



Acumatica Warehouse

USER GUIDE FOR HANDHELD & MOBILE DEVICES

V. 18.11.02.1

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Introduction

Acumatica Warehouse is part of the Scanco software suite. This application allows Acumatica users in warehouse environments the ability to scan and collect information about inventory. The software consists of mobile apps that perform inventory adjustments, purchase receipts, sales order shipping, physical count and other types of adjustments. 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 Warehouse 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 is also 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 Warehouse 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 Warehouse

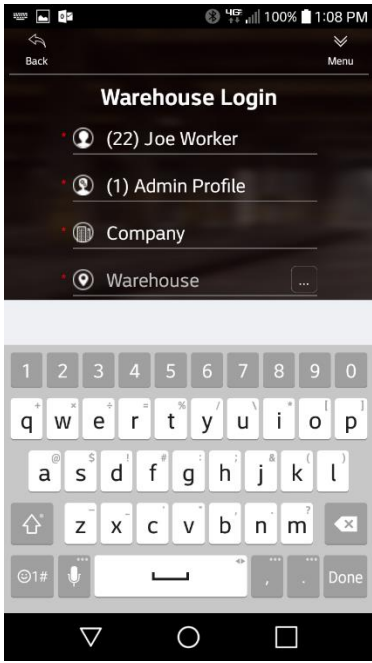
Log On and Off the App

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

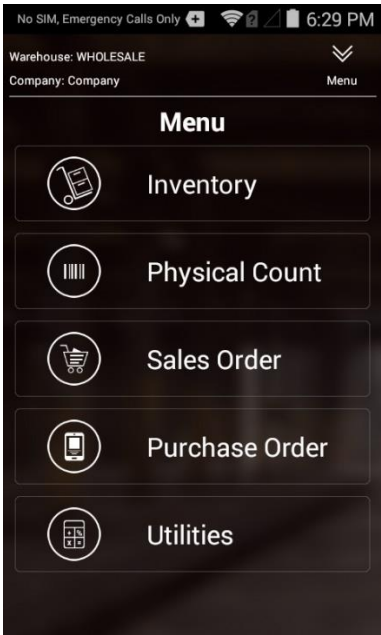
Open the Acumatica client. Scan your badge to login or tap in the **Login** and **Password** fields to enter your log on credentials.



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 Warehouse. This section describes the basics for working in the client.

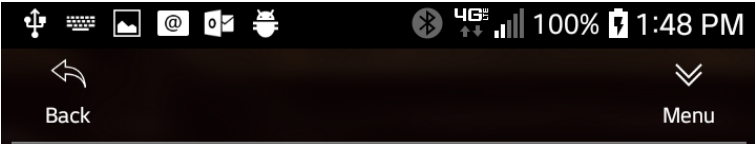
NOTE: You can also customize settings on your handheld to work optimally for you. See [Custom Device Settings](#).

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

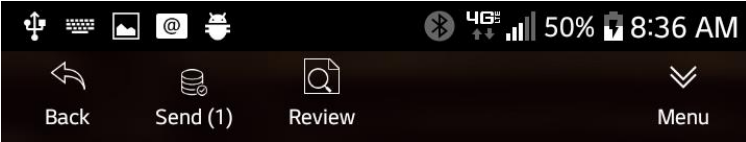
In each screen, you can return to the main menu or access additional options.



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

Send Button

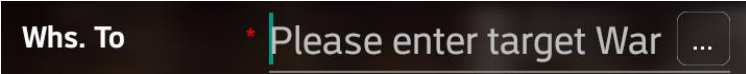
After performing one or more transactions, you can send them to Acumatica. The Send button includes the number of transactions waiting to be sent.



- 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.



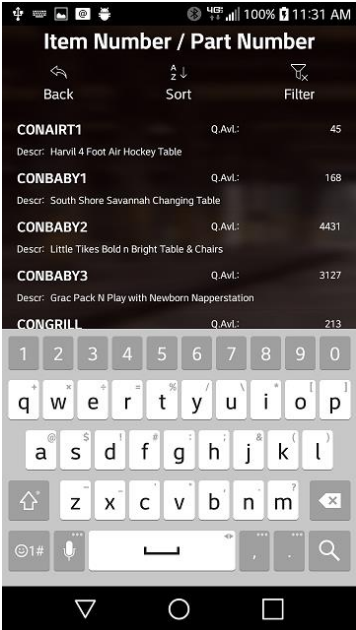
To sort lookup results

- 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.

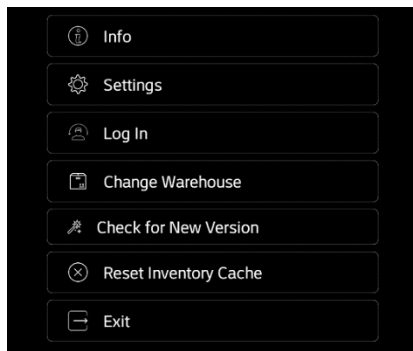
Instructions for printing are included in the procedures for each type of transaction. You can also print labels while reviewing transactions that have not been sent to Acumatica. See, [Reviewing and Deleting Transactions](#).

Custom Device Settings

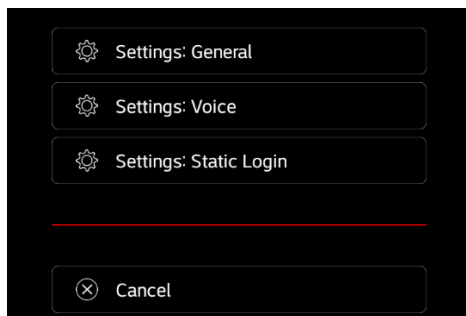
You can set up the handheld/mobile device to make it easier to work the way you do. For example, you can change the language, theme, sounds, and voice prompts for your device. You can also set the device to remember your login so you don't have to enter it each time.

