Scanco's Customer Service Portal for Acumatica

ADMINISTRATOR GUIDE

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Contents

Introduction to the Customer Service Portal

Access Scanco's cloud-based Customer Service Portal for Acumatica to control and configure options for your client setup. The portal is comprised of six areas designed to give an administrator control over devices, users, profiles, application functions, and default settings. Using Automation Intelligence, the administrator can view all transactions (in progress, in history, or rejected) and data logs to help troubleshoot errors.

About this Guide

This guide explains how to configure the Warehouse and Manufacturing clients, and how to use Automation Intelligence. To learn more about configuring SkyPrint, see the *SkyPrint for Acumatica – Installation & Configuration Guide*.

Acumatica Warehouse & Manufacturing Settings

Both the Warehouse and Manufacturing clients are set up, configured and controlled in the same way. Although you can set up each client differently, the process and procedures to do so are the same.

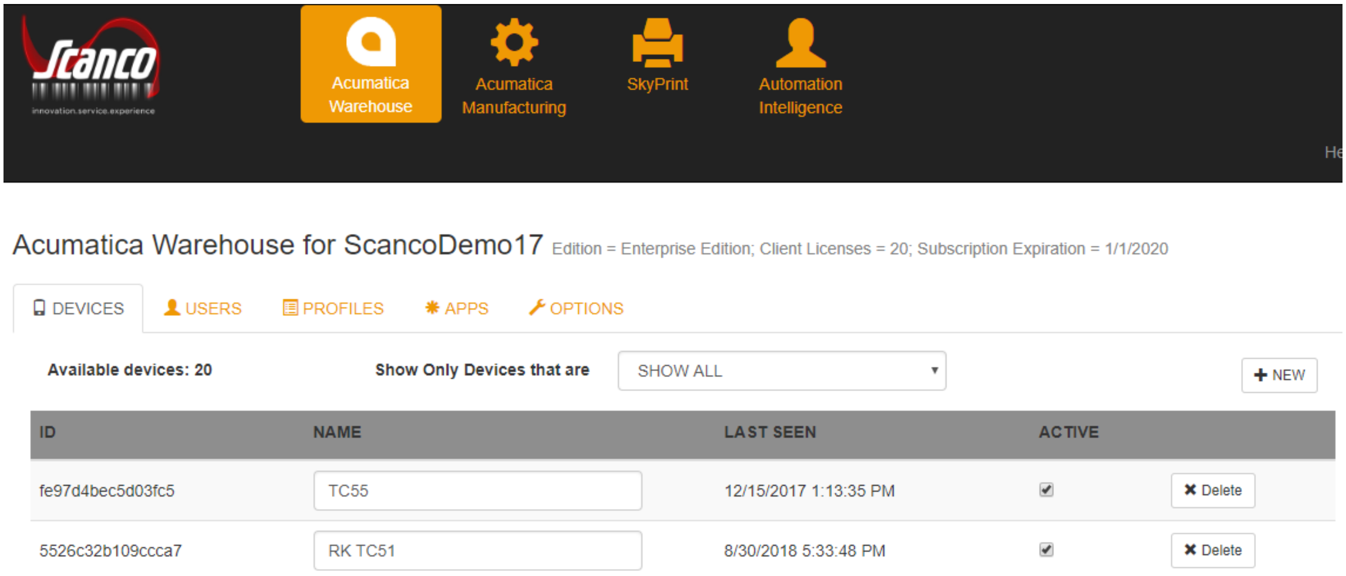
Log on to the Portal

1. In your browser, go to: **https://acumatica.scancocloud.com**.
2. Enter your **Company Code**, **Login name** and **Password.**

   (Your Login and password are assigned by a Scanco Implementation Specialist.)
3. Click **Log In.**
4. Select a client to set up ((Warehouse or Manufacturing).

Setting Up Devices

The Devices tab shows all registered devices running the Warehouse and/or Manufacturing client. From the Devices tab, you can grant or revoke access to use the client.



Activate a New Device

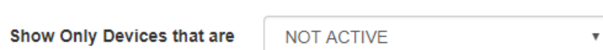
After the client is installed on a device, you must activate it in order to grant the user access. When the user logs into the client the first time, they receive the message: "Device is not Active." This triggers the system to display the device in the Devices list with the "Active" flag set to false (unchecked).

NOTE: The total number of devices you activate cannot exceed the total number of licenses you have purchased from Scanco.

To activate a new device

1. On the **Devices** tab, locate the user's Device ID.

TIP: New devices are typically located near the end of the list, as it is sorted by "Last Seen" date. You can narrow the search by selecting "Not Active" from the "Show Only Devices that are" option.



Once the device is registered, the Device ID appears. It is recommended that you change the name of the device for ease in identification. If you register the device manually, you must name the device.

2. (Optional) In the **Name** field, type a name for the device. (A descriptive name will ensure the device is easy to identify in the future.)

3. In the **Active** column, select the check box for the device.

Deactivate or Delete a Device

You may decide to deactivate or delete devices that are not in use. Deactivating a device leaves it in the system for future use. You may choose this option if, for example, you have reached the maximum number of devices you have licenses for.

NOTE: Deleting a device will remove it from the system.

To deactivate a device

1. Locate the device in the list.
2. Clear the check box in the **Active** column.

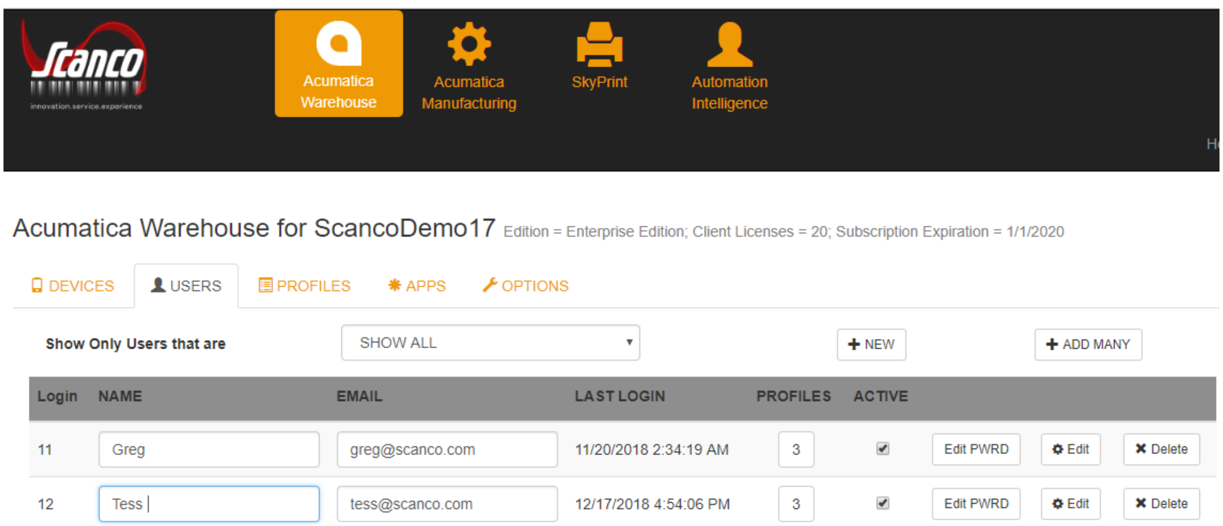
To delete a device

1. Locate the device in the list.
2. Click **Delete**. When prompted to confirm, click **OK**.

Setting Up Users

The Users tab is where you add, activate, and create credentials for new users. It is also where you assign profiles. (For more information, see Setting Up Profiles.) After you set up users, you can set permissions and features available to them.

