorded in the system during the picking process.

Steps to Pick an Item

1. **Select the Warehouse**:
   - From the dropdown menu at the top, select the warehouse where you will be picking the items.
2. **Choose the 'Pick' Action**:
   - Ensure the 'Pick' button is highlighted. This indicates that you are in the picking mode.
3. **Scan the Item**:
   - Position your smartphone’s camera over the barcode of the item you want to pick.
   - Tap the 'Scan' button next to the 'Item' field to activate the scanner.
   - Once the item’s barcode is scanned, the item details will appear in the 'Item' field.
4. **Scan the Picking Location**:
   - Scan the barcode of the picking location using the same process as scanning the item.
   - Tap the 'Scan' button next to the 'Picking Location' field to activate the scanner.
   - The location details will be filled in automatically.
5. **Enter Work Order Number**:
   - Manually enter the work order number in the 'Work Order Number' field, if applicable.
6. **Enter Badge Number**:
   - Enter the badge number of the user performing the pick in the 'Badge Number' field.
7. **Enter Quantity**:
   - Specify the quantity of the items being picked in the 'Quantity' field.
8. **Submit the Pick**:
   - Review the details entered.
   - Tap the 'Submit' button to record the picking action in the system.
   - If you need to clear the entries and start over, tap the 'Clear' button.



Manual Input

- If needed, toggle the 'Manual Input' switch to manually enter item and location details instead of scanning barcodes.

Practical Tips

- Ensure barcodes are well-lit and clearly visible when scanning.
- Double-check the entered details before submission to avoid errors.
- Use the 'Clear' button if any mistakes are made during the input process.

Important Notes

- **Creating New Items**:

  - If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Items
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Creating New Locations**:
  - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Locations
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Conclusion

The Pick screen streamlines the process of selecting and recording items for orders within the warehouse, leveraging the smartphone's scanning capabilities to enhance accuracy and efficiency.

