

NCH Software

Inventoria Stock Manager

This user guide has been created for use with
Inventoria Stock Manager Version 7.xx

Technical Support

If you have difficulties using Inventoria Stock Manager please read the applicable topic before requesting support. If your problem is not covered in this user guide please view the up-to-date Inventoria Stock Manager Online Technical Support at

www.nchsoftware.com/inventory/support.html.

If that does not solve your problem, you can contact us using the technical support contacts listed on that page.

Software Suggestions

If you have any suggestions for improvements to Inventoria Stock Manager, or suggestions for other related software that you might need, please post it on our Suggestions page at

www.nch.com.au/suggestions/index.html.

Many of our software projects have been undertaken after suggestions from users like you. You get a free upgrade if we follow your suggestion.

Inventoria Stock Manager

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Other Links

Options ~ Web Routing <http://www.nch.com.au/kb/10233.html>

Introduction

Thank you for installing Inventoria.

Inventoria is a professional stock management software for Windows and Mac OS X that allows you to manage inventory in one or several locations.

Features

- Simple, easy to use interface
- Monitor stock levels, costs and averages with easy to create reports
- Set low level stock warnings so you know when to reorder
- Transfer stock between locations with a few clicks
- Maintain a database of suppliers and customers
- Group common items into categories for easy stock management
- Create purchase orders and email them directly to your vendors
- Set-up recurring orders and have them sent automatically
- Add notes, URLs and photos to item description
- Scan in barcodes
- See product history of when items have been received or sold
- Have multiple users access the data via a web interface with just a single installation
- Restrict user access and powers (when used with web interface)

System Requirements

- Windows 98/2000/XP/2003/Vista/7/8/10
- Internet Connection (for sending reports by email)
- Printer (for printing reports)

Password Management

How to change your password

1. First, login to your account and click the "change password" link on the main page.
2. Enter your current password.
3. Enter the new password you wish to use.
4. Re-enter the new password to confirm it.
5. Click OK to finish.

Retrieve Your Password

Just click on "Forgot your password?" link on the login page, enter your email address and click Ok. An email containing your reissued password will be sent to your email box. For security reasons, your password will be reset every time that you retrieve your password.

Getting Started

After you first install Inventoria the startup wizard will run. This will prompt you for your company name, which will appear on top of all your reports.

After the startup wizard has run you should be able to add/purchase/sell items. All defaults should work "out of the box". Click on the Add New Item option and add your first test item.

When you have added your first item you can go back and fine tune Inventoria using the configuration Options (from the Tools menu). This lets you setup more detail about your business, tax rates etc.

Data Backup and Restore

It is essential to back up your Inventoria data often in the event that you lose data. Inventoria gives you several options for backing up your data, and makes it easy to restore your data when you need it.

To back up data, click the **Tools** menu and select **Back Up Data**. Select a method for backup depending on how you would like to access the data later on.

To restore data, click the **Tools** menu and select **Restore Data**. Confirm you want to restore, and browse to the location of your backup file.

See also:

- [Backup](#) in the Screen References section

Find Item

Use this window to find an item from the list. To open the Find Item dialog, either select **Find Item** from the Inventory menu, or press Ctrl+F.

An item can be found by typing a code or description into the Find Item window.

If the first item returned in list does not match your expectation, you can cycle to the next item in the list by selecting **Find Next Item** from the Inventory menu, or by pressing F3 on the keyboard.

Keyboard Shortcuts

The following list shows shortcuts for the most common tasks used in Inventoria:

- New Item **Ctrl+N**
- Edit Item **Ctrl+E**
- Duplicate Item **Ctrl+D**
- Delete Items **Del**
- Find Item **Ctrl+F**
- Find Next Item **F3**
- Open Web Access **Ctrl+W**
- Access Program Options **Ctrl+O**
- Open Help Documentation **F1**
- Exit (Turn Off) Inventoria **Alt+F4**

NCH Software Suite

This is a useful way to browse all the software available from NCH Software

You can see a set of products by type like Audio, Video and so on and view the product. From there you can try out the product and it will download and install it for you to trial. If you already have the product installed then you can click "Run It Now" and the program will be launched for you.

There is also a list of features for products in the category. Click on a feature, such as "Edit a Video File", to install a product with that ability.

Search

Search our website for products matching any keywords you type.

See more of our software

Browse our website for more software.

Subscribe to our newsletter

You can subscribe to our newsletter for announcements of new releases and discounts. You can unsubscribe at any time.

See the latest discounts for purchase

See the latest discounts we are offering for purchasing our products.

Software License Terms

Our goal is for every user to have a successful experience with our software. We offer it to you on the basis that you accept our End User License Agreement (EULA).

This EULA limits our liability and is governed by an arbitration agreement and venue agreement. Please read below as these terms affect your rights.

1. The copyrights in this software and any visual or audio work distributed with the software belong to NCH Software and others listed in the about box. All rights are reserved. Installation of this software and any software bundled with or installed-on-demand from this software, including shortcuts and start menu folders, is licensed only in accordance with these terms. These copyrights do not apply to any creative work made by you, the user.
2. By installing, using or distributing the software you, on your own behalf and on behalf of your employer or principal, agree to these terms. If you do not agree to any of these terms, you may not use, copy, transmit, distribute, nor install this software - return it to the place of purchase within 14 days to receive a full refund.
3. This software, and all accompanying files, data and materials, are distributed "as is" and with no warranties of any kind, whether express or implied except as required by law. If you intend to rely on this software for critical purposes you must test it fully prior to using it, install redundant systems and assume any risk.
4. We will not be liable for any loss arising out of the use of this software including, but not limited to, any special, incidental or consequential loss. Your entire remedy against us for all claims is limited to receiving a full refund for the amount you paid for the software.
5. You may not use this software in any circumstances where there is any risk that failure of this software might result in a physical injury or loss of life. You may not use this software if you do not regularly backup your computer, or do not have antivirus and firewall software installed on the computer, or keep sensitive data unencrypted on your computer. You agree to indemnify us from any claims relating to such use.
6. You may copy or distribute the installation file of this software in its complete unaltered form but you may not, under any circumstances, distribute any software registration code for any of our programs without written permission. In the event that you do distribute a software registration code, you will be liable to pay the full purchase price for each location where the unauthorized use occurs.
7. Use of data collected by the software is subject to the NCH Software Privacy Statement which allows automatic anonymized collection of usage statistics in limited circumstances.
8. Choice of Law. If you reside in the United States, your relationship is with NCH Software, Inc, a United States company, and this agreement is governed by the laws and courts of Colorado. If you reside anywhere in the world outside of the United States, your relationship is with NCH Software Pty Ltd, an Australian company, and this agreement is governed by the laws and courts of the Australian Capital Territory. Such courts have continuing and exclusive jurisdiction over any dispute between you and us, regardless of the nature of the dispute.
9. U.S. Customers Only: Arbitration Agreement and Class Action Waiver: PLEASE READ THIS CAREFULLY. IT MAY AFFECT YOUR RIGHTS.

