

BarcodeApps Manual

1 — Last update: 2020/04/27

BarcodeApps

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1. INTRODUCTION



ABOUT

A former staff member once described us to a client as “a small yet mighty company.” We’re inclined to agree.

From humble beginnings in 2004, we’ve offered quality business solutions to clients in warehousing, distribution and manufacturing.

Over time, we realized that we were constantly producing custom solutions to help our clients better manage their sales orders, and out of this, PRISM – our first app – was born in 2005.

We followed up with this in 2007 with BASIS, our powerful warehouse management app. Around the same time, we started to integrate our apps with many popular accounting packages.

Today, our mission is to develop high-quality technology solutions that enable small- and medium-sized businesses to manage their sales and inventory with peace of mind.

In addition, we know our clients are the beating heart of our business. We strive to deliver excellent value and service every single time.

1.1. HELP RESOURCES

This guide provides detailed information on installing, setting up and using Barcodeapps on your system. However should you find yourself with a problem that you cannot answer with the provided tools, please contact Barcodeapps.

When you call your Barcodeapps Partner, please be at your computer and prepared to provide the following information:

- Product name and version number.
- The exact wording of any messages that appeared on your screen.
- Can you reproduce the steps taken prior to the problem?
- How you tried to solve the problem?
- How did you try to solve the problem?

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2. PRISM



OVERVIEW

PRISM is a powerful mobile sales order management tool, designed for iOS, Android and Windows 7, 8 and 10. Its intuitive design ensures that sales reps can focus on liaising with clients.

PRISM integrates seamlessly with a variety of accounting packages, and allows updates to be sent to our securely hosted server from the road.

Our goal is to make your business run smoother. PRISM helps by keeping your sales team happy, organized and efficient.

Prism Components:

1. Prism App (iOS and Android)

- Is an iPad application for order management and sales automation, This application gives the sales representatives the ability to add customers, share e-catalogues and send orders using an iPad from a remote location.

2. Prism Desktop

- Is a desktop version of Prism that is installed on your local machine that retrieves and sends information from accounting packages or excel data to the cloud data server and vice versa

3. Shopping Website

- This feature provides the customers of a customer the ability to shop right from their iPad or online using their computer if they don't have the PRISM App.

4. PRISM Self Service Website (Joomla)

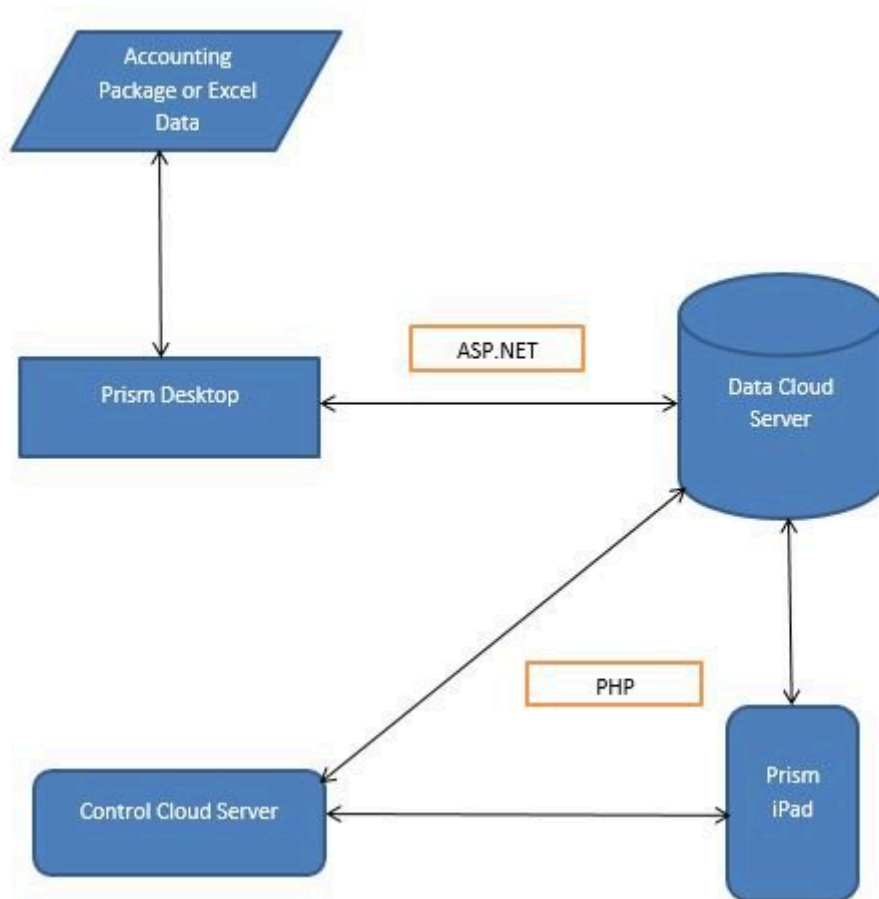
- Is used is web based tool designed to let users administer their customers, products and e-catalogues. It is also capable of managing mobile devices configuration.

Logic Data Flow from Accounting Package to Ipad

1. Accounting packages or Excel files have the customer and product information
2. Information from the accounting package are sent to SQL Server on Prism Desktop
3. Information from the SQL Server Prism Desktop is sent to the Data Cloud SQL Server
4. All information on the iPad are retrieved from the Data Cloud Server and data are stored in SQL Lite

Logic Data Flow from Ipad to the Accounting Package

1. Sales representatives creates a new customer or order in Prism iPad
2. Data is sent to the Data Cloud Server
3. Prism Desktop retrieves and imports data to the local SQL Server Database
4. Data is sent to the Accounting Package directly or to an Excel template or TXT file



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2.1. I. PRISM ACCOUNT CREATION

2.1.1. A. System Requirements

System Requirements

Recommended system requirements for PRISM Desktop and PRISM App

SERVER AND WORKSTATIONS

Windows 7 or newer

20 GB hard drive space (required for the local SQL database)

8 GB ram

MS Office Access 2007 or newer 32 bit only

SQL Server Express 2012 and SQL Studio 2012

PRISM APP iOS AND ANDROID

iPad Air

iOS 9 or newer

Lollipop 5.5 or newer

16 GB or up

Strong wifi connection

Working iPad mail client



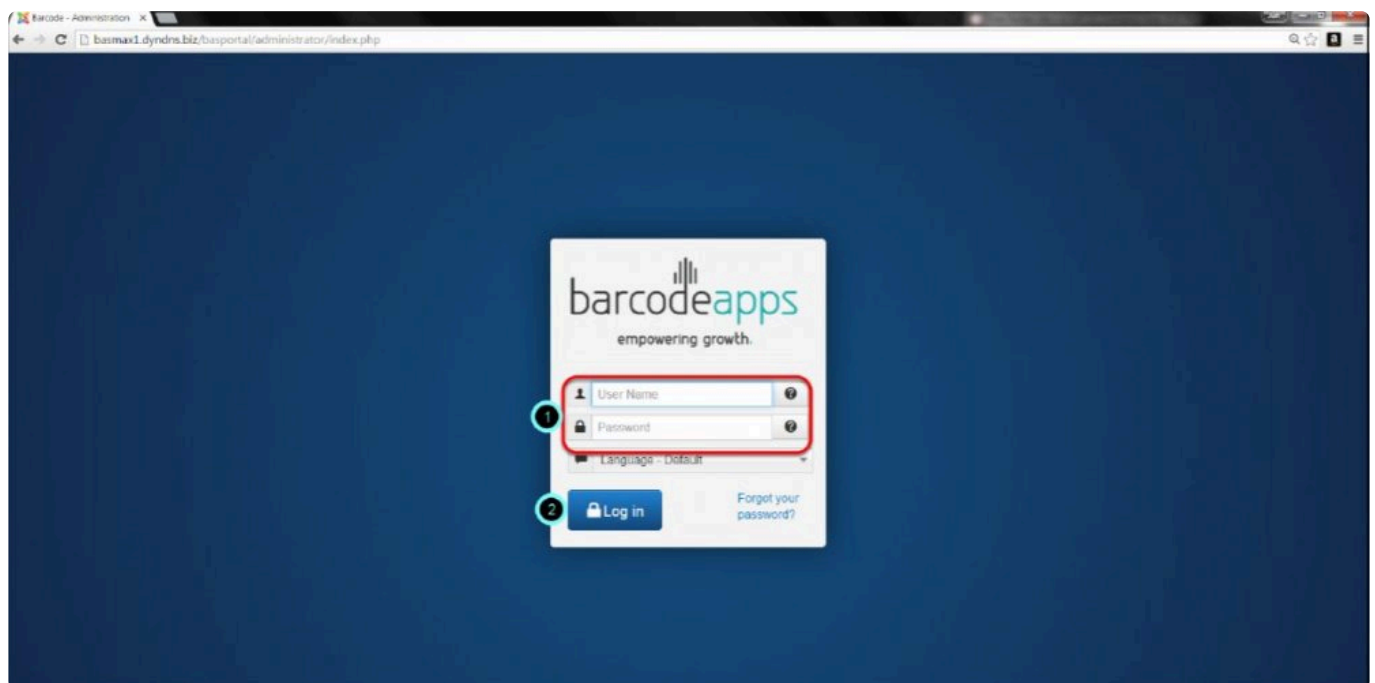
Note: The PRISM app can create orders even when not connected to wifi. Orders pending on the iPad can be sent to cloud once connected to the internet.

B. Manufacturer Code, Joomla Website Administrator, PRISM Webstore And PRISM App

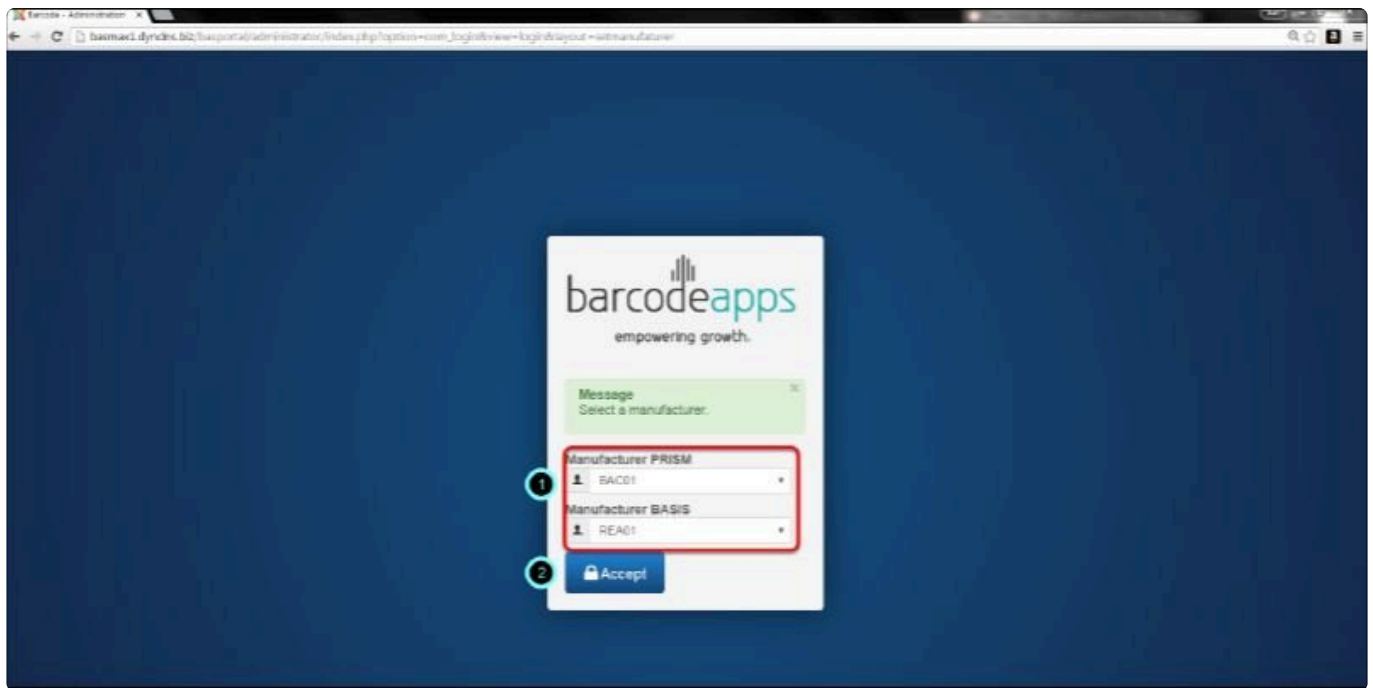
Automatic Manufacturer Code Creation

This knowledge base article will explain how to create new manufacturer codes for new BASIS and PRISM customers

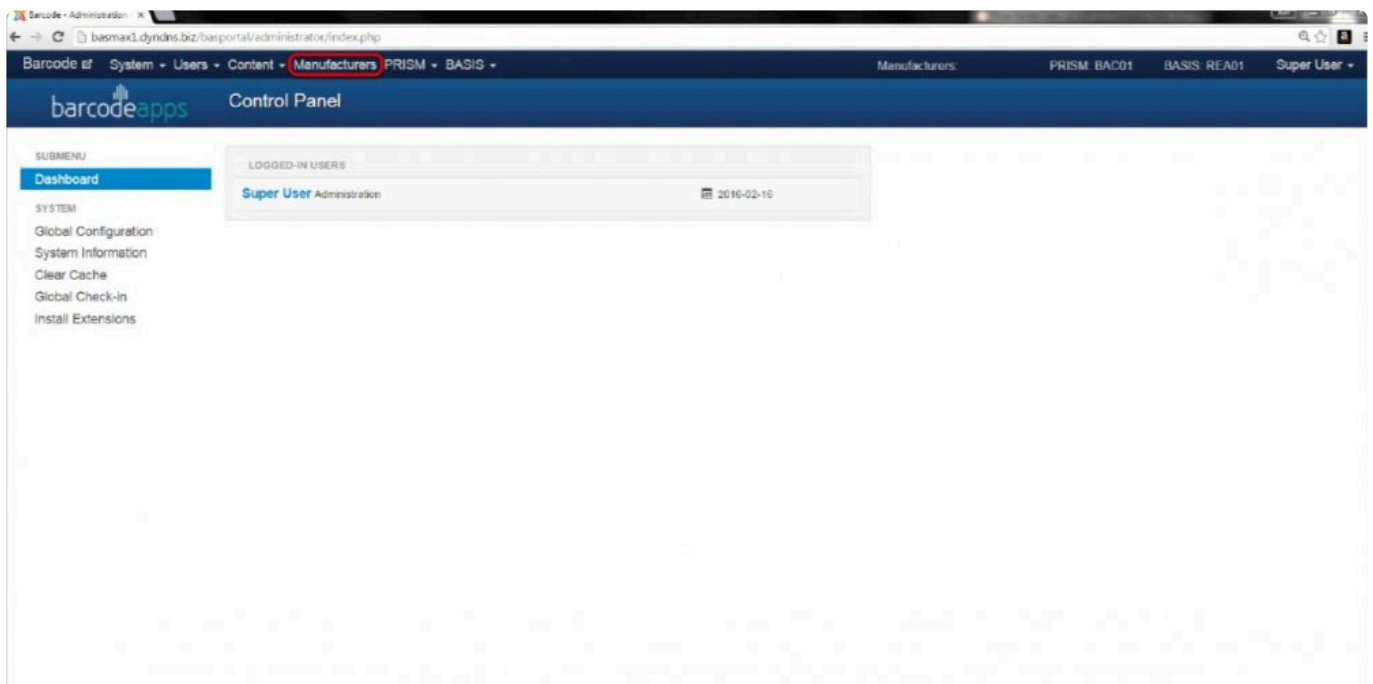
Login as Administrator to [Joomla Website](#). Type in the Username and Password then click Login.



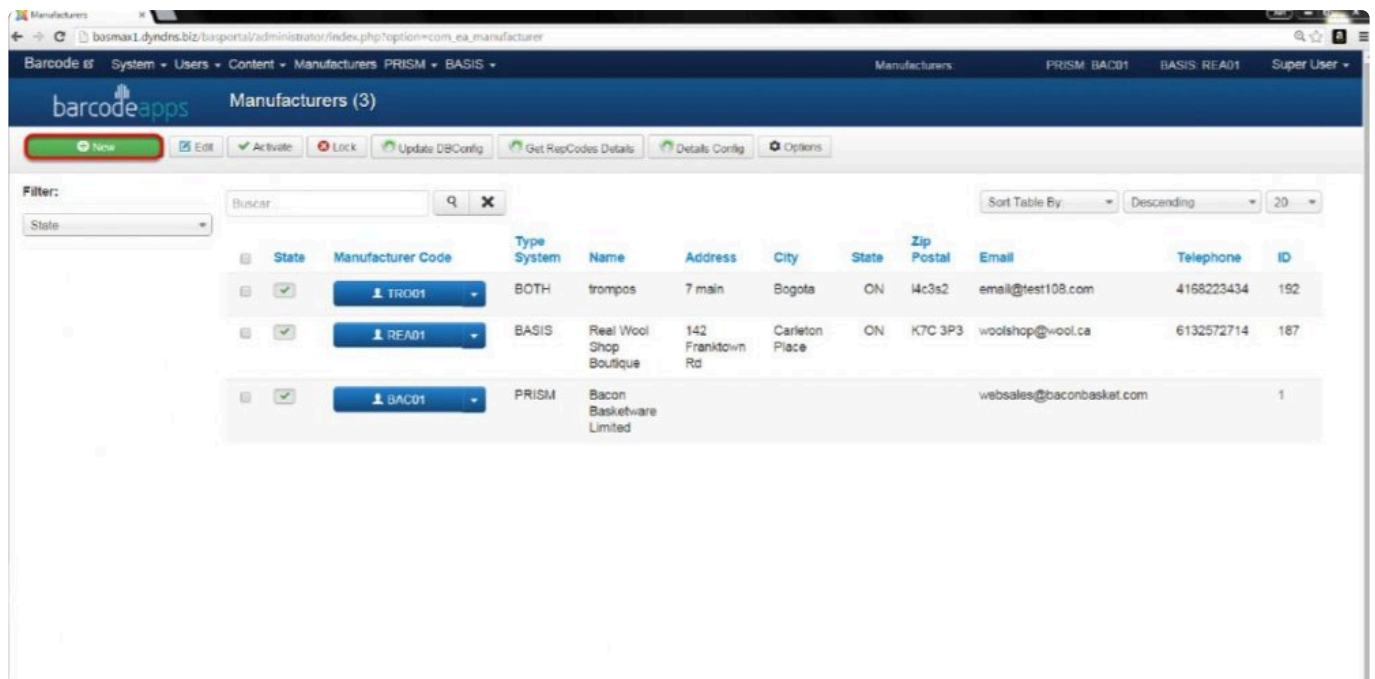
Select any manufacturer code then click Accept.



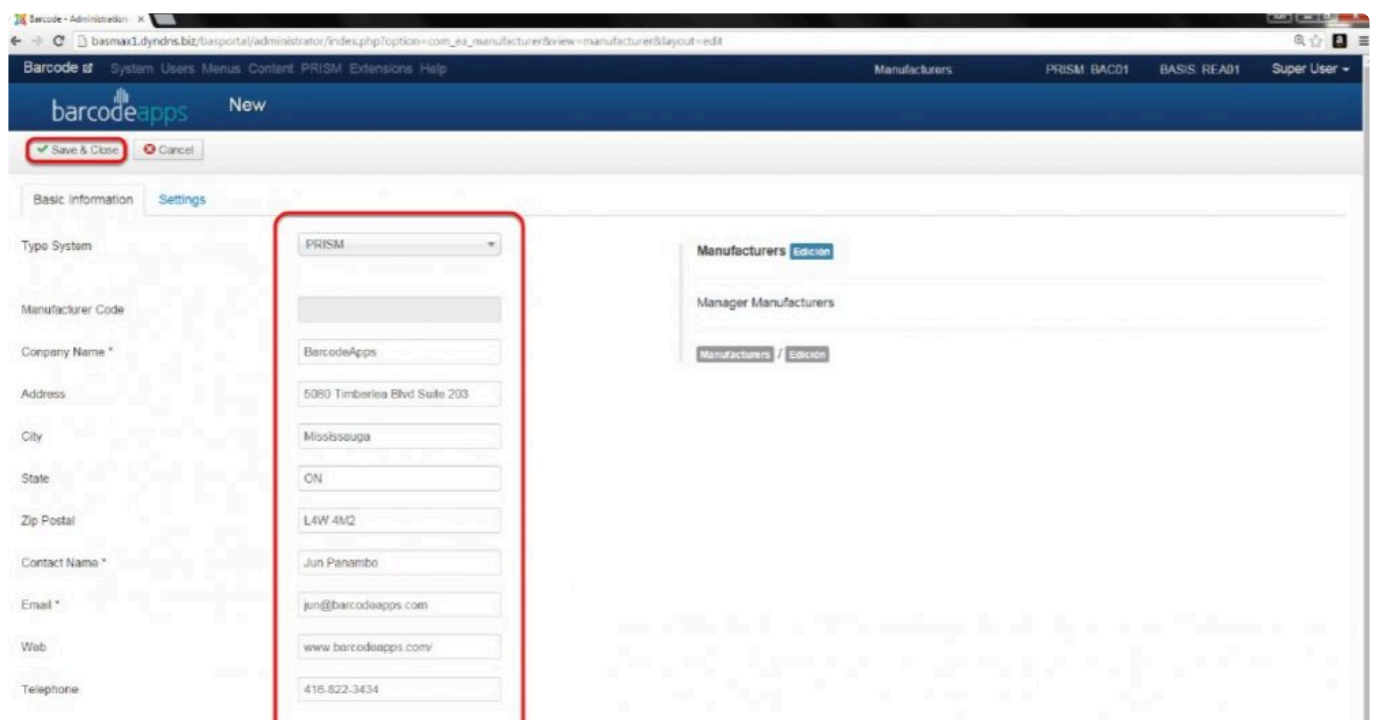
Click Manufacturers on the top menu.