Move Item

Move Screen

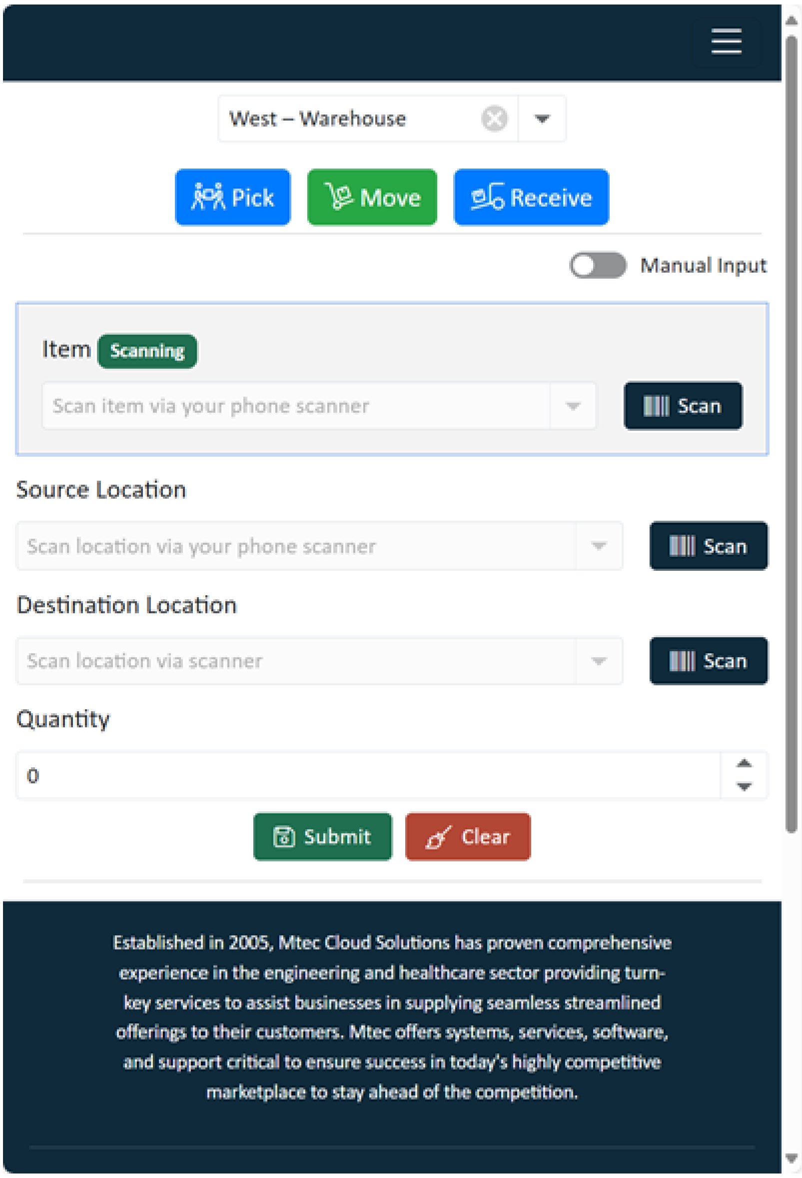
Overview

The Move screen in the Warehouse User Portal application is designed to facilitate the movement of stock from one location to another within the warehouse using a barcode scanner. This process ensures accurate tracking and updating of stock locations.

Steps to Move Stock

1. **Select the Warehouse**:
   - From the dropdown menu at the top, select the warehouse where you will be moving the stock.
2. **Choose the 'Move' Action**:
   - Ensure the 'Move' button is highlighted. This indicates that you are in the stock moving mode.
3. **Scan the Item**:
   - Position your smartphone’s camera over the barcode of the item you want to move.
   - Tap the 'Scan' button next to the 'Item' field to activate the scanner.
   - Once the item’s barcode is scanned, the item details will appear in the 'Item' field.
4. **Scan the Source Location**:
   - Scan the barcode of the current location of the item using the same process as scanning the item.
   - Tap the 'Scan' button next to the 'Source Location' field to activate the scanner.
   - The source location details will be filled in automatically.

5. **Scan the Destination Location**:
   - Scan the barcode of the new location where the item will be moved.
   - Tap the 'Scan' button next to the 'Destination Location' field to activate the scanner.
   - The destination location details will be filled in automatically.
6. **Enter Quantity**:
   - Specify the quantity of the items being moved in the 'Quantity' field.
7. **Submit the Move**:
   - Review the details entered.
   - Tap the 'Submit' button to record the movement of stock in the system.
   - If you need to clear the entries and start over, tap the 'Clear' button.



Manual Input

- If needed, toggle the 'Manual Input' switch to manually enter item and location details instead of scanning barcodes.

Practical Tips

- Ensure barcodes are well-lit and clearly visible when scanning.
- Double-check the entered details before submission to avoid errors.
- Use the 'Clear' button if any mistakes are made during the input process.

Important Notes

- **Creating New Items**:
  - If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Items
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
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  - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Locations
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Conclusion

The Move screen streamlines the process of relocating items within the warehouse, leveraging the smartphone's scanning capabilities to enhance accuracy and efficiency. This ensures that stock movements are correctly recorded and updated in the system.