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**.

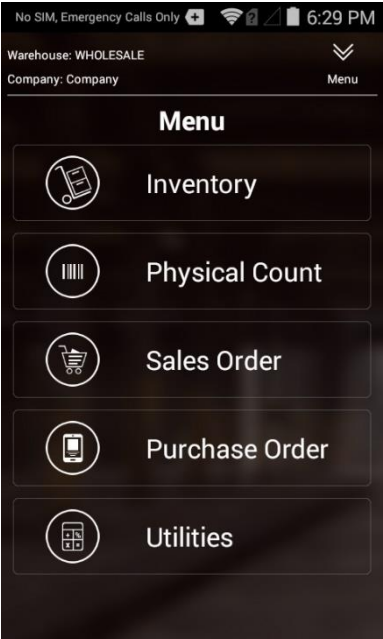
To set up the device to remember your login

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

Inventory Transfer

You can transfer inventory to and from warehouses and perform Bin transfers within the same warehouse.


- From the main menu, tap **Inventory**.



Inventory Transfer Out

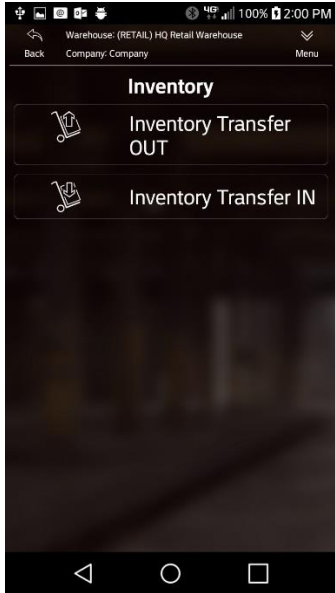

The Inventory Transfer Out option lets you transfer inventory from the warehouse where it currently resides to another warehouse. You can also transfer to and from Bins within the same warehouse.

1	Tap Inventory Transfer OUT .	A screenshot of the 'Inventory Transfer OUT' screen in the mobile application. The title is 'Inventory'. There are two main options: 'Inventory Transfer OUT' (with a forklift icon) and 'Inventory Transfer IN' (with a forklift icon). The screen also shows a back arrow, 'Warehouse: (RETAIL) HQ Retail Warehouse', and 'Company: Company'.
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<p>2</p>	<p>Scan or use a Lookup to complete the following. The Whs From field will be the default warehouse you logged into.</p> <ul style="list-style-type: none"> • Whs To. The warehouse you want to transfer inventory to. • Item. The item name/number to transfer. The item’s description will appear in the Descr field. NOTE: If prompted, you can scan aliases if they are set up in the system. See more in the note section below. • UOM (if applicable). Unit of measure may default based on your system settings. If not, and depending on the item to transfer, enter a unit of measure. • Bin From. The Bin you want to transfer the item from. • Bin To. The Bin you want to transfer the item to. • Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Lot (if applicable). The Lot number you want to transfer from. • Serial (if applicable). The Serial number for the item you want to transfer. The quantity of available items to move will appear. • Print Quantity (if applicable). Enter the number of labels to print. <p>NOTE: Print Quantity is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items to transfer. 	
<p>Notes</p>	<ul style="list-style-type: none"> • Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab. • Available quantity is calculated based on available quantity in Acumatica less any pending inventory reductions. Any pending inventory increases are not counted in the calculation at this time. 	
<p>Done</p>	<p>You have finished transferring inventory out of one warehouse (and or Bin) to another. You are prompted to transfer another inventory item, or you can exit.</p>	

Inventory Transfer In

You can use this option to transfer inventory into a warehouse, such as from a receiving warehouse into a main warehouse.

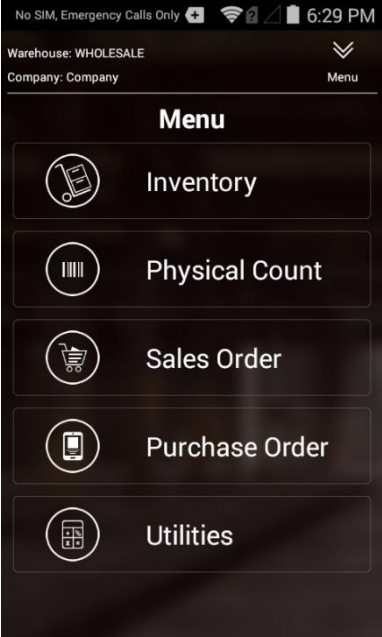
<p>1</p>	<p>Tap Inventory Transfer IN.</p>	
<p>2</p>	<p>Scan or use a Lookup to complete the following. The Whs To field will default to the warehouse you logged into.</p> <ul style="list-style-type: none"> • Whs From. The warehouse you want to transfer inventory from. • Item. The item name/number to transfer. The item’s description will appear in the Descr field. <p>NOTE: If prompted, you can scan aliases if they are set up in the system. See more in the note section below.</p> <ul style="list-style-type: none"> • UOM (if applicable). Unit of measure may default based on your system settings. If not, and depending on the item to transfer, enter a unit of measure. • Bin From. The Bin you want to transfer the item from. • Bin To. The Bin you want to transfer the item to. • Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Lot. The Lot number you want to transfer from. • Serial. The Serial number for the item you want to transfer. The quantity of available items to move will appear. 	

