



Acumatica Manufacturing

USER GUIDE FOR HANDHELD & MOBILE DEVICES

V 18.10.16.1

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Publish Date: 12.14.2018

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Introduction

Acumatica Manufacturing is part of the Scanco software suite. This application allows Acumatica users in manufacturing environments the ability to scan and collect information about inventory. The software consists of mobile apps that perform and track production order (work order) moves throughout the production/manufacturing process, and can track labor against each operation. It also includes a cloud-based portal where features and functions are configured, and information is managed.

Before you Begin

This guide references the Scanco Customer Service Portal for Acumatica, or simply *the portal*. The portal is where you configure how your Scanco Acumatica Warehouse & Manufacturing clients function. See the *Scanco Customer Service Portal - Administrator Guide* for more information.

Installation and Configuration

- Ensure the correct version of the Acumatica Manufacturing client is installed on your mobile device, and your system settings and user permissions are set up. For more information, see your system administrator or the *Scanco Customer Service Portal - Administrator Guide*.
- Ensure the correct version of the Scanco Warehouse Plugin and Manufacturing Plugin are also installed. (For the Manufacturing plugin to work, the Warehouse plugin must also be installed.) See your system admin or the *Scanco Plugins for Acumatica - Installation and Configuration Guide*.
- If you want to print labels to the printer from your device, see the *SkyPrint for Acumatica - Installation Guide*.

Application and Device Settings

The first time you open the client, you must select options for using it, and then activate the device.

Available Features, Options and Permissions

Some features and options described in this guide may only be available depending on your system set up and configuration. As well, based on your user permissions, you may only have access to certain features and options. If you require additional access, see your system administrator.

NOTE: This guide describes all functionality regardless of your current set up or permissions.

Using Handheld and Mobile Devices

All of the features and functionality of Acumatica Manufacturing are available on both iOS and Android operating systems (OS's). Most mobile devices can be used with the client. In order to scan information, a barcode imager is required.

IMPORTANT: This guide will provide screen images from an Android mobile device. Screens will appear differently depending on the device you are using. During training, your instructor may provide you with additional images from other operating systems.

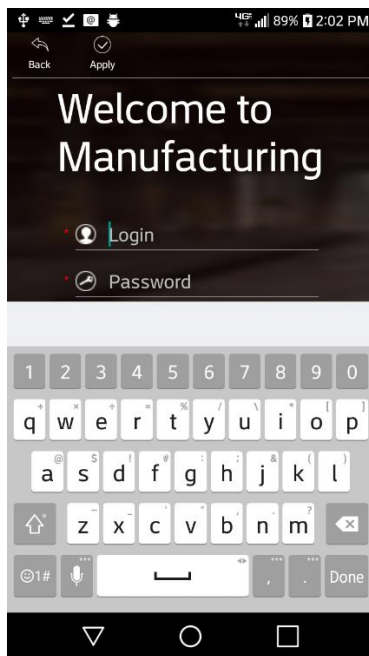
Scanco supports certain barcode imagers from Zebra, Honeywell, Cognex and Lineapro. Contact Scanco for the latest supported hardware.

Working in Acumatica Manufacturing

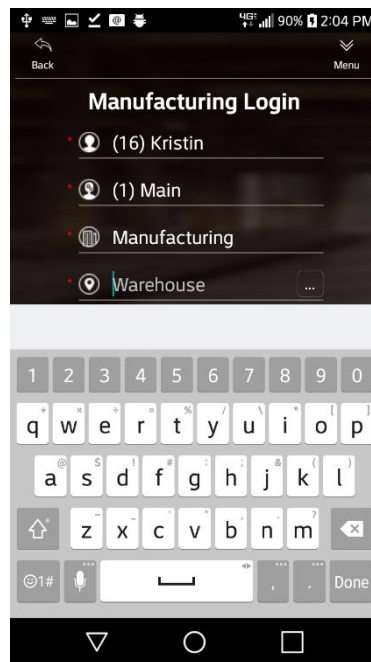
Log In and Out of the App

Your device should already be set up to access Acumatica Manufacturing. If not, you will see the general Settings screen. For more information, see *Acumatica Warehouse & Manufacturing Client – Installation & Configuration Guide*.

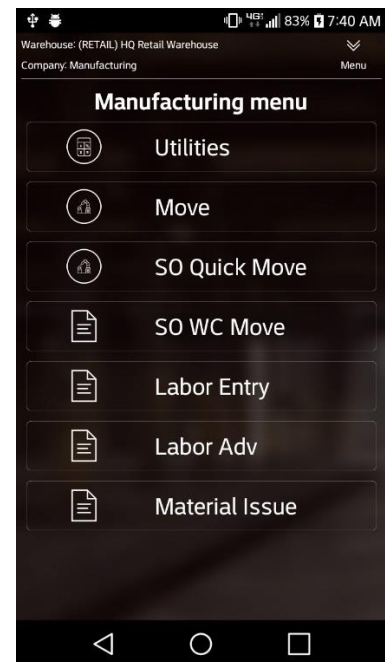
Open the Acumatica client. Scan your badge to login or tap in the **Login** and **Password** fields to enter your log on credentials.