NOTE: You can add an unlimited number of users. Licensing is dependent on the number of activated devices, not the number of users.



From the Users tab, you can see when a user logged in last, the number of profiles they have access to, and whether they are active in the system.

NOTE: You can edit a user's profile from this tab or the Settings tab. Procedures for editing a user's profile is explained in Configuring Settings.

Adding and Activating Users

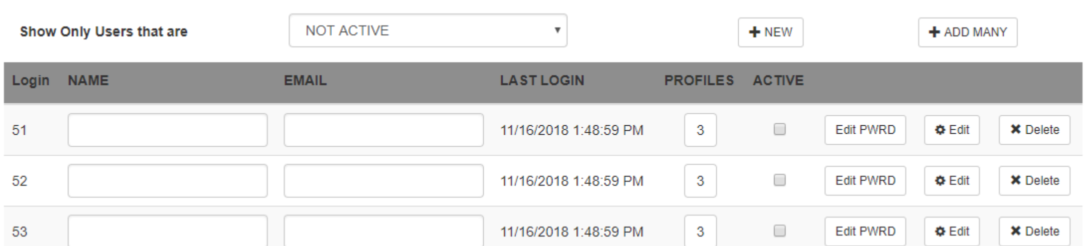
You can add one or more user at a time, then assign them to profiles. When you add multiple users at one time, each user will be assigned the same password.

Example: Adding Multiple Users at One Time

Let's say you want to create three users with Login ID's of 51, 52, and 53. A prefix number and range of numbers, or *indexes* are required. You would do the following:

1. On the Users tab, click **+Add Many**.
2. In the window that appears, enter "5" for the **Prefix**, "1" for the **Starting Index**, "3" for the **Ending Index**, and a password.

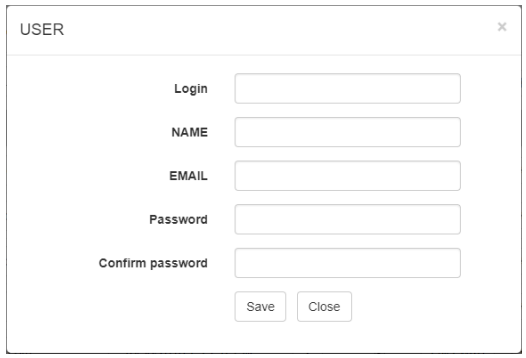
When you save, the Users tab will display the new users by Login ID. You can then enter their names and email addresses.



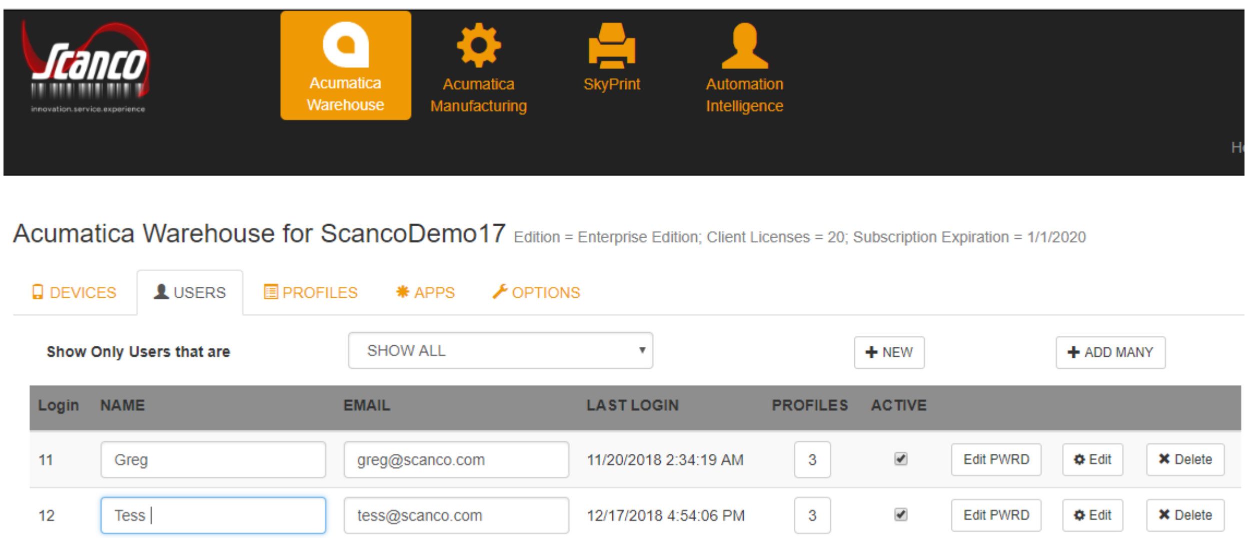
To add a new user

NOTE: To add more than one user at a time, see the steps on page **10**.

1. Click **+New**.

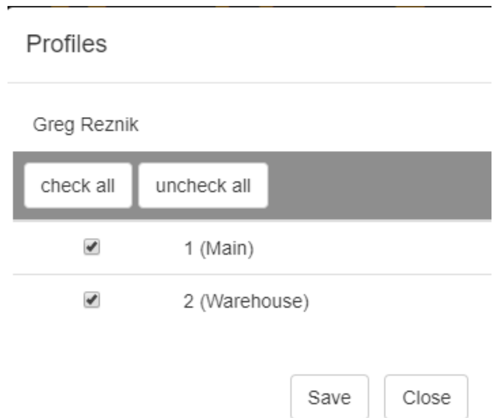


2. Create the user's **Login** ID.
   TIP: Use numbers to make it easier to enter on handheld/mobile devices.
3. Enter the user's **Name**, **Email** address, and **Password**. Confirm the password.
4. When finished, click **Save**.



5. To assign one or more profiles to the user, click the button under **Profiles**.

   The first time you set up a user, the profile will default to "1."

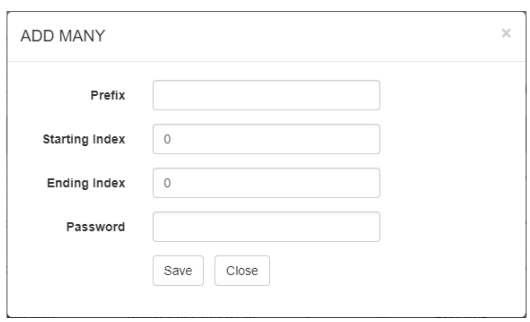


6. Select the profiles you want to assign to them, or click **Check All** to assign all profiles. Click **Save**.
7. When the Users list returns, select the check box in the **Active** column to activate the user.