	<ul style="list-style-type: none">• Print Quantity (if applicable). Enter the number of labels to print. NOTE: Print Quantity is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.• Quantity. Enter the number of items to transfer.	
Notes	<ul style="list-style-type: none">• Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica's <i>Stock Item > Cross Reference</i> tab.• Inventory items must include a Lot and Serial Number if they are "When Received" lot/serial classes.• Available quantity is calculated based on available quantity in Acumatica less any pending inventory reductions. Any pending inventory increases are not counted in the calculation at this time.	
Done	You have finished transferring inventory out of one warehouse (and or Bin) to another. You are prompted to transfer another inventory item, or you can exit.	

Physical Count

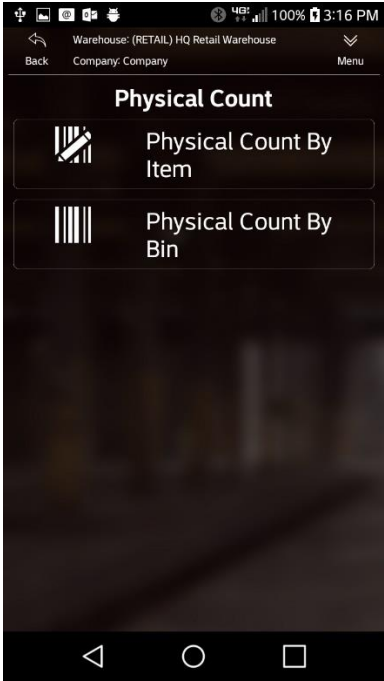

You can perform inventory counts (either full or cycle counts) against your current inventory in Acumatica. Depending on your system's settings, you may have the option to add inventory while performing physical counts.

- From the main menu, tap **Physical Count**.



Physical Count By Item


You can perform a physical count of inventory by item.

<p>1</p>	<p>Tap Physical Count by Item.</p>	 <p>The screenshot shows a mobile application interface with a dark theme. At the top, there's a status bar with icons for connectivity and battery. Below that, a header bar contains 'Warehouse: (RETAIL) HQ Retail Warehouse' and 'Company: Company'. The main content area is titled 'Physical Count' and features two large buttons: 'Physical Count By Item' (with a barcode icon) and 'Physical Count By Bin' (with a vertical bar icon). The bottom of the screen shows standard Android navigation icons.</p>
<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none">• Count Number. This is a reference number within Acumatica. <p>Warehouse. Defaults to the warehouse where the count is being done.</p> <ul style="list-style-type: none">• Item. The item name/number being inventoried. The item's description will appear in the Description field.• UOM (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.• Bin. The Bin location of the item.• Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none">• Print Lbls (if applicable). Swipe right to Select Yes/On. <p>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.</p>	 <p>The screenshot shows the 'Physical Count by Item' form in the application. It has a dark theme and includes fields for 'Count' (20), 'Warehouse' (WHOLESALE), 'Item' (AACOMPUT01), 'Description' (Acer Laptop Computer), 'UOM' (EA), and 'Bin' ((COUNTER) Counter Sales). There are also toggle switches for 'Scan Each' and 'Print Lbls', both currently set to 'No'. At the bottom, there's a 'Qty Counted' field showing '0 of 2' and a 'Qty' field with a prompt 'Please enter count quantity'. The top navigation bar includes 'Back' and 'Menu' options.</p>

	<ul style="list-style-type: none"> • Lot. The Lot number location of the item. • Serial. The Serial number for the inventoried item. <p>NOTE: The Qty Counted displays the number of items counted during physical inventory by one or more users. It does not include quantity on hand or available.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items counted. 	
Note	<ul style="list-style-type: none"> • Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab. • Inventory items must include a Lot and Serial Number if they are “When Received” lot/serial classes. • Available quantity is calculated based on available quantity in Acumatica less any pending inventory reductions. Any pending inventory increases are not counted in the calculation at this time. 	
Done	You have finished performing a physical count by item.	

Physical Count By Bin

You can perform a physical count of inventory by bin.

1	Tap Physical Count by Bin.	
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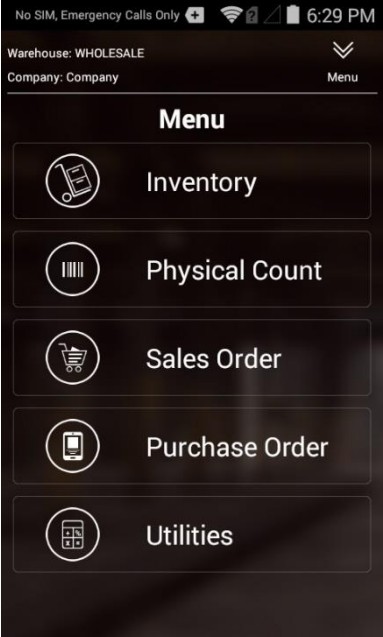
<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none"> • Count Number. This is a reference number within Acumatica. <p>Warehouse. Defaults to the warehouse where the count is being done.</p> <ul style="list-style-type: none"> • Item. The item name/number being inventoried. The item’s description will appear in the Description field. • UOM (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure. • Bin. The Bin location of the item. • Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Print Lbls (if applicable). Swipe right to Select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Lot. The Lot number location of the item. • Serial. The Serial number for the inventoried item. <p>NOTE: The Qty Counted displays the number of items counted during physical inventory by one or more users. It does not include quantity on hand or available.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items counted. 	
<p>Notes</p>	<ul style="list-style-type: none"> • Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab. • Inventory items must include a Lot and Serial Number if they are “When Received” lot/serial classes. • Available quantity is calculated based on available quantity in Acumatica less any pending inventory reductions. Any pending inventory increases are not counted in the calculation at this time. 	
<p>Done</p>	<p>You have finished performing a physical count by bin.</p>	

Sales Order (SO)

You can ship sales orders by order number or customer. If you do not have the quantity of items on hand to fill an order, you can ship the quantity available (short-ship) and ship the remaining later.