If given more than one profile, or more than one company or warehouse to work in, select the **Profile**, **Company**, and **Warehouse** you want to work in.



When logged on, the following screen appears. The Warehouse and Company you logged onto appears in the upper left corner of the screen.



To Log Off, from the top right of the screen, tap **Menu**. In the screen that appears, tap **Log Off**.

Basic Instructions and Use

There are many common options and functions throughout Acumatica Manufacturing. This section describes the basics for working in the client.

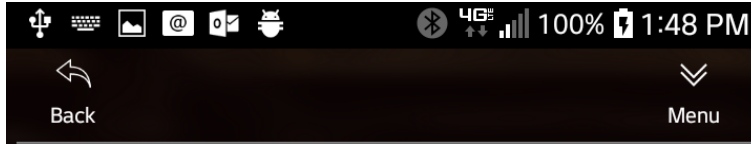
NOTE: You can also customize settings on your handheld to work optimally for you. See [Custom Device Settings](#).

Scan, Tap, or Enter

Depending on the options you choose, or the type of device you use, you will be instructed to scan, tap or enter (type) information into your handheld/mobile device. To enter information manually, use your mobile keyboard.

Navigation Buttons

In each screen, you can return to the main menu or access additional options.



- Tap **Back** to return to the main menu screen.
- Tap **Menu** to view additional options and functions.

Send Button

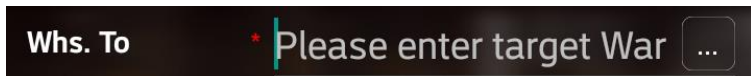
After performing one or more transactions, you can send them to Acumatica. The Send button includes the number of transactions waiting to be sent.



- Tap **Send**. When you receive a message asking if you want to send all data, tap **Yes**.

Using a Lookup

You can enter information in a field using a “Lookup.” A Lookup will find and/or narrow your search results. The Lookup button is shown as ellipses (...), located in any field where you can perform a lookup. You can also sort and filter the results of a lookup.



- Tap the **Lookup** button (...). Or, type part of the information you are looking for into the field, then tap the **Lookup** button.

NOTE: Depending on how your system is set up, rather than tapping the Lookup button, you may be able to simply press ENTER in the field.



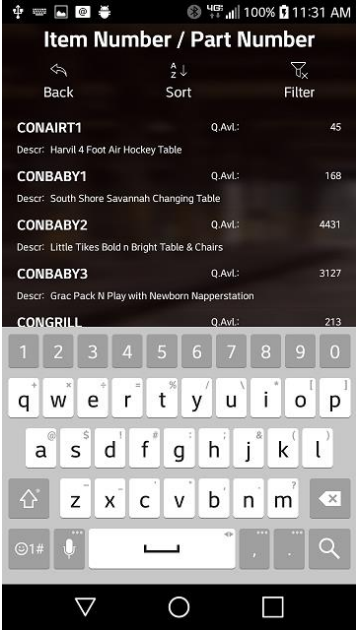
To sort lookup results

- 1. Tap **Sort**.
- 2. In the screen that appears, sort fields based on the lookup, and either by **Ascending** or **Descending** order.

To filter lookup results

- 1. Tap **Filter**.
- 2. When the keyboard appears, type the first few letters of the item you are searching for.

The list will start with the first item beginning with the letters you type. For example, if CON is typed, the list might show as follows:



Printing Labels

If printing has been enabled on your system, on any screen where you see a Print button, you can print labels for an item.

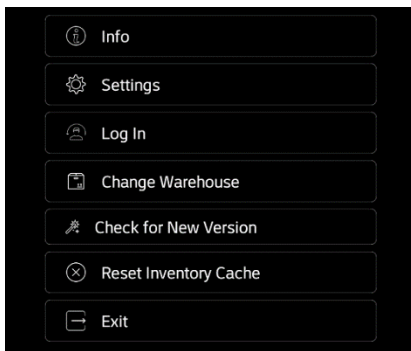
Instructions for printing are included in the procedures for each type of transaction. You can also print labels while reviewing transactions that have not been sent to Acumatica. See, [Reviewing and Deleting Transactions](#).

Custom Device Settings

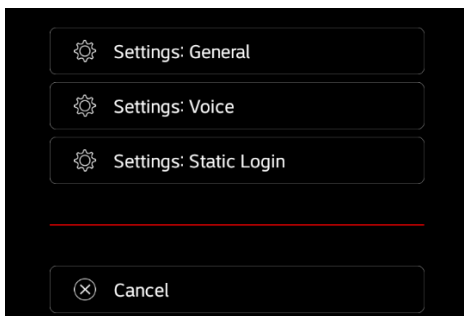
You can set up the handheld/mobile device to make it easier to work the way you do. For example, you can change the language, theme, sounds, and voice prompts for your device. You can also set the device to remember your login so you don't have to enter it each time.

To change settings

1. From any screen, tap **Menu**.
2. In the screen that appears, tap **Settings**.



3. In the settings screen, select the option you want to customize. Then, continue with setting changes as described in the following steps.