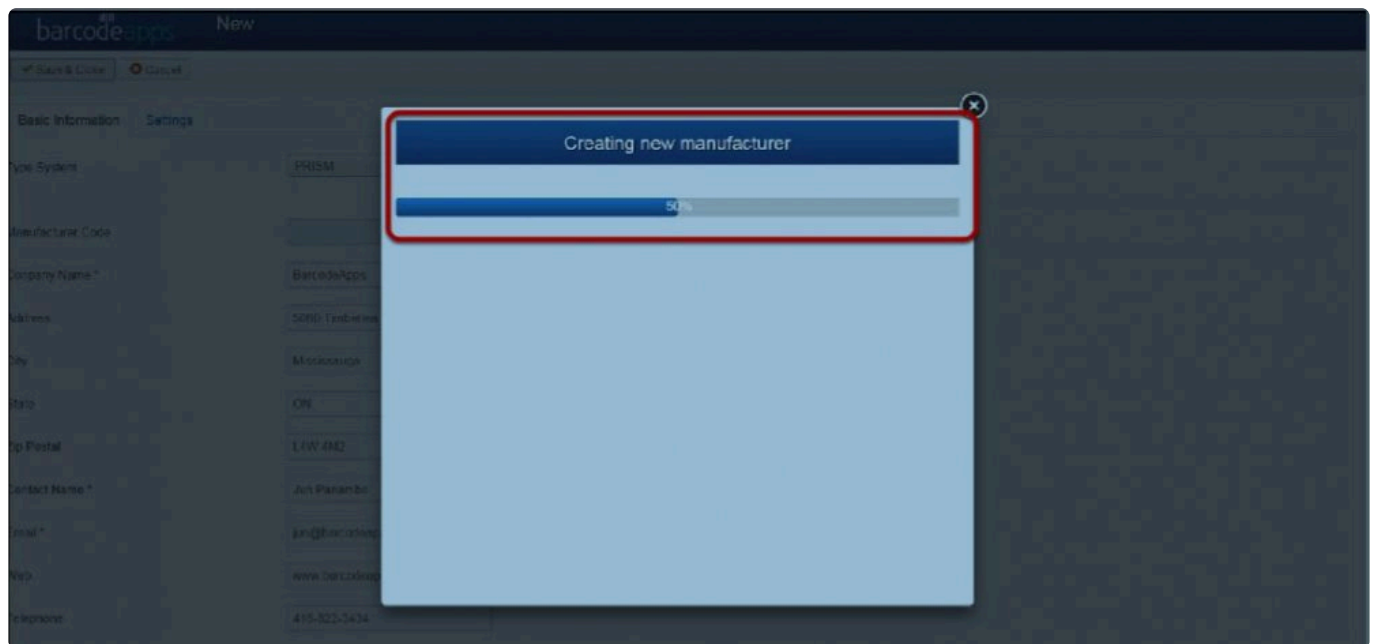
Click New.



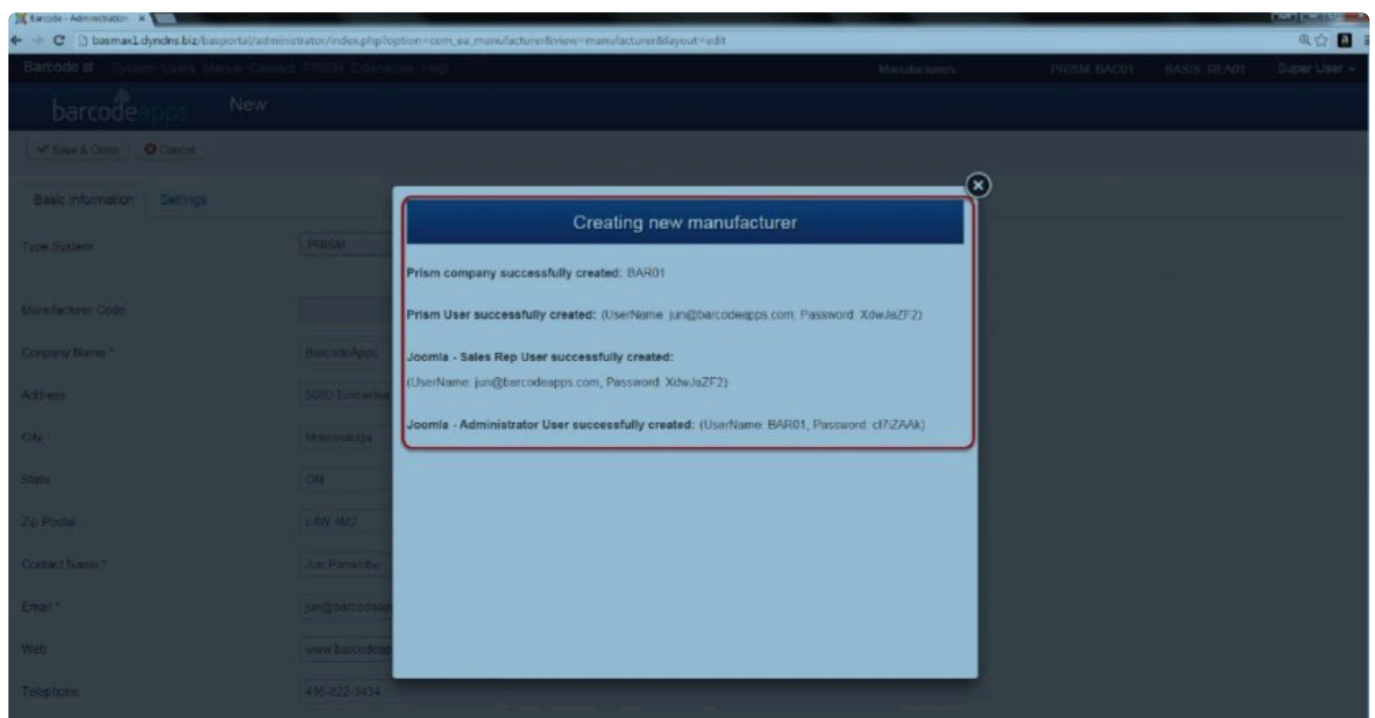
Fill out the required information to create the new manufacturer code. The click Save & Close.



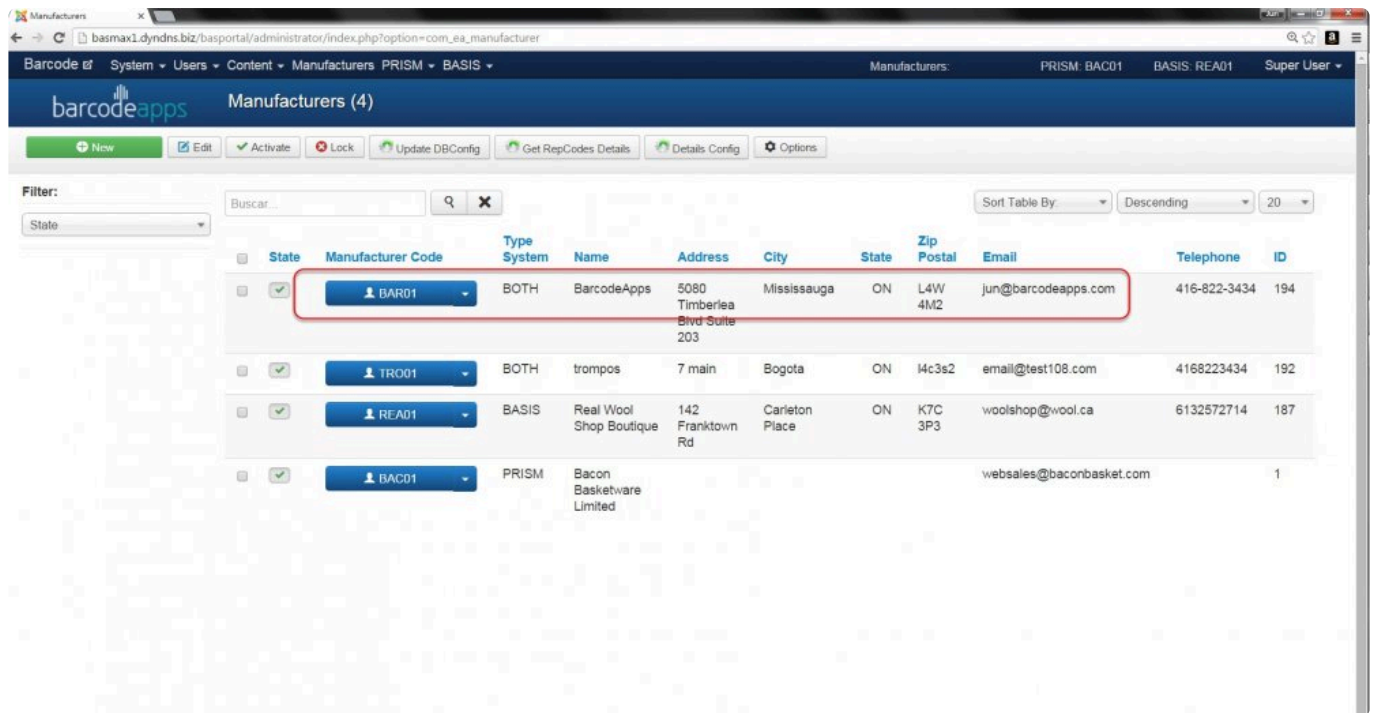
Wait for your manufacturer code to be generated.



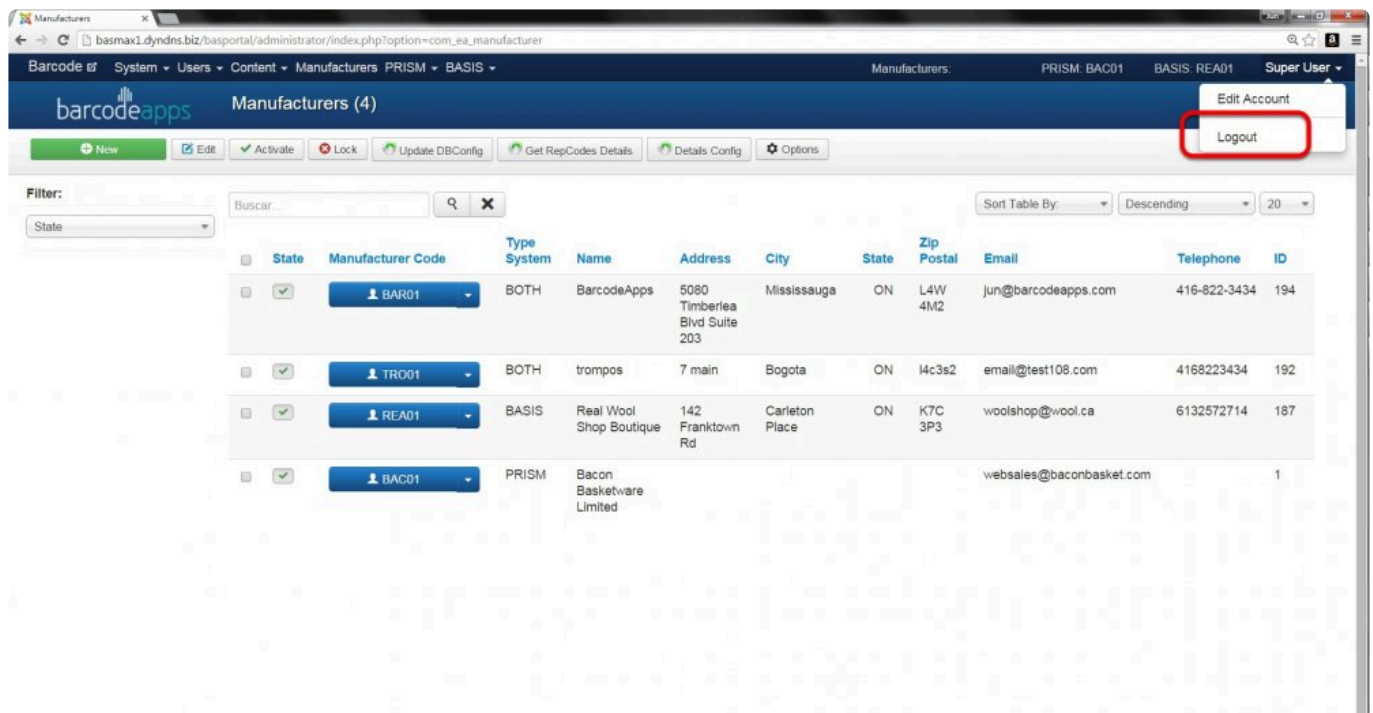
Make a note of your new login credentials. e.g. New Manufacturer Code, iPad User Login, Joomla Administrator Login etc.



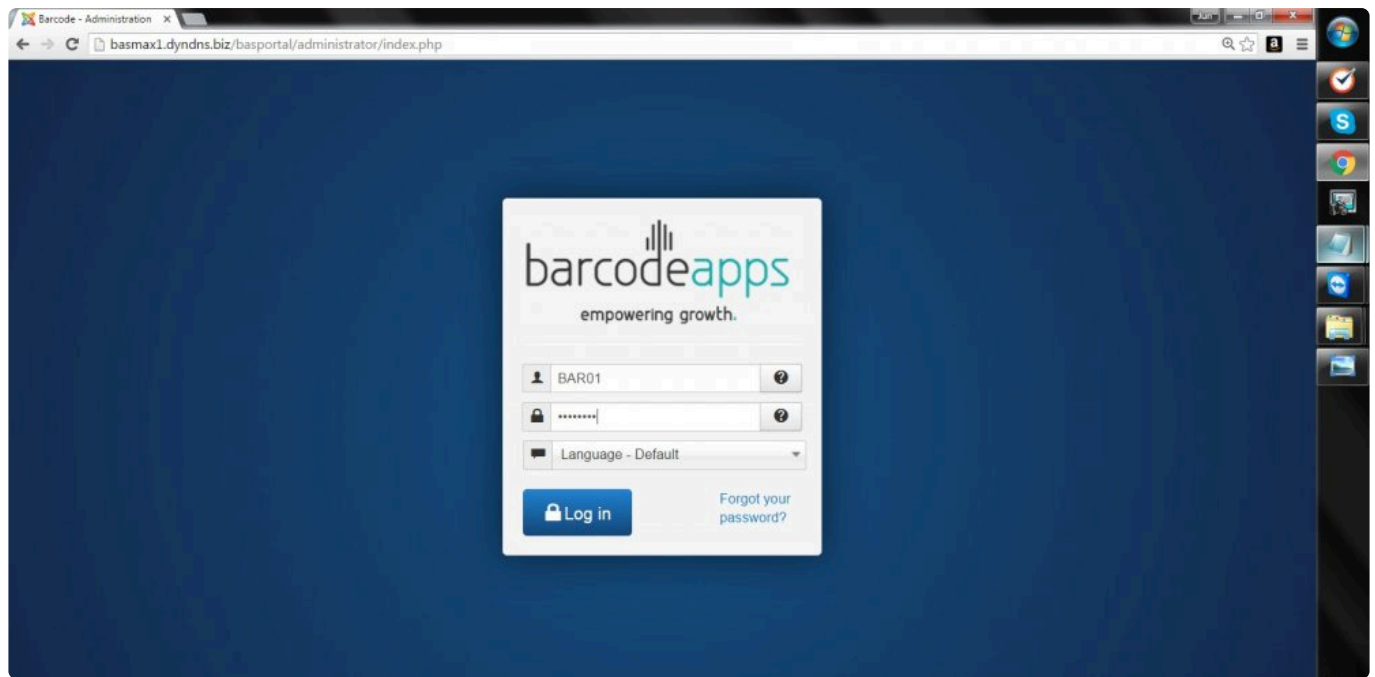
Once the new manufacturer code is created you should see it added on the list of manufacturer codes.



To sign out from Joomla website click on the Logout option.



Provide the new login credentials to the new customer and advise to test their credentials on their own Joomla website.