If you reside in the United States, NCH Software and you agree to arbitrate all disputes and claims between us. This agreement to arbitrate is intended to be broadly interpreted. References to "NCH" "you," and "us" include our respective subsidiaries, affiliates, agents, employees, predecessors in interest, successors, and assigns. This arbitration agreement does not preclude you from bringing issues to the attention of U.S. federal, state, or local agencies. Such agencies can, if the law allows, seek relief against us on your behalf. This Agreement evidences a transaction in interstate commerce, and thus the Federal Arbitration Act governs the interpretation and enforcement of this provision. This arbitration provision shall survive termination of this Agreement.

A party who intends to seek arbitration must first send to the other, by certified mail, a written Notice of Dispute ("Notice"). The Notice to NCH should be addressed to:

Legal Department
NCH Software, Inc.
6120 Greenwood Plaza Blvd, Ste 120
Greenwood Village CO, 80111
USA

("Notice Address"). The Notice must (a) describe the nature and basis of the claim or dispute; and (b) set forth the specific relief sought ("Demand"). If NCH and you do not reach an agreement to resolve the claim within 30 days after the Notice is received, you or NCH may commence an arbitration proceeding. The amount of any settlement offer made by NCH or you shall not be disclosed to the arbitrator.

A. The arbitration will be governed by the Commercial Arbitration Rules and the Supplementary Procedures for Consumer Related Disputes (collectively, "AAA Rules") of the American Arbitration Association ("AAA"), as modified by this Agreement, and will be administered by the AAA. The AAA Rules are available online at adr.org, by calling the AAA at 1-800-778-7879, or by writing to the Notice Address. The arbitrator is bound by the terms of this Agreement. All issues are for the arbitrator to decide, including issues relating to the scope and enforceability of the arbitration provision. Unless NCH and you agree otherwise, any arbitration hearings will take place in Greenwood Village Colorado. If your claim is for \$10,000 or less, we agree that you may choose whether the arbitration will be conducted solely on the basis of documents submitted to the arbitrator, through a telephonic hearing, or by an in-person hearing as established by the AAA Rules. If your claim exceeds \$10,000, the right to a hearing will be determined by the AAA Rules. Regardless of the manner in which the arbitration is conducted, the arbitrator shall issue a reasoned written decision. NCH will pay all AAA filing, administration, and arbitrator fees for any arbitration initiated in accordance with the notice requirements above. If, however, the arbitrator finds that either the substance of your claim or the relief sought in the Demand is frivolous or brought for an improper purpose then the payment of all such fees will be governed by the AAA Rules. In such case, you agree to reimburse NCH for all monies previously disbursed by it that are otherwise your obligation to pay under the AAA Rules. In addition, if you initiate an arbitration in which you seek more than \$75,000 in damages, the payment of these fees will be governed by the AAA rules.

B. The arbitrator may award declaratory or injunctive relief only in favor of the individual party seeking relief and only to the extent necessary to provide relief warranted by that party's individual claim. **YOU AND NCH AGREE THAT EACH MAY BRING CLAIMS AGAINST THE OTHER ONLY IN YOUR OR ITS INDIVIDUAL CAPACITY, AND NOT AS A PLAINTIFF OR CLASS MEMBER IN ANY PURPORTED CLASS OR REPRESENTATIVE PROCEEDING.** Further, unless both you and NCH agree otherwise, the arbitrator may not consolidate more than one person's claims, and may not otherwise preside over any form of a representative or class proceeding. If this specific provision is found to be unenforceable, then the entirety of this arbitration provision shall be null and void.

C. Notwithstanding any provision in this Agreement to the contrary, we agree that if NCH makes any future change to this arbitration provision (other than a change to the Notice Address) you may reject any such change by sending us written notice within 30 days of the change to the Arbitration Notice Address provided above. By rejecting any future change, you are agreeing that you will arbitrate any dispute between us in accordance with the language of this provision.

D. To opt out of this Arbitration Agreement and class action waiver send an Opt Out notice to the Notice Address stating "I am electing to opt out of the Arbitration Agreement and class action waiver contained in the Legal Terms applicable to my purchase of an NCH product." Your Opt Out Notice must include the date and proof of purchase. The Opt Out Notice must be postmarked no later than thirty (30) days after the date of purchase. A separate Opt Out Notice must be sent for each product purchased.

Common Tasks - Common Tasks: Summary Overview

Adding new item Click Add New Item on the main window. Enter item code, description, price, cost. You can select a different location and/or category for the item. You can enter also quantities for the item. When all the details are correct you can save the item. Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Common Tasks - Common Tasks: Order Stock

Ordering Stock Click Order Stock on the main window. Enter or select the supplier name. Click on the Add Item button to enter the items you wish to buy. You can select the item codes from the drop down box to fill in the rest of the details for you. When all the details are correct there are several options:

- Record and Preview: Save (or record) and preview the order.
 - Record and Print: Send the order to a printer.
 - Record and Email: Turn the order into a pdf and send it to the customer's email address.
 - Record and Fax: Send the order to the customer's fax number.
 - Save as Draft: Save the order. It can be altered and sent later.
 - Save as Recurring: Save the order with a schedule of when and how often it is to be sent. When the order is due to be sent Inventoria will first confirm that the order is to be sent then automatically send it using whatever method was last used (i.e. Print, Email or Fax).
- Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Common Tasks - Common Tasks: Import Items

Importing Items from a CSV text file Click Import Items from CSV on the main window. Enter or select the file name.

The input text file should have the format ItemCode, Description, Category, Location, Quantity, Cost Price, Sales Price, Tax.

The tax field may be left blank to assign the default tax to each item. Otherwise, it is an integer representing the tax type. Enter 0 for no tax, or 1, 2, or 3 to select the respective tax from the Options -> Tax dialog.

Multilingual Support

Western Languages - If you are using Excel, save your import file using the "CSV (Comma delimited)" or "Unicode text" file type.

Eastern Languages - If you are using Excel, save your import file using the "Unicode text" file type. If you are using OpenOffice, choose the "Unicode (UTF-8)" character set.

Web Access - Items List

The main functionalities in the Items page are: View the different items; to open the Items page, click the Items link from web access control panel. The default list includes all items that you have entered with Inventoria. Different methods of viewing are available so that you can filter specific items by:

- Category
- Location
- Item

You may also sort the list of items by clicking on a criterion of your choice from the first row of the list. Your options are: Item, Description, Category, Location, Tax, Cost, Price, Quantity, and Measure.

The remaining columns in the listing offer you the convenience of receiving, selling, editing, transferring, or deleting an item by clicking on its corresponding symbol under the Receive, Sell, Edit, Transfer, and Delete headings. You may also edit an item by clicking its link under the Item title in the list. Note that users with "Viewer" privileges will not be able to add, edit, or perform any other actions with items other than viewing their properties.

From the main Item page, at the bottom you can also:

- Add a new item by clicking the button "Add New Item."
- View the list of item previously received by clicking the button "View Receive History."
- View the list of items sold by clicking the button "View Sales History."
- View the list of transfer by clicking the button "View Transfer History."

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Transfer List

The main functionalities in the Transfer List page are: View the different transfer requests; to open the Transfer List page, click the Items link from web access control panel. Then click View Transfer History at the bottom of the page.

You may sort the list of items by clicking on a criterion of your choice from the first row of the list. Your options are: Transfer, Status, Origin, Destination, Request Date, Request By, Send Date, Sent By, Receipt Date, and Received By.