To change the language or theme

1. Tap **Settings: General**.
2. Do one or more of the following:
 - In the **Language** field, tap the **Lookup** button. On the screen that appears, tap the language you want your device to use.
 - In the **Theme** field, tap the **Lookup** button. On the screen that appears, tap the theme you want your device to use.
3. When you return to the Settings screen, click **Apply**.

To change voice/sound settings

1. Tap **Settings: Voice**.
2. Select one or more of the following:
 - **Voice Lab.** Select **Yes** to hear the label name when focus is on a new field.
 - **Full Text.** Select **Yes** to hear the full description of the field when focus is on a new field.
 - **Voice Val.** Select **Yes** to hear prompts/directions for each field entry in the client.
 - **Voice OK.** Select **Yes** to hear when a transaction has been successfully executed/saved.
 - **Voice Err.** Select **Yes** to hear when an error has been made with a transaction.
 - **Voice Speed.** If Yes was selected for voice options, use the slider to set slower or faster speaking speed.
 - **Beep OK.** Select **Yes** to hear a sound when a transaction has been successfully executed.
 - **Beep Err.** Select **Yes** to hear a sound when an error has been made with a transaction.
 - **Vibrate.** Select **Yes** to for the device to vibrate when transactions are either successful or have an error.
3. When you are finished, click **Apply**.

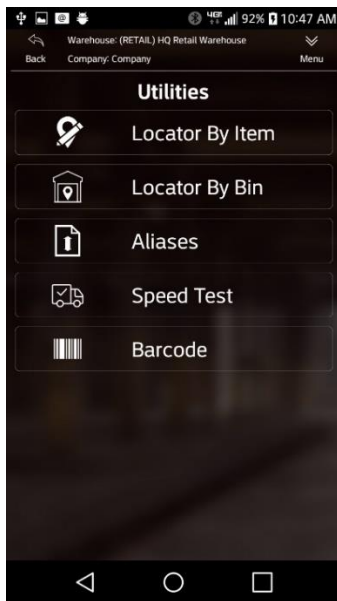
To set up the device to remember your login

1. Tap **Settings: Static Login**.
2. Use the slider to select **Yes** or **No**.

Utilities


Utilities are used to help you locate items, show aliases, and test your connection speed.

1. From the main menu, tap **Utilities**.
2. Tap the utility you want view.



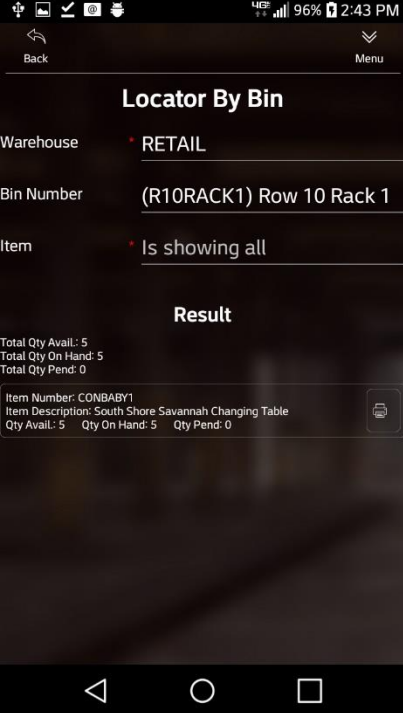
Locator by Item

Locator by Item is a quick way to lookup where items are stored in a warehouse. You can also print the details of any record you select.

	<ul style="list-style-type: none"> • Warehouse. The warehouse where you want to search for an item. • Item. Will default to all showing. Change to view only a specific item. The item’s description will appear in the Description field. • Bin (optional). Will default to all showing. Change to view only specific bins. • Lot. Will default to all showing. Change to view the lot where the item is located. 	
<p>Note</p>	<p>To display “Quantity on PO” and “Quantity on SO,” your system administrator must select those options in system set up.</p>	

Locator by Bin

Locator by Item is a quick way to lookup what inventory is stored in a specified bin.

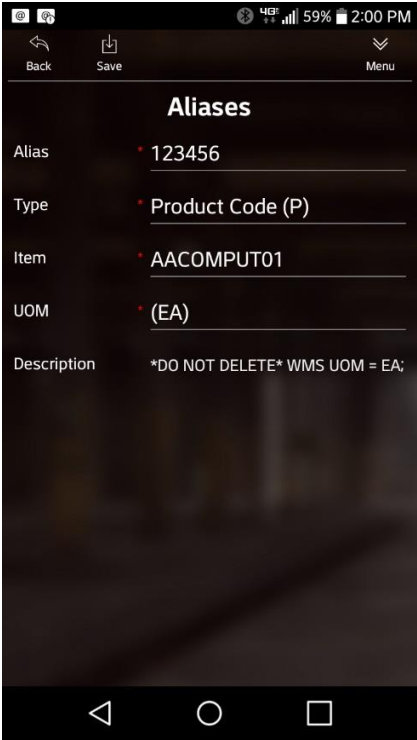
	<ul style="list-style-type: none"> • Warehouse. The warehouse where you want to search for an item. • Bin. Will default to all showing. Change to view only specific bins. • Item (optional). Will default to all showing. Change to view only specific items. <p>NOTE: To print item details, tap the printer icon to the right of the item.</p>	
<p>Note</p>	<p>To display “Quantity on PO” and “Quantity on SO,” your system administrator must select those options in system set up.</p>	

Aliases (Cross-references)

Aliases are “cross-references” that let you easily locate stock items. You can locate items by aliases for products, customers, and vendors or general aliases.