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2.2. II. PRISM DESKTOP SETUP

2.2.1. A. Server Installation

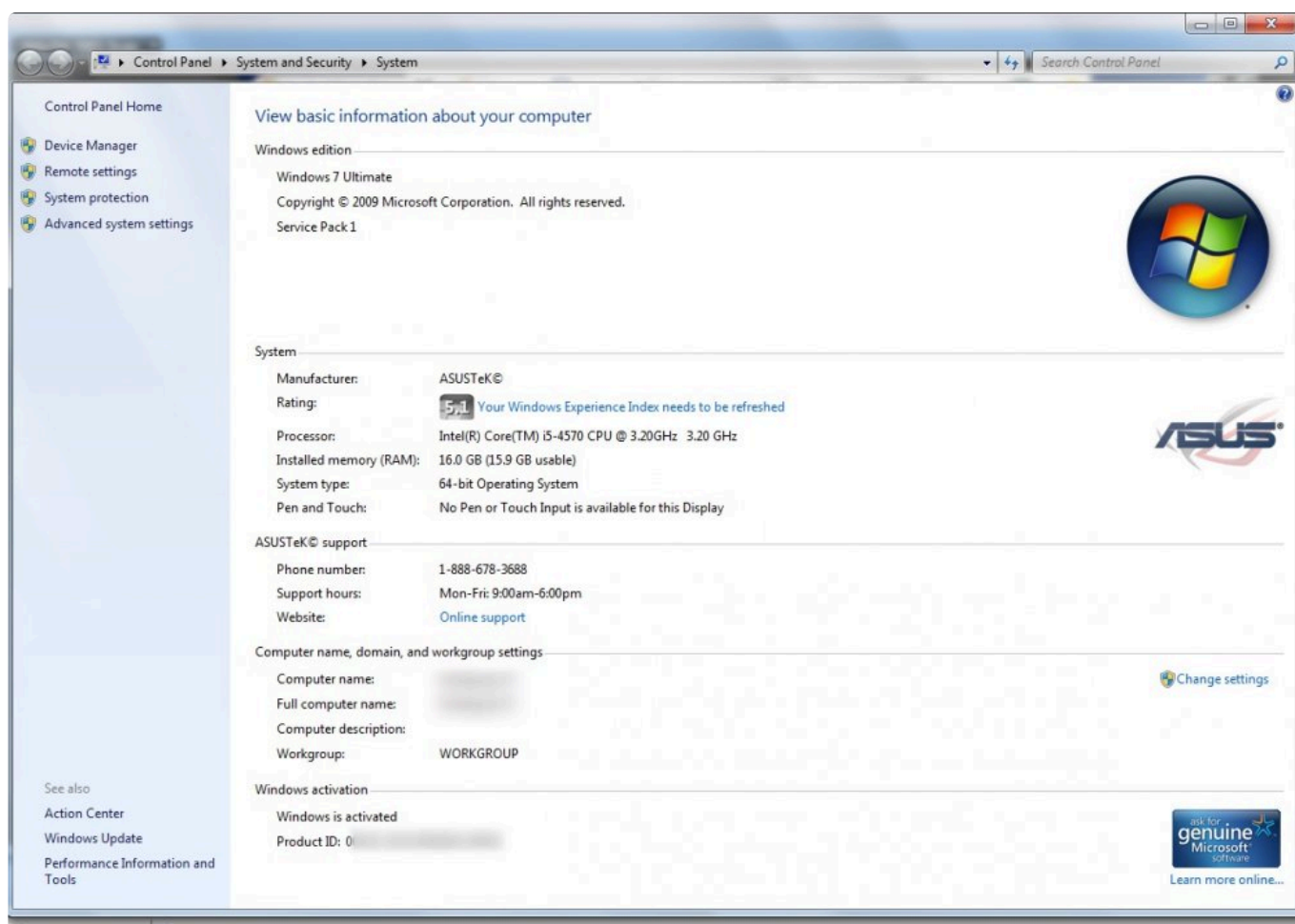
This knowledge base article will guide you on how to install PRISM Desktop Server with Sage Business Vision integration

PRISM DESKTOP COMPONENTS

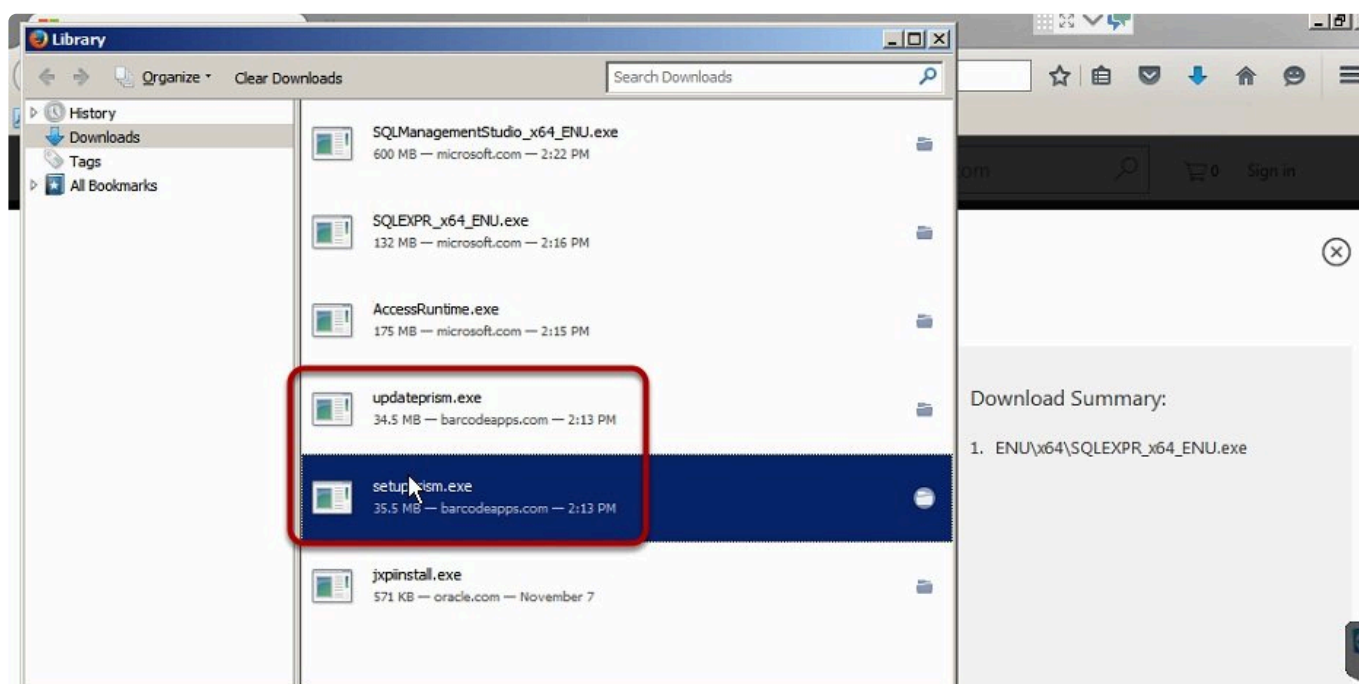
Software Requirements
Access Runtime 2010
Access Runtime 2013
SQL Server® 2012
SQL Express 2012
PRISM Main Installer
PRISM Updater
NET Framework 3.5

PRISM DESKTOP

Before starting the installation first check the computer specifications for compatibility issues (e.g. operating system, computer name etc.,)



Download PRISM Main Installer and PRISM Updater.



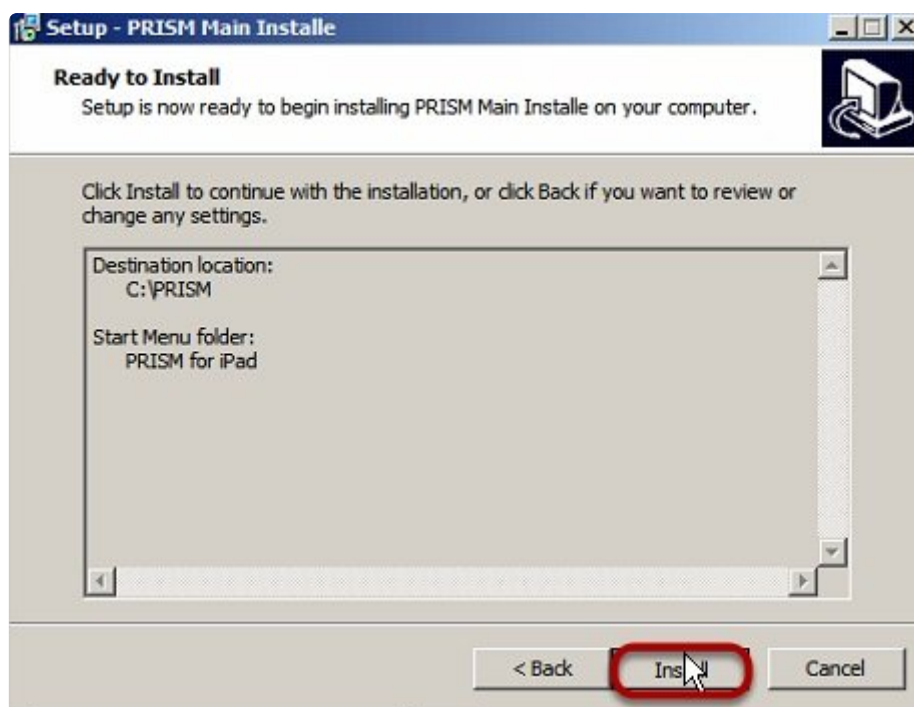
Open and Run setupprism.exe.



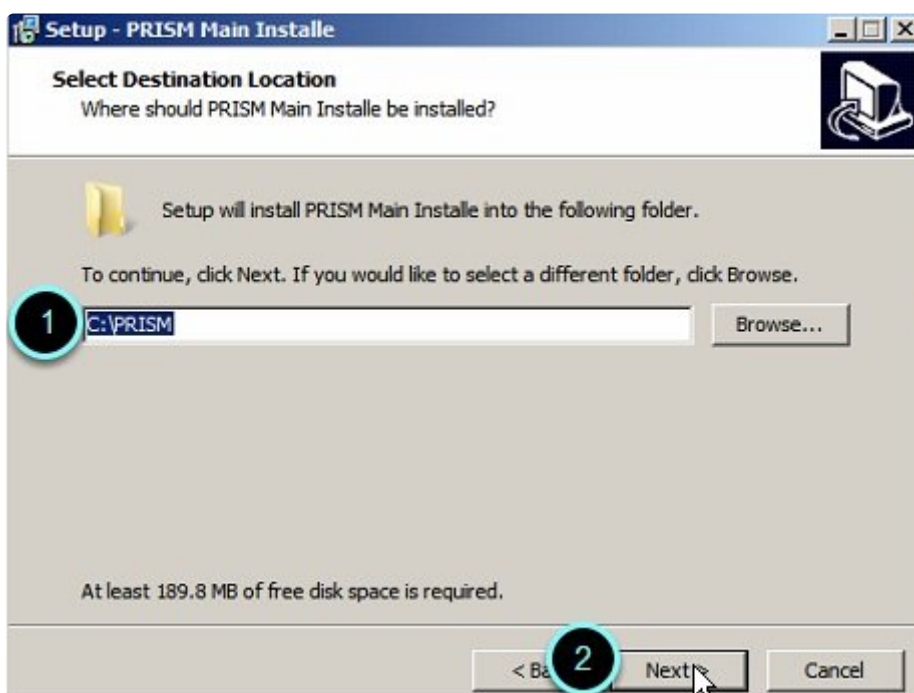
Click Next.



Click Install.



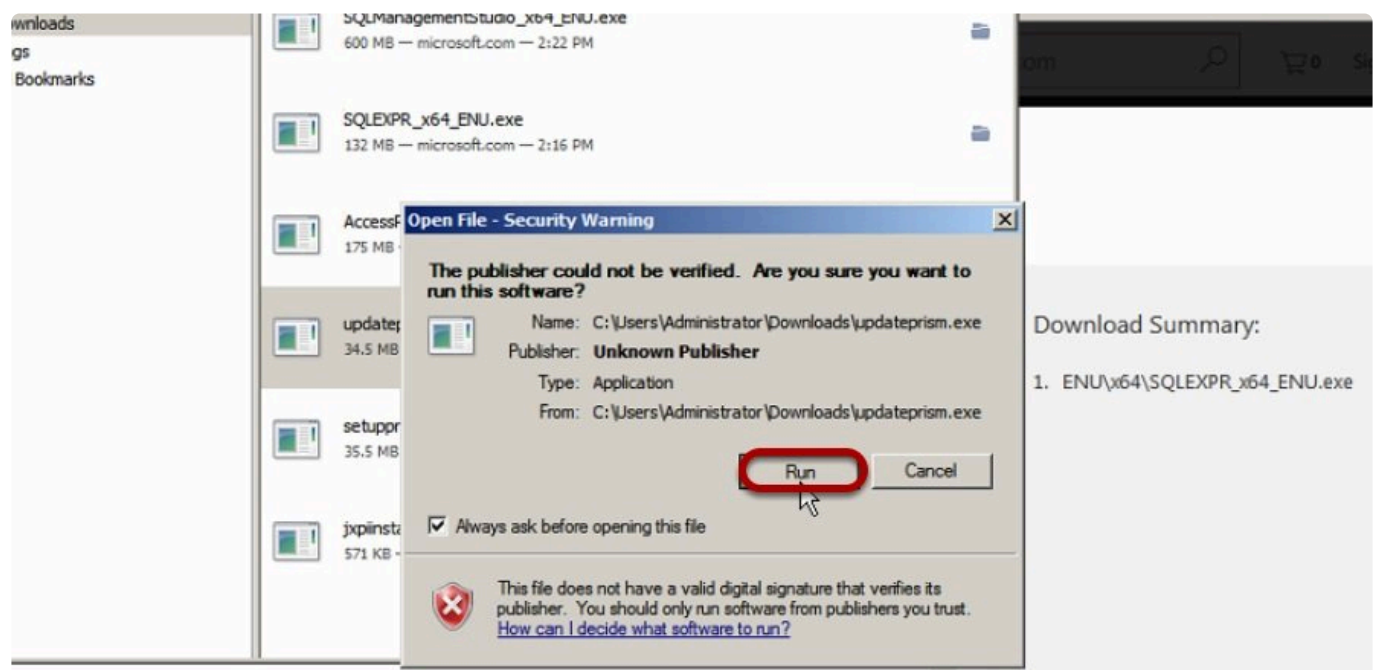
Default location should be C:\PRISM then click Next.



Click Finish.



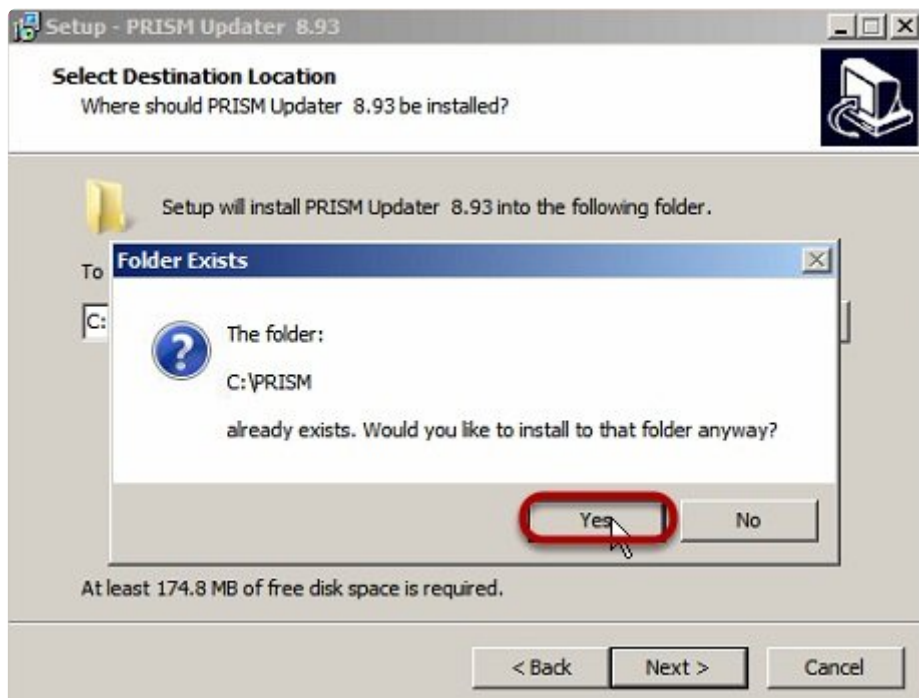
Open and Run updateprism.exe.



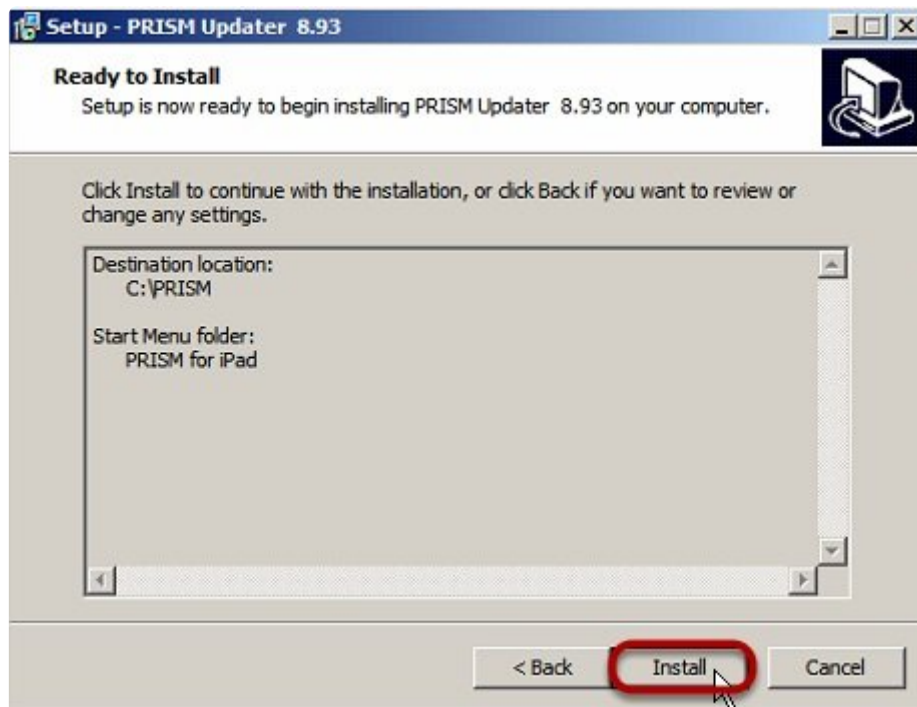
Click Next.



Default location should be C:\PRISM then click Next. (You will be prompted if you wish to overwrite C:\Prism, click Yes).



Click Install.

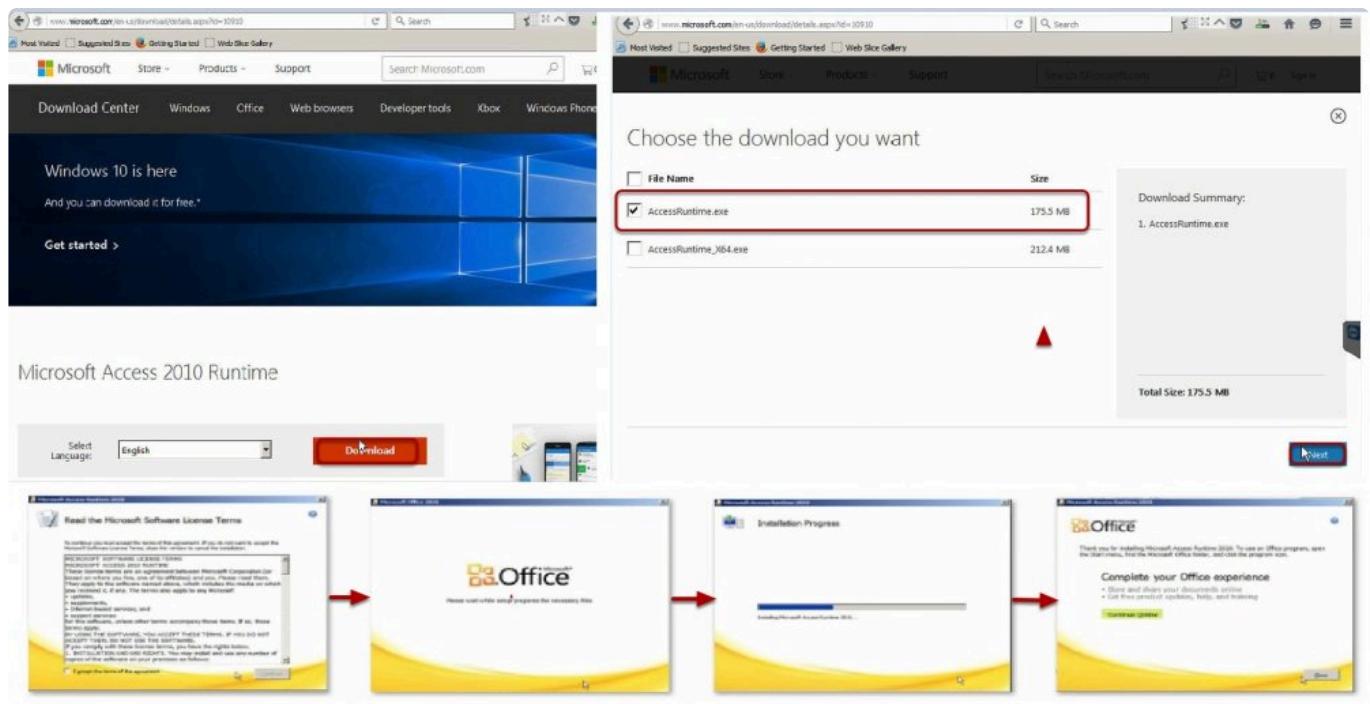


Click Finish.



MICROSOFT OFFICE ACCESS RUNTIME 2010

Download and Install [Access Runtime 2010](#) (Make sure to select AccessRuntime.exe – Not _X64).



SQL SERVER 2012

Download [SQL Server® 2012](#)

The screenshot shows the Microsoft Download Center website. The top navigation bar includes links for Download Center, Windows, Office, Web browsers, Developer tools, Xbox, and Windows Phone. The main banner features the Windows 10 logo and the text "Windows 10 is here" and "And you can download it for free.*". Below this, there is a "Get started >" link.

Below the banner, the page displays "Microsoft® SQL Server® 2012 Express". There is a "Select Language:" dropdown menu set to "English" and a red "Download" button. To the right of the button is a small image of a smartphone.

Below this, the page shows the URL <https://www.microsoft.com/en-ca/download/details.aspx?id=29062>. The page title is "Choose the download you want".