The remaining columns in the listing offer you the convenience of viewing, editing, sending, receiving, and cancelling a stock transfer by clicking on its corresponding symbol. Note that users with "Viewer" privileges will not be able to edit, send, receive, or delete transfers.

Web Access - Transfer Sent/Received By

This dialog allows you to designate the person who sent/received this transfer. Names must be set up in the desktop version of Inventoria.

Web Access - View Transfer

The main functionality in the View Transfer page is: View the details of a transfer request; to open the View Transfer page, click the Items link from web access control panel. Then click View Transfer History at the bottom of the page. Finally, click the "view" icon corresponding to the transfer you want to see.

The View Transfer page shows:

- The origin and destination of the transfer
- The quantity to be transferred
- The person who requested the transfer
- Any notes about the transfer
- Information about the availability of the item at the origin location

It is also possible to create a printable PDF with the transfer details by clicking "Create PDF."

Web Access - Add/Edit Item

The Add/Edit Item window is where you fill in the details for items. To access the Add/Edit Item window, click **Add New Item** from the Items List or click edit on one of the existing items. Note that users with "Viewer" privileges will not be able to add or edit items.

Item Code

Enter the code for the item. If you have the right equipment (e.g., barcode reader) you may scan the item code instead. Make sure the cursor is in the Item Code field.

Item Description

Enter a description of the item.

Category

Select the category of this item.

Sub-Category

Select the sub-category of this item.

Bill of Materials

Open the Bill of Materials page. If the new item you are creating is a package or bundle of other items, use the Bill of Materials to specify those items and to help you estimate costs. This button does not appear when this item is part of another item's Bill of Materials.

Unit Cost

Enter the unit cost of the item.

Unit Price

Enter the unit price of the item.

Tax

Select the type of tax to apply to orders of this item.

Unit Measure

Enter a unit of measure for the item.

Item Image

Showing an image of the item.

Item Image(bmp/jpg)

Select an image for the item.

Item Note

Enter a note about the item.

Item Website

Enter a website for the item.

Custom Fields

When custom fields are enabled on the Item tab of Options, they will appear here, at the bottom of the Item tab of the Add New Item window. You can specify two custom fields.

Inventory tab: manage the inventory stock levels

Click if you would like to manage the quantities of this item using Inventoria.

Quantity

The quantity currently on hand.

Ideal Quantity

The quantity you would most like to keep on hand.

Warning Quantity

Inventoria will warn that stock of this item is running low when the quantity entered here is reached. You may check the box to "Send an email when quantity goes down to warning."

Send an email when quantity goes down to warning

Check this box to receive an email notification. Email settings can be configured in the desktop program under Options -> Other -> Email Settings.

Default Supplier

Select the supplier for this item.

Record

Save the current item and return to the Items List.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Receive History

Use this page to view receive history for items.

You can use controls near the top of the page in order to filter history by date, item's ID, location, supplier.

You can sort the list by Quantity, Item, Cost, Date, Location, Supplier, Order, Amount, or Note.

You can return to main items' list page by clicking on the Item link on top of the page.

Web Access - Sales History

Use this page to view the history of sold items.

You can use controls near the top of the page in order to filter history by date, item's ID, location, supplier.

You can sort the list by Quantity, Item, Cost, Date, Location, Supplier, Order, Amount, or Note.

You can return to main items' list page by clicking on the Item link on top of the page.

Web Access - Transfer Stock

Use this page to transfer stock between locations. Note that users with "Viewer" privileges will not be able to complete transfers using the web interface.

The list shows you the available quantities of the item you selected in each of the locations where it exists.

You can use drop-down controls to select the From Location and the "Transfer To Location." Then enter the Quantity you would like to transfer. Please make sure it is already available at the source (i.e., From Location).

Use the "Requested By" list to choose the employee responsible for this transfer. You can add employees by opening the stock transfer dialog in the desktop version of Inventoria.

Transfer functionality is restricted for users with viewer-only privileges.

Web Access - Sell and Purchase Item

Sell Item

Use this page to sell the item, identified by Item Code, you have selected. You need to enter the:

- Quantity (default is 1) you wish to sell,
- Location from which you want to item to be sold,
- Customer whom you are selling the item to,
- Sales Price and Date of Sale, and any
- Note you might have about this sell.

You may check the "Damaged/lost item" box if you are not actually selling that item.

The remaining three fields show the Current, Ideal, and Warning Quantity; information you might need when selling an item.

Note that users with "Viewer" privileges will not be able to sell items using the web interface.

Purchase Item

Use this page to purchase the item, identified by Item Code, you have selected. You need to enter the:

- Quantity (default is 1) you wish to purchase,
- Location which you want the item be purchased to,
- Supplier from whom you are purchasing the item,
- Receive Cost and Receive Date, and any
- Note you might have about this purchase.

The remaining three fields show the Current, Ideal, and Warning Quantity; information you might need when purchasing an item.

Sell, and purchase functionality is restricted for users with viewer-only privileges.

Web Access - Orders List

The main functionalities in the Orders page are: View the Orders; to open the Orders lists, click on the Orders link in the web access control panel. The default list shows the orders you have entered and recorded with Inventoria. You may switch to show orders that you have started but not completed yet by clicking on Display Draft tab at the top of the page. The Display All tab shows you all the orders including recorded, draft and recurring. Click the Display Recurring tab to display recurring orders only. Then, you can click "Run Selected Button" to generate all currently due orders for the selected recurring order, according to its schedule.

You may sort the list of orders by clicking on a criterion of your choice from the first row of the list. Your options are: Issue Date, Receipt Date, Order, Supplier, Amount, and Status.

The remaining columns in the listing offer you the convenience of editing, receiving, or deleting an order by clicking on its corresponding symbol under the Edit, Receive, and Delete headings. Note that users with "Viewer" privileges will not be able to create or edit orders using the web interface.

From the main Orders page, at the bottom you can also:

- Add a new order by clicking the button "Add New Order"
- View the list of items on order by clicking "View Items On Order"
- Order stocks that are low by clicking "Order Low Stocks"

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Select Company

This page provides a dialog which allows the selection of the company you wish to view. This is particularly useful when multiple businesses are setup.

Web Access - Add/Edit Order

You can add a new order or edit an existing one. You need to select the:

- Supplier, from whom you are ordering,
- Issue Date, of the order,
- Expected Receipt Date, of the order,
- Tax, that applies to this order, and
- Location, where the order should get.

Also, you need to enter the:

- Bill To, information about who will take care of the bill,
- Ship To, address where the order should get,
- Tracking Ref#, to keep track of the order,
- Ship by, enter the company or service you used for shipping,
- Note, you might have about the order, and
- Internal Notes, you might want to keep for your records.

You may use the control in the following table to select and Add Item to your order.

Last, you will be able to:

- Create PDF: save the order as a PDF document
- Save as Draft: to come back and finish the order later
- Save as Recurring: to make that order a recurring one
- Record: Just save (or record) the order

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Order Low Stock

You may use this page to order low-stock items. You may choose between:

- All items with stock below ideal quantity, or
- Items with current stock percentage below ideal quantity. in this case you may chose a threshold by selecting Percent below, between 10% and 50%.