Receive Item

Receive Screen

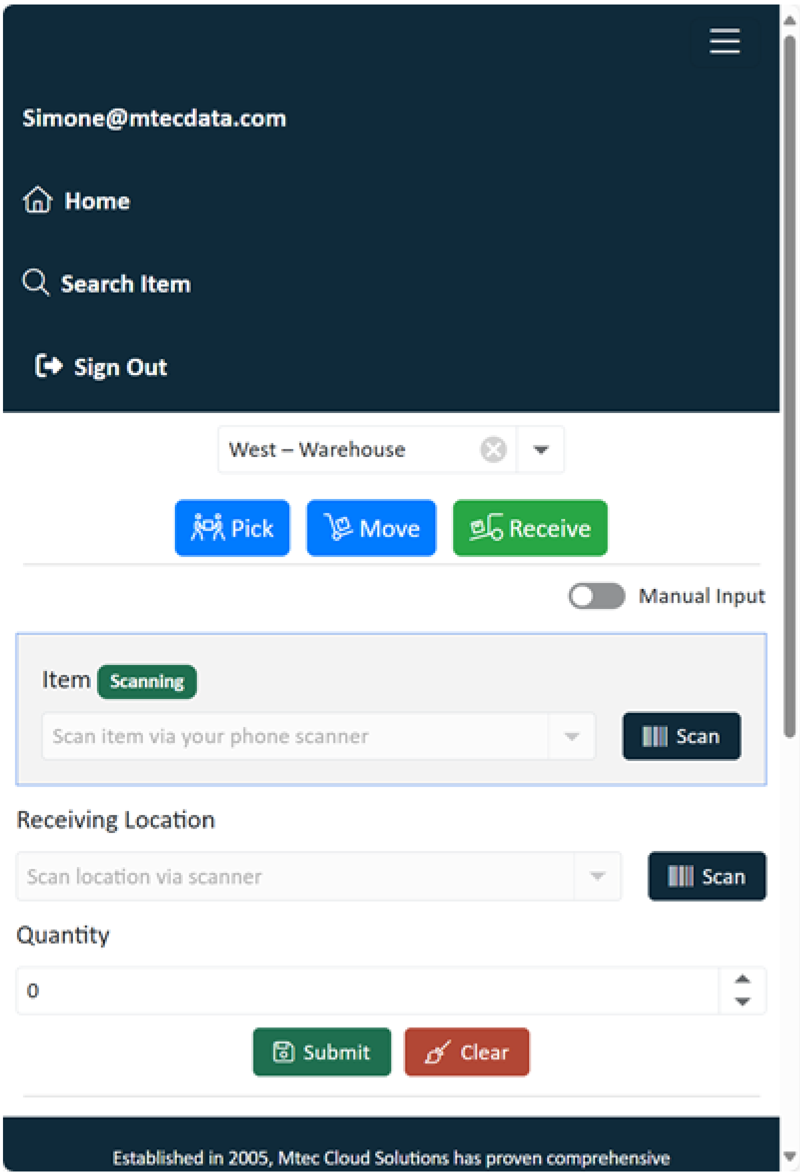
Overview

The Receive screen in the Warehouse User Portal allows users to record the receipt of items into the warehouse using a barcode scanner. This is essential for maintaining accurate inventory levels and ensuring that received stock is logged correctly.

Steps to Receive Items

1. **Open the Receive Screen**:
   - Navigate to the main menu and select "Receive" from the options available.
2. **Selecting the Item**:
   - Use the phone's camera to scan the barcode of the item you are receiving.
   - Alternatively, you can manually input the item information by toggling the "Manual Input" switch.

3. **Receiving Location**:
    - o Scan the barcode of the location where the item will be stored.
    - o If scanning is not possible, toggle the "Manual Input" switch and select the receiving location from the dropdown menu.
4. **Quantity**:
    - o Enter the quantity of the item being received.
5. **Submit**:
    - o Once all fields are filled, click the "Submit" button to complete the receipt transaction.
    - o If you need to clear the form, click the "Clear" button.



Important Notes

- **Creating New Items**:
    - o If a new item needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.[Manage Items]

    - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.
- **Creating New Locations**:
    - If a new location needs to be added, it must be created in the "Manage Items" section of the User Admin Portal.Manage Locations
    - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Example Workflow

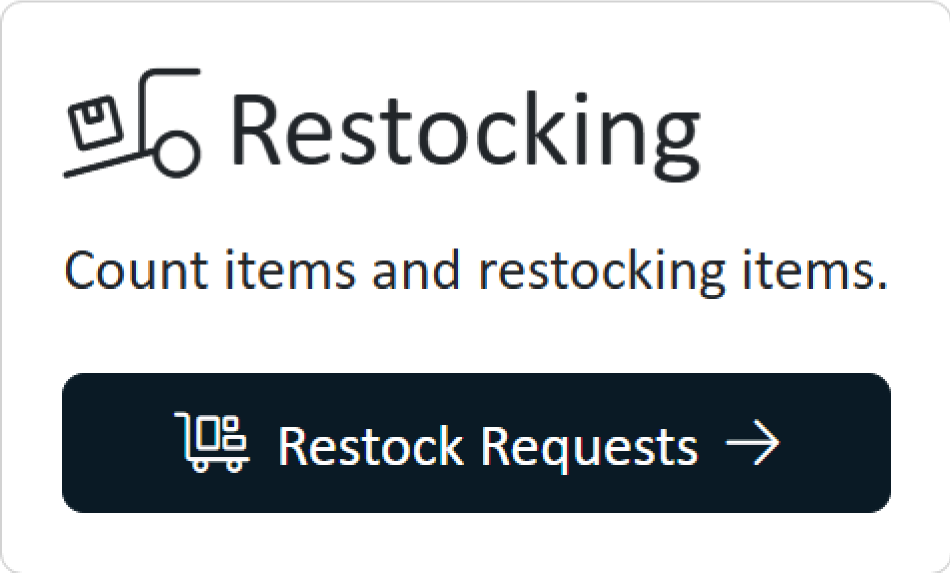
1. **Start Receive Process**:
    - Open the Receive screen and scan the item barcode.
2. **Scan Receiving Location**:
    - Scan the barcode of the location where the item will be stored.
3. **Enter Quantity**:
    - Input the number of items received.
4. **Submit Transaction**:
    - Press "Submit" to record the receipt.