The page lists several download options in a table:

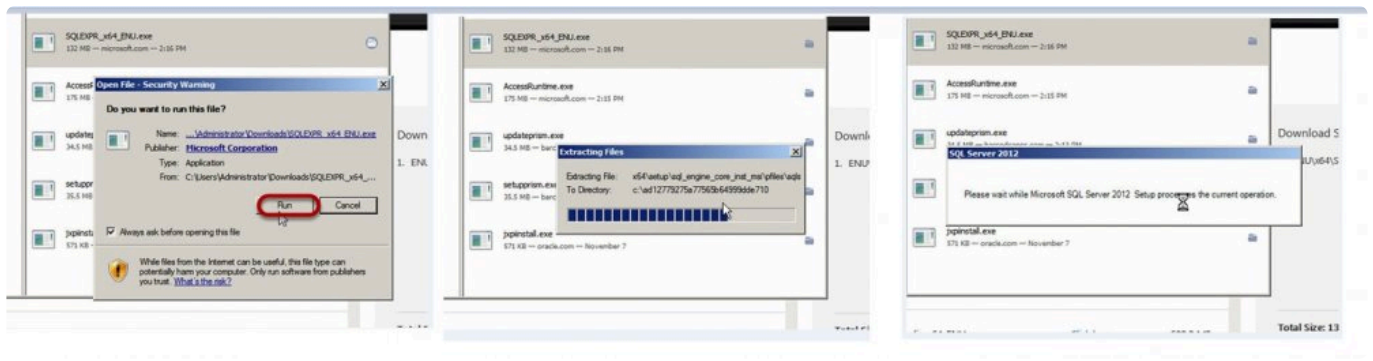
File Name	Size
<input checked="" type="checkbox"/> 64 bit <input type="checkbox"/> ENUSqlExpr_x64_ENU.exe	132.3 MB
<input type="checkbox"/> ENUSqlExprDV_x64_ENU.exe	1.3 GB
<input type="checkbox"/> ENUSqlExprWT_x64_ENU.exe	669.9 MB
<input type="checkbox"/> ENUSqlLocalDB.MSI	33.0 MB
<input type="checkbox"/> ENUSqlManagementStudio_x64_ENU.exe	600.2 MB
<input checked="" type="checkbox"/> 32 bit <input type="checkbox"/> ENUSqlExpr_x86_ENU.exe	116.7 MB

Below the table, there is a "Download Summary" section that says "You have not selected any file(s) to download." and "Total Size: 0". There is a "Next" button at the bottom right.

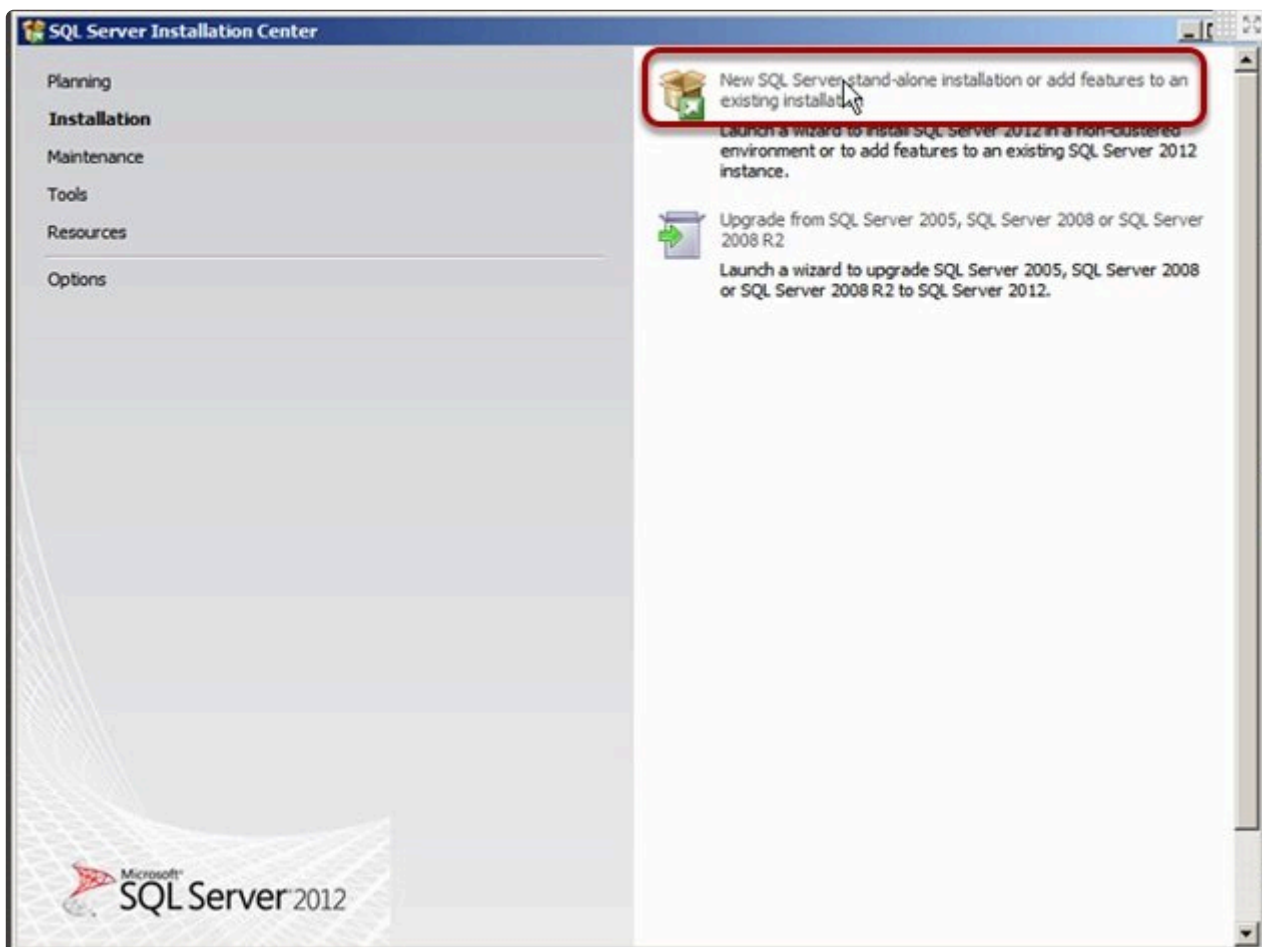


Only download either 32 bit SQLEXPRESS_x86_ENU.exe. or 64 bit SQLEXPRESS_x64_ENU.exe.

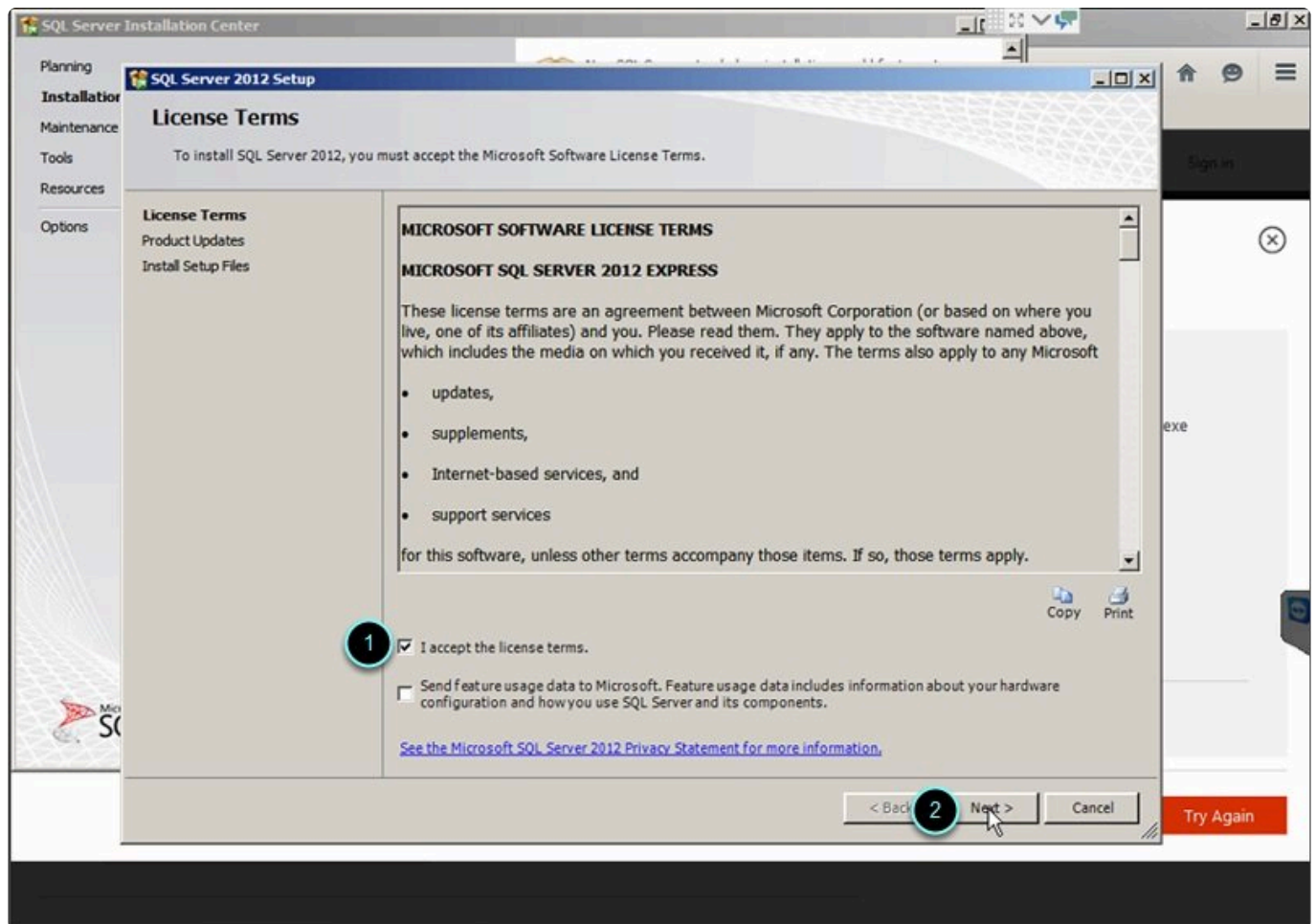
Open and Run SQLEXPRESS_x64_ENU.exe.



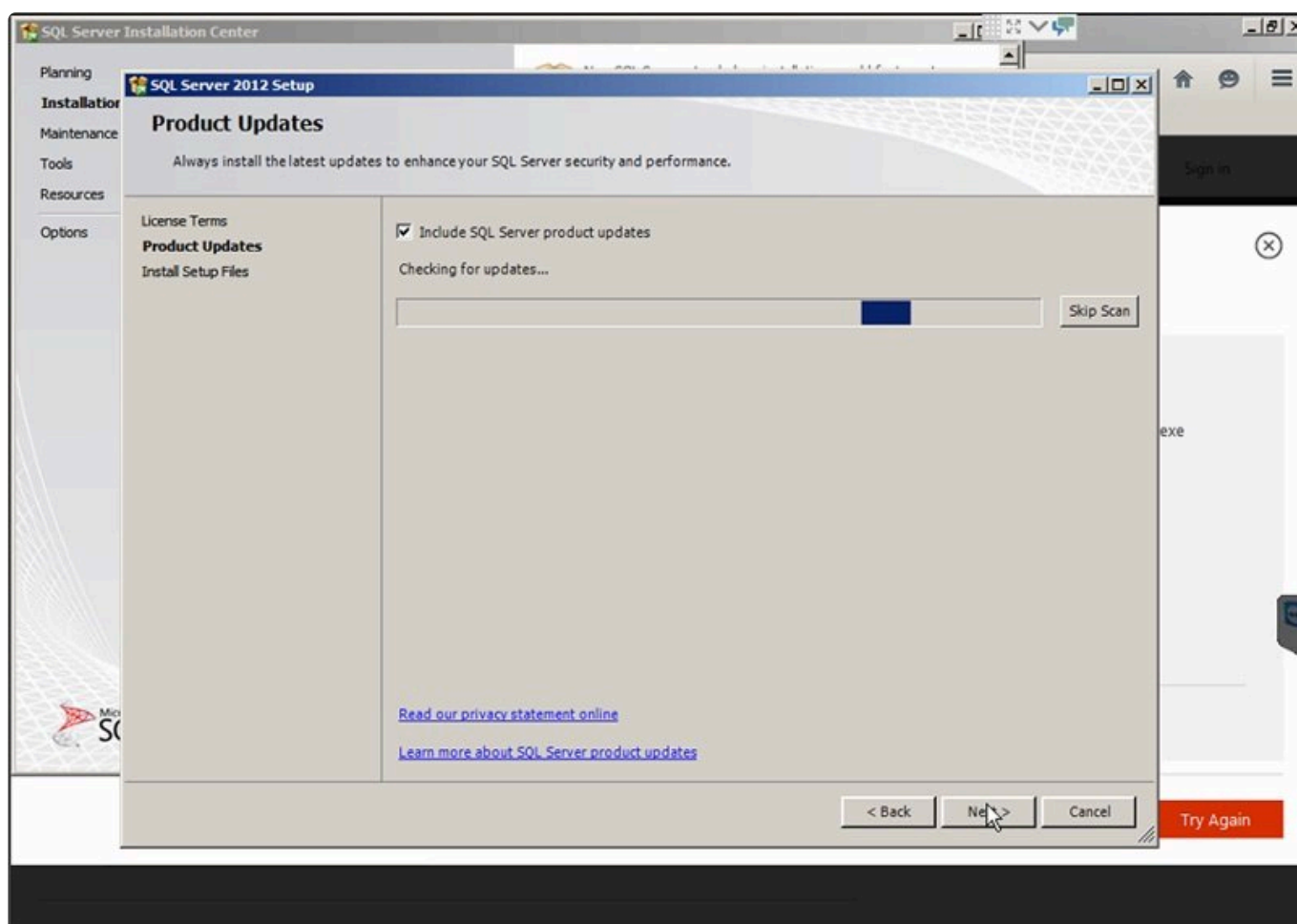
Click on New SQL Server stand-alone installation.



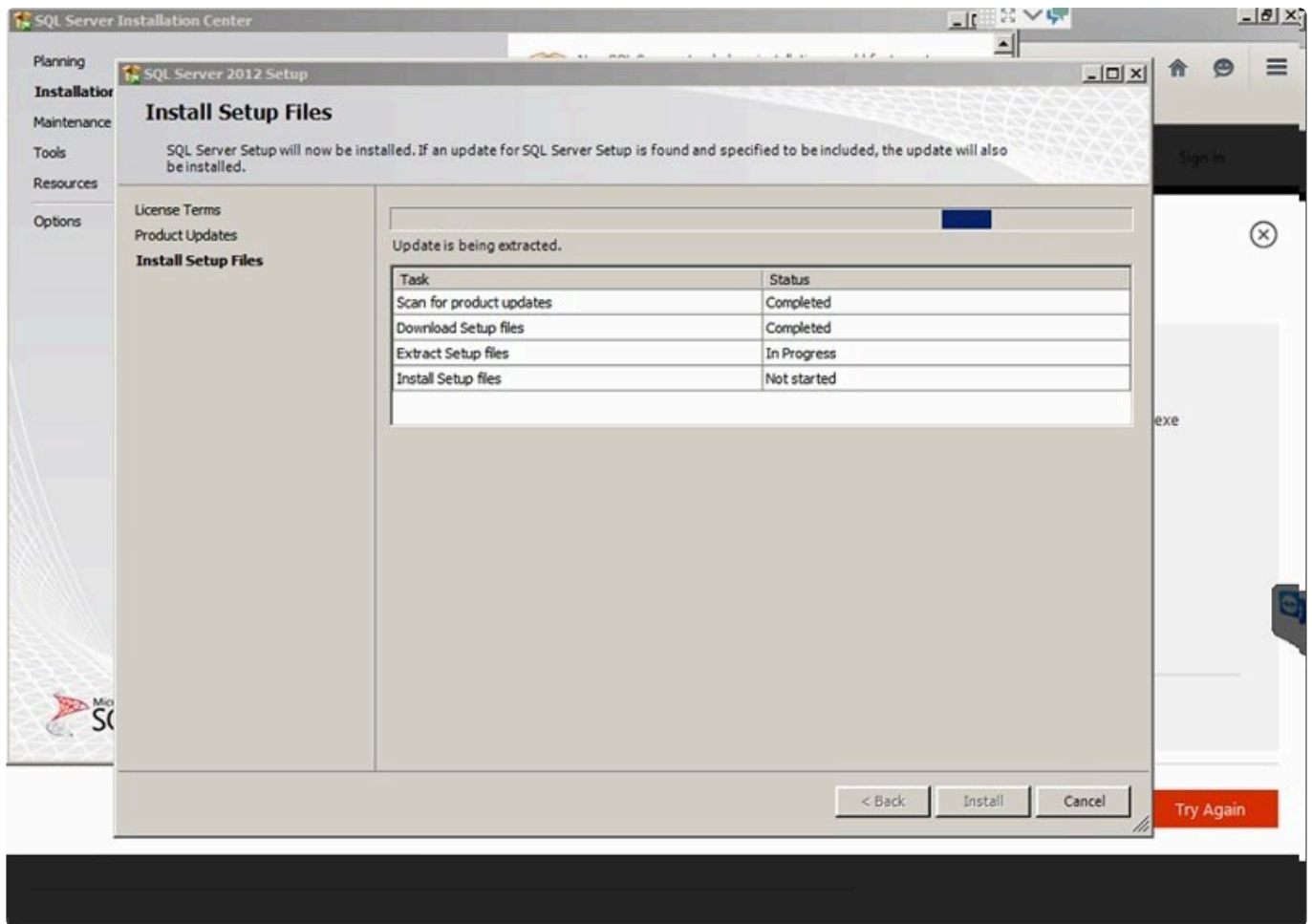
Accept license terms and click Next.



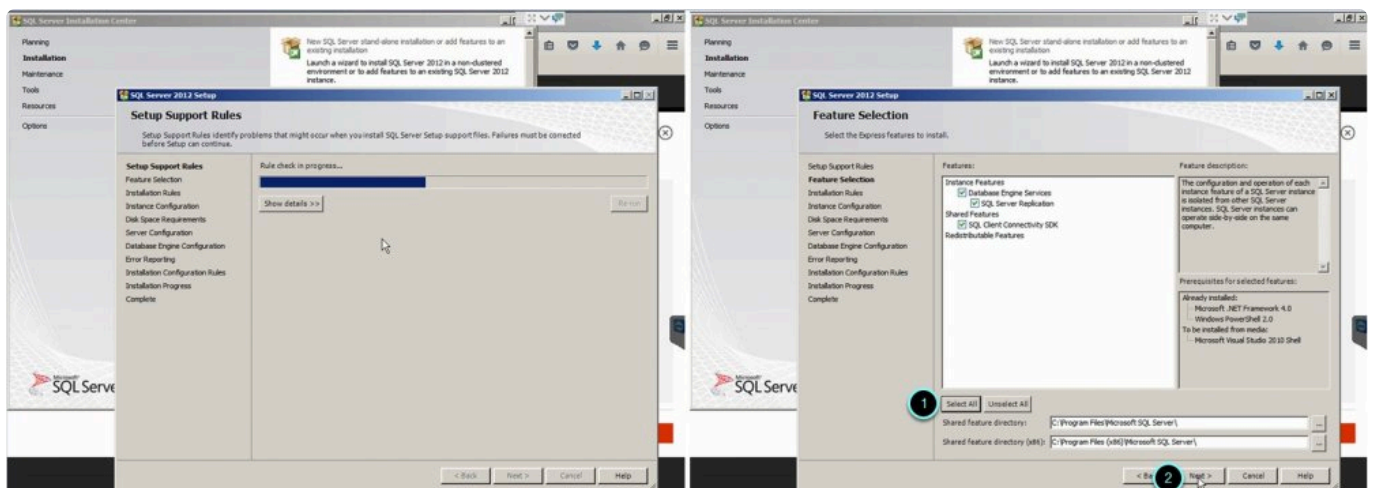
Check "Include SQL Server product updates" and click Next.