To add many new users at one time

To learn more about this procedure, see the example under [Adding and Activating Users].

1. Click **+Add Many**.



2. Enter a **Prefix** to represent the first number or letter of the Login ID. (For example, 1 or A.)
3. Enter a **Starting** and **Ending Index** to represent the range of Login IDs. (For example, 1 – 5 to create 5 Login IDs.)
4. Enter a **Password**.
   NOTE: The password will be used by all users assigned the logins.
5. Click **Save**.

To change a user's password

1. Locate the user in the list.
2. Click **Edit PWRD**.
3. When prompted, enter a new password. Click **Save**.

Deactivating and Deleting Users

You can delete users from the system or simply deactivate them.

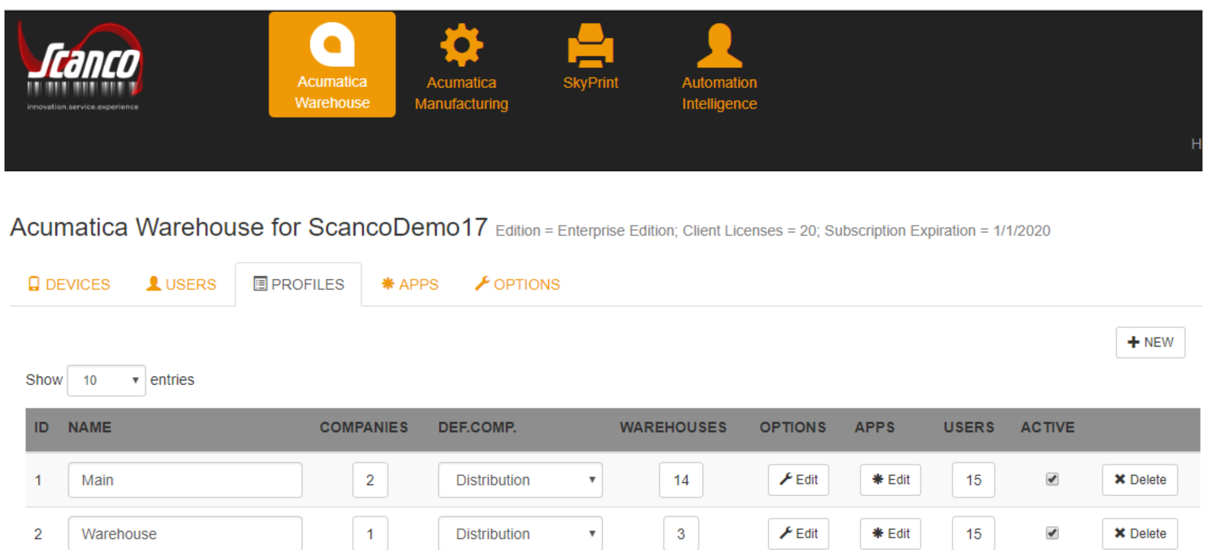
To deactivate or delete a user

1. Locate the user in the list.
2. Do one of the following:

- To deactivate, clear the **Active** check box.
- To delete, click **Delete.** When prompted to confirm, click **OK**.

Setting Up Profiles

Profiles are set up to designate features and functions available in the client and how they work. Profiles are assigned to users to control the level of access they have to specific features.



You can create an unlimited number of profiles. For the system to function properly, it must have at least:

- One company, warehouse, and user associated with the profile.
- One active profile.

Applications are also associated with profiles. For more information about application (App) settings, see Setting Up Apps and Configuring Default Settings/Application Settings.

Creating Profiles

You can create as many profiles as you need. New profiles automatically include all of the Warehouses and Users already set up in the system. For example, if you have two warehouses and 20 users, new profiles will include both warehouses and all 20 users. You can change those as needed.

To create a profile

1. Click **+New**.
2. Type a name for the profile in the **Name** field. Click **Save**.

The Profiles list displays the new profile with every warehouse and user assigned to the profile.

Editing Profiles

You can change the name of Profiles, select a different company to assign them to, and remove warehouses or users assigned to a profile.

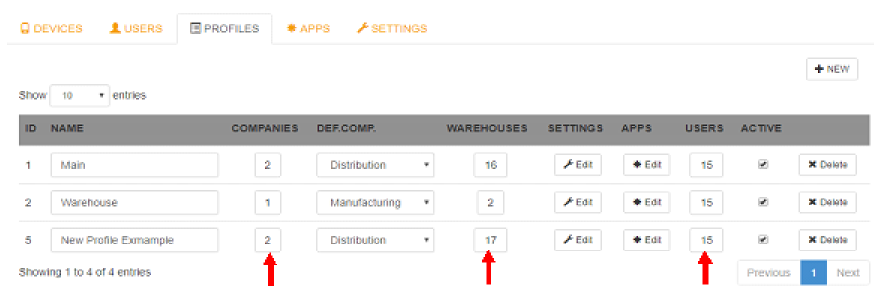
IMPORTANT: Editing profiles will impact all users assigned to the profile. Ensure users are logged off the system before editing.

NOTE: To edit Profile *Settings*, see Configuring Default Settings/Profile Settings.

To edit companies, warehouses, and users assigned to a profile

1. Locate the profile in the list.

The list displays the number of Companies, Warehouses and Users assigned to each profile.



2. Do one or more of the following for the profile you want to change:
   - To change the name, type over the current name in the **Name** field.
   - To change the companies assigned to the profile, click the button in the **Companies** column. In the list that appears, select the companies to assign or unassign.
   - To change the warehouses assigned to the profile, click the button in the **Warehouses** column. In the list that appears, select the warehouses to assign or unassign.
   - To change the users assigned to the profile, click the button in the Users column. In the list that appears, select the users to assign or unassign.

Deactivating and Deleting Profiles

To deactivate or delete a profile

1. Locate the profile in the list.
2. Do one of the following:
    - To deactivate, clear the **Active** check box.
    - To delete, click **Delete.** When prompted to confirm, click **OK**.

Setting Up Apps

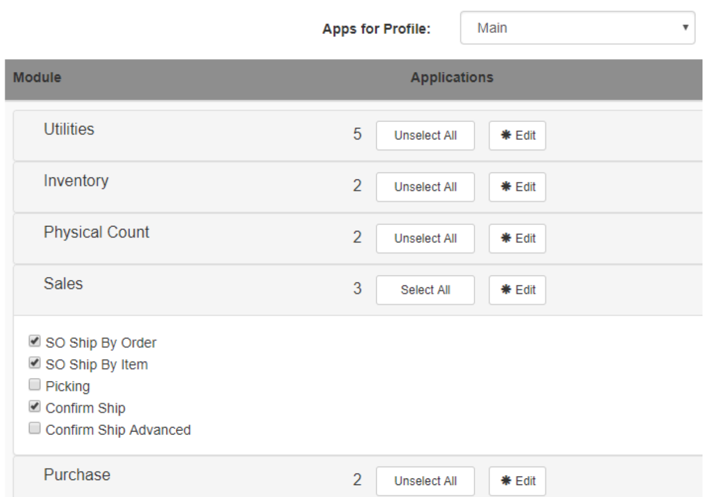
Applications (Apps) are essentially functions or actions a user can perform in a device. Apps are included in the following *modules*: Utilities, Inventory, Physical Count, Sales Orders, and Purchase Orders. For example, Ship by Item is an app under the Sales module.