You may select which low stocks to order using the check-box at the left of each potential item.

For each item you may:

- select the Supplier, from which to order,
- enter the Order Qty, to specify the quantity you wan to order
- enter the Cost, that you will be paying for the item, or
- accept the default settings.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Customers List

The main functionalities in the Customers page are:

- View the list of your customers that you have entered with Inventoria. To open the Customers list, click the Customers link from the web access control panel.
 - You may sort the list by customer's Name or by any Note you might have about the customer by clicking on the headings in the first row of the list.
 - You can also Edit or Delete any customer at any time by clicking the Edit or Delete button associated with a customer listing. You may also edit a customer by clicking on the link under the Name column of the list.
 - Finally, to add a new customer click the "Add New Customer" button at the bottom.
- Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Add/Edit Customer

The Add/Edit Customer window is where you fill in the information about a customer. To access the Add/Edit Customer window, click **Add New Customer** from the Customers List or click Edit on one of the existing customers.

Customer name

Enter the name of the customer.

Contact Person

Enter the full name of your contact person from that customer.

Contact First Name

Enter the first name of that contact.

Billing address

Enter the full billing address of the customer (Street, City, State, ZIP Code, and Country).

Contact information

Enter the contact information of the customer (Phone and Fax numbers, and an Email address).

Other Options

You may enter further information related to the customer, including a Shipping address, an associated Salesperson, along any Notes you might wish to add.

Save Changes whenever you are done entering the customer's details.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Suppliers List

View the list of your suppliers that you have entered with Inventoria. To open the Suppliers list, click the Suppliers link from the web access control panel.

You may sort the list by supplier's Name or Address by clicking on the headings in the first row of the list.

You can also Edit or Delete any supplier by clicking the edit or delete symbol associated with a supplier listing. You may also edit a supplier by clicking on the link under the Name column of the list.

Finally, add a new supplier by clicking the "Add New Supplier" button at the bottom of the page.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Web Access - Add/Edit Supplier

Use the Add/Edit Supplier page to fill in the information about a supplier. To access the Add/Edit Supplier page, click **Add New Supplier** from the Supplier List or click Edit on one of the existing suppliers.

Supplier Name

Enter the name of the supplier.

Contact Person

Enter the full name of your contact person from that supplier.

Contact First Name

Enter the first name of that contact.

Address

Enter the full address of the Supplier (Street, City, State, ZIP Code, and Country).

Contact information

Enter the contact information of the supplier (Phone and Fax numbers, and an Email address).

Press **OK** button whenever you are done entering the supplier's details.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Categories List

View the list of your stocks by category or sub-category as entered with Inventoria. All items must be given a category when created. To open the Categories list, click the Categories link from the web access control panel.

You may sort the list by Category or Sub-Category by clicking on the headings in the first row of the list.

You can also Edit or Delete any category when needed by clicking the edit or delete symbol associated with a category listing. You may also edit a location by clicking on the link under the Category or Sub-Category column of the list.

Finally, add a new category by clicking the "Add New Category" button at the bottom of the page.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Add/Edit Category

Use the Add/Edit Category page to add a new or fill in the information about an existing category. It is also possible to add, edit or delete Sub-Categories within the same page. To access the Add/Edit Category page, click **Add New Category** from the Category List or click Edit on one of the existing categories.

Note that users with "Viewer" privileges will not be able to create or edit categories using the web interface.

Web Access - Locations List

View the list of your locations that you have entered with Inventoria. To open the Locations list, click the Locations link from the web access control panel.

You may sort the list by location's Name or by its Address by clicking on the headings in the first row of the list.

You can also Edit or Delete any location at any time by clicking the edit or delete icons associated with the location listing. You may also edit a location by clicking on the link under the Name column of the list.

Finally, add a new location by clicking the "Add New Location" button at the bottom of the page.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Add/Edit Location

Use the Add/Edit Location page to add a new or fill in the information about an existing location you have. To access the Add/Edit Location page, click **Add New Location** from the Location List or click Edit on one of the existing location.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Web Access - Reports Page

The main functionalities in the Reports page are to provide you with inventory related reports, in a portable-document format (PDF) file. To open the Reports page, click the Reports link from the web access control panel. You may choose between the following reports:

- Inventory: prints all items that you have entered with Inventoria.
- Inventory by Location and Category lets you select, via a drop-down menu, which location and/or which category to print.
- Inventory with Image by Category lets you select, via a drop-down menu, which category you wish to print information, with the corresponding images you have saved, about your items in Inventoria.
- Low Level Stock prints a list of items that are low on stock, based on the threshold that you have pre-specified. The generated report will be given in a file named [lowLevel.pdf].
- Inventory by Supplier lets you select, via a drop-down menu, which supplier's inventory to print.
- Backorder report: lets you print a list of items that have been ordered but not yet received.
- Sales report: allows reporting of all sales within a user specified date range.

Web Access - Edit Notes for Transfer

This page allows you to enter and edit notes for this stock transfer.

General - CSV Import Wizard: Select CSV for Import

Select CSV for Import

CSV Import File

Enter the name of the CSV file containing the import or click the adjacent button to open a file browsing dialog.

A CSV (Comma-Separated Value) file contains data entries separated by a comma. Many spreadsheet applications allow the user to save entered data in the CSV format.

General - CSV Import Wizard: Match Data Fields

Match Data Fields

This page of the wizard provides a means of associating the headers in your CSV file with the fields supported by Inventoria Stock Manager.

To assign a header to a specific field, click on the cell adjacent to the field. A list of unassigned headers will display, from which you may select the header you wish to assign.

General - CSV Import Wizard: CSV Import Results

CSV Import Results

The results page shows how many items were successfully imported, how many rows failed to produce an import, as well as all relevant errors generated during the import.

Screen References - Add New Return Stock Item

Item:

Select the item for the order.

Description:

The items description (non editable).

Location:

Location of item.

Return Quantity:

Returned item quantity.

Cost:

Cost of item.

Screen References - Order Stock

Fill in the details for the order.

Order Supplier

Choose the Supplier from the pull down list.

Issue Date

The date of issuing the order.

Expected Receipt Date

The expected date of receiving the order.

Tax

Tax, that applies to this order.

Ship to(location)

Location, where the order should be shipped.

Bill To

Information about who will take care of the bill.

Ship To

The address of ship-to location.

Tracking Ref#

Tracking Reference number of the order.

Ship by

The company or service which was used for shipping.

Order Items

This is the list of items on the order. Click on the Add button to add a new item, or double-click in the list area to add an item and click the different cells to select different values for the item.

Click Remove to delete an item from the list.

Total

This is the sales tax and total display. If you think the sales tax calculation is wrong, please see the Tax tab of Options.

Record

- Record and Preview: Save (or record) and preview the order.
- Record and Print: Send the order to a printer.
- Record and Email: Turn the order into a pdf and send it to the customer's email address.
- Record and Fax: Send the order to the customer's fax number.
- Save as Draft: Save the order. It can be altered and sent later.
- Save as Recurring: Save the order with a schedule of when and how often it is to be sent. When the order is due to be sent Inventoria will first confirm that the order is to be sent then automatically send it using whatever method was last used (i.e. Print, Email or Fax).