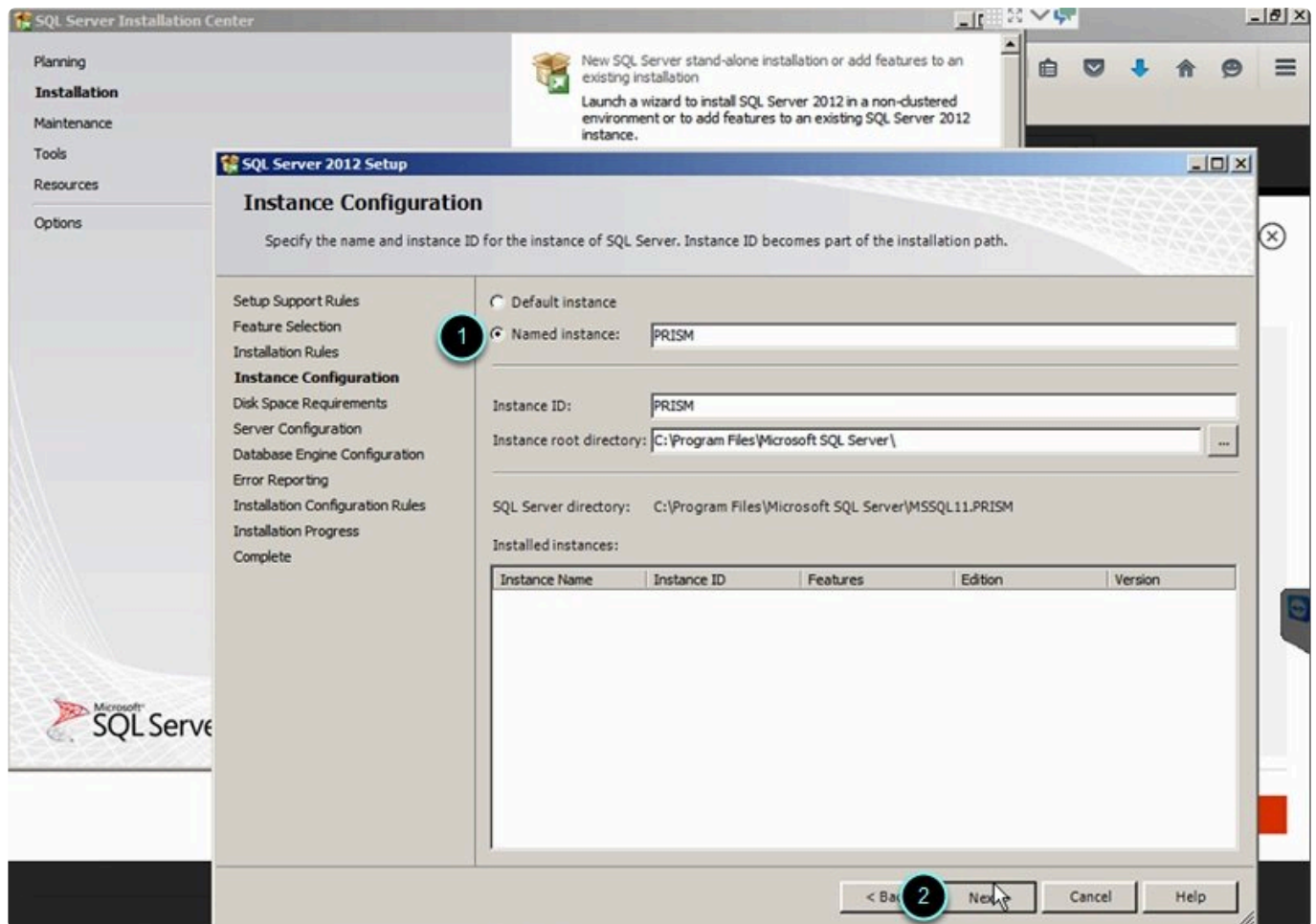
Install updates and components.



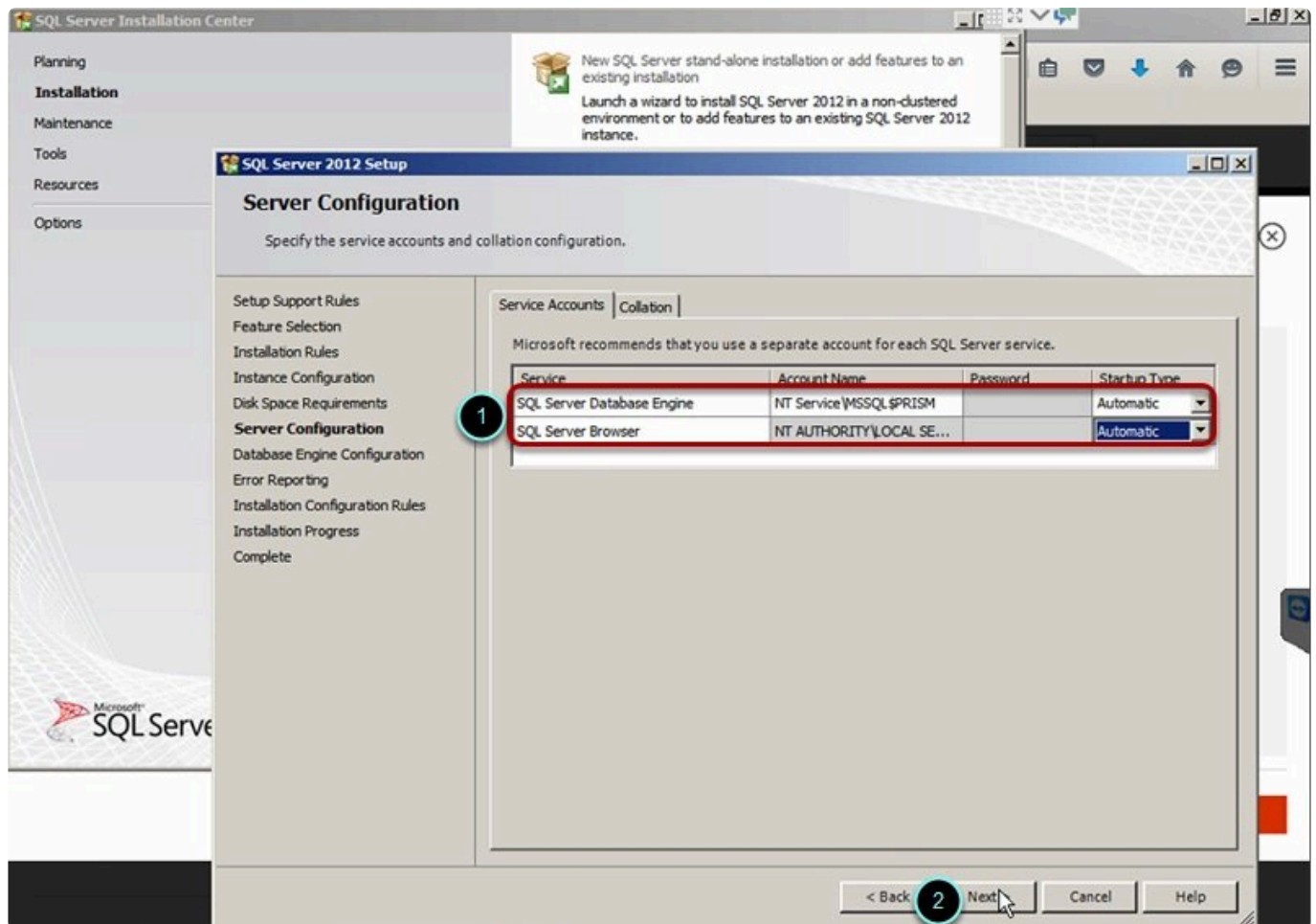
Click select all features and select Next.



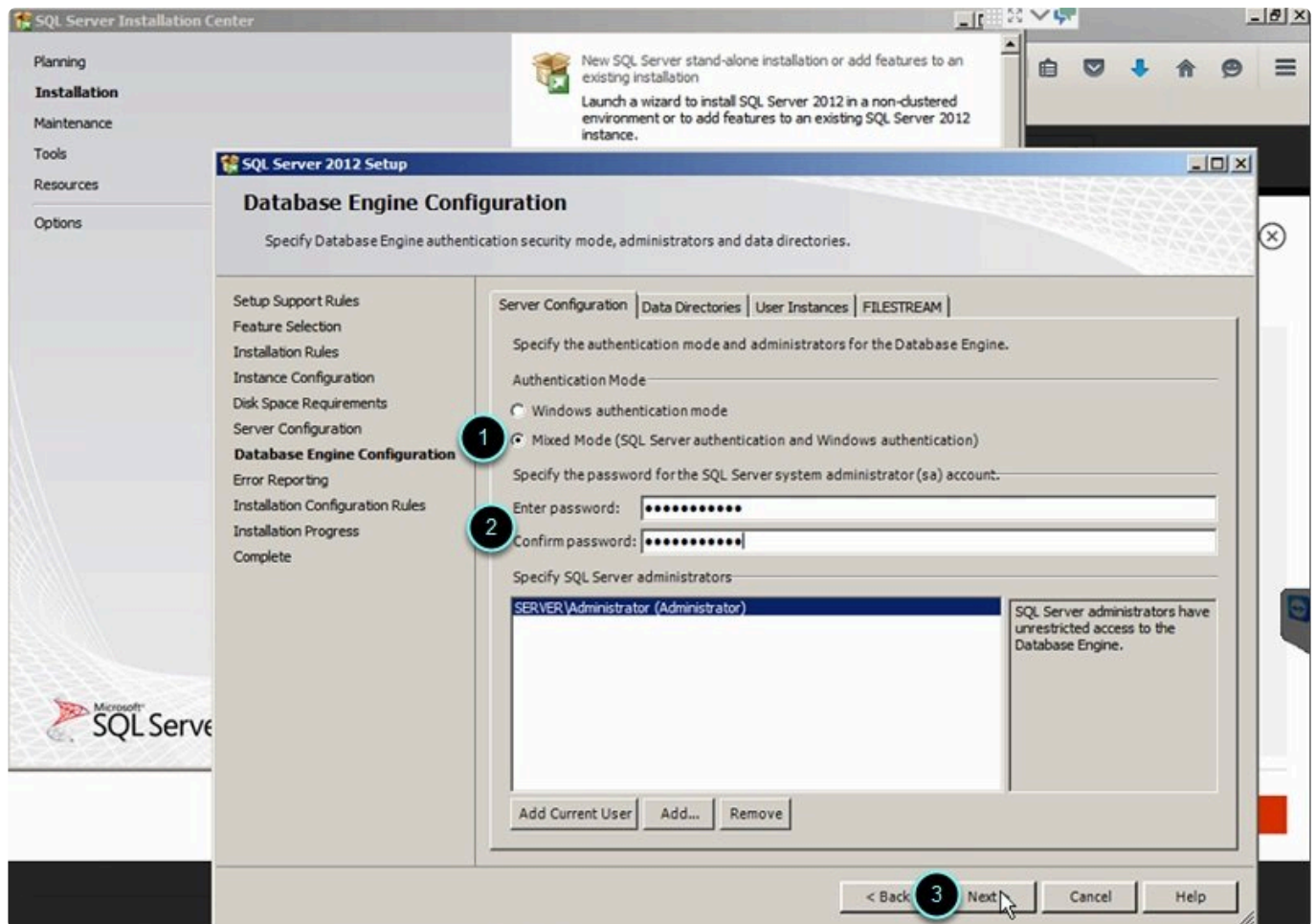
Select "Named Instance" and Type in PRISM. Then click Next.



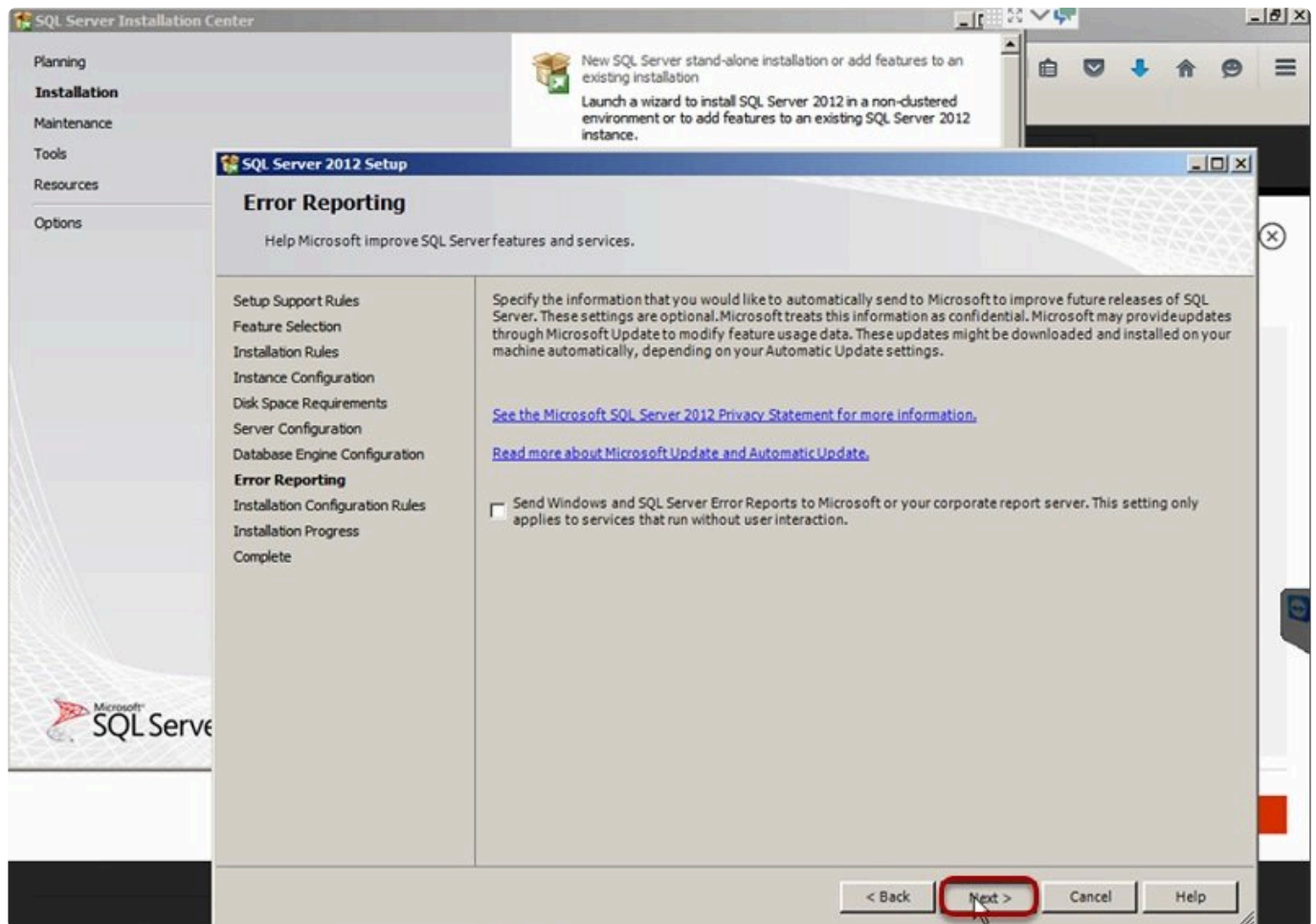
Make sure SQL Server Database Engine and SQL Server Browser are both set to Automatic. Click Next.



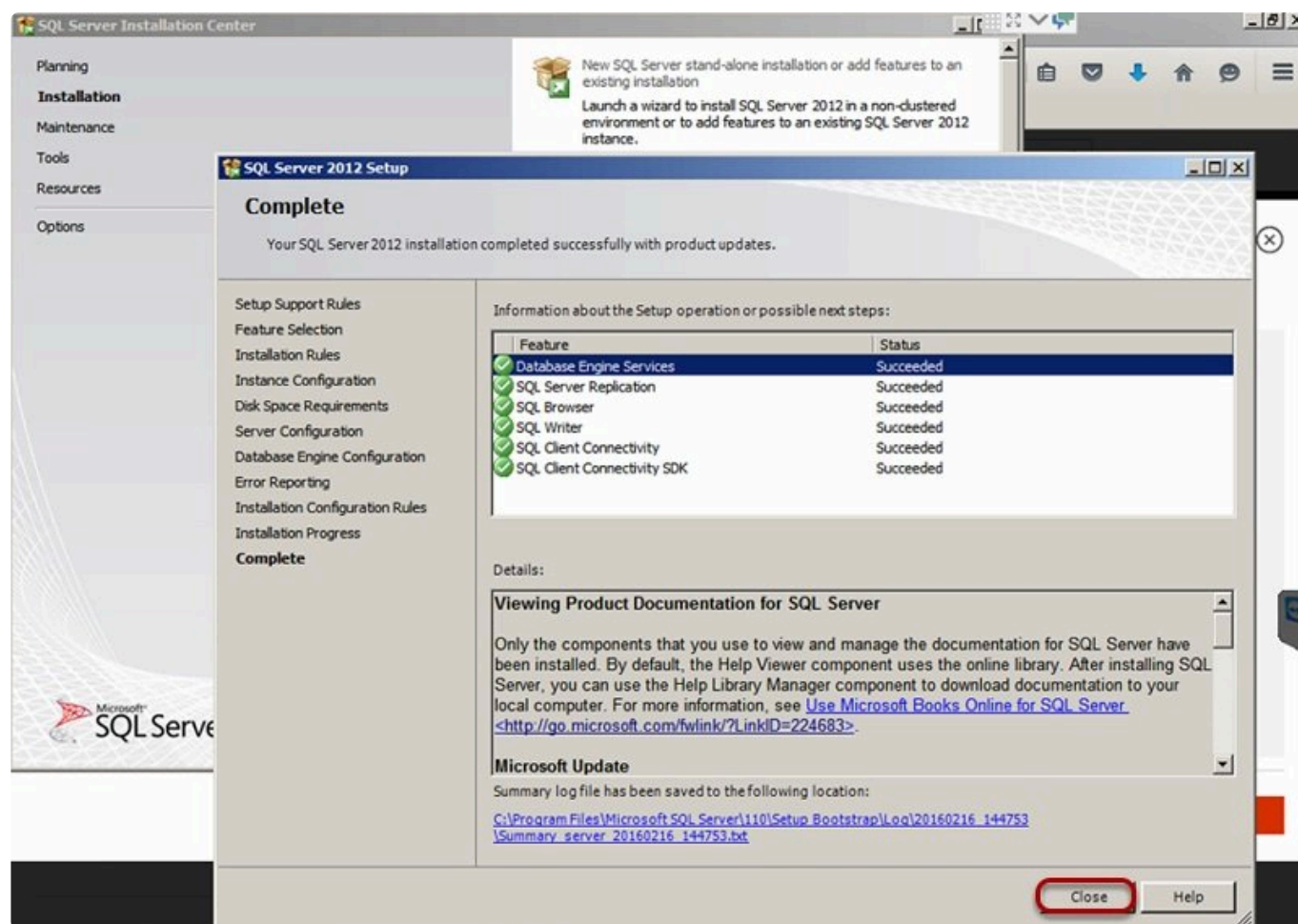
Select Mix Mode and specify the password e.g. prism12345# and click Next.



Click Next.

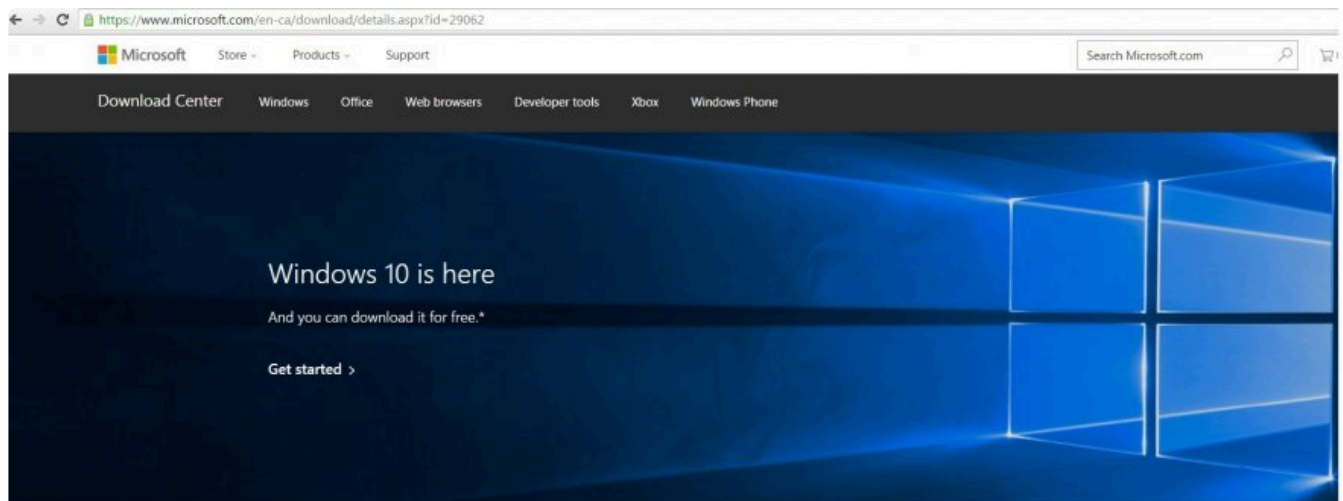


Wait for installation to complete then click Close.