You may be able to add aliases for items if your system is set up to do so.

- **Alias.** Scan bar code for cross-reference.
- NOTE: If an item’s alias already exists, when you enter or scan the alias, information about the item appears.
- **Type.** Type of alias you are creating. Select Customer, General, Product, or Vendor.
- NOTE: Depending on the Type selected, required fields will appear.
- **Item.** The item name/number to associate with the alias.
 - **UOM.** (For “P” Type only) For the Item selected, enter a unit of measure. If only one exists, it will appear as the default.
 - **Customer** (For “C” Type only). The customer associated with this alias.
 - **Vendor.** (For “V” Type only). The vendor associated with this alias.
 - **Description.** For all aliases, except for products (“P” Type) enter a description.
- IMPORTANT:** If you are creating a new alias, you must tap **Save** for it to take effect.



Speed Test

See [Troubleshooting](#) for more information.

Bar Code Test

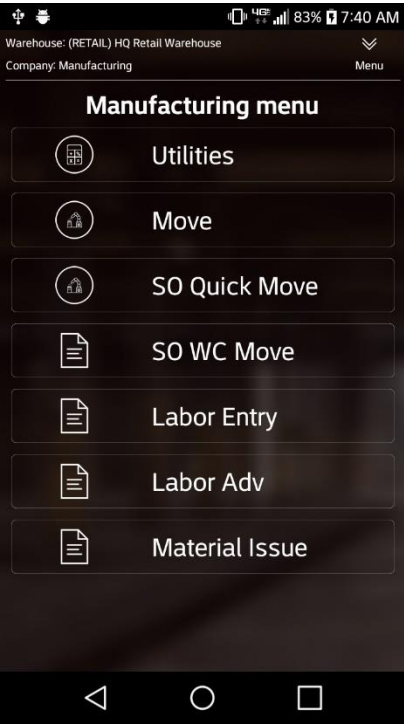
Scan a barcode to show on screen. Once scanned, the Barcode will display under Results.

NOTE: You may have to swipe Show Specifics to Yes.

Move

Move lets you advance a Production Order transaction from one operation to another, for example when there are multiple operations for building a product. You can also move a Production Order to a different Work Center.

NOTE: If you do not want to backflush labor, but want to manually record labor instead, use the [Labor Entry](#) option for this transaction.

1	From the main menu, tap Move .	
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2 Scan or use a Lookup to complete the following.

- **Prod.** The Production Order number (Work Order) being advanced.
- **Oper.** The operation number being advanced.

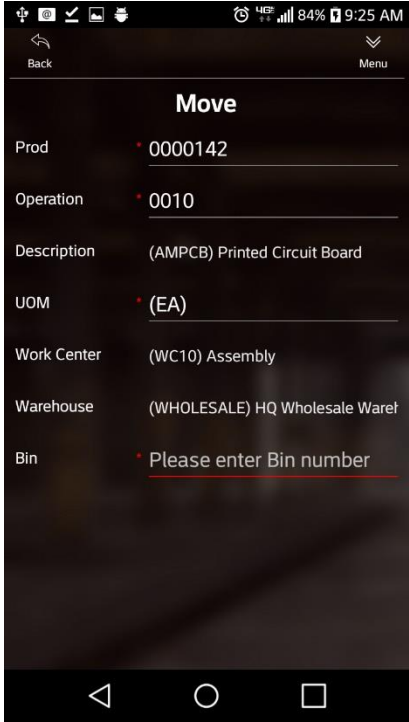
NOTE: The Production and Operation numbers may be combined depending on your set up.

The item's description appears based on the product/operation selected.

- **UOM** (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.

Work Center. The work center where the operation is being done. This will default based on the operation number.

- **Warehouse (WHSE)** (if applicable). Warehouse may default based on your system settings. If not, enter the warehouse you are transacting against.
- **Bin.** The bin where the product in its current state is being stored for the operation.



QTY (scpd). This displays the number of materials being scrapped.