Order Notes

These notes are printed on the bottom of the Order.

Internal Notes

These are notes for internal use only they are not printed on the Order.

Add, edit, and delete functionality is restricted for users with viewer-only privileges. Also, once an order has been received, it is no longer editable.

Screen References - Receive History

Use this window to view receive history for items.

You can use controls under the toolbar to filter the history by date, item, location, or supplier.

You can view the selected item by pressing the Open Item button or by pressing Ctrl-I.

You can view an order for the selected item by pressing the Open Order button on the toolbar or by pressing Ctrl-O.

You can view, print, or save the report by pressing the corresponding buttons on the toolbar.

Screen References - Sales History

Use this window to view sales history for items.

You can use controls under the toolbar to filter the history by date, item, location, or customer.

You can view the selected item by pressing the Open Item button or by pressing Ctrl-I.

You can view, print, or save the report by pressing the corresponding buttons on the toolbar.

Screen References - List Window

A list window shows all the elements of a group (e.g., Sales persons, units of measure).

Select

You can select a new element by pressing Select button.

Add

You can add a new element by pressing Add button.

Edit

You can edit selected element by pressing Edit button.

Delete

You can delete selected element by pressing Delete button.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Screen References - Sales Person List

A list window shows all the Sales persons.

Add

You can add a new Sales persons by pressing Add button.

Edit

You can edit selected Sales persons by pressing Edit button.

Delete

You can delete selected Sales persons by pressing Delete button.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Screen References - Sales Person List

A list window shows all the Sales persons.

Select

You can select a new Sales person by pressing Select button.

Add

You can add a new Sales persons by pressing Add button.

Edit

You can edit selected Sales persons by pressing Edit button.

Delete

You can delete selected Sales persons by pressing Delete button.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Screen References - Unit Measure List

A list window shows all the Unit measure.

Select

You can select a new Unit measure by pressing Select button.

Add

You can add a new Unit measure by pressing Add button.

Edit

You can edit selected Unit measure by pressing Edit button.

Delete

You can delete selected Unit measure by pressing Delete button.

Add, edit, delete, and save functionality is restricted for users with viewer - only privileges.

Screen References - Ship By List

The Ship by List displays the different shipping methods your company uses. You can access the Ship By list from the New Purchase Order window by clicking the icon to the right of the Ship By text field.

Select

You can select a new shipping method by clicking the Select button.

Add

You can add a new shipping method by clicking the Add button. This opens the **New Ship By** window, where you enter the shipping method used for the order.

Edit

You can edit the selected shipping method by clicking the Edit button.

Delete

You can delete the selected shipping method by clicking the Delete button.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Screen References - Items on Order

Use this window to view items that were ordered but haven't yet been received.

Open Order

You can view an order for the selected item by clicking this button on the toolbar, or from the desktop version by pressing Ctrl-O.

Screen References - Customers List

Use this window to view customers.

Add

You can add a new customer by pressing Add button.

Edit

You can edit selected customer by pressing Edit button.

Delete

You can delete selected customer by pressing Delete button.

Email

You can send an email to the selected customer by pressing Email button. Inventoria will run your default email client, so you can edit and send an email to the customer.

Call

You can make a call to a selected customer by pressing the Call button. Inventoria will download free NCH Express Talk software, which allows you to make calls through your computer.

Export Data for Mail Merge

You can export your customer list as a file that can be used in a word processor mail merge, which allows you to create form letters or mailing labels.

Add, edit, delete, and save functionality is restricted for users with viewer-only privileges.

Screen References - Report View

Use this window to preview, print or save a report.

Preview

You can preview a report by pressing the Preview button.

Print

You can print a report by pressing the Print button.

Save as PDF

You can save a report as a PDF file by pressing this Save button.

Save as CSV

You can save a report as a CSV file by pressing this Save button.

Email

You can email a report as a PDF file by pressing the Email button.

Fax

You can send a report by Fax as a PDF file by pressing the Fax button.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Categories List

Use this window to define the possible categories that can be assigned to an item. All items must be given a category when created.

Select (Optional)

Select a new category from the list. The Select button is only available if the Item dialog is open.

Add

Add a new category to the list.

Delete

Remove the currently selected categories from the list.

Edit

Edit the currently selected category. If more than one category is selected, this button will be disabled.

Category

List of available categories.

Sub-Category

List of available sub-categories for each category. Edit sub-categories from the category screen.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Locations List

Use this window to define locations where stock may be stored.

Add

Add a new location to the list.

Delete

Remove the currently selected locations from the list.

Edit

Edit the currently selected location. If more than one location is selected, this button will be disabled.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Orders List

Use this window to view and manage stock orders. You can sort the list of orders by clicking on the column headers, e.g., click on the 'Supplier' column heading to sort orders by supplier name.

Select

Select from the stock orders.

New

Create a new stock order.

Delete

Delete the currently selected orders.

Edit

Edit the currently selected order. If more than one order is selected, only the top most order is edited.

Receive Stock

Mark the selected order as stock received. If more than one order is selected, only the top most order is marked as received.

Preview

Preview the selected order as it would be printed to paper.

Print

Print the selected order to a printer of your choice.

Save

Save the selected order(s) as a PDF file.

Email

Email the selected order to a recipient as a PDF file attachment. You will be prompted for an email address to send to.

Fax

Fax the selected order to a fax machine. You will be prompted for a fax/phone number. Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Recurring Orders List

Use this window to view and manage recurring stock orders. You can sort the list of orders by clicking on the column headers e.g., click on the Supplier column heading to sort orders by supplier name. To open the Recurring Orders List, click the View Recurring Orders link under the Purchase heading in the explorer bar. Note that if no recurring orders have been set up, this link will not appear under the Purchase heading. For more information on how to set up a recurring order, see the topics [Common Tasks: Order Stock](#) and [Recurring Order Schedule](#) in this manual.

New

Click the New button in the toolbar to create a new recurring order. Make sure the Save as Recurring option is selected when the order is saved, or else the order will not recur.

Delete

To delete recurring orders, select the recurring order(s) to be removed from the list, and click the Delete button in the toolbar.

Edit

Click this button to edit the currently selected recurring order. This only applies to one recurring order at a time.

Schedule

Click the Schedule button to view or change the schedule for the selected recurring order.

Preview

Click the Preview button to see how the recurring order will appear when printed, saved as a PDF document, or emailed to a customer.

Run

Click the Run button to generate all currently due orders for the selected recurring order, according to its schedule.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Suppliers List

Use this window to manage the list of suppliers which stock is ordered from.

Select

Select a new supplier from the list. This button is only available if the Item dialog is open.

Add

Add a new supplier to the list.

Delete

Remove the currently selected supplier from the list.

Edit

Edit the currently selected supplier. If more than one supplier is selected, this button will be disabled.

Email

You can send an email to the selected customer by pressing Email button. Inventoria will run your default email client, so you can edit and send an email to the customer.

Call

You can make a call to a selected customer by pressing the Call button. Inventoria will download free NCH Express Talk software, which allows you to make calls through your computer.

Preview

You can preview a report of suppliers by pressing the Preview button.