You can grant access and permissions to apps via the Profile. For each profile you set up, you assign user access and permissions to certain apps in the Warehouse and/or Manufacturing client. For example, you may want to allow only one group of users under a profile the ability to ship sales orders by item.

Example:

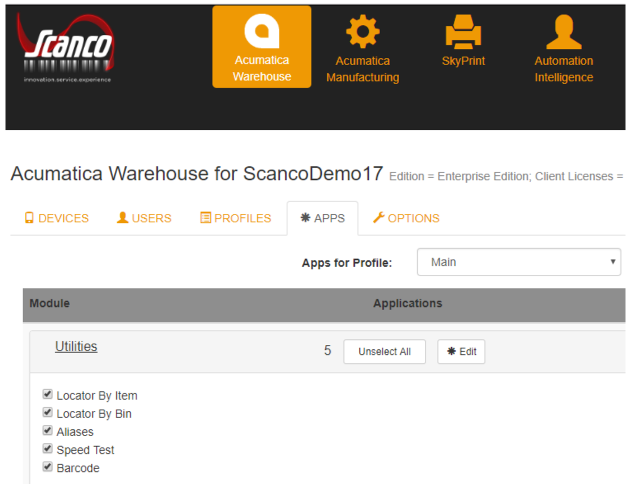
Let's say you created a Profile called "Main," and you want users assigned to that profile to have access to only certain applications and functions in the Sales module. You could do the following:

3. Select **Main** in the **Apps for Profile** list.
4. In the **Module** list, click **Sales**.
5. Select the options you want to grant users access to when they use the Sales module.



To assign Apps to modules

1. From the **Apps for Profile** list, select the profile you want to set up apps for.



2. Click the name of the module to display a list of activities.
3. Select the activities you want users under this profile to perform. Or, click **Select All**.

Configuring Default Options

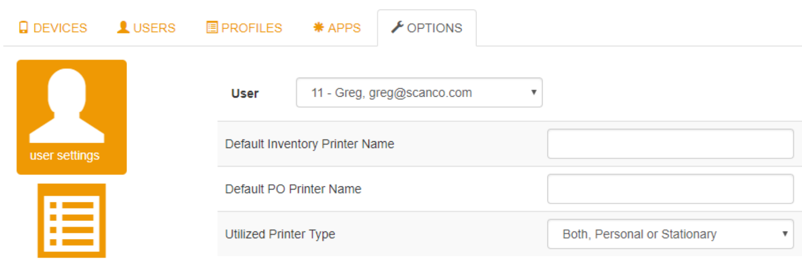
You can configure default options for users, profiles, warehouses, and applications for both the Warehouse and Manufacturing clients.

User Settings

You can set default printers for each user.

To configure default user settings

1. On the **Options** tab, click **User Settings**.



2. Select a **User** from the drop-down list.
3. Type or select one or more of the following:
   - **Default Inventory Printer Name**. This is the default location where labels will print.
   - **Default PO Printer Name**. This is the default location where purchase orders will print.
   - **Utilized Printer Type**. Select the type of printer used.

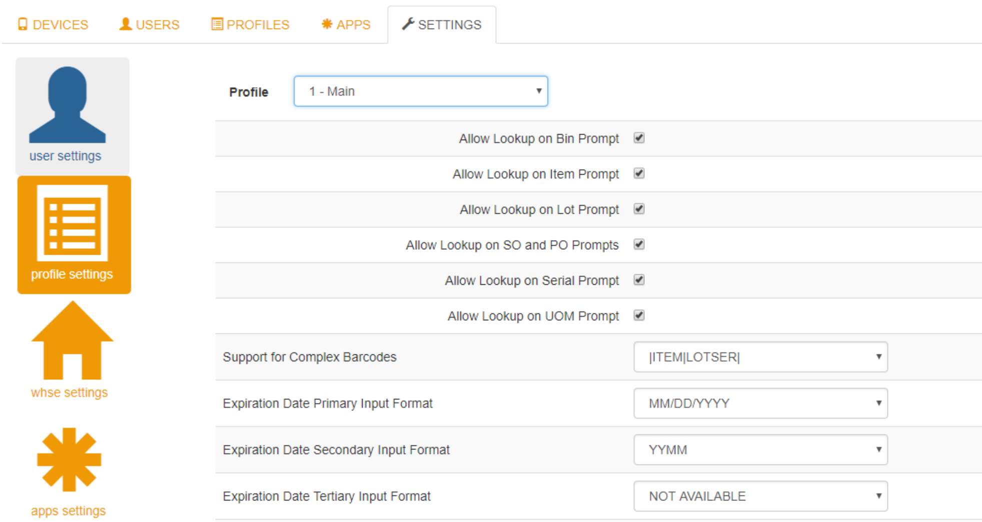
Profile Settings

You can set default functions for each profile.

To configure default profile settings

1. On the **Options** tab, click **Profile Settings**.

NOTE: The following image shows only a sub-set of the settings you can configure.



2. Select the **Profile** you want to configure from the drop-down list.
3. Select one or more of the **Allow Lookup on … Prompts** to determine whether the user of the profile can use the Lookup feature for those fields.
4. Select or enter one or more of the following default options for users of this profile:
   - **Support for Complex Barcodes.**

   Expiration Date Formats: If using expiration dates, provide date formats that will be recognized by the handheld/mobile device when scanning labels. This lets you match date formats your vendors may use (for example, MM/YY, DD/MM/YY, etc.) When the primary format is not recognized, the system will try to match the second and then third formats. You can select up to three (3) date formats, but you must set a Primary format.

   - **Expiration Date Primary Input Format** (Required). Select the primary date format.
   - **Expiration Date Second Input Format**. Select the second alternative date format.
   - **Expiration Date Third Input Format**. Select the third alternative date format.
   - **Invalid Input forces Lookup to Open.** Select ON if you want the system to prompt the user to perform a lookup a when invalid data is scanned or entered into a field.
   - **Auto Generate Lot Numbers**. Select **Scanco** or **Acumatica** depending on where you want lot numbers to auto-generate.
   - **Lot Prefix**. If you selected Scanco to auto-generate lot numbers, you can optionally type an alpha-numeric prefix for lot numbers.
   - **Lot Format**. If you selected Scanco to auto-generate lot numbers, select the format in which they appear.
   - **Auto Generate Serial Number**. Select **Scanco** or **Acumatica** depending on where you want serial numbers to auto-generate.