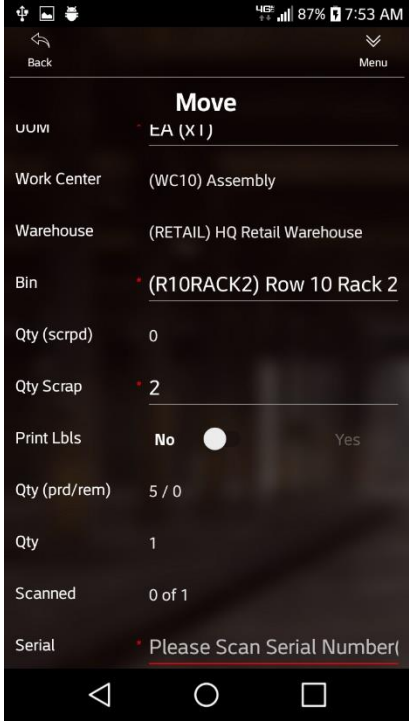
- **QTY Scrap** (if applicable). Enter the number of materials being scrapped.
- **Scan Each** (if applicable). Swipe right to select Yes/On.

NOTE: Scan Each is used with non-serial items, allowing you to scan each item's barcode instead of typing a quantity for each transaction. In this mode, each scan = quantity of 1.

- **Lot.** The Lot number assigned to a group of items produced.
- **Print Lbls** (if applicable). Swipe right to Select Yes/On.

NOTE: Print Lbls is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.

- **Qty to Print** (if applicable). Enter the number of labels to print.



	<p>Qty (prd/rem) refers to the number of items produced and number left to produce for the operation selected.</p> <ul style="list-style-type: none"> • QTY. The quantity produced. • Serial. The Serial number for the item produced. 	
Note	The Scanned field appears on the last step of the Production Order and only for serialized items. It tracks the number of items scanned with serial numbers.	
Done	The move transaction is complete.	

Sales Order (SO) Quick Move

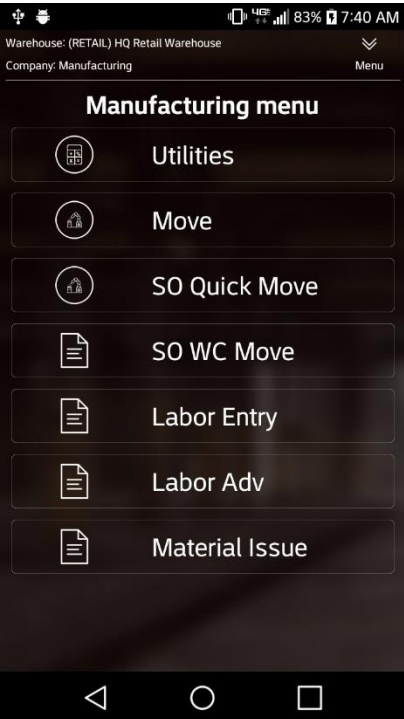
The Quick Move option lets you advance transactions by Operation number, for multiple Production Orders (and all item quantities) to either the next operation or another Work Center in bulk. The transaction is based on the sales order number to which one or more Production Orders are linked.

NOTES:

- The Quick Move option cannot be used for Serial or Lot product orders.
- Quick Move works best in scenarios when multiple orders have the same routing, when you want to backflush labor and material, and only when transacting full quantities of each operation.

Example

Let’s say you have one sales order for 10 Big widgets and 10 Small widgets. In Acumatica, two production orders are generated—one for each type of widget (BIGWDG, SMWDG). Since none are in stock, the widgets are made to order. However, rather than processing each order separately, you can move them from operation to operation, advancing both BIGWDG and SMWDG items at the same time.

1	<p>From the main menu, tap SO Quick Move.</p>	
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<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none"> • SO. Sales order number. <p>The Prod Number will show the total number of valid production orders for the SO selected.</p> <ul style="list-style-type: none"> • Operation. The operation number being advanced. <p>Operation will show the total number of production orders for a given SO.</p> <p>The item’s description appears based on the product/operation selected.</p> <ul style="list-style-type: none"> • UOM (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure. <p>Work Center. The work center where the operation is being done. This will default based on the operation number.</p> <ul style="list-style-type: none"> • Warehouse (if applicable). Warehouse may default based on your system settings. If not, enter the warehouse you are transacting against. • Bin. The bin where the product in its current state is being stored for the operation. 	
<p>Done</p>	<p>The quick move transaction is complete for all production orders, and the transaction is sent to Acumatica automatically.</p>	

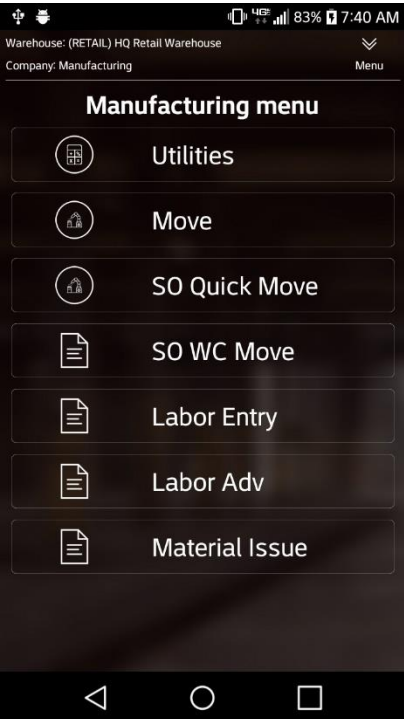
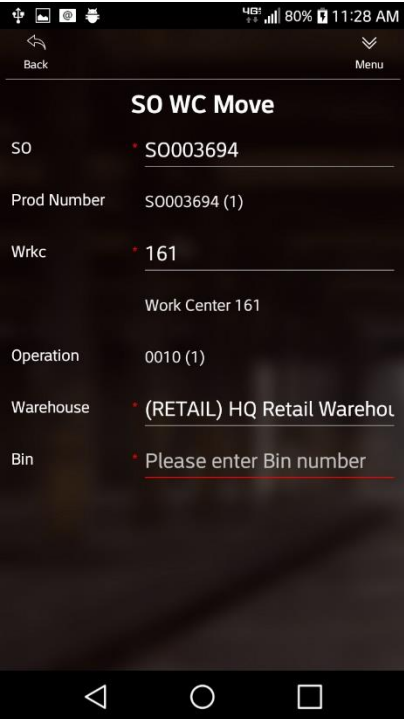
Sales Order (SO) Work Center (WC) Move