Print

You can print a report of suppliers by pressing the Print button.

Fax

You can send a report of suppliers by Fax as a PDF file by pressing the Fax button.

Save

Click the Save icon in the toolbar to save a report of the suppliers as a PDF file.

Import

On the menu, click Supplier -> Import Suppliers from CSV. The following fields can be imported: Supplier Name, Contact Person, Contact First Name, Address, Phone, Secondary Phone, Fax, and Email.

Export

To export suppliers, select one or more suppliers in the list. Then on the menu, click Supplier -> Export Data for Mail Merge.

Add, edit, and delete functionality is restricted for users with viewer-only privileges.

Screen References - Stock Manager Transfer List

Use this window to view and manage stock transfers. You can sort the list of orders by clicking on the column headers, e.g., click on the 'Transfer' column heading to sort orders by transfer number.

New

Create a new stock transfer.

View

View the selected transfer. The transfer cannot be edited from here. To edit, cancel the current transfer and create a new transfer.

Notes

Create any notes that should accompany the transfer, such as handling information or delivery delays, etc., here.

Cancel

Cancel the currently selected transfer.

Send

Send the selected transfers from the sending location. This will update the Status of the transfers to In Transit.

Receive Stock

Mark the selected transfer as stock received. This will update the Status of the transfers to Received.

Preview

Preview the selected transfer as it would be printed to paper.

Print

Print the selected transfer to a printer of your choice.

Save

Save the selected transfer to a PDF file.

Screen References - Items List

Use this window to select an item.

Select

Select an item from the list.

Screen References - Transfer Sent By

This dialog allows you to designate the person who sent this transfer.

Screen References - Transfer Received By

This dialog allows you to enter the name of the person who received this transfer.

Screen References - Edit Notes for Transfer

This dialog allows you to enter and edit notes for this stock transfer.

Screen References - Fax Settings

To send faxes you need an electronic gateway to send direct from your PC using email protocols. Click on the recommended gateways link for more information.

Gateway domain (after @):

To send faxes you must enter the gateway domain (that is the part after @). For example to send a fax to [FaxNumber]@yourfaxco.com enter yourfaxco.com as the domain.

Screen References - Fax Number

Please enter the telephone number for the fax to send to.

Remember this fax number

Tick 'Remember this fax number' to save the number for use in the future.

Screen References - Email Address

Please enter the email address you want to send to. This needs to be the full email address, e.g. tom.jones@example.net . To send to multiple email addresses, separate each address with a comma. For problems with sending an email, please refer to [this page](#).

Remember this email address

If this option is available, tick 'Save this as email ...' to save the email address for use in the future.

Screen References - Print Preview

The Preview window displays each page of the document as it will be printed by the printer.

Print (if available)

You can print the document by clicking the Print button.

This will open the printer selection and settings dialog where you can select which pages of the document to print.

Previous and Next

Use the Previous and Next buttons to view each page of the document when there is more than one page to print.

Close

The Close button closes the window.

Screen References - Advanced Settings

CSV Format Settings

Save csv files in utf8 character encoding

Check this option to save csv files in utf8 character encoding.

Save as csv for Excel

Check this option to save csv files which can be opened by windows programs such as Excel, WordPad...

Inventoria Synchronization Settings

Allow Express Invoice, Express Accounts or Copper to synchronize with Inventoria

Check this option to permit these programs to connect remotely for downloading current item data and uploading quantity changes.

Access Authentication Code (must be entered in client program):

Enter a code that other programs will use to connect to this business in Inventoria.

Screen References - User Account

Each Inventoria account is identified by their email address.

User Name:

Enter the user's name. This is used for display purposes.

Email address:

This is used to uniquely identify the user. The user will use this in their email as the account name.

Password:

Enter the password for this user. The user will use this in their email to verify who they are.

Account Enabled

Check (tick) this option to enable the account.

User Privileges

Administrator

Check this option to allow this user to be able to modify others user's preferences and to add/edit/remove transactions.

User

Check this option to allow this user to be able to add/edit/remove transactions.

Viewer

Check this option to disallow this user to be able to add/edit/remove transactions.

Organizations

This is the list of organizations that the user can access.

Screen References - Bill of Materials

The Bill of Materials dialog is used to specify which items will be used to create a new bundled or packaged item. The dialog can be used to help you track costs and inventory. To open the Bill of Materials, open the Item dialog, and click the Bill of Materials button at the end of the first section. When you are finished entering the items contained in the bill of materials, click the generate button. Back on the Item dialog, fill out the details for the bundled or packaged item.

Add...

Click this button to add a new item to the bill of materials. Two or more items must be added before the Generate button becomes active, allowing you to complete the bill of materials for this item.

Remove

Click this button to remove the selected item from the list.

Calculated Bill of Material Cost:

This is the cost of the item calculated from the Bill of Materials above. Note that you may choose to assign different cost values on the Item dialog.

Screen References - Recurring Order Schedule

Start Date:

Enter the date when the order should first be generated.

Interval:

Select how often the orders should issue.

Action:

Select the action that should be done after order has been recorded.

Replace the string %period% in any description with dates

It is sometimes useful to print the actual period on the order to the supplier to explain what period the order is for. To do this enter descriptions with the word period circumfixed with percentages i.e. %period% that way whenever a recurring order is issued the %period% will be replaced with the actual period of the order.

Update the prices of any items which have been changed

If this is ticked, whenever a recurring order is recorded it will check if the item price has changed. If it has, the order prices will be updated.

Screen References - Transfer Stock

Transfer From Location:

Select the location of where you would like to transfer the item from.

This is the list of items.

Find

Find an item.

Find Next

Find next item.

Transfer to Location:

Select the location of where you would like to transfer the item to.

Quantity:

This is the quantity of the item.

Requested By:

This is the user that issued the transfer request.

Screen References - Receive Stock

Specific Items

Supplier:

Select the supplier of the item.

Purchase Order

Order:

Select a PO number and the details of the item and the quantity will be completed for you.

Receive Date:

Enter the date when the stock was received.

Item Details

Select or view the items to receive.

Note:

Enter note for this receipt.

Mark order as fully received

Check this box to mark the order as fully received, even if stock counts are not complete.

Selecting this option will not reconcile or account for the extra items, but it will close the order so that it no longer appears in the list as a partial order.

Screen References - Sell Stock

Customer:

Select the customer.

Date of Sale:

Enter the date when the stock was sold.

Add

Click this button to create an item entry on the list to be sold.

Remove

Click this button to remove the selected item entry from the list to be sold.

Damaged/lost item

Tick this option if it is a damaged or lost item. This will create a sale record with a price of zero and "damage/loss" as the customer.

Note:

Enter notes for this sale.

Screen References - Return Stock to Supplier

Specific Items

Supplier:

Select the supplier of the item.

Purchase Order

Order:

Select a PO number and the details of the item and the quantity will be completed for you.

Return Date:

Enter the date when the stock was returned.

Item Details

Enter or view the details of the items to be returned.

Note:

Enter note for this return.

Screen References - Change item quantity

Location:

Select the location

Quantity:

This is the quantity of the item.

Warning Quantity:

This is the warning quantity of the item.

Ideal Quantity:

This is the ideal quantity of the item.