NOTE: You cannot ship more than the quantity on hand, or *over-ship*.

- From the main menu, tap **Sales Order**.



Sales Order (SO) Shipment by Order

SO Ship By Order lets you to ship sales orders to one customer at a time. Once the transaction is completed, there will be a new shipment generated in Acumatica.

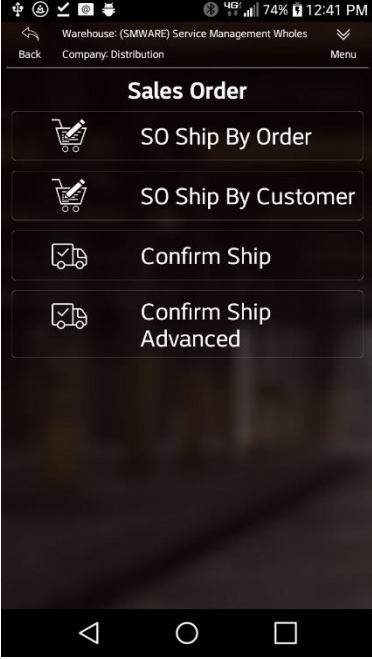
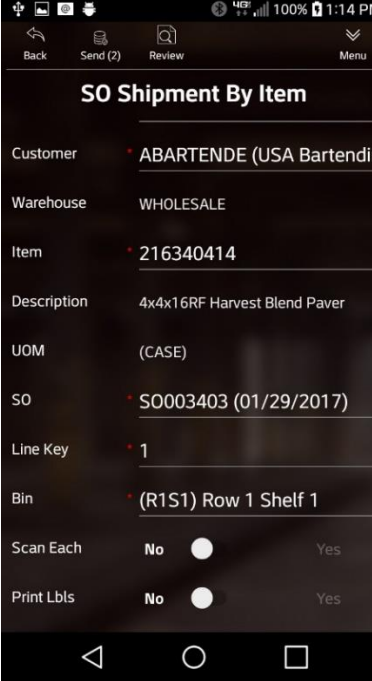
1	Tap SO Ship by Order .	
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<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none"> • Type. The order type will default to Sales Order (SO). • Sales Order. The SO number to ship. Customer name appears based on the SO selected. <p>Warehouse. Defaults to the warehouse you are logged into. NOTE: The order appears only if allocated to the warehouse you are logged into. If an order has line items in different warehouses, those will not appear in the warehouse you are logged into.</p> <ul style="list-style-type: none"> • Item. The item to ship. The item’s description will appear in the Description field. <p>NOTE: Item Prompt will allow you to scan aliases if they are set up in the system. See more in the note section below.</p> <ul style="list-style-type: none"> • Line Key. Use only when the item is listed more than once per order. • UOM (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure. • Bin. The Bin you want to ship the item from. • Lot (if applicable). The Lot number you want to ship from. • Serial (if applicable). The Serial number for the item you want to ship. • Print Quantity (if applicable). Enter the number of labels to print. <p>NOTE: Print Quantity is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.</p> <p>Qty Left/Ord shows the amount of items left to be fulfilled and total Quantity Ordered.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items to ship. <p>NOTE: If you do not have the number of items to fill the order, you can ship only the quantity available (short-ship).</p>	
<p>Note</p>	<p>Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab.</p>	
<p>Done</p>	<p>The order will ship, and the app will let you to select another order to ship.</p>	

Sales Order (SO) Shipment by Customer

SO Ship By Item lets you to ship multiple sales orders to your customer at the same time. Once the transaction is completed, there will be a new shipment generated in Acumatica.

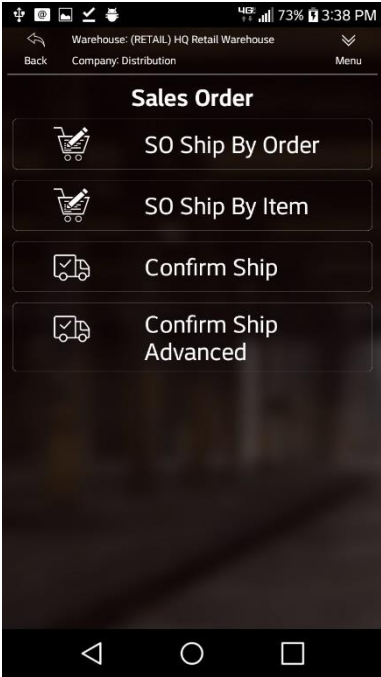
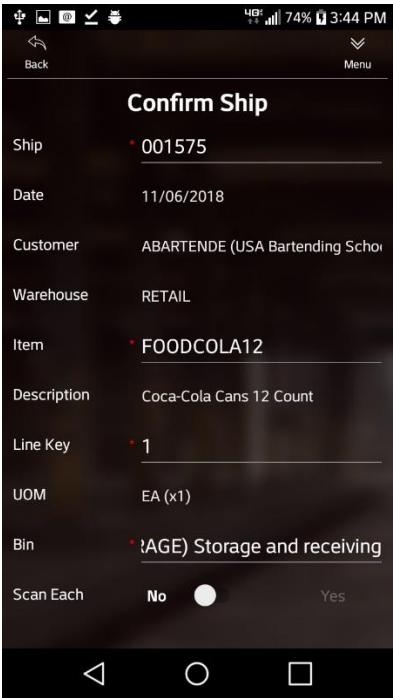
NOTE: You will require the Customer Code to perform this action.