The Work Center Move option lets you advance transactions by Work Center, for multiple Production Orders (and all item quantities) to either the next operation or another Work Center. The transaction is based on the sales order number to which one or more Production Orders are linked.

NOTE: The Work Center Move option cannot be used for Serial or Lot product orders.

Example

Using this option, you can move product to completion in bulk. Let’s say you have a sales order for 20 widgets, and since none are in stock, the widgets are made to order. Rather than making each widget individually; moving them from one Work Center to another, you can collect all the required materials, assemble them, and move all 20 widgets into completion at the same time.

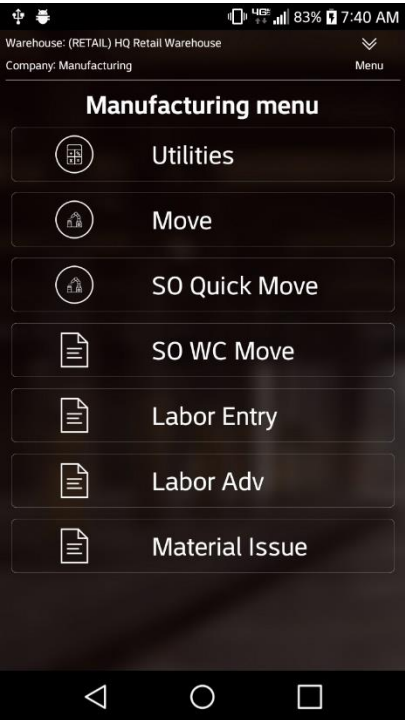
1	<p>From the main menu, tap SO WC Move.</p>	 A screenshot of a mobile application interface. At the top, it shows 'Warehouse: (RETAIL) HQ Retail Warehouse' and 'Company: Manufacturing'. Below this is a 'Manufacturing menu' with several options: Utilities, Move, SO Quick Move, SO WC Move, Labor Entry, Labor Adv, and Material Issue. The 'SO WC Move' option is highlighted.
2	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none">• SO. Sales order number. <p>The Production Order number will show the total number of valid production orders for the SO selected.</p> <ul style="list-style-type: none">• Oper. The operation number being advanced.• Work Center (Wrkc). The work center where production orders are advancing to. The Work Center description appears. <p>Operation will show either the total number of operations that match the SO and work center selections, or when only one production order matches both SO and work center, the order number appears.</p> <ul style="list-style-type: none">• Warehouse (WHSE) (if applicable). Warehouse may default based on your system settings. If not, enter the warehouse you are transacting against.• Bin. The bin where the product in its current state is being stored for the operation.	 A screenshot of the 'SO WC Move' form in the application. It has a 'Back' button and a 'Menu' button. The form contains several fields: 'SO' with value 'S0003694', 'Prod Number' with value 'S0003694 (1)', 'Wrkc' with value '161' and description 'Work Center 161', 'Operation' with value '0010 (1)', 'Warehouse' with value '(RETAIL) HQ Retail Warehous', and 'Bin' with a prompt 'Please enter Bin number'.
Done	<p>The work center move transaction is complete for all production orders, and the transaction is sent to Acumatica automatically.</p>	

Labor Entry

Labor entry lets you advance a Production Order while tracking labor against each operation. When you record time worked on an order, this is known as *tracking in and out*. The order will remain open and transactions will not be sent to Acumatica until you track out and [send the transaction](#).

NOTE: If you are not tracking labor or will back flush labor, use the [Move](#) option instead.

If you want to delete a labor entry record, for example, if you were removed from an assignment, see [Reviewing and Deleting Transactions](#).

1	From the main menu, tap Labor Entry .	
---	--	--

2 Scan or use a Lookup to complete the following.

- **Emp.** Your employee ID.
- **Prod.** The Production Order number you are working on.
- **Oper.** The operation number you are working on.

NOTE: The Production and Operation numbers may be combined depending on your set up.
The item’s Description appears based on the product and operation selected.