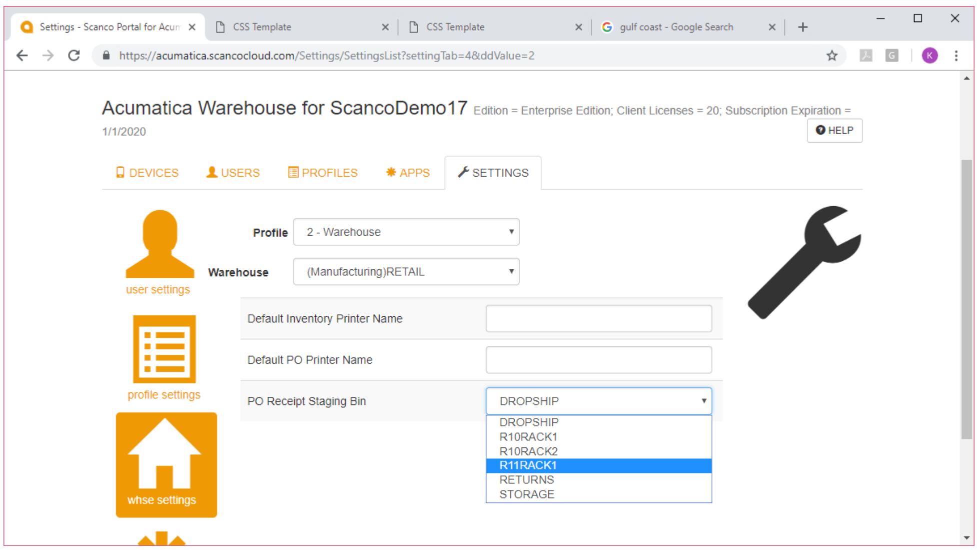
- **Serial Prefix**. If you selected Scanco to auto-generate serial numbers, you can optionally type an alpha-numeric prefix for serial numbers.
- **Serial Format**. If you selected Scanco to auto-generate serial numbers, select the format in which they appear.
- **WO Lookup Format**. The format Work Orders will display in a Lookup. Select **Combined** or **Simple**.

Warehouse Settings

You can set default functions for each warehouse based on a specified profile.

To configure default warehouse settings

1. On the **Options** tab, click **Warehouse Settings**.

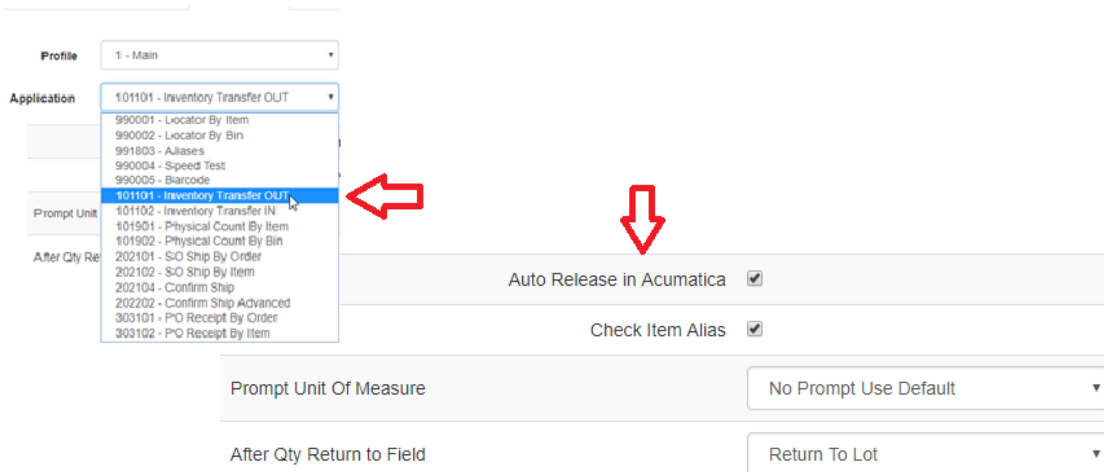


2. Select the **Profile** and **Warehouse** you want to configure default settings for.
3. Type or select one or more of the following:
   - **Default Inventory Printer Name**. This is the default location where labels will print for this warehouse.
   - **Default PO Printer Name**. This is the default location where purchase orders will print for this warehouse.
   - **PO Receipt Staging Bin**. Select the bin that will be used as the staging bin. (In the App, when "Use Staging Bin" is selected for PO by Order or PO by Item, the bin number will default to what is specified here.)

Application Settings

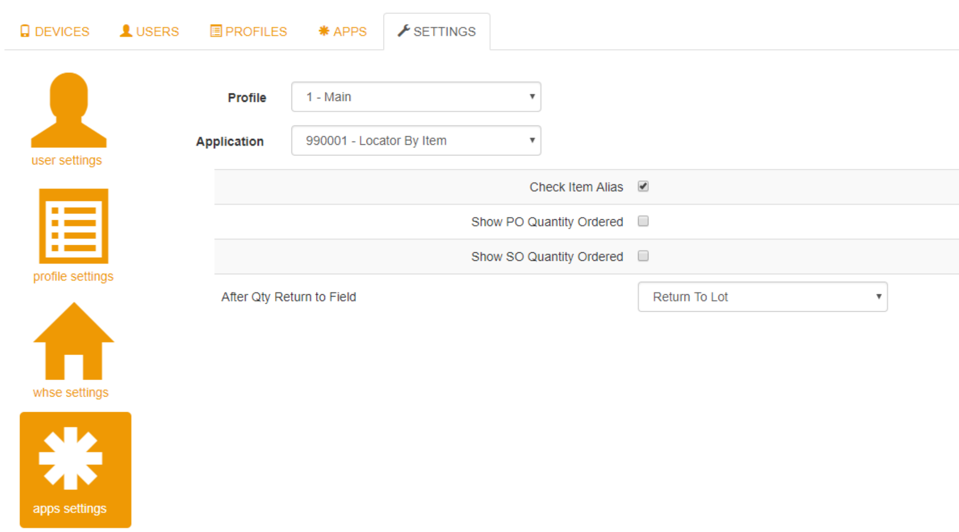
For all profiles, you can set default options for each module's applications. Options will differ depending on the application you select.

For example, if you select the application "Inventory Transfer OUT," you are provided with default options to choose specifically for that application.



To configure default application settings

1. On the **Options** tab, click **Apps Settings**.



2. Select the **Profile** and **Application** you want to configure default settings for.
3. Type or select one or more options based on the following Applications:

Locator By Item / Locator By Bin

Select the options each application allows when searching for items.

- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Show PO Quantity Ordered**. To display the purchase order quantity ordered.
- **Show SO Quantity Ordered**. To display the sales order quantity ordered.
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

Inventory Transfer OUT / Inventory Transfer IN

- **Auto Release in Acumatica**. To automatically release the item in Acumatica.
- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Prompt Unit Of Measure**. Whether to prompt a default unit of measure.
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

Physical Count By Item / Physical Count By Bin

- **Allow Multiple User Counting Same Bin**. Lets more than one user perform a physical count of the same bin, at the same time.
- **Allow Multiple User Counting Same Item**. Lets more than one user perform a physical count of the same items, at the same time.
- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Send User's Counts back to Acumatica Individually**. Counts will be returned separately by each user rather than when everyone completes their counts.
- **Show Count by All Users in Lookups**. When performing lookups, this option will show the total physical count from all users.
- **Show Count by All Users in Qty Counted**. When multiple users are performing a physical count, this shows total quantity counted by all users.
- **On-the-fly Count**. Allows user to add to the count beyond what is assigned in Acumatica, directly from the handheld/mobile device.
- **Allow New Count Lines**. Allows user to add to the count beyond what is assigned in Acumatica, directly from the handheld/mobile device.
- **Prompt Unit Of Measure**. Whether to prompt a default unit of measure.
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

SO Ship By Order / SO Ship By Customer

- **Allow Multiple User Same Order.** To allow several users access to the same sales order.
- **Allow Multiple User Order Same Item.** To allow several users access to the same items on the same order.
- **Auto Release in Acumatica**. To automatically release the order in Acumatica.
- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Sales Order Kit Scanning**. To allow scanning the sales order kit.
- **Allow next Lot**.
- **Allow next Serial**.
- **Prompt Unit Of Measure**. Whether to prompt a default unit of measure.
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

Confirm Ship / Confirm Ship Advanced

- **Auto Release in Acumatica**. To automatically release the order in Acumatica.
- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Allow next Lot**.
- **Allow next Serial**.
- **Prompt Unit Of Measure**. Whether to prompt a default unit of measure.
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

PO Receipt By Order / PO Receipt By Item

- **Allow Multiple User Same Order.**
- **Allow Multiple User Order Same Item.**
- **Auto Release in Acumatica**. To automatically release the order in Acumatica.
- **Check Item Alias**. To allow vendor aliases or UPC codes to be scanned.
- **Allow next Lot**.
- **Allow next Serial**.
- **Prompt Unit Of Measure**. Whether to prompt a default unit of measure.
- **Utilize Warehouse Receipt Staging Bin**. Select the bin that will be used as the staging bin. (In the App, when "Use Staging Bin" is selected for PO by Order or PO by Item, the bin number will default to what is specified here.)
- **After Qty Return to Field**. The field the user is returned to after entering the quantity.

Automation Intelligence

Automation Intelligence is where you can track the status of warehouse and manufacturing transactions. You can view transactions in progress, those that have been rejected, or those already sent to Acumatica (historical transactions). While viewing rejected transactions, you can edit, delete, or resubmit them directly from the dashboard. As well, tools are available to show you every detail of a transaction and will help you troubleshoot any errors (see Inspections Tab).

The dashboard shows you the number of records you have for each status and includes filters and other search options to help you quickly find the information you are looking for.

To access Automation Intelligence

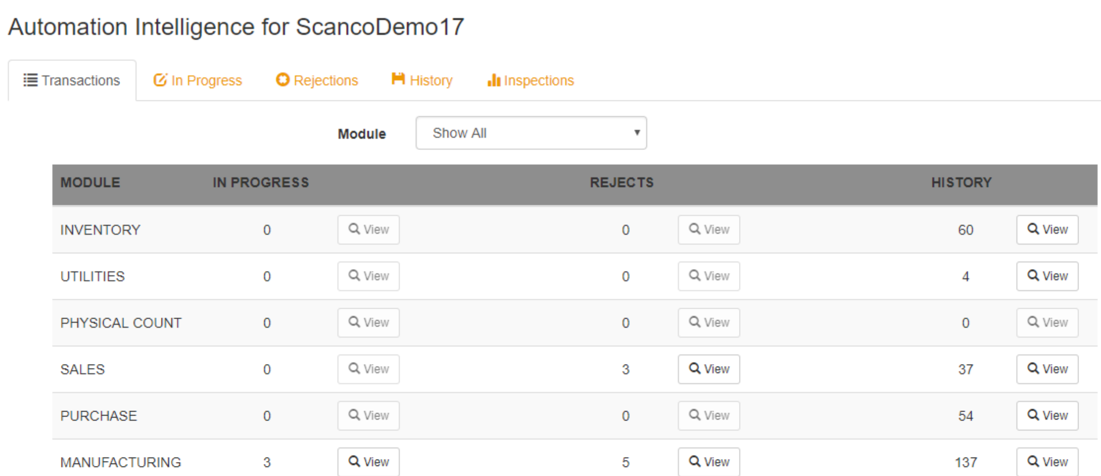
1. On the portal, click **Automation Intelligence**.
2. Select the tabs to view information as needed.

Each tab’s features and options are described in this section.

Transactions Tab

For each module, this tab provides an overview of the number of transactions with the status of In Progress, Rejected, or History (already submitted to Acumatica).

- Click **View** to drill down to the details of each transaction.



In Progress Tab

This tab displays the number of Scanco device transactions in progress for any sales order, purchase order or inventory item. You can use the filter options to narrow your search and find transactions more quickly.

Finding In Progress Transactions

Use filters to narrow the results of In Progress transactions.

To find transactions using filters

1. Select the type of transactions you want to search for. (For example, Inventory).
2. Begin typing in one or more search fields (Company, Application, Item, User, Warehouse From). As you type, a list of available options appears for you to select from.
3. Click **Run**.
4. (Optional). To download the list to an Excel Spreadsheet, click **Export**. In the dialog that appears, type the name of the file. Click **Save**.
5. Click **Clear** to clear the filter.

To find transactions using Search

- In the **Search** field, type text, numbers, or phrases for the transactions you want to locate.

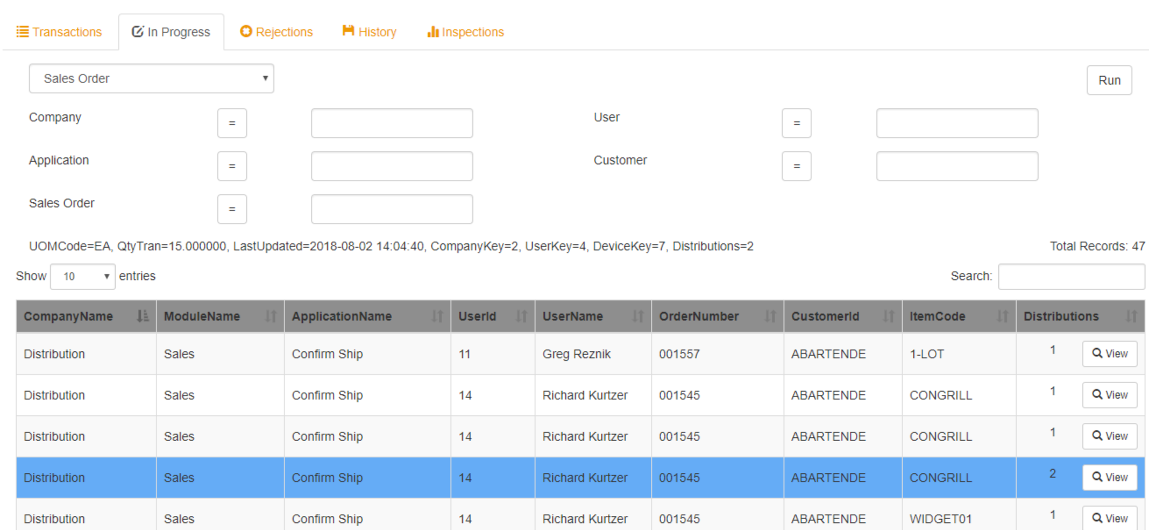
  TIP: You can do this after using filters to further narrow your results.