<p>1</p>	<p>Tap SO Ship by Customer.</p>	
<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none">• Type. The order type will default to Sales Order (SO).• Customer. The customer to ship to. <p>Warehouse defaults to the warehouse you are logged into. NOTE: The order appears only if allocated to the warehouse you are logged into. If an order has line items in different warehouses, those will not appear in the warehouse you are logged into.</p> <ul style="list-style-type: none">• Item. The item to ship. The item's description will appear in the Description field. <p>NOTE: Item Prompt will allow you to scan aliases if they are set up in the system. See more in the note section below.</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.• SO. The SO associated with the customer and/or the item being shipped.	

	<p>NOTE: If this is a single order for an item or customer, the SO will automatically populate. If multiple orders with this same item are available, you must select the order to ship the item against.</p> <ul style="list-style-type: none"> • Line Key. Use only when the item is listed more than once per order. • Bin. The Bin you want to ship the item from. • Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Lot (if applicable). The Lot number you want to ship from. • Serial (if applicable). The Serial number for the item you want to ship. • Print Lbls (if applicable). Swipe right to Select Yes/On. <p>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.</p> <p>Qty Left/Ord shows the amount of items left to be fulfilled and total Quantity Ordered.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items to ship. <p>NOTE: If you do not have the number of items to fill the order, you can ship only the quantity available (short-ship).</p>	
<p>Note</p>	<p>Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab.</p>	
<p>Done</p>	<p>The order will ship, and the app will let you to select another item to ship.</p>	

Confirm Ship

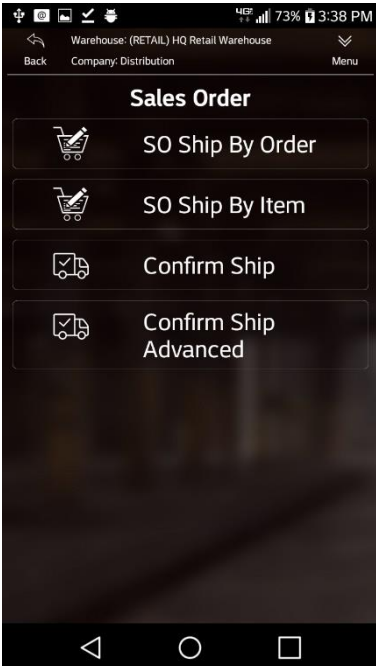

Confirm Shipment transactions let you scan in the generated shipment and confirm its allocations (Lot, Serial, and Bin information). Once the transaction is completed, the shipment will be released in Acumatica.

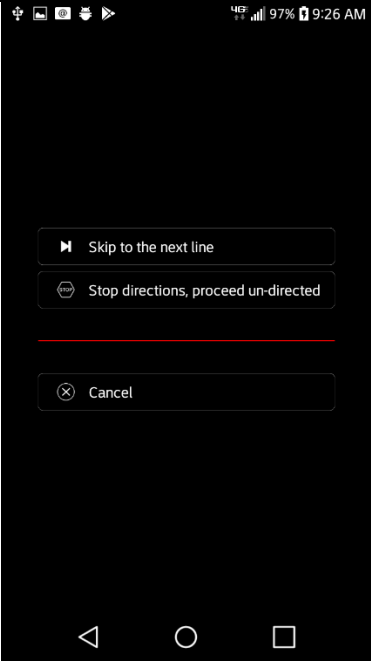
<p>1</p>	<p>Tap Confirm Ship.</p>	
<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none">• Ship. The shipping number you want to confirm. <p>The date the item shipped will appear, along with the customer name based on the shipping number selected. Warehouse defaults to the warehouse you are logged into.</p> <ul style="list-style-type: none">• Item. The item name/number to confirm being shipped. <p>NOTE: If prompted, you can scan aliases if they are set up in the system. See more in the note section below.</p> <ul style="list-style-type: none">• Line Key. Use only when the item is listed more than once per order.• UOM (if applicable). Unit of measure may default based on your system settings. If not, and depending on the item, enter a unit of measure.• Bin. The Bin the item shipped from.• Scan Each. Swipe right to select Yes/On. <p>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.</p>	

	<ul style="list-style-type: none"> • Lot. The Lot number the item shipped from. • Serial. The Serial number for the item shipped. The quantity of available items to move will appear. • Print Lbls (if applicable). Swipe right to Select Yes/On. <p>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.</p> <p>Qty Left/Ord shows the amount of items left to be fulfilled and total Quantity Ordered.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items being shipped. <p>NOTE: This may differ from what the order indicates as the total number of items may not be in stock, or some items will be shipped from a different bin or lot.</p> <p>WARNING: If the shipment includes more line items than you are able to send, all unconfirmed lines are removed from the shipment. As well, if you send line items that have “short” confirmation quantities, the shipment lines are adjusted to the quantities you sent.</p>	
<p>Note</p>	<p>Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via <i>Acumatica's Stock Item > Cross Reference</i> tab.</p>	

Confirm Ship Advanced

Confirm Ship Advanced transactions lets you scan in the generated shipment using either directed or undirected mode. “Directed” mode guides you through the warehouse to select items while confirming allocations (Lot, Serial, and Bin information). Once the transaction is completed, the shipment will be released in Acumatica.

<p>1</p>	<p>Tap Confirm Ship Advanced.</p>	
<p>2</p>	<p>Scan or use a Lookup to complete the following.</p> <ul style="list-style-type: none">• Ship. The shipping number you want to confirm. <p>The date the item shipped will appear, along with the customer name based on the shipping number selected. Warehouse defaults to the warehouse you are logged into.</p> <p>NOTE: Directed mode is the default. In the example shown, you are directed to select a specific Bin, Item, and Lot number.</p> <ul style="list-style-type: none">• To use Un-directed mode, tap Direct in the upper-right the screen. Then, go to Step 2a.• To continue in Directed mode, go to Step 3.	