SQL SERVER MANAGEMENT STUDIO 2012

Download SQL Server Management Studio ® 2012(Only download either 32 bit or 64 bit).

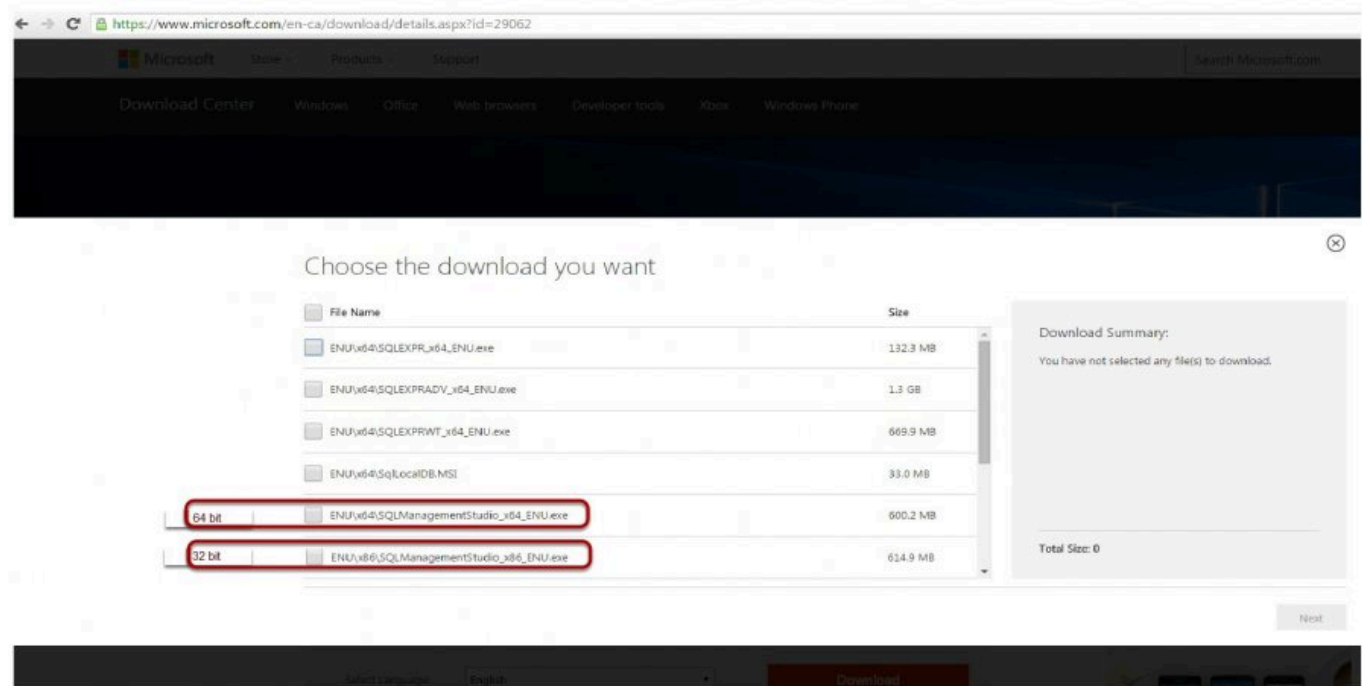


Microsoft® SQL Server® 2012 Express

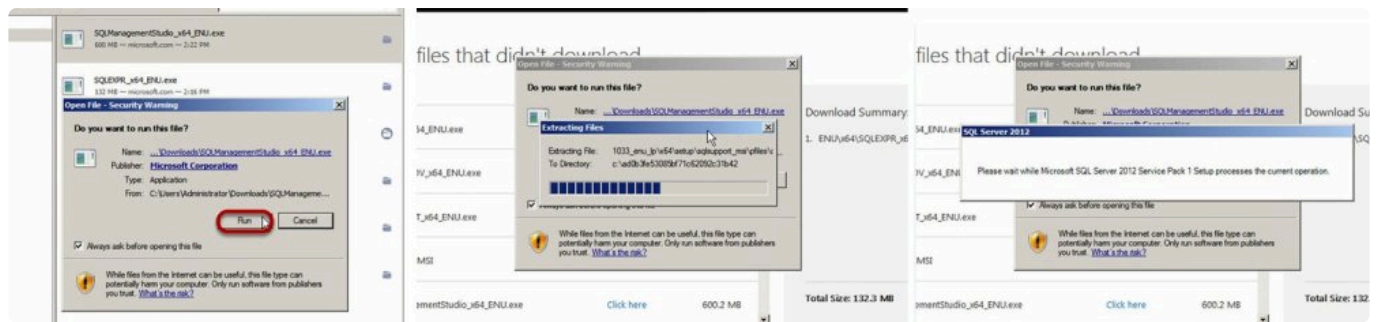
Select Language:

English

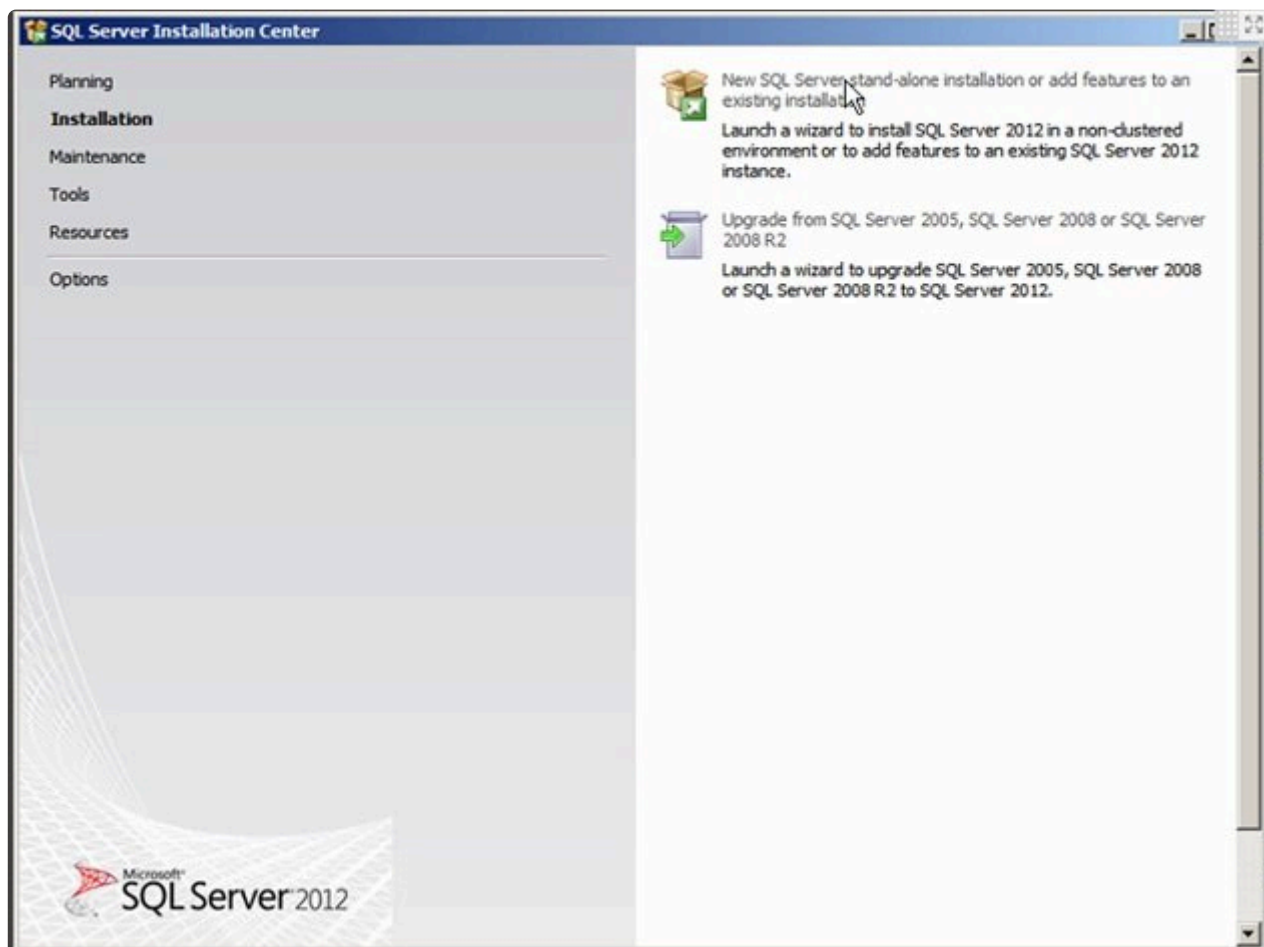
Download



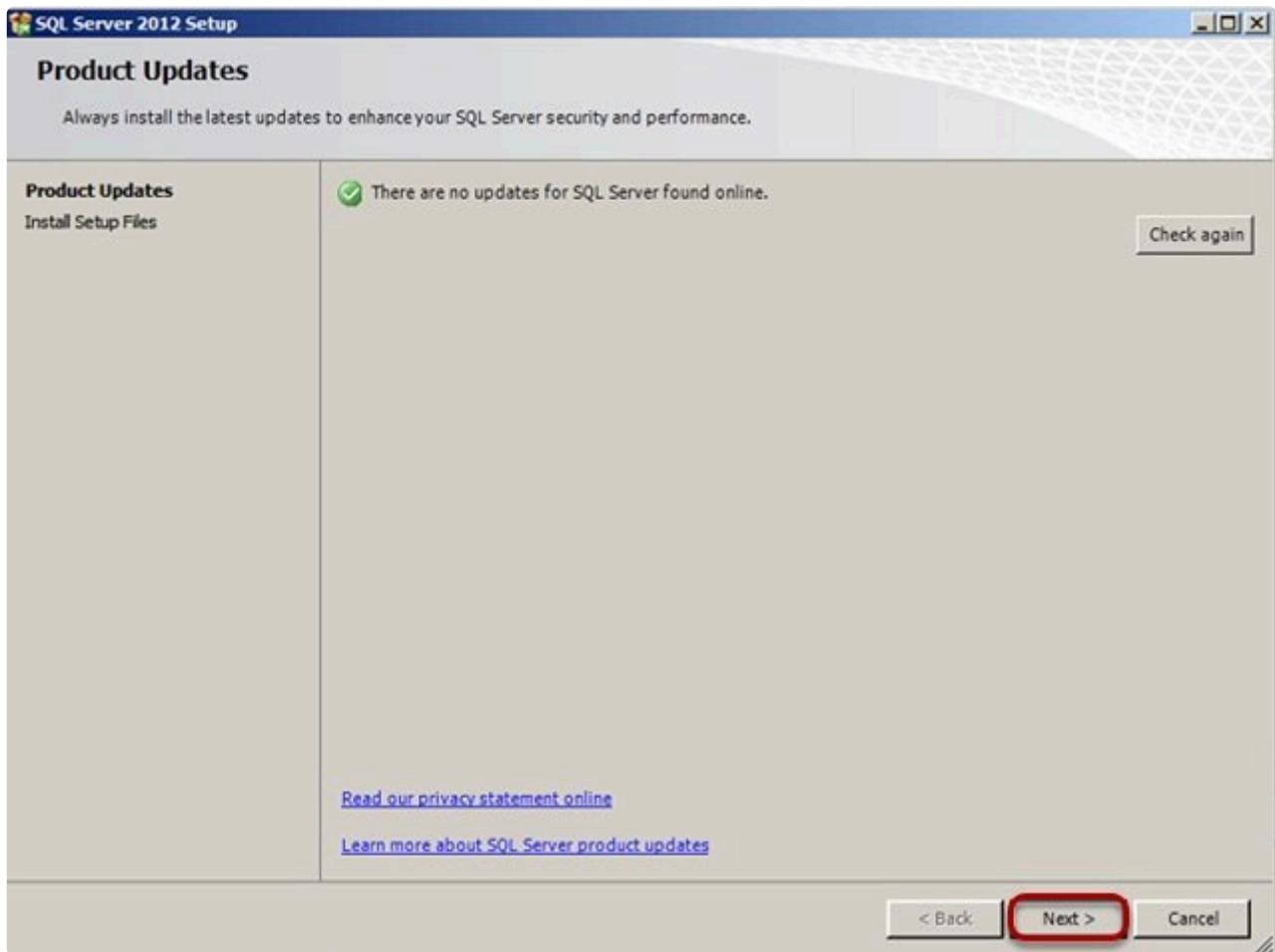
Open and Run SQL ManagementStudio_x64_ENU.exe



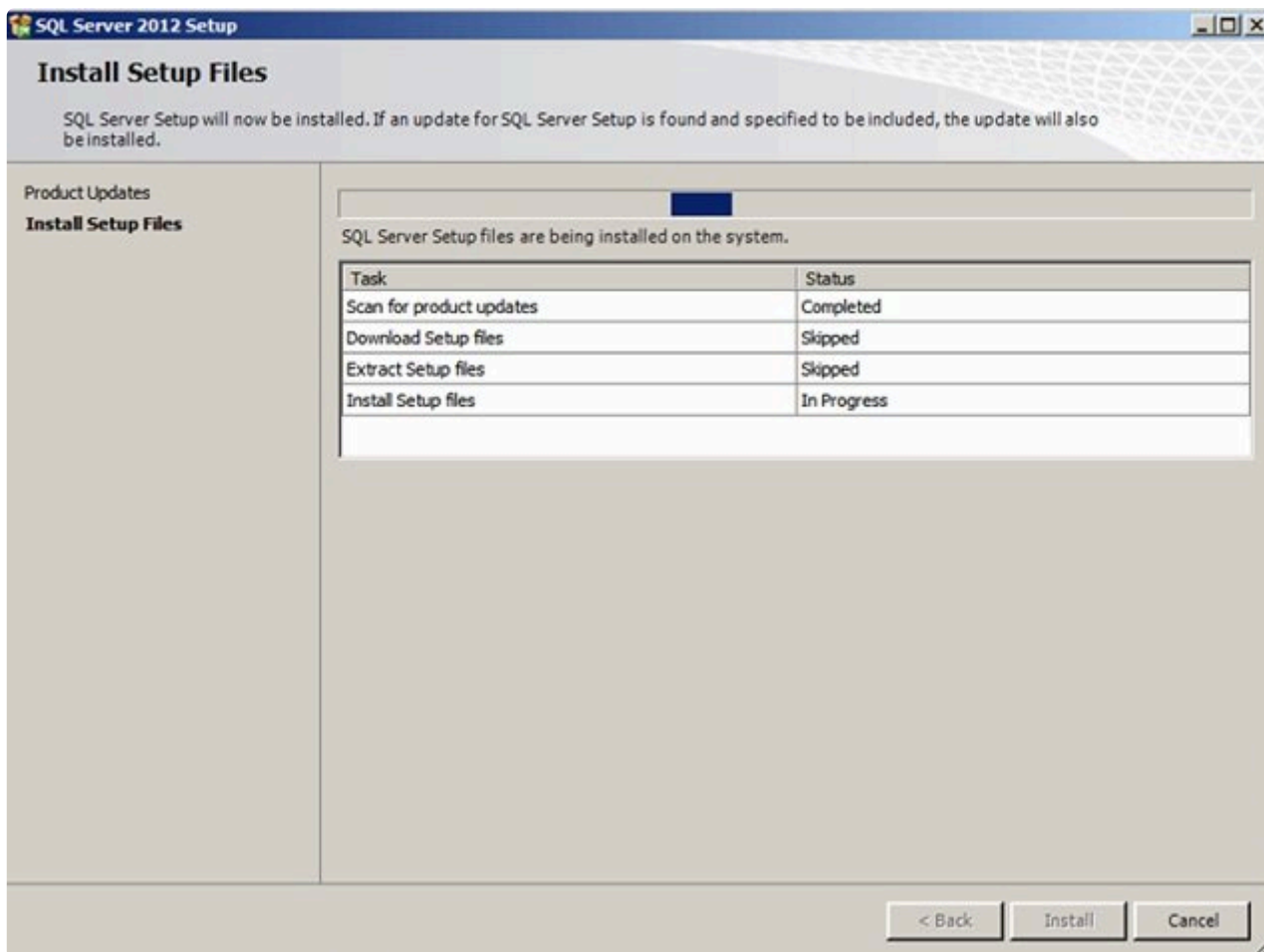
Click on New SQL Server stand-alone installation.



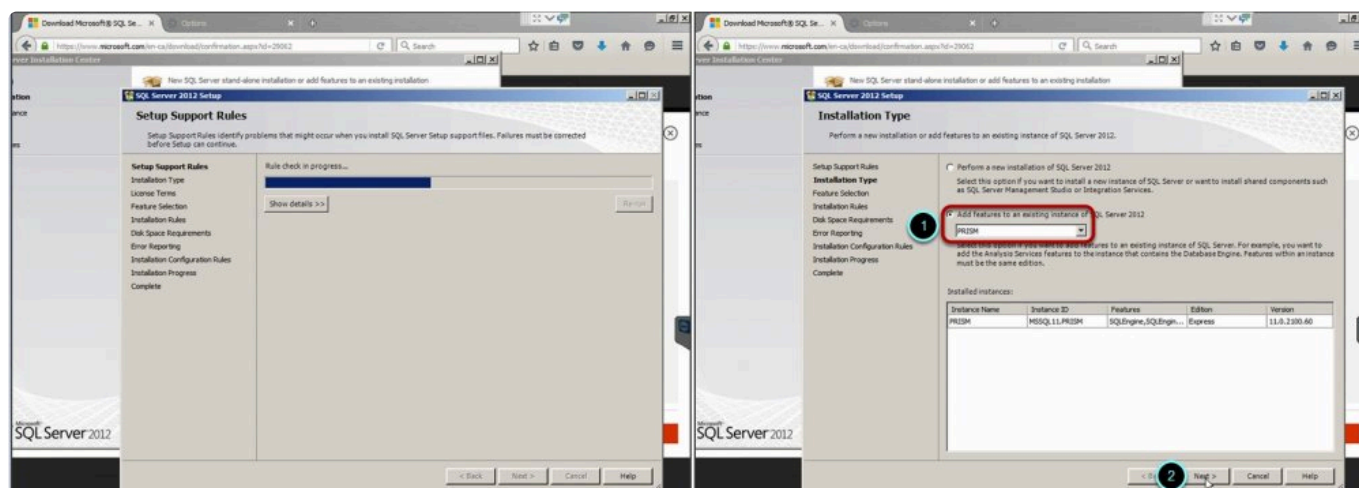
Click Next.



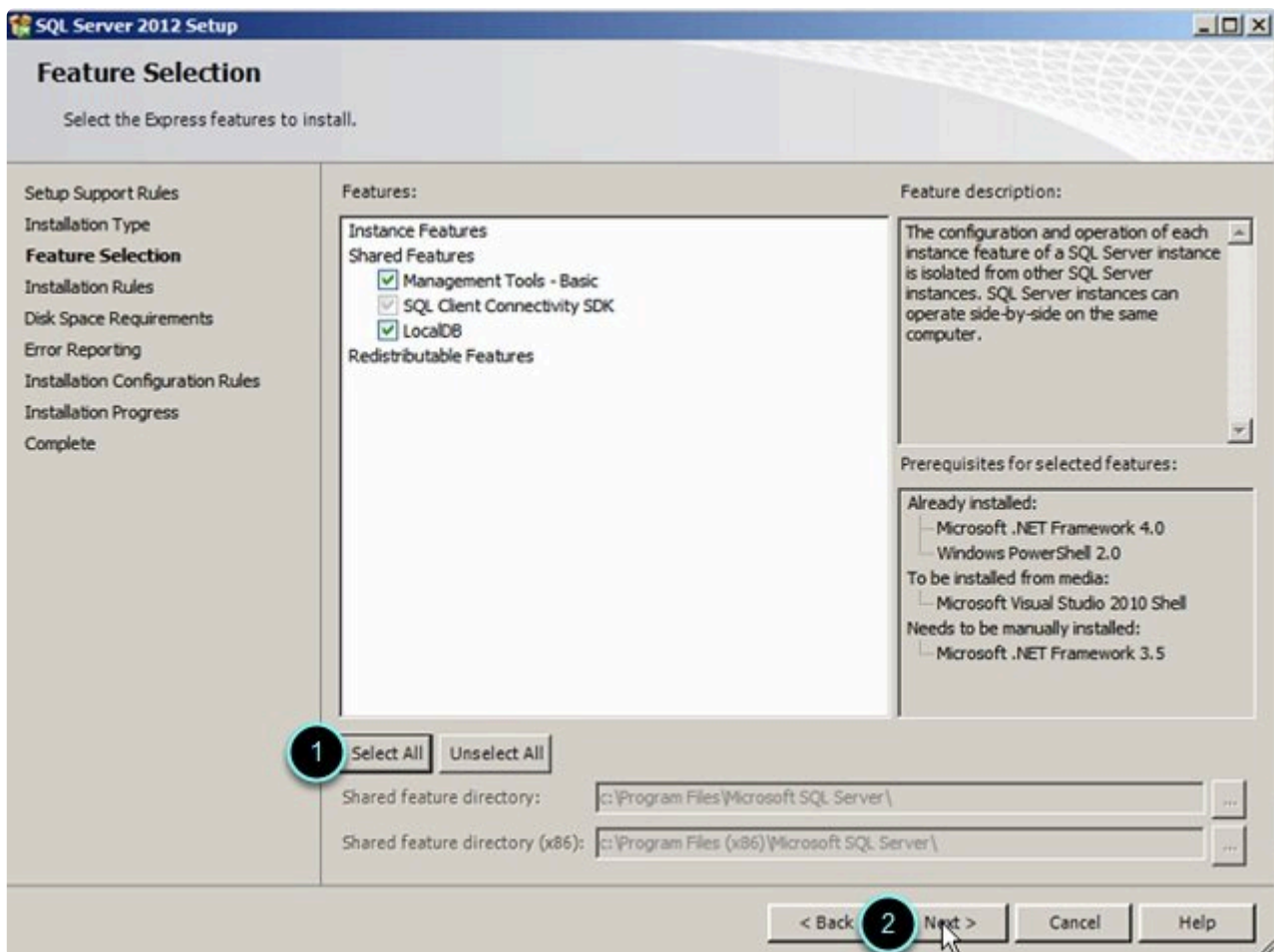
Wait for set up files to finish.