Viewing Transaction Details

You can drill down to details of a transaction in progress. You may do this, for example, to ensure it is correct before sending it to Acumatica.

To view transaction details

1. Click **View** for the transaction you want to view.



2. In the screen that appears, if there is more than 1 distribution, click **Next** to see all records.

Rejections Tab

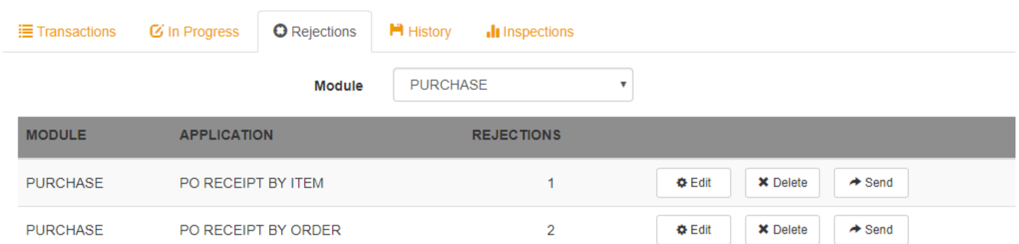
This tab displays transactions that have been rejected before they are sent to Acumatica. The dashboard shows the number of rejected transactions by Module and Application. You can view the details of a rejected transaction including each line Item. Based on your permissions, you can edit a rejected transaction, save and send it to Acumatica, or delete it.

To view, edit, or delete rejected transactions

1. In the dashboard, locate a rejected transaction. You can filter the list by selecting a specific module.

   WARNING: From this view, you can delete or send all rejected transactions. <u>You are not given a chance to confirm your selection</u>. If you click Delete, all transactions for the specific application will be deleted immediately. It is highly recommended that you click Edit, and then select rejected transactions you want to delete.

   Example: In the image below, the second line item, "PO Receipt By Order" shows two rejected transactions. Clicking Delete for that line item would delete both transactions.

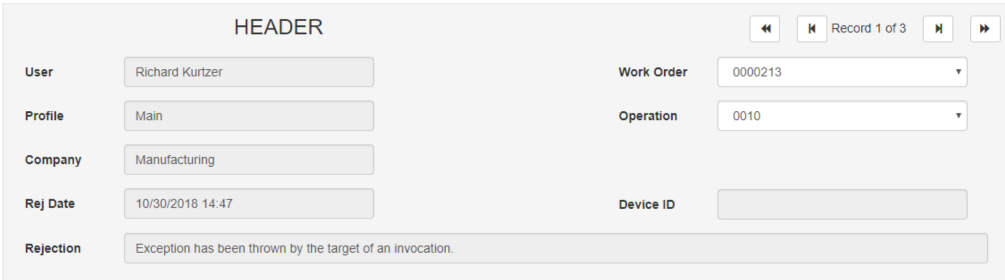


2. Click **Edit** for the transaction you want to view, edit, or delete.

   The screen that appears is divided into three sections: Header, Detail, and Distribution. Each section displays the number of records you can search through. You can edit fields that are not shaded, and you can save, send or delete all or part of a transaction. The information that appears in each section depends on the type of rejection you selected. For example, a rejected Sales Order displays different information than a rejected Purchase Order, etc.

Header

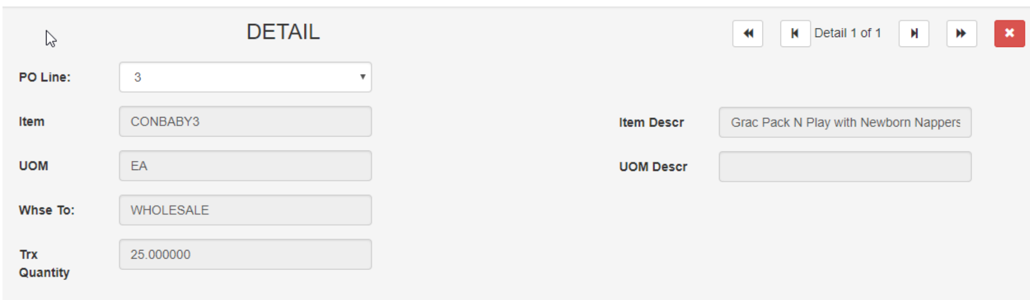
The Header shows information at the "order" level (Sales, Purchase, etc.). If there is more than one record, use the arrow buttons to view them. In the following example Record 1 of 2 is shown.



Detail

The Detail section provides information at the line item detail level. If there is more than one record, use the arrow buttons to view them.

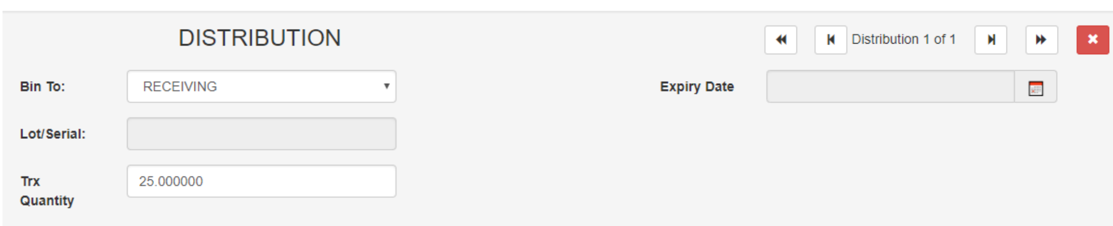
To delete Detail for one or more rejected transactions, click the red Delete (x) button.



Distribution

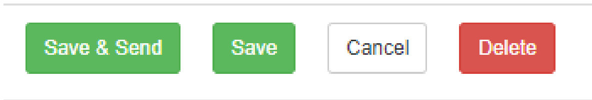
This section describes the distribution allocation portion of the record (lot, serial and bin information).

To delete the distribution for one or more rejected transactions, click the red Delete (x) button.



3. (Optional) Do one or more of the following:

- To return to the dashboard without making any changes, click **Cancel**.
- Delete only portions of the transaction's detail or distribution data as previously described.
- To save, send, or delete an entire transaction and all its records, click the **Save & Send**, **Save**, or **Delete** buttons as needed.


Save & Send
Save
Cancel
Delete

History Tab

This tab displays all transactions that have been sent to Acumatica.

Finding History Transactions

Use filters to narrow the results of historical transactions.

1. Select the type of transactions you want to search for. (For example, Sales Order History).
2. Begin typing in one or more search fields (Company, Application, Sales Order, User, Customer). As you type, a list of available options appears for you to select from.
3. Click **Run**.
4. (Optional), to download the list to an Excel Spreadsheet, click **Export**. In the dialog that appears, type the name of the file. Click **Save**.
5. Click **Clear** to clear the filter.