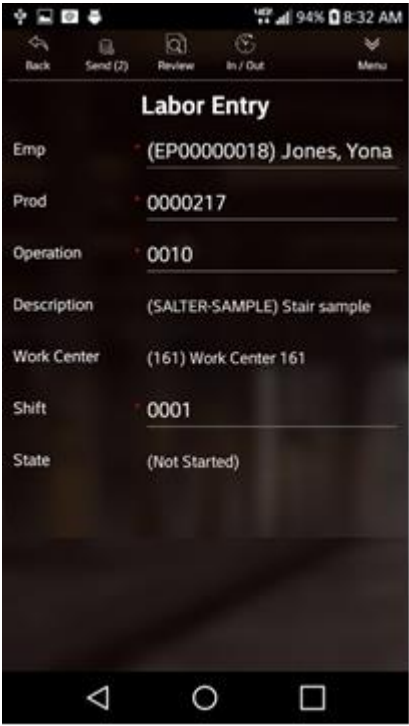
- **UOM** (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.

Work Center. The work center where the operation is being performed. This will default based on the operation number.

- **Shift.** The shift worked.

State. The first time you work an operation, this will default to “Not Started.”

IMPORTANT: You must tap **In/Out** (at the top of the screen) to continue with the transaction and track time worked against the order.



3

- **Bin.** The bin where the product in its current state is being stored for the operation.

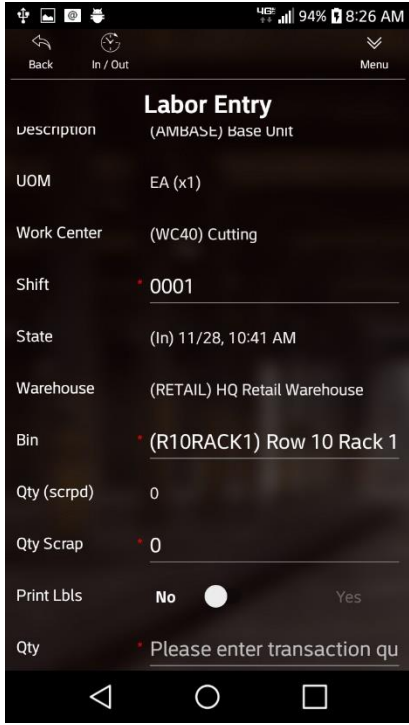
QTY (scprd). This displays the number of materials being scrapped.

- **QTY Scrap** (if applicable). Enter the number of materials being scrapped.
- **Scan Each** (if applicable). Swipe right to select Yes/On.

NOTE: Scan Each is used with non-serial items, allowing you to scan each item’s barcode instead of typing a quantity for each transaction. In this mode, each scan = quantity of 1.

- **Lot.** The Lot number assigned to a group of items produced.
- **Print Lbls** (if applicable). Swipe right to Select Yes/On.

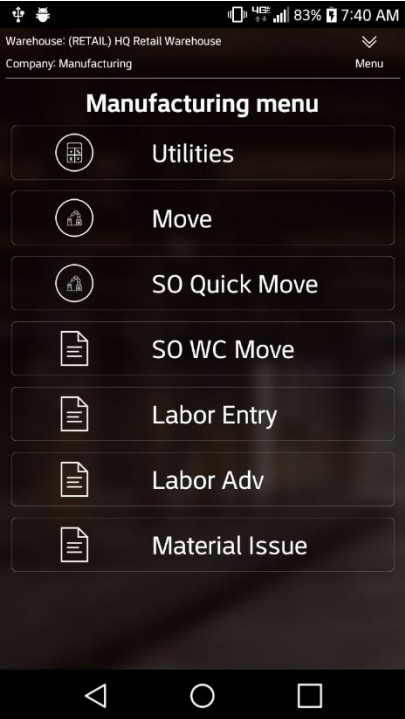
NOTE: Print Lbls is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.



	<ul style="list-style-type: none"> • Qty to Print (if applicable). Enter the number of labels to print. <p>Qty (prd/rem) refers to the number of items produced and number left to produce for the operation selected.</p> <ul style="list-style-type: none"> • QTY. The quantity produced. • Serial. The Serial number for the item produced. <p>IMPORTANT: When you are finished working transactions for the Production Order, you must tap In/Out (at the top of the screen) to finish tracking time against the order and to be able to submit the transaction to Acumatica.</p>	
Done	You are finished with the Production Order transaction and tracking time.	

Material Issue

Use this option to manually issue materials to a Production Order.

1	From the main menu, tap Material Issue .	
---	---	--

2 Scan or use a Lookup to complete the following.

- **Prod.** The Production Order number you are issuing materials to.
- **Oper.** The operation number you are issuing materials to.

NOTE: The Production and Operation numbers may be combined depending on your set up.

- **Item.** Item(s) to issue for the Operation number selected.

The Description appears based on the item selected.

- **UOM** (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.
- **Warehouse (WHSE)** where the materials will come from.
- **Bin.** The bin where materials are located.
- **Scan Each.** Swipe right to select Yes/On.

NOTE: Scan Each is used with non-serial items, allowing you to scan each item’s barcode instead of typing a quantity for each transaction. In this mode, each scan = quantity of 1.