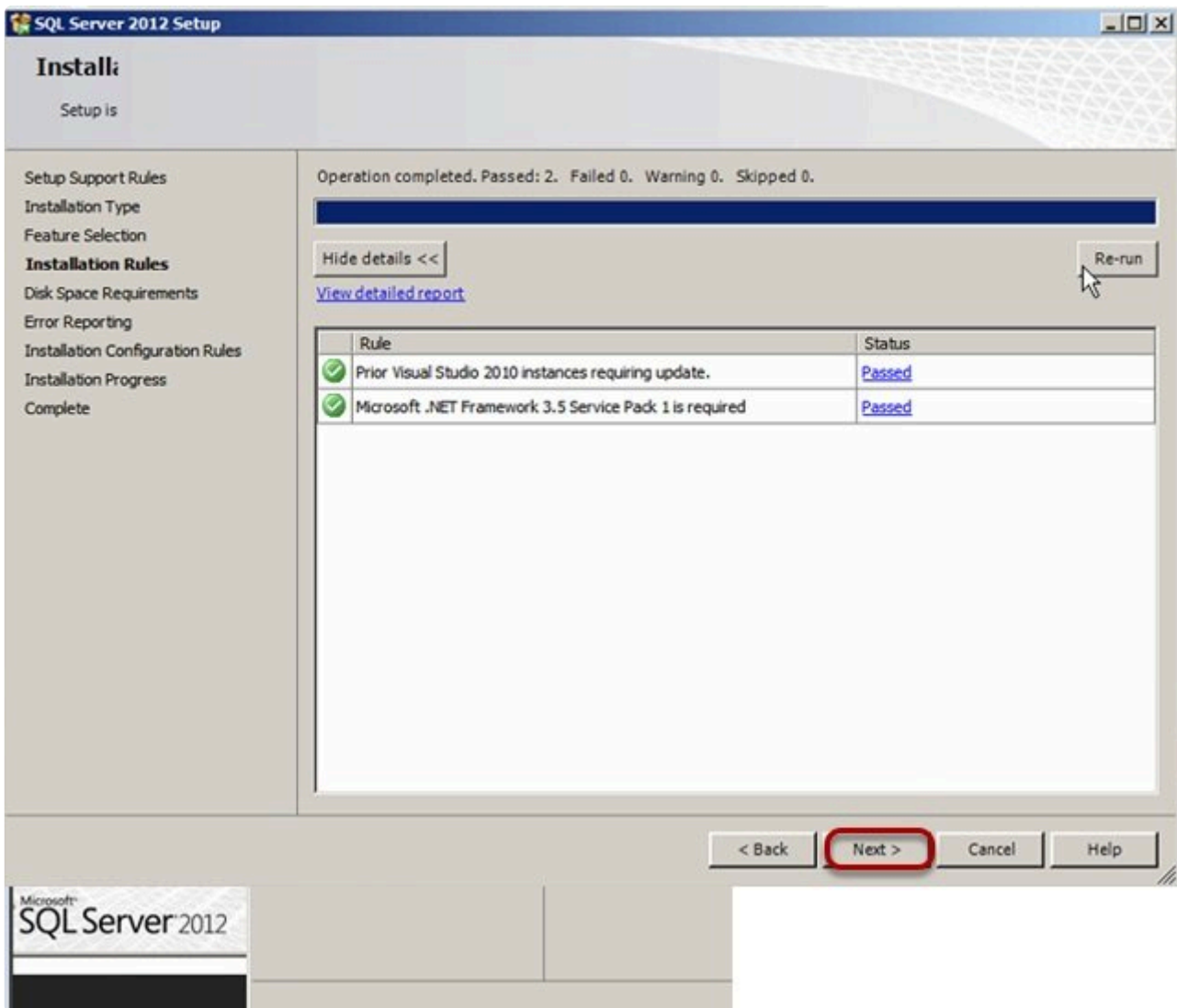
Select “Add features to an existing instance of SQL Server 2012” and click Next.



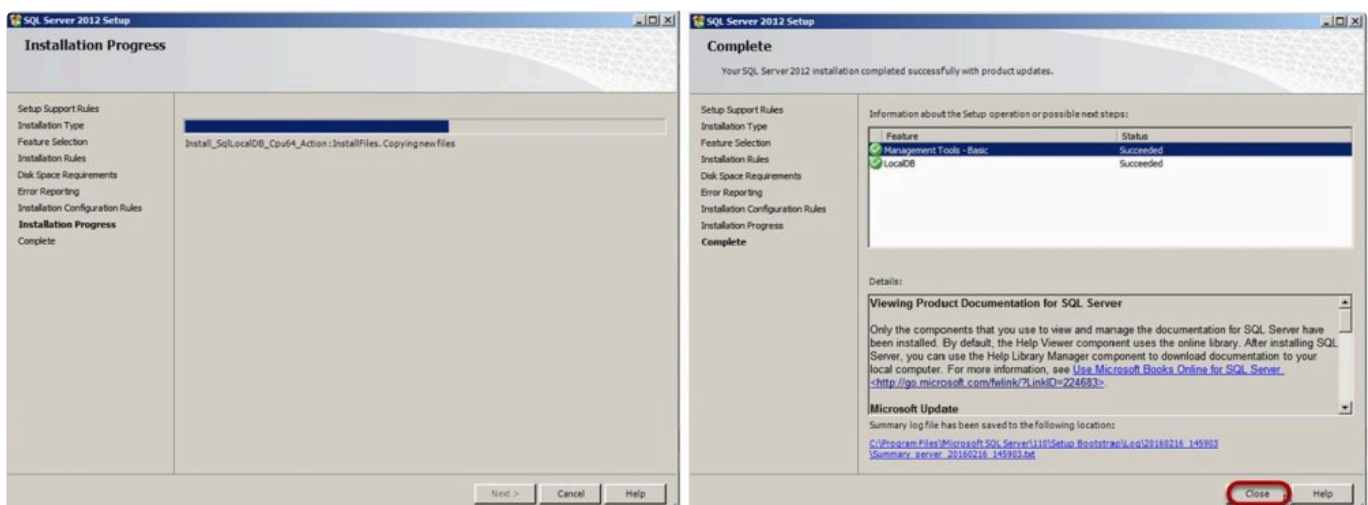
Click on “Select All” and click on Next.



Click Next.

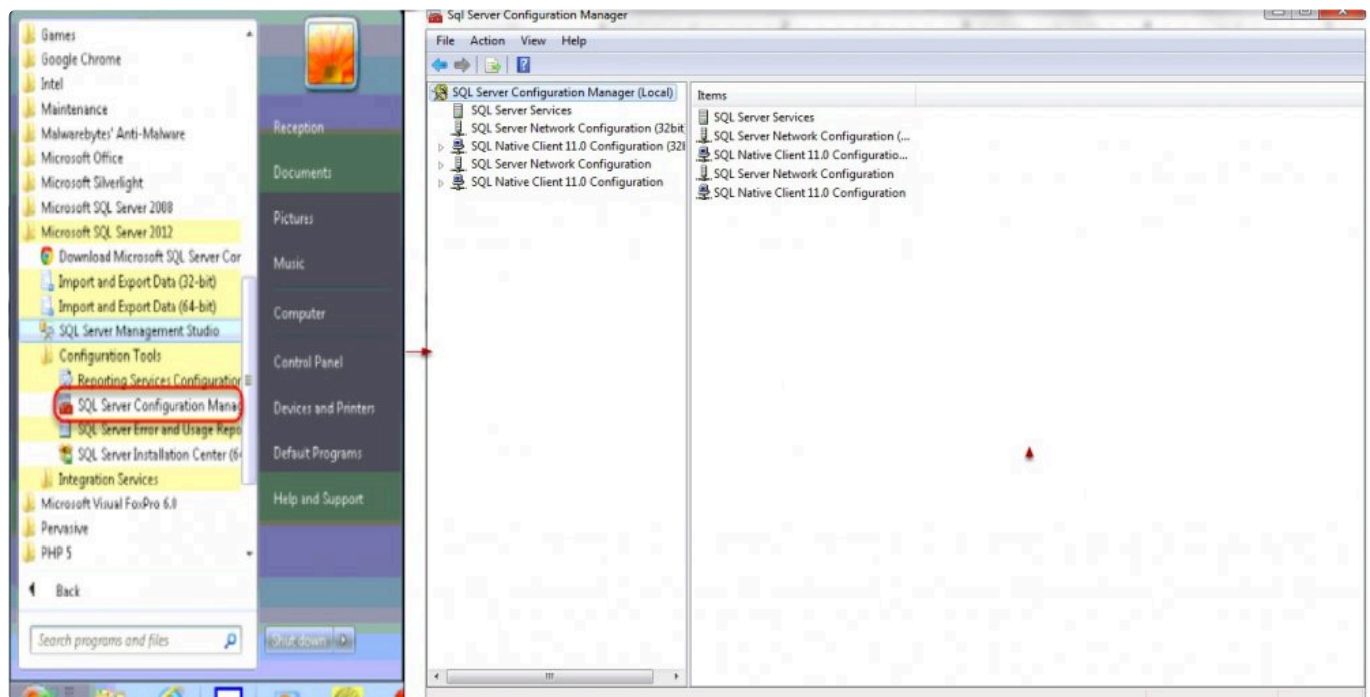


Wait for installation to complete then click Close.

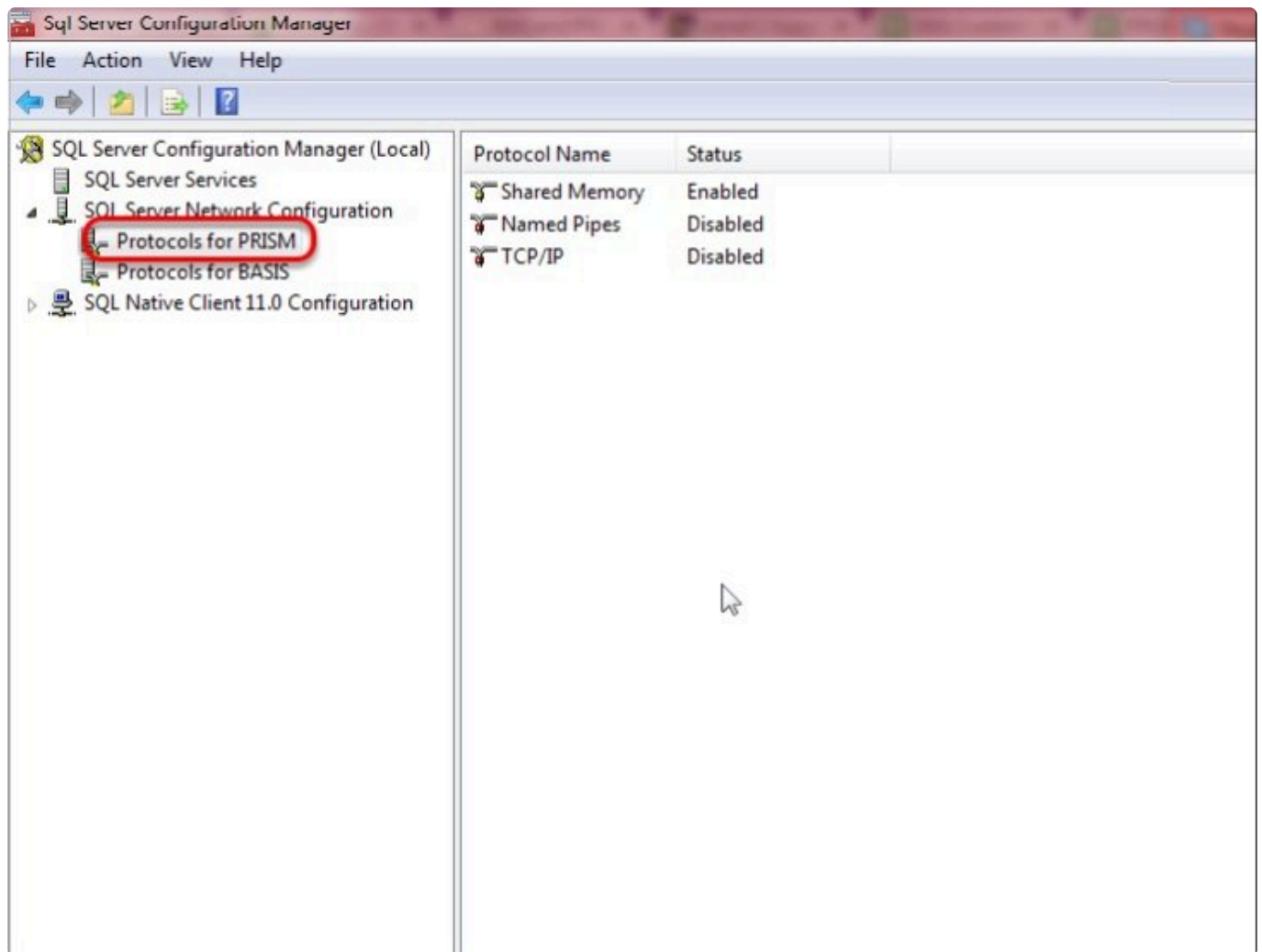


SQL SERVER 2012 CONFIGURATION

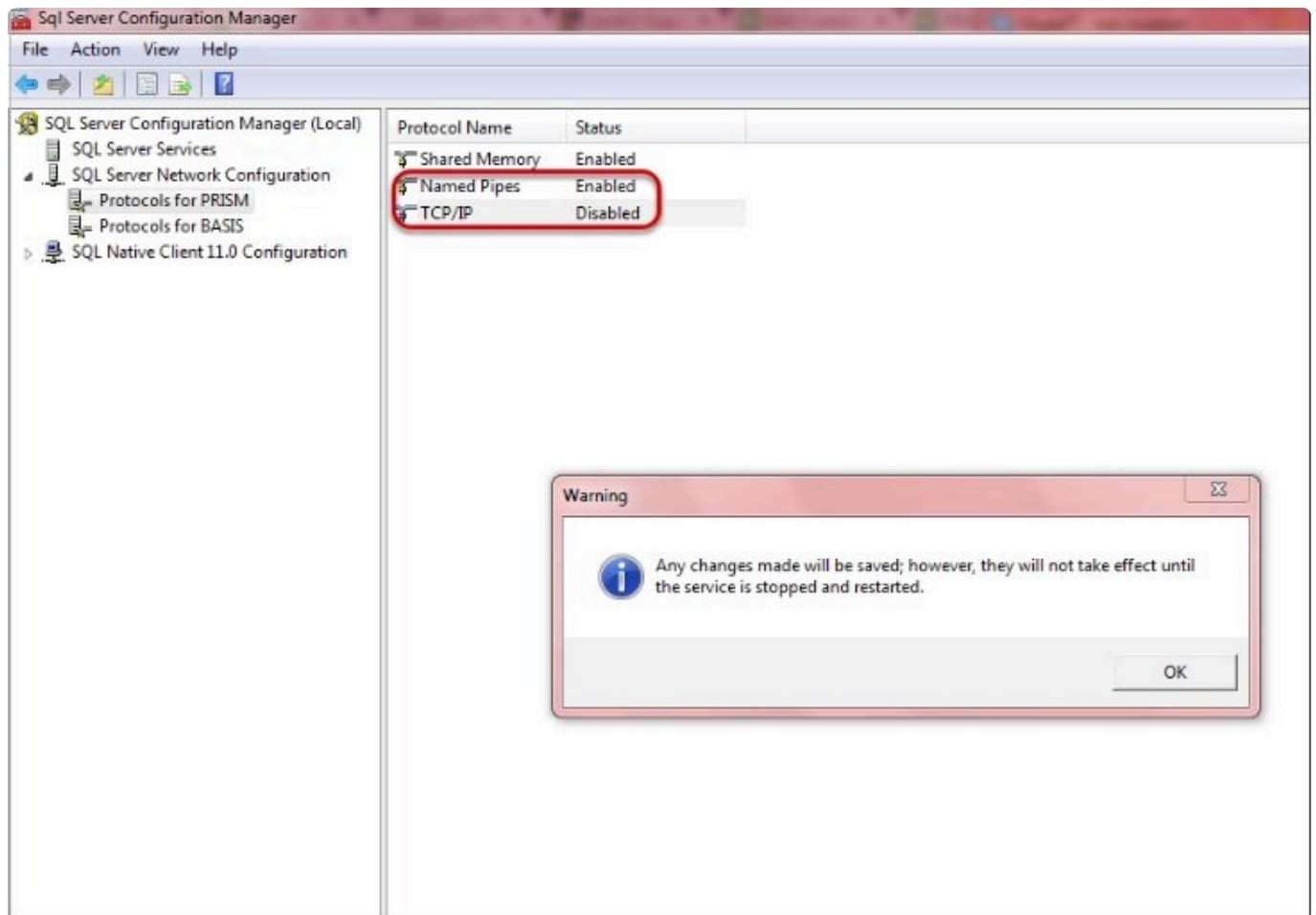
Open SQL Server Configuration Manager.



