

Pocket Inventory Quick Start Guide

How to Perform an Inventory Count (existing item)

1. Click "Count"
2. Scan barcode/key in barcode
3. Enter count amount with on screen keyboard
4. Click "Save" from bottom left of screen

How to Perform an Inventory Count (new item)

1. Click "Count"
2. Scan new barcode/key in new barcode
3. Enter Item Name
4. Select Department
5. Enter Cost
6. Enter Price
7. Click "OK"
8. Enter count amount with on screen keyboard
9. Click "Save" from bottom left of screen

How to Perform a Price Check

1. Click "Price Check"
2. Scan barcode/key in barcode
3. Verify Item Number, Item Name, Price, and In Stock level
4. Click "Save"

How to Perform an Inventory Adjustment

1. Click "Adjust"
2. Select appropriate reason code
3. Scan barcode/key in barcode
4. Enter adjustment amount with on screen keyboard
5. Click "Save"

Purchase Orders

Receive a Purchase Order

1. Click "Purchase Orders"
2. Click "Receive PO"

3. Highlight appropriate Purchase Order
4. Hit "Select" from bottom left
5. Highlight Rcvd and input amount received
6. Click "Order Status"
7. Check "Completed"
8. Click "Save"

Create a Purchase Order

1. Click "Purchase Orders"
2. Click "Create PO"
3. Select a Vendor
4. Input a Reference Number
5. Add Shipping Information (optional)
6. Select Due Date
7. Scan/key in barcodes to add to the Purchase Order
8. Click "Save"

Creating a DSD (Direct Store Delivery/Instant Purchase Order)

1. Click "Purchase Orders"
2. Click "DSD"
3. Select a Vendor
4. Input a Reference Number
5. Click "Add Items"
6. Scan/Key in barcodes to add to Purchase Order
7. Click "Save"

Creating a DSD Credit

1. Click "Purchase Orders"
2. Click "DSD Credit"
3. Select a Vendor
4. Input a Reference Number
5. Click "Add Items"
6. Scan/Key in barcodes to add to Credit
7. Click "Save"

Inventory Edits

1. Select "Edit"
2. Scan/Key In a Barcode
3. General Tab
 - a. Edit Item Name
 - b. Edit Department

4. Details Tab
 - a. Edit Location
 - b. Edit Number of Barcode Labels
5. Pricing Tab
 - a. Edit Cost
 - b. Edit Price
 - c. Edit Retail Price
6. Counting Tab (no options)
7. Vendor Tab
 - a. Edit Default Vendor
 - b. Edit Vendor Part Number