



Quick Start Guide - Operations

1. Import from Quick Books using QB Sync tab. You will be prompted to supply information for new items and customers or you can accept all default options by selecting DONE.. If you accepted defaults, the records will remain marked "New" for additional processing later.
2. In order to proceed, you must add inventory quantity. Select Move and then Adjustments from Move screen. Select Add Found Items for each item. Supply location and quantity information. Locations are available from the drop-down selection.
3. Process Purchase Orders by selecting Receive and start at Step #2. Review each valid Purchase Order and print a picking sheet for each. To close the invalid Purchase Orders, proceed to step #3 and close them by selecting Close Order.
4. The first part of processing Customer Orders is to prepare and pick orders using Pick. The second part is tracking them from picked to shipped using Manage. Step #2 in Picking allows for modifying orders and designating them as available to release, OKAY TO RELEASE. After reviewing and selecting orders that can be released into the system, Step #3 will release those orders and allocate inventory and prepare a picking sheet. To print a picking sheet, select Manage, Reports and Print Picking Sheet.
5. After a Customer Order has been picked, it is entered into the system on Step #4 of Pick. Per the picking sheet, accept the qty under Picked, or enter a new qty. Then select Update Inventory.
6. Customer Orders have a predetermined operations path after they are picked. The user supplied path can be as simple as Picked to Shipped. Or can be several steps such as QC, Packed, Shipped.