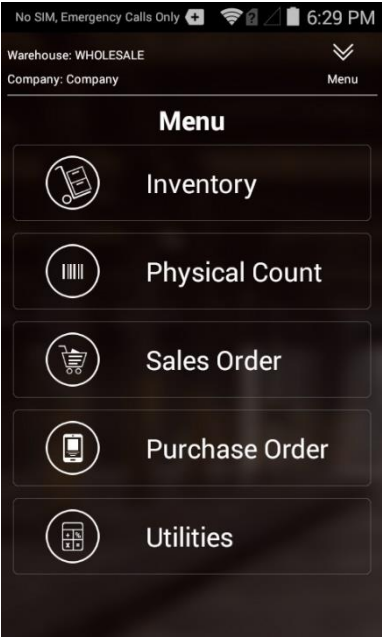
<p>2a</p>	<p>If the current item is not in the designated location, use Un-directed Mode to advance to the next line item, skipping items you cannot locate.</p> <ol style="list-style-type: none"> 1. Tap Skip to the next line. When complete, 2. Only when you have completed the pick-list, tap Stop directions, proceed un-directed. 	 <p>The screenshot shows a dark-themed mobile application interface. At the top, there are status icons for signal strength, Wi-Fi, and battery (97%), along with the time 9:26 AM. Below the status bar, there are three buttons stacked vertically. The first button has a right-pointing arrow icon and the text 'Skip to the next line'. The second button has a circular arrow icon and the text 'Stop directions, proceed un-directed'. The third button has an 'X' icon and the text 'Cancel'. At the bottom of the screen, there are three navigation icons: a back arrow, a home circle, and a recent apps square.</p>
<p>3</p>	<ul style="list-style-type: none"> • Bin. The Bin the item shipped from. • Item. The item name/number to confirm being shipped. <p>NOTE: If prompted, you can scan aliases if they are set up in the system. See more in the note section below.</p> <ul style="list-style-type: none"> • Line Key. Use only when the item is listed more than once per order. • UOM (if applicable). Unit of measure may default based on your system settings. If not, and depending on the item, enter a unit of measure. • Scan Each. Swipe right to select Yes/On. <p>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.</p> <ul style="list-style-type: none"> • Lot. The Lot number the item shipped from? • Lot Exp. The date the lot expires?? What's this mean? Enter the date as: mm/dd/yyyy. • Serial. The Serial number for the item shipped. The quantity of available items to move will appear. • Print Lbls (if applicable). Swipe right to Select Yes/On. <p>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.</p>	

	<p>Qty Left/Ord shows the amount of items left to be fulfilled and total Quantity Ordered.</p> <ul style="list-style-type: none">• Quantity. Enter the number of items being shipped. <p>NOTE: This may differ from what the order indicates as the total number of items may not be in stock, or some items will be shipped from a different bin or lot.</p> <p>WARNING: If the shipment includes more line items than you are able to send, all unconfirmed lines are removed from the shipment. As well, if you send line items that have “short” confirmation quantities, the shipment lines are adjusted to the quantities you sent.</p>	
Note	Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab.	

Purchase Order (PO)

This allows you to scan orders received into inventory.

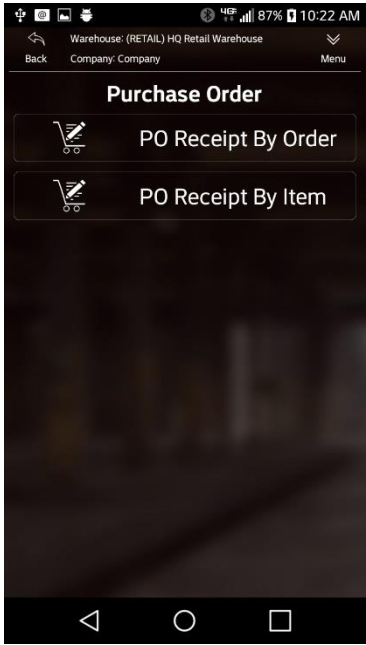
- From the main menu, tap **Purchase Order**.



PO Receipt by Order

PO Receipt by Order lets you scan orders in one at a time. This is used when multiple orders on the same PO arrive separately from the same vendor.

1 Tap **PO Receipt By Order**.



2 Scan or use a Lookup to complete the following. The Type field will default to “normal.”

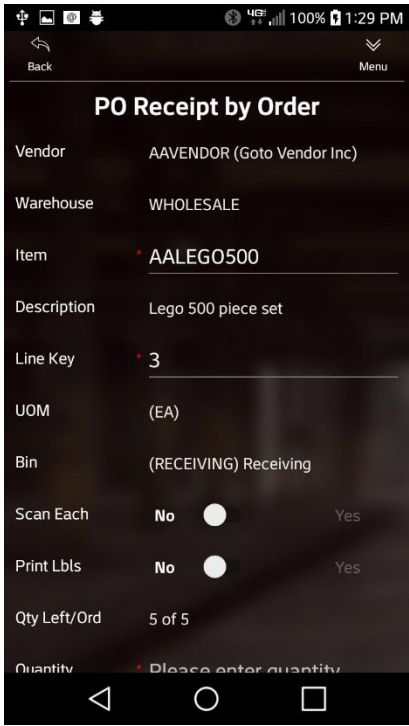
- **PO.** The PO number for the item(s) received. The Vendor name displays based on the PO number. The Whs. will default to the warehouse you logged into.
- **Item.** The name of the item received. The item’s description will appear in the Description field.
- **Line Key.** Use only when the item is listed more than once per order.
- **UOM** (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.
- **Bin.** The bin where the item will go. The bin may default depending on your system settings.
- **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.