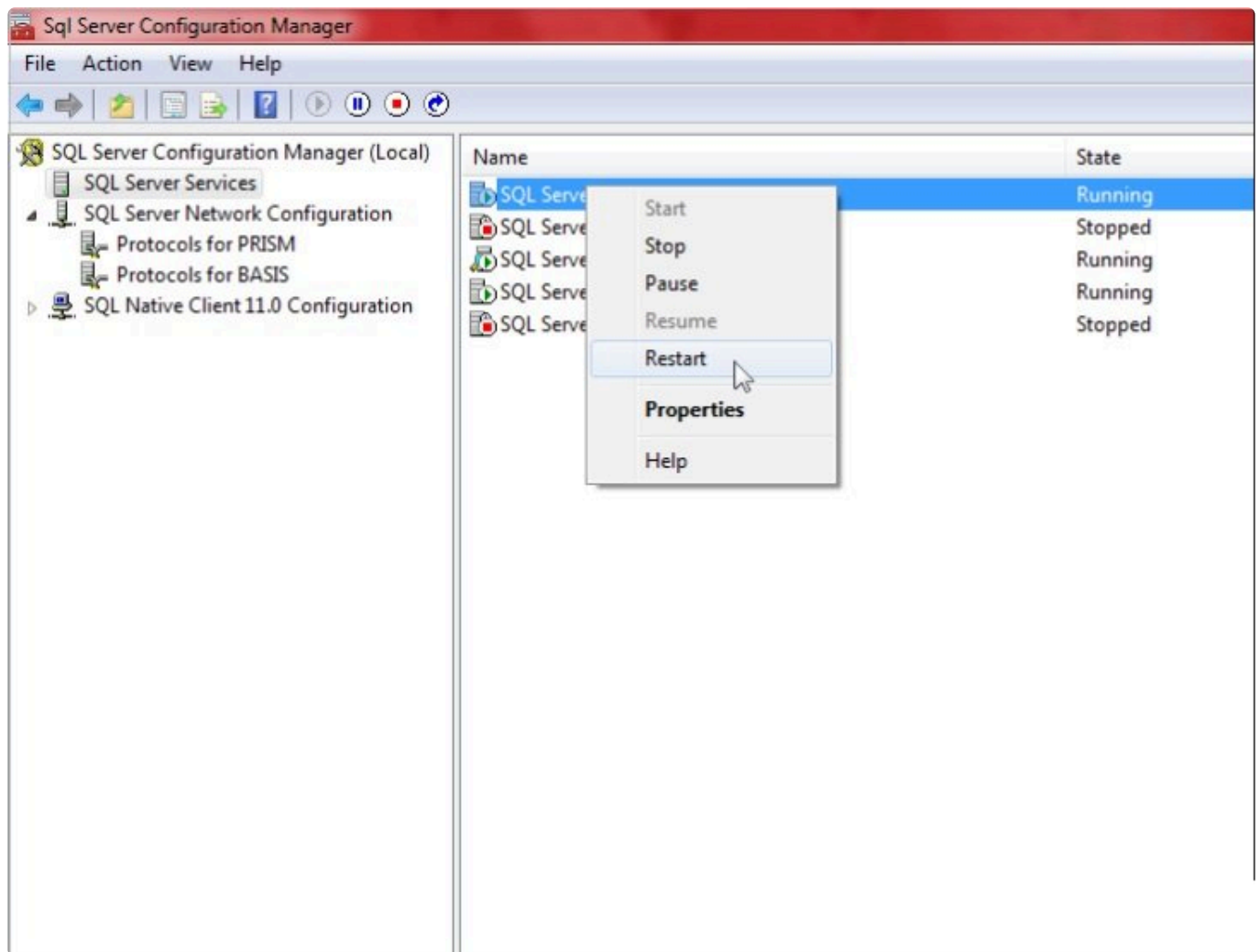
Select Protocols for PRISM under SQL Server Network Configuration.



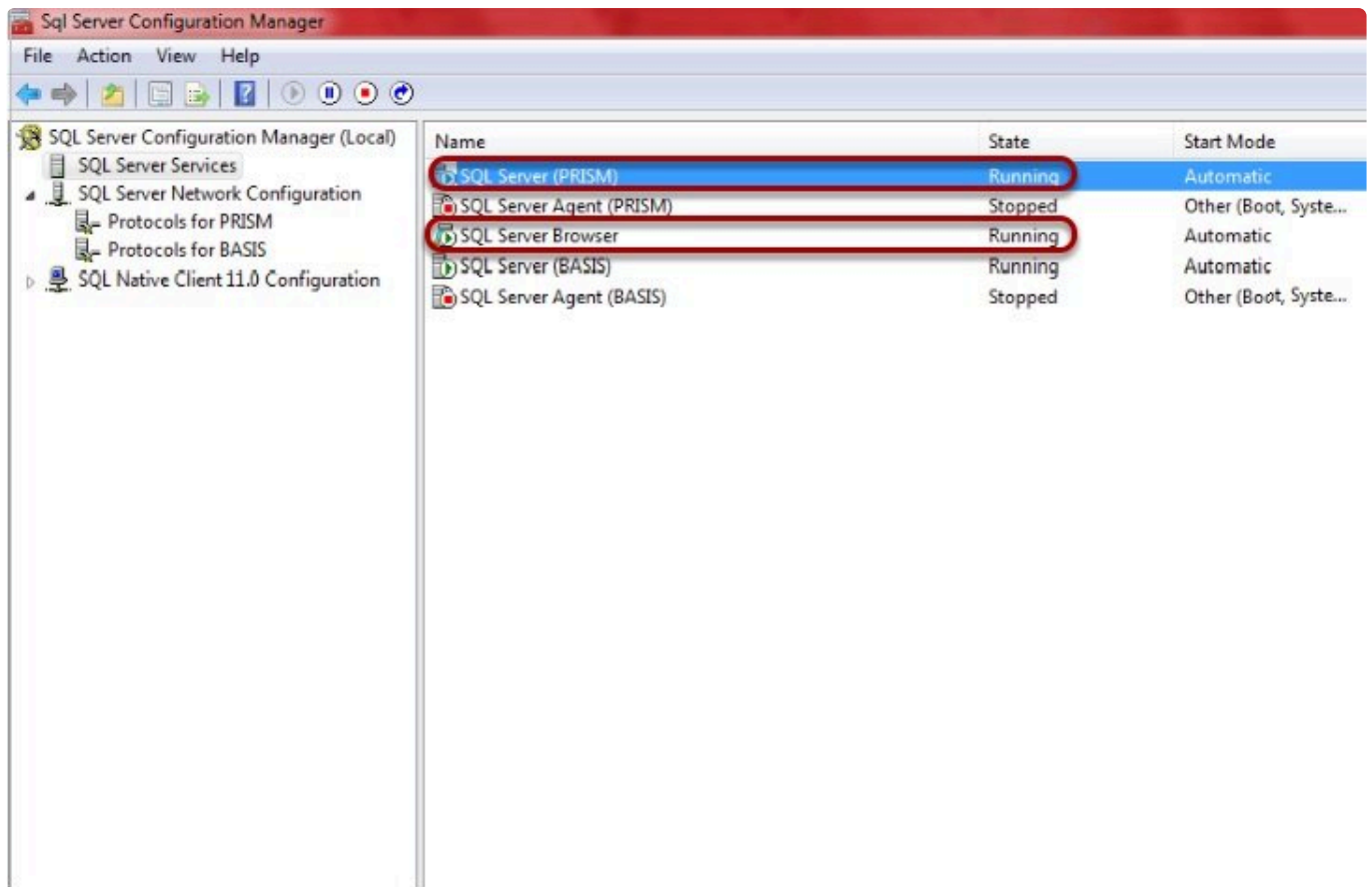
Enable Named Pipes and TCP/IP. Both should be enabled.



Go to SQL Server Services and restart both SQL Server PRISM and SQL Server Browser.



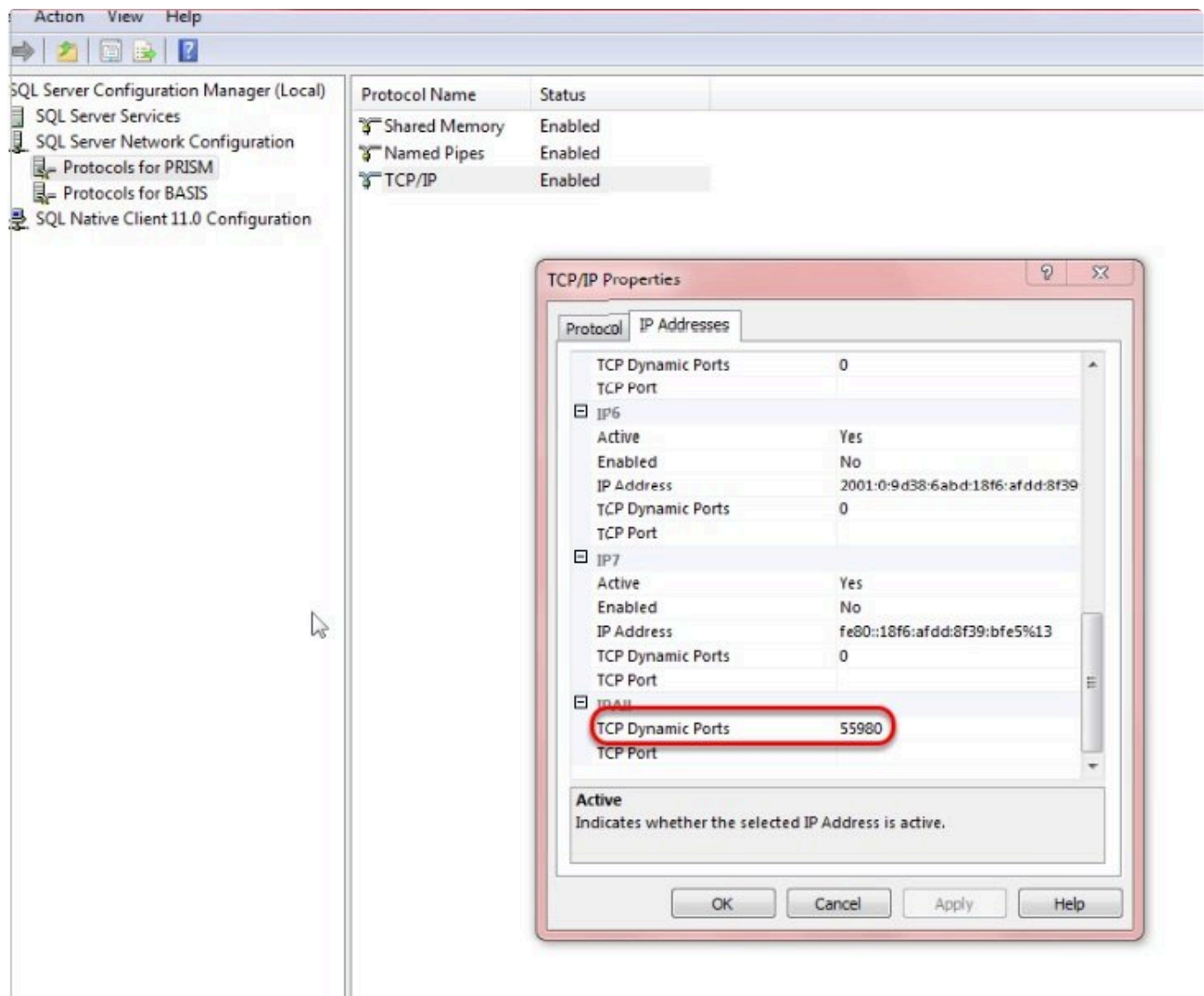
Make sure both SQL Server PRISM and SQL Server Browser are running and start mode should be Automatic.



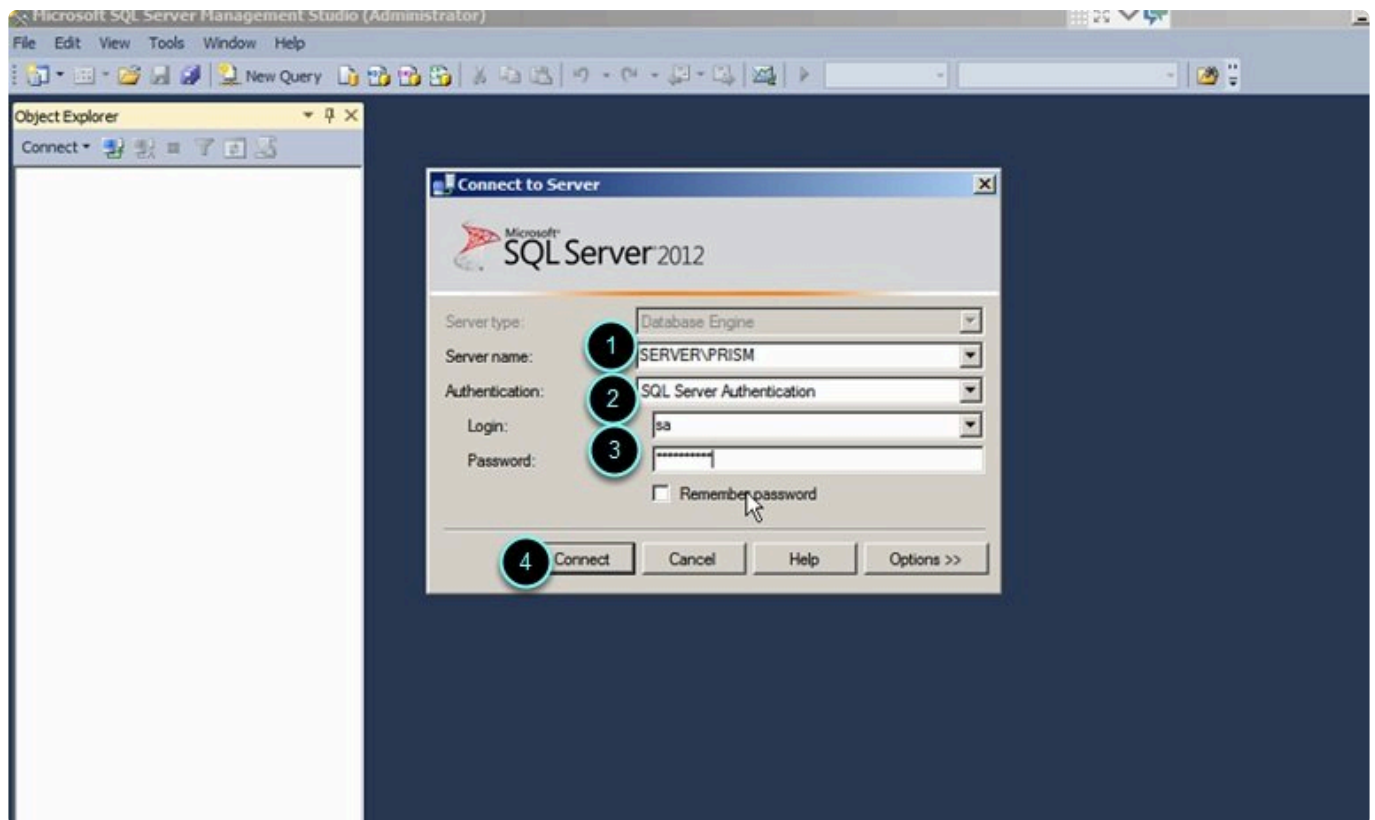
Click Protocols for PRISM and right click on TCP/IP and click Properties. Go to the IP Addresses tab and scroll down

to TCP Dynamic Ports. Make a note of the

port number. This is the port that needs to be opened for Firewall exceptions.

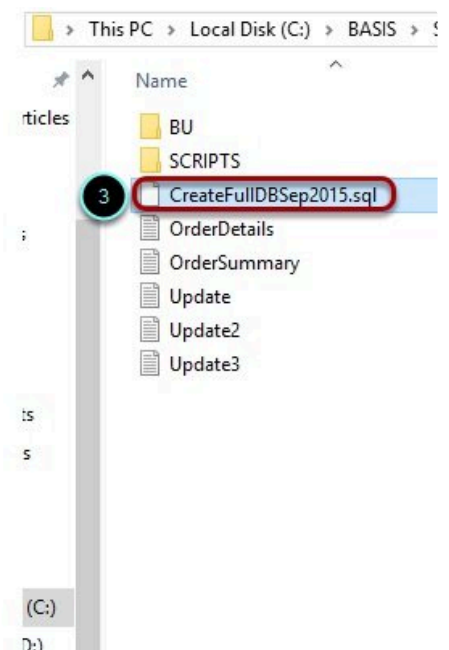
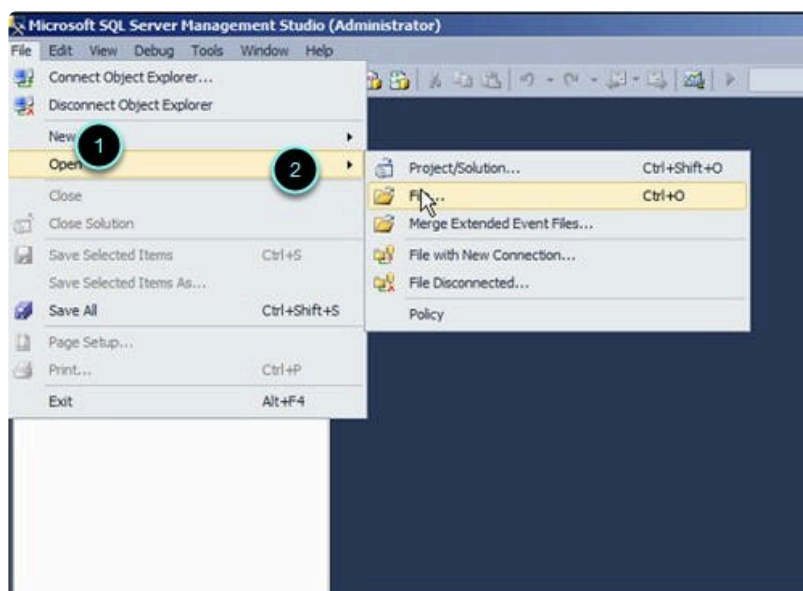


Login to SQL Server 2012 Management Studio. Select the proper server instance name(computer name\instance name), authentication should be set to SQL Server Authentication, specify the login ID and Password and click Connect.

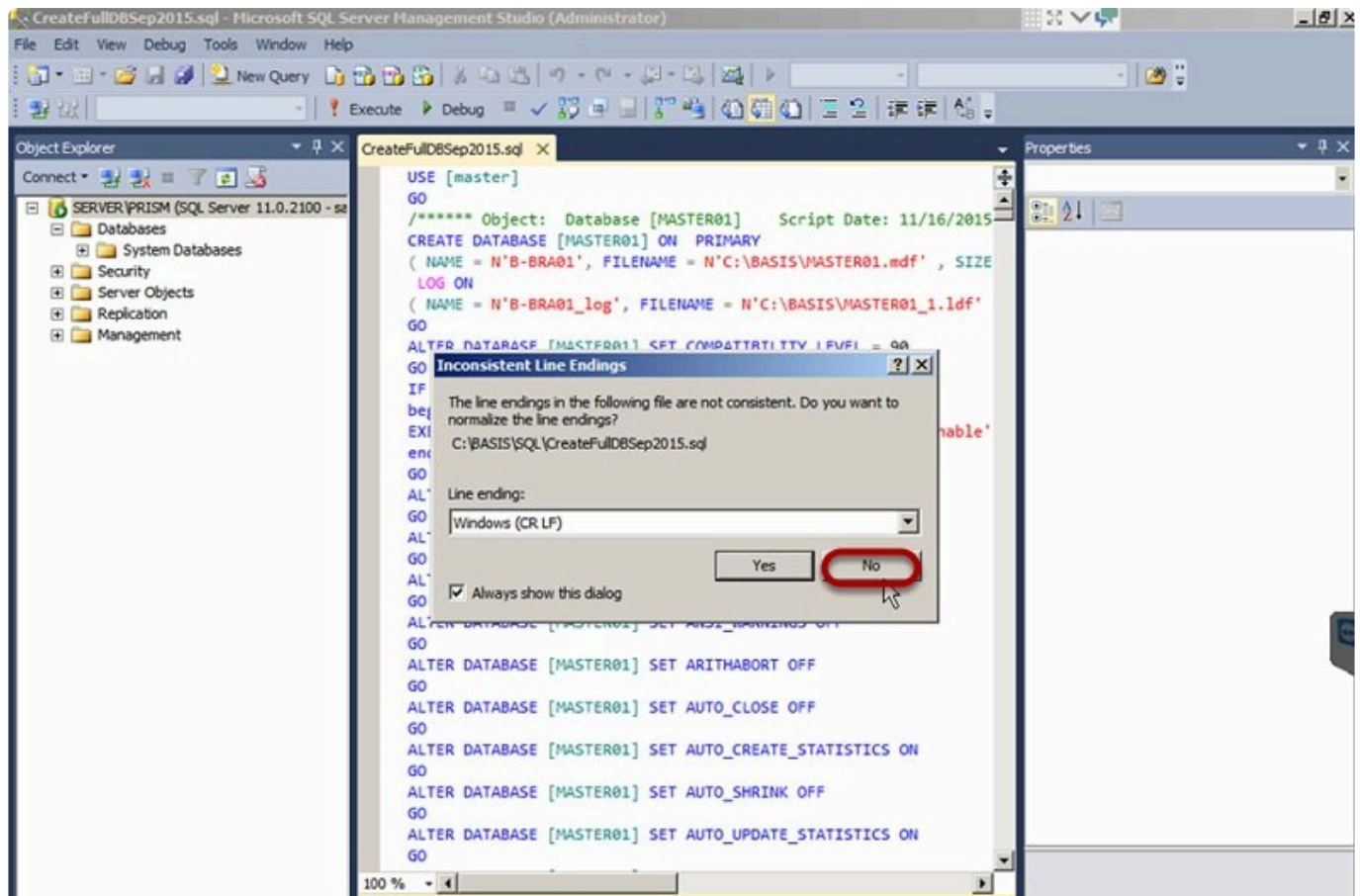


PRISM LOCAL DATABASE CREATION