Screen References - Add/change location details

Name:

Enter or change the location's name.

Address:

Enter or change the address of the location.

Screen References - Add Order Item

Item Code:

Enter or select the unique short code for the item you would like to add or edit.

Description:

Enter the full description you want to be displayed on the order.

Tax:

Select the tax rate which applies. If you only see None you may need to configure the Tax Options (Options from the main window then click the Tax tab).

Screen References - Choose location and category

Location:

Select the Location of the item.

Category:

Select the Category of the item.

Sub-Category:

Select the Sub-Category of the item.

Screen References - Choose category

Category:

Select the Category of the item.

Sub-Category:

Select the Sub-Category of the item.

Screen References - Choose supplier

Supplier:

Select the supplier.

Screen References - Choose Date Range

Select a start date and end date for which you wish to have a sales report generated.

Screen References - Backup

It is essential that you backup your data regularly just in case something goes wrong. Please select one of the options below.

Backup Option

Backup to a Network Folder

This is a good option if you are working in an office. Ask your Network Administrator to create a safe folder on the shared server. Select this folder and click Backup. The entire Inventoria folder will be copied to that folder. If something goes wrong (like a hard drive crash) you just copy back the folder and everything will be restored.

Backup to a CD or DVD with Express Burn

Select this option to Burn all the data to disc. Inventoria links to Express Burn to do this. See [Express Burn](#) for more information.

Backup to a Removable Drive

As an alternative use this option to backup to an external USB hard drive or USB key flash drive. Please consider using MEO to encrypt the files if using removable media.

Backup Schedule

The backup can be scheduled to run at the same time every day.

Screen References - Restore Data

Restore the data from a scheduled or manual backup.

Restore scheduled backup

Select this option to restore from a backup created by the backup scheduler.

Restore point:

Select a restore point from the list of backups.

Restore manual backup

Select this option to select a directory where you manually backed up your data.

Screen References - Multiple Businesses

A single installation of Inventoria can manage many businesses. They run as if they were entirely different installations. Settings can be changed for each business. Each business has its own suppliers and items.

To add a business from the menu select Inventory -> Multiple Businesses. Then click Add. After you click Add the Startup Wizard will run.

To remove a business from the menu, click Delete Business. To restore a business that has been removed, check Show Deleted Businesses. Then select the business and click Restore Business.

To begin using the highlighted business, click the Select button.

Screen References - Add New Category

Use this dialog to add a new category and corresponding sub-categories as needed. First, type a name in the new Category Name text field, then click the Add button to insert new sub-categories. You may also delete and edit a selected sub-category by clicking the Delete and Edit... buttons. Click the Save button whenever you are done adding.

Screen References - Edit Transfer Notes

Create or modify notes for this transfer.

Screen References - Transfer Sent By

Sent By:

Designate by whom this transfer was sent.

Screen References - Transfer Received By

Received By:

Designate by whom this transfer was received.

Screen References - Match CSV Fields

User should select row number from which Inventoria should start to read the data. At the left list user can see data that was imported from the CSV file. And at the right list he/she can see Inventoria Fields that should be matched to the corresponding fields in the CSV file. User should double click Matching Import Fields column inside the list and select corresponding field for the current row.

Screen References - Order Low Stock Items

Start by selecting which of the two options you would like to order by clicking on the corresponding radio button.

Items with current stock a percentage below ideal quantity

Items with current stock a percentage below ideal quantity. If the later is picked then a 'Percentage below' must be spacificied.

Percent below:

Select a threshold percentage to order low stock items at.

Screen References - Options ~ Company

This tab is used to enter details about your business or company. Most of the information is printed on each report. If you don't want the information printed you can leave the fields blank.

Company Details

Business Name:

Enter the official name of the business (eg. Acme Corporation, Inc).

Registered Number:

In many countries, each business has an official number. Please enter it here.

Address:

Enter the address of your business as you want it to be printed on reports.

Shipping Address:

Enter the shipping address of your business as you want to be printed on reports.

Contact Details:

Enter the contact details you want on reports. For example, phone, fax and email address.

Logo Image File:

To add your logo to reports you can select the file path to a jpg image.

Logo Height:

The logo height field determines the size of your logo when it is printed. The logo will be stretched or shrunk so it matches that height while still maintaining the correct aspect ratio.

Send Settings

Email Settings...

Please refer to [Knowledge Base Articles - Problems when sending email using our software](#) for more information.

Fax Settings...

Click the Fax Settings button to set up a gateway for sending faxes from Inventoria on your computer.

Screen References - Options ~ Item

This tab is used to set custom fields as part of the item's record. For example, you might want to add a color, shape, manufacturer, or something more industry-specific.

Custom Field Labels

Check a box and type the name of the custom field you wish to add to your item records. For example, you might want to add a color, shape, or manufacturer.

Check a box and type in the name of the custom field you wish to add to your items.

Custom Field Label 1:

Check the box and type in the name of the 1st custom field you wish to add to your item records.

Custom Field Label 2:

Check the box and type in the name of the 2nd custom field you wish to add to your item records.

Screen References - Options ~ Tax

This page is used to configure any sales tax, GST or VAT rates which are applied.

Sales Tax System:

This is where you select if sales tax applies in your state or country and whether there are 1, 2 or 3 rates.

Tax Rates

Tax Name:

Enter the name that the tax is called in your state or country (eg. Sales Tax, GST, VAT etc).

Tax Rate (percent):

Enter the default tax rate.

Tax Name 2:

This is where you have a second rate of tax. Note that the rates are not cumulative. So if the rates should both apply Rate 2 should be the dual rate.

Tax Name 3:

This is where you have a third rate of tax. Note that the rates are not cumulative. So if the rates should all apply, Rate 3 should be the combined triple rate.

Tax Options

By default items have this tax rate:

Any new item will have this rate selected by default.

Item prices are tax inclusive (presumed to already include tax)

If this is ticked all items subject to tax will be priced and displayed as being tax inclusive.

By default new suppliers are tax exempt

If ticked any new suppliers will be marked as tax exempt (so no sales tax will be applied). Use this if you mainly export.

Screen References - Options ~ Order

This dialog is used to set the standard text that appears on printed orders. You can preview any changes you make by clicking Preview Order at the bottom of the Order dialog

Purchase Order Title:

This is the title which will be printed on purchase orders. By default, the title is PurchaseOrder.

Order Number:

This is the current order number. It is increased every time you record a new order. Note that order drafts are not assigned an order number until they are recorded and saved.

Number Prefix (optional):

The order number prefix is optional. You can enter digits or characters to be used in front of any order number.

Logo Height:

The logo height field determines the size of your logo when it is printed. The logo will be enlarged or reduced according to the height entered while still maintaining the correct aspect ratio.

Quantity Column Title:

This is the default heading of the Quantity column which will be printed on orders, and can be changed to Hours or any other heading to reflect your needs.

Unit Price Column Title:

This is the default heading of the Unit Price column which will be printed on orders, and can be changed here to reflect your specific needs.

Note Comment

Text entered here will appear at the bottom of the printed order. Choose an alignment and font size for the text.

Foot Comment

Text entered here will appear at the very end of the printed order. Choose an alignment and font size for the text.

Preview Order...