- **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.

- **Lot.** The Lot number where the item will go.
- **Serial.** The Serial number for the item you received.

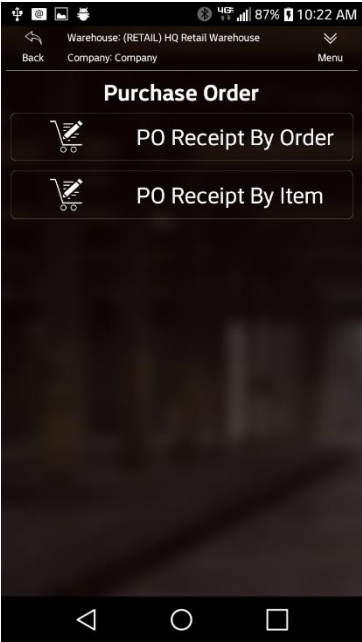


	<ul style="list-style-type: none"> • Print Quantity (if applicable). Enter the number of labels to print. <p>NOTE: Print Quantity is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.</p> <p>Qty Left/Ord refers to how many of this item are left to receive on the PO.</p> <ul style="list-style-type: none"> • Quantity. Enter the number of items being received. 	
Note	<ul style="list-style-type: none"> • Item Prompt for aliases are set up in <i>Utilities > Aliases</i> mobile application or via Acumatica’s <i>Stock Item > Cross Reference</i> tab. • Inventory items must include a Lot and Serial Number if they are “When Received” lot/serial classes. 	
Done	Items on the PO have been received into the warehouse.	

PO Receipt by Item

PO Receipt by Item lets you process receipt of items on multiple Purchase Orders from the same vendor, or when a mix of items are on one container.

NOTE: You will require the Vendor Code to perform this action.

1	Tap PO Receipt By Item .	 <p>The screenshot shows a mobile application interface for a warehouse. At the top, it says 'Warehouse: (RETAIL) HQ Retail Warehouse'. Below that, there are two buttons: 'PO Receipt By Order' and 'PO Receipt By Item'. The 'PO Receipt By Item' button is highlighted with a white border, indicating it is the selected option. The background is dark, and there are navigation icons at the bottom.</p>
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2 Scan or use a Lookup to complete the following. The Type field will default to "normal."

- **Vendor.** The vendor you received the item from.
- Whs. will default to the warehouse you logged into.
- **Item.** The name of the item received.
The item's description will appear in the Description field.
- **Line Key.** Use only when the item is listed more than once per order.
- **UOM** (if applicable). Unit of measure may default based on your system settings. If not, enter a unit of measure.
- **PO.** The PO number for the item(s) received.
- **Bin.** The bin where the item will go. The bin may default depending on your system settings.
- **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.

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

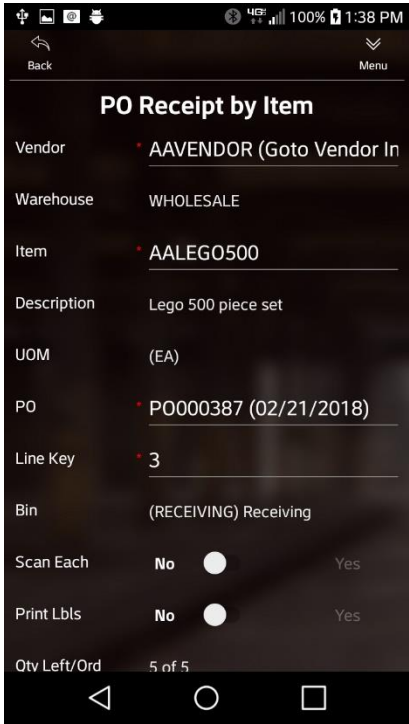
NOTE: Print Lbls is available only when SkyPrint is active. At least one print server must be set up and labels must be associated with this application.

- **Lot.** The Lot number where the item will go.
- **Serial.** The Serial number for the item you received.
- **Print Quantity** (if applicable). Enter the number of labels to print.

NOTE: Print Quantity 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 Left/Ord refers to how many of this item are left to receive on the PO.

- **Quantity.** Enter the number of items being received.



Note

- Item Prompt for aliases are set up in Utilities > Aliases mobile application or via Acumatica's Stock Item > Cross Reference tab.
- Inventory items must include a Lot and Serial Number if they are "When Received" lot/serial classes.

Done

Items on the PO have been received into the warehouse.

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.

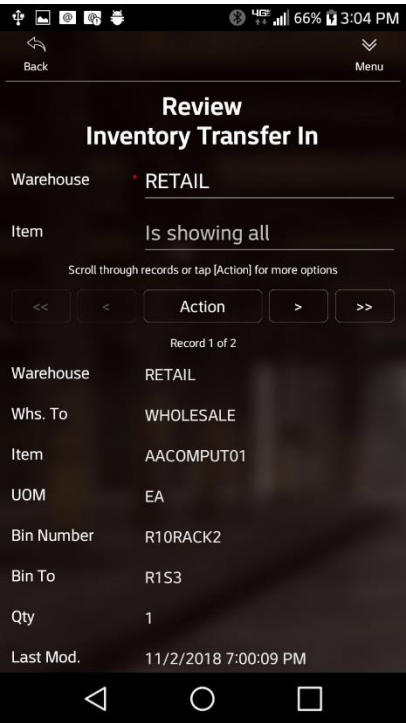
NOTE: On a screen where you are performing a transaction, the Review button will only appear if there is at least one transaction to send.

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.