This process ensures that all incoming stock is accurately recorded and integrated into the warehouse's inventory system, reflecting real-time stock levels and locations.

Restocking

Restock Request

The Restock Request functionality in the Warehouse User Portal application allows users to count and update inventory for restock requests created in the admin portal. This process involves selecting the restock request, scanning item quantities and locations, and updating the counts in the system. Once the counts are updated, the user returns to the admin portal to calculate the quantities and place the order.



Restock Requests

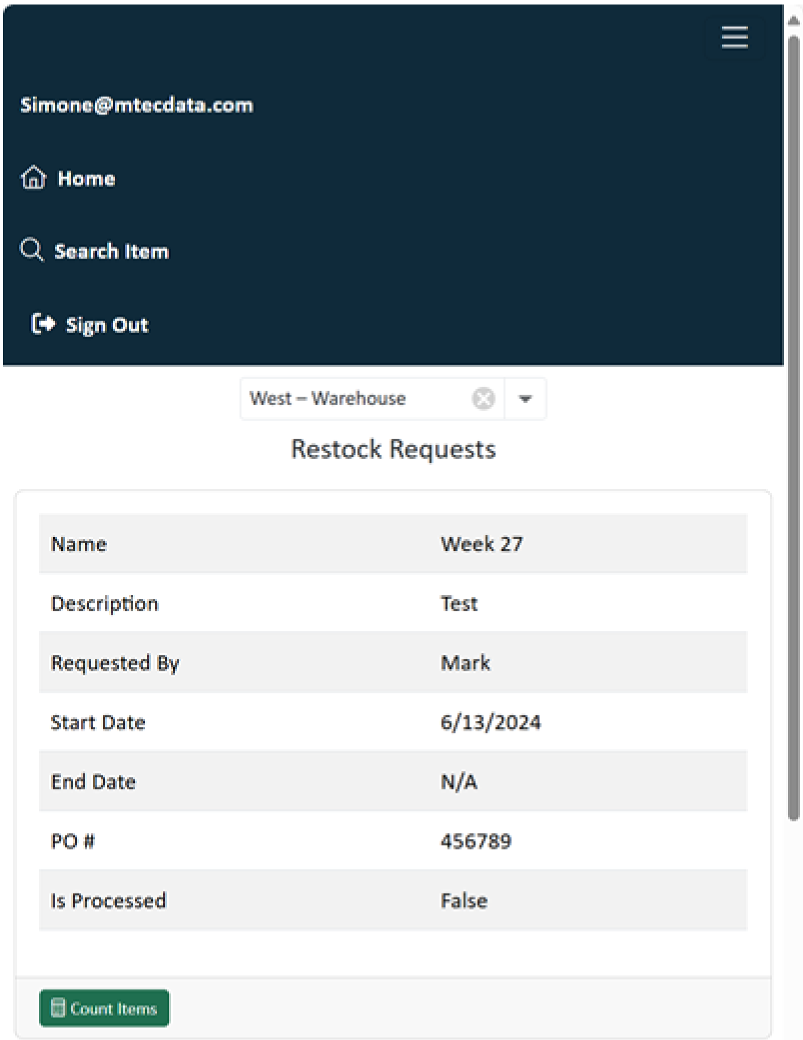
Restock Request

The Restock Request functionality in the Warehouse User Portal application allows users to count and update inventory for restock requests created in the admin portal. This process involves selecting the restock request, scanning item quantities and locations, and updating the counts in the system. Once the counts are updated, the user returns to the admin portal to calculate the quantities and place the order.