When clicked, the information on this Order tab will be saved after your confirmation and reflected in a preview of the Order Report.

Screen References - Options ~ Other

Regional Format Settings

Currency Symbol:

This is the symbol used for money in your country - usually \$.

Currency Order:

Use this option to select if the currency symbol is before the number (eg. \$10.00) or after the number (eg. 10.00\$).

Currency Digits:

Use this option to set the number of digits after the decimal point.

Decimal Symbol:

This is the symbol used for the decimal point - usually a dot everywhere but in Europe where a comma is used.

Thousands Symbol:

This is the symbol used to separate thousands - usually a comma.

Number of Decimal Places For Quantity:

This is the number of digits that will appear to the right of the decimal place when displaying quantities. Note that this does not apply to currency amounts.

Printed Date Format:

This is the date format used for printing or pdf generation

Paper Size:

This is the paper size used for pdf generation and when the default printer is used.

Measurement Units:

This is the units used for measurements, either inches or millimeters.

Margins

These define the size of the space surrounding the content of a printed page. The smaller margins are, the larger the report size will be. **Side Margin:**

Left and right margins may be adjusted by typing a number in inches into the side margin field.

Top and Bottom Margin:

Top and bottom margins may be adjusted by typing a number in inches into the top and bottom margin field.

Shipping Address Position:

The position where the shipping address appears on the quote can be adjusted using these settings. For example, if you want the shipping address to fit exactly in a window face envelope you can adjust the position.

Billing Address Position:

The position where the address appears on the quote can be adjusted using these settings. For example if you want the billing address to fit exactly in a window face envelope you can adjust the position.

Advanced Settings...

Click the Advanced Settings button to view settings for CSV files and Inventoria Synchronization.

Screen References - Options ~ Web Accounts

Inventoria Web Accounts

List of user accounts.

Add New User

Add a new account to Inventoria

Remove

Remove an account from Inventoria

Edit User

Edit the Inventoria preferences for the account.

Screen References - Options ~ Web Access

This lets you configure the settings for the Inventoria Web Interface. The web interface works by having Inventoria run as a mini web server.

To set up the web interface, you must first specify a user name and password to use as your logon details. Next, specify what port on which you would like the web interface to run. The default port is 97, and we recommend that if you change it then you do not use port 80, because that port is often used by other web servers.

To access the web interface from the Inventoria computer, the easiest way is just to click on one of the hyperlinks shown in the dialog window - both links point to the same URL. Alternatively type "http://localhost:[port]" into your web browser, where "[port]" is the port number you specified in the dialog. If you want to access the web interface from elsewhere on your LAN, or from the Internet, use the following formatting when typing the URL into your web browser:

- http://computername:port eg. http://mycomputer:97 (for use on a Local Area Network)
- http://privateip:port eg. http://192.168.0.1:97 (for use on a Local Area Network)
- http://publicip:port eg. http://212.137.22.14:97 (for Internet use)
- http://domainname:port eg. http://axon.mycompany.com:97 (advanced option - only use if you have a domain name set up for your IP address)

You need to make sure your firewall is not blocking the port number you have specified. Refer to your firewall settings to check the correct UDP port is opened.

Speak to your network administrator about any networking problems you have. They can usually fix routing or firewall problems.

Screen References - Item ~ Item

General

Use this dialog to add, edit, or duplicate an item. If you are duplicating an item, the fields are copied from the existing item but will be saved as a new item. In this case, please change the Item Code to a unique code, and make sure the inventory counts are correct, since even these are copied from the existing record.**Item Code(Input/scan bar code):**

Enter a short (but memorable) code for this item. If you have the right equipment (e.g., barcode reader) you may scan the item code instead. Make sure the cursor is in the Item Code field.

Item Description:

Enter the full description you want to be displayed.

Category:

Select the category of the item.

Sub-Category:

Select the sub-category of the item.

Use Bill of Materials

Check this box to use the Bill of Materials created for this item.

Select Items

Open the Bill of Materials window. If the new item you are creating is a package or bundle of other items, use the Bill of Materials to specify those items and to help you estimate costs. This button is unavailable when this item is part of another item's Bill of Materials.

Pricing

Unit Purchase Cost:

This is the value when you buy the item.

Unit Sales Price:

This is the value when you sell the item.

Tax:

Select the tax rate which applies. If you only see None you may need to configure the Tax Options (Options from the main window then click the Tax tab).

Unit Measure:

Not all items are sold individually. Input feet, meters, pounds, kgs or by the sack or dozen etc.

Item Note:

Enter the note for this item.

Item Website:

This is the website of the item if there is one.

Custom Field 1

This is the value of your 1st custom field (the label name is set in Options ~ Item).

Custom Field 2

This is the value of your 2nd custom field (the label name is set in Options ~ Item).

Screen References - Item ~ Inventory

Totals:

Displays the following totals from the inventory list.

Total Quantity: The total quantity of items.

Total Ideal Quantity: The total ideal quantity of items.

Total Warn Quantity: The total warn quantity value must be less than or equal to ideal quantity

Send an email when quantity goes down to warning.

Tick this option if you want Inventoria to send an email to you when quantity goes down to warning.

View Receive History...

Use this button to open the window to view receive history for items.

View Sales History...

Use this button to open the window to view sales history for items.

Supplier

Default Supplier:

Select the default supplier for the item.

Supplier Part Number:

Enter a short (but memorable) supplier part number or ID for this item.

Add Image...

Click the Add Image button to add a picture of the product to the item record.

Remove Image

Click the Remove Image button to remove the picture of the product to the item record.

Screen References - Supplier ~ Supplier

Supplier Name:

Enter the business name of the supplier.

Contact Person:

Enter the full name of the person you deal with.

Contact First Name:

This is the first name of the person you deal with or the way you address them.

Address:

Enter the supplier's address.

Phone (primary):

Enter the supplier's primary phone number.

Phone (alternative):

Enter an alternative phone number for the supplier.

Fax:

Enter the supplier's fax number.

Email:

Enter the supplier's email address. This email address is also the one used for sending invoices by email, if email is the preferred method.

Screen References - Customer ~ Customer

Customer Name:

Enter the business name of the customer.

Contact Person:

Enter the full name of the person you deal with.

Contact First Name:

This is the first name of the person you deal with or the way you address them.

Billing Street Address:

Enter the customer billing address. If the customer has a different shipping address you can enter that on the Other tab.

City:

Enter the billing city.

State:

Enter the billing state, province, or territory.

ZIP Code:

Enter the billing ZIP code.

Country:

Enter the billing country.

Phone (primary):

Enter the customer's primary phone number.

Phone (alternative):

Enter an alternative phone number the customer can be reached at.

Fax:

Enter the customer's fax number.

Email:

Enter the customer's email address. This email address is the one used for sending orders by email if email is the preferred method.

Screen References - Customer ~ Other

If the customer has separate billing and shipping addresses, you can enter the shipping address on this tab, including the city, state/territory/province, ZIP and country. You can also assign a salesperson to this customer and store notes about the customer on this tab.

Salesperson:

Select the salesperson assigned to this customer from the drop menu.

Customer Notes:

These notes are for internal use only. They can be used, for example, to indicate customer history or special terms.