NCH Software

Inventoria Stock Manager

This user guide has been created for use with

Inventoria Stock Manager Version 11.xx

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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

Contents

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

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.

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

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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.

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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.

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.

Email Suppliers List Report

On the menu, click Supplier -> Email Suppliers List Report. You will be prompted for an email address to send to.

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 replace 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 it 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 filed 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 spacified.

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 shrunken 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.