Restock Request Screens

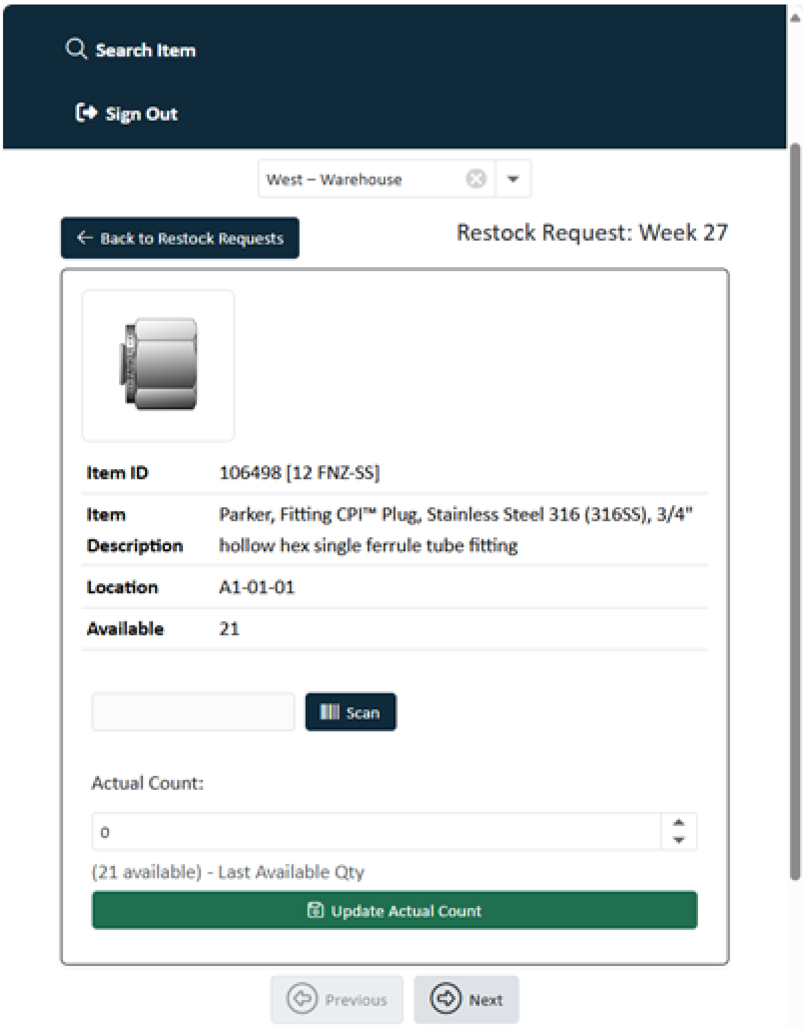
Restock Request Overview Screen

1. **Accessing the Restock Request Screen**:
   - Navigate to the Restock Request screen from the main menu of the Warehouse User Portal application.
   - Ensure you have selected the appropriate warehouse from the dropdown menu at the top of the screen.
2. **Viewing Restock Requests**:
   - The Restock Request screen displays the details of the restock request, including the request name, description, requested by, start date, end date, PO number, and whether the request is processed.
3. **Counting Items**:
   - To start counting items, click on the "Count Items" button at the bottom of the screen. This will take you to the item count screen.



Item Count Screen

1. **Item Details**:
   - The Item Count screen displays the details of the item to be counted, including the item ID, item description, location, and available quantity.
2. **Scanning Items**:
   - Use the barcode scanner to scan the item. The scanner will verify if the correct item is scanned. If the item is not scanned or an incorrect item is scanned, an error message will appear.
3. **Updating the Count**:
   - After scanning the item, enter the actual count in the "Actual Count" field.
   - Click the "Update Actual Count" button to save the updated count. The available quantity will be updated accordingly.
4. **Returning to Restock Requests**:
   - Once all items are counted, click the "Back to Restock Requests" button to return to the main restock request screen.



Practical Tips

- **Ensure Accurate Scanning**:
  - Ensure the barcode is clearly visible and properly aligned with the scanner.
  - Verify the scanned information on the screen before updating the count.
- **Verify Item Information**:
  - Double-check the item details and location before updating the count to avoid errors.

Important Notes

- **Managing Restock Requests**:
  - New restock requests must be created in the "Re-stock Requests" section of the User Admin Portal.[Re-Stock Requests]
  - Ensure all necessary details and configurations are set up correctly in the admin portal to reflect accurately in the User Portal.

Conclusion

The Restock Request functionality in the Warehouse User Portal simplifies the process of managing restock requests by enabling users to count and update inventory using barcode scanning. This ensures accurate and real-time inventory updates, improving overall warehouse management and streamlining the restock process.