- **Lot** (if applicable.) The Lot number of the material being issued.

Expiration date of the lot being issued is shown, if applicable. This field displays only for items with lots that are capable of expiring.

- **Print Lbls** (if applicable). Swipe right to Select Yes/On.

NOTE: Print Lbls is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.

- **Qty to Print** (if applicable). Enter the number of labels to print.

QTY (avail/req). Refers to the number of items available and what is required for the operation number.
 QTY (issd/rem) – Refers to the number of items issued for the production order and what remains to be issued.

- **QTY:** The number of items to issue.
- **Serial.** The Serial number for the item produced.



Done You are finished issuing materials for the Production Order.

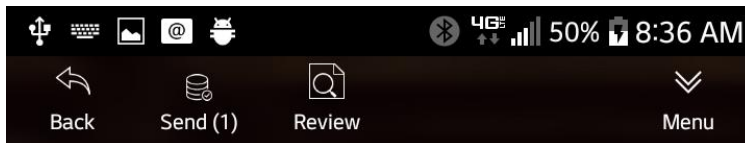
Reviewing and Deleting Transactions

You can review a record of all transactions or delete transactions before you send them to Acumatica. You can also print labels while you are in Review mode.

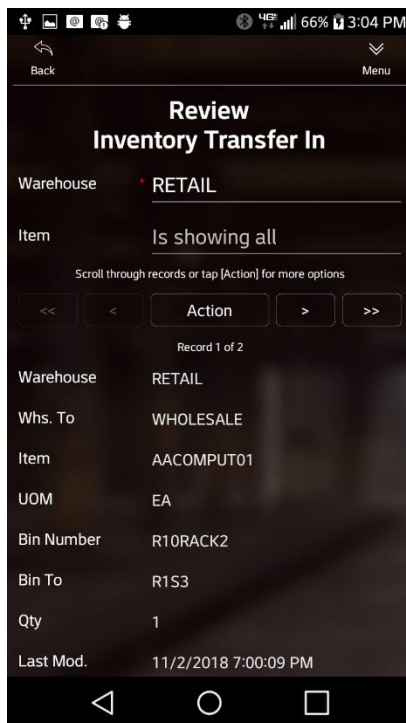
NOTE: On a screen where you are performing a transaction, the Review button will only appear if there is at least one transaction to send.

To review a record of transactions

1. In a screen where you are performing a transaction (for example Inventory Transfer, Sales Orders, etc.), tap **Review**.



The screen displays a list of all transactions that have not been sent to Acumatica. Fields with a red dot can be changed. As well, fields that display “Is showing all” can be changed to show only specific items, which will reduce the number of items listed.

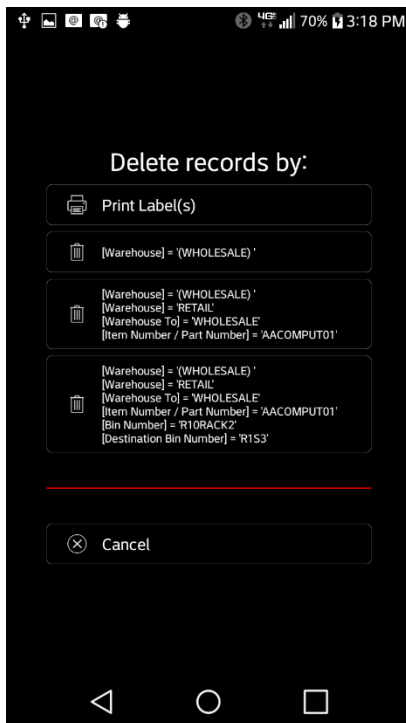


From any Review screen, you can view additional records. The total number of records displays below the Action button, and indicates which record number you are on (for example, Record 1 of 2).

- Tap the right arrow (>) button. To view the last transaction, tap the double right arrow (>>) button. (To return, tap the left arrow or double left arrow buttons.)

To print labels or delete transactions

1. Tap **Action**.
2. In the screen that appears, do one of the following:



- To print labels for transactions in view, tap **Print Label(s)**. Follow additional prompts to print.
- To delete a transaction, select the transaction. Tap **Yes**, when asked to confirm.

Troubleshooting

Synchronization

If moves, labor, or material issues have not synchronized correctly to Acumatica, you can re-sync them in batch. You can also request an updated Work Order from Acumatica.

1. On any screen, tap the **Menu** button in the upper right corner. Then, tap **Request Update Work Order**.
2. Select the work order type, and scan or enter the work order number.
3. Tap the **Send** button.

Inventory

- To reset pending quantity increase/decrease calculations that are used to determine quantity available, from any screen, tap the **Menu** button in the upper right corner. Then, tap **Reset Inventory Cache**.

Speed Test

Speed Test is used to test your connection to Scanco, from Scanco to the server, and the database speed. This function is typically used to troubleshoot issues.

1. From the main menu, tap **Utilities**.
2. Tap **Speed Test**.
3. You may be asked to tap the following options and provide results to Scanco:

- **Test Connection Speed.**
- **Short Speed Test.**
- **Big Data Speed Test.**