To find transactions using Search

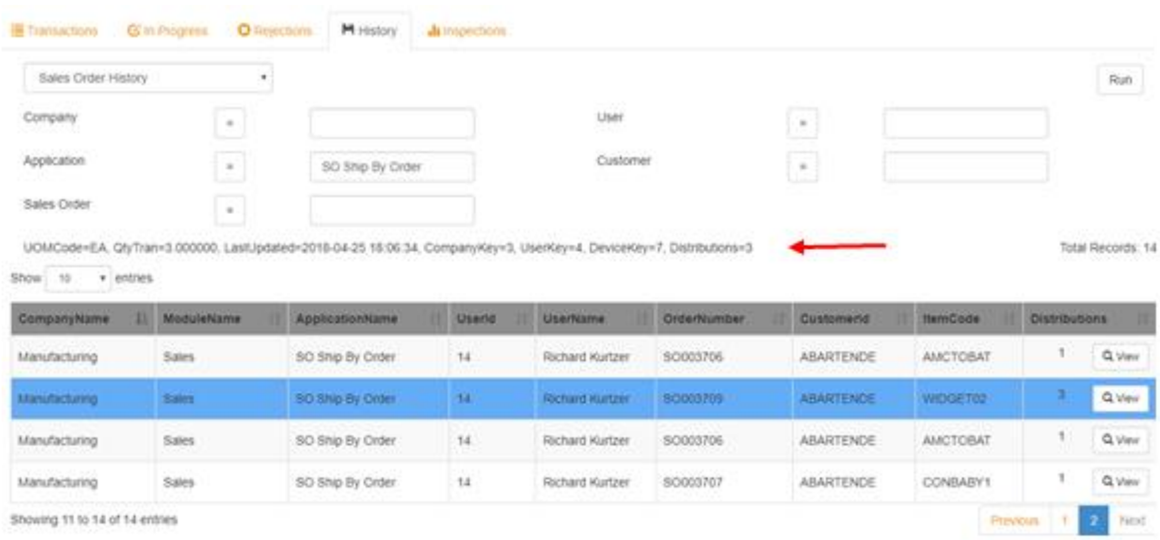
- In the **Search** field, type text, numbers, or phrases for the transactions you want to locate.

  TIP: You can do this after using filters to further narrow your results.

Viewing Transaction Details

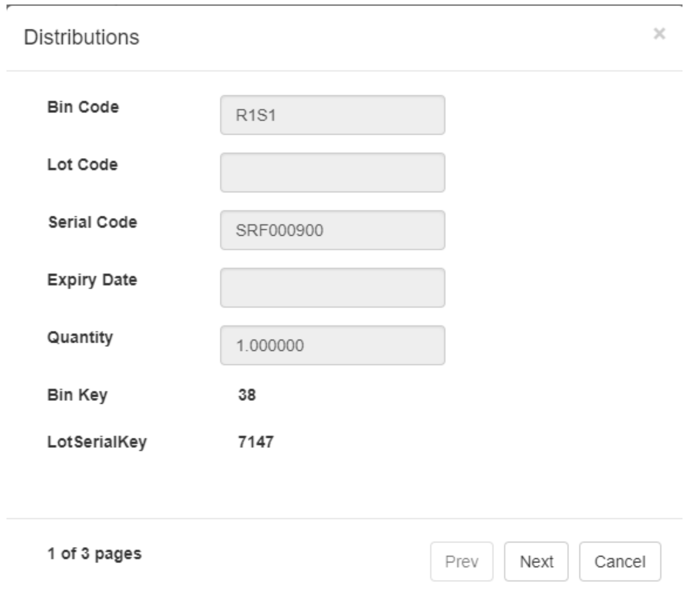
You can drill down to view details of a transaction’s history.

NOTE: When you place focus on a line item, as shown in the following image, additional information about the transaction appears (indicated by the red arrow) and is not located anywhere else in this view. This may be helpful for troubleshooting.



1. Click **View** for the transaction you want to view.

2. (If applicable) When the results appear, if there is more than one transaction, click **Next** to view more.



Inspections Tab

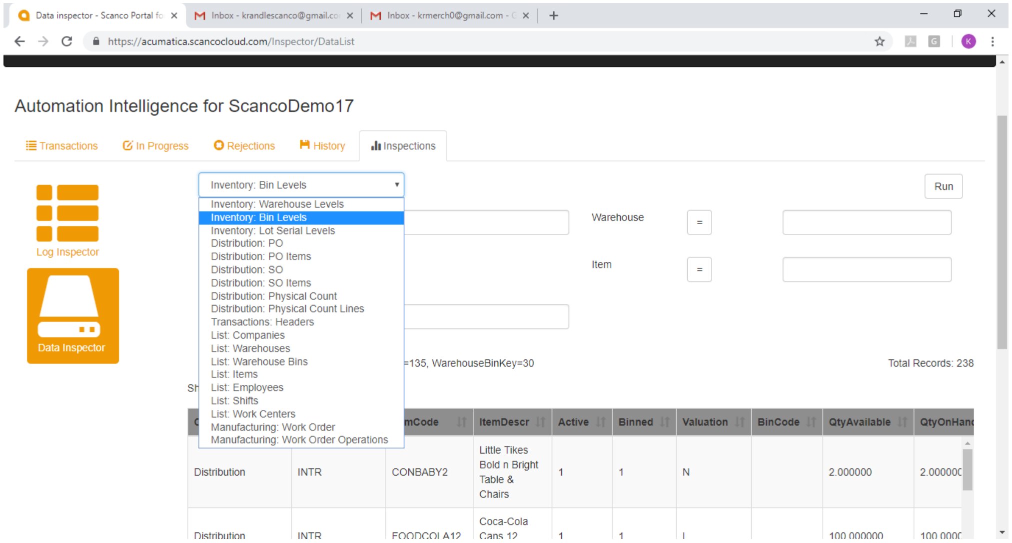
A Data Inspector and Log Inspector provide you tools necessary to analyze transaction details and troubleshoot errors.

Data Inspector

The Data Inspector provides transaction details for Work Orders, Inventory, Sales and Purchase Orders, Physical Counts, and more. Using the Data Inspector, you can easily locate information such as a transaction's status, order date, distribution vendor, or quantities of items and their locations.

To use the Data Inspector

1. On the **Inspections** tab, click **Data Inspector**.
2. From the drop-down list, select the transaction type you want to view.



3. To find specific transactions, filter the list by typing in one or more search fields. As you type, a list of available options appears for you to select from.

4. Click **Run**.

   The records that appear are based on your filter selections.

5. (Optional) At the bottom right of the screen, click **Next** to view additional transaction records.

6. Click **Clear** to clear the filter.

Log Inspector

The Log Inspector helps you pinpoint errors such as when synchronization fails, and shows warnings and messages about transactions so you can quickly identify and correct any issues.

To use the Log Inspector

1. On the **Inspections** tab, click **Log Inspector**.

2. Depending on the type of information you want to search, select an option from the **Entry Type** list. (E.g., Errors, Warnings, Messages or a subset of each).

3. Select the **Date Range** to search. If you select "Specific Range," enter the dates you want to search between.

4. Click **Run**.