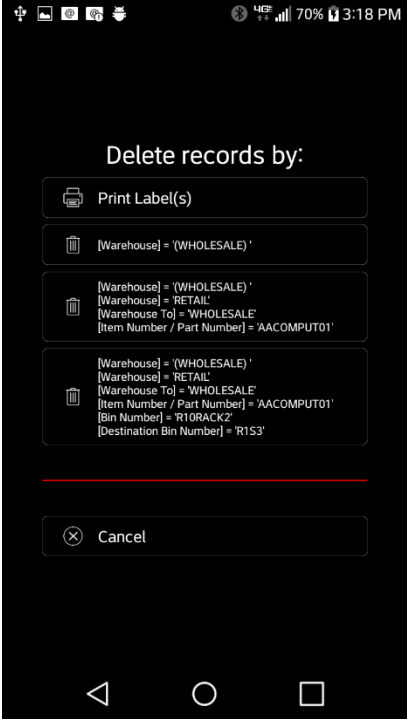


From any Review screen, you can view additional records. The total number of records displays below the Action button, and indicates which record number you are on (for example, Record 1 of 2).

- 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:

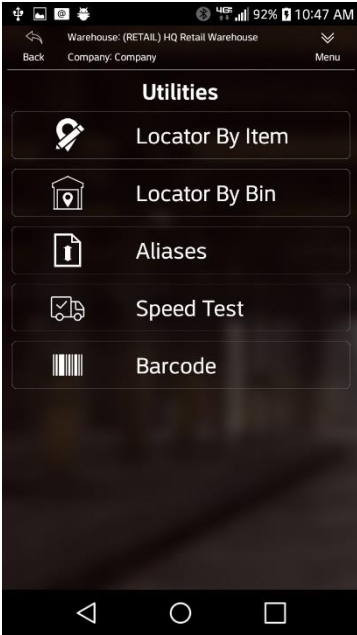


- To print labels for transactions in view, tap **Print Label(s)**. Follow additional prompts to print.
- To delete a transaction, select the transaction. Tap **Yes**, when asked to confirm.

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.



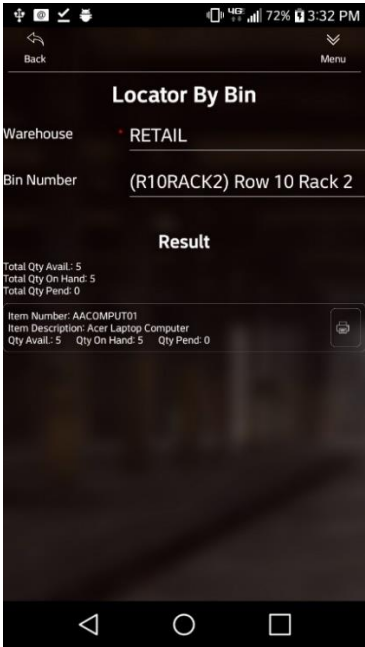
Locator by Item

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 the item you want to locate. The item’s description will appear in the Description field. • Bin. 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: 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>	

Locator by Bin

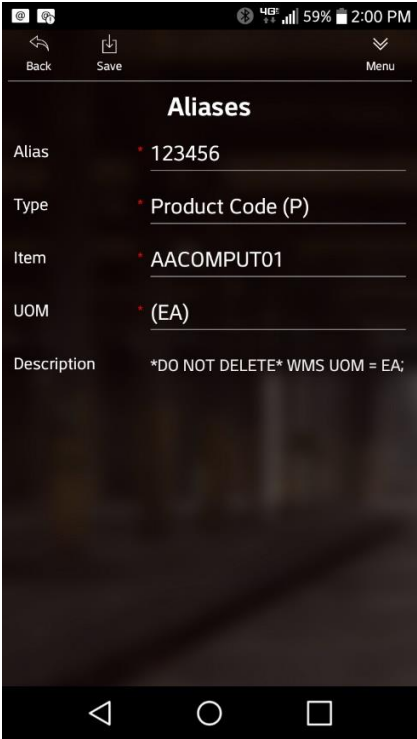
Locator by Bin is a quick way to lookup what inventory is stored in a specified bin. You can also print the details of any record you select.

	<ul style="list-style-type: none"> • Warehouse. The warehouse where you want to search for an item. • Bin. Will default to all showing. The bin where the item is located. <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.

	<ul style="list-style-type: none"> • Alias. Scan bar code for cross-reference. <p>NOTE: If an item’s alias already exists, when you enter or scan the alias, information about the item appears.</p> <ul style="list-style-type: none"> • Type. Type of alias you are creating. Select Customer, General, Product, or Vendor. <p>NOTE: Depending on the Type selected, required fields will appear.</p> <ul style="list-style-type: none"> • 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. 	
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IMPORTANT: If you are creating a new alias, you must tap Save for it to take effect.	
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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.

Troubleshooting

Synchronization

If sales orders, purchase orders or counts have not synchronized correctly to Acumatica, you can re-sync batch orders and counts or specify which orders to re-sync.

NOTE: Specifying individual orders to re-sync takes significantly less time. Re-synchronizing batch (all) orders and counts can take several minutes to hours depending on your database.

To re-sync one order at a time

1. From any **Sales Order**, **Purchase Order**, or **Physical Count** screen, tap the **Menu** button in the upper right corner.
2. Depending on the screen you are in, tap either **Request Update SO** or **Request Update PO**.
3. Select the order **Type** (if applicable) and **Order No.**
4. Tap **Send**.

To re-sync batch (all) orders

1. From any **Sales Order**, **Purchase Order**, or **Physical Count** screen, tap the **Menu** button in the upper right corner.
2. Depending on the screen you are in, tap either **Reload Sales Orders**, **Reload Purchase Orders**, or **Reload Counts**.
3. Tap **Send**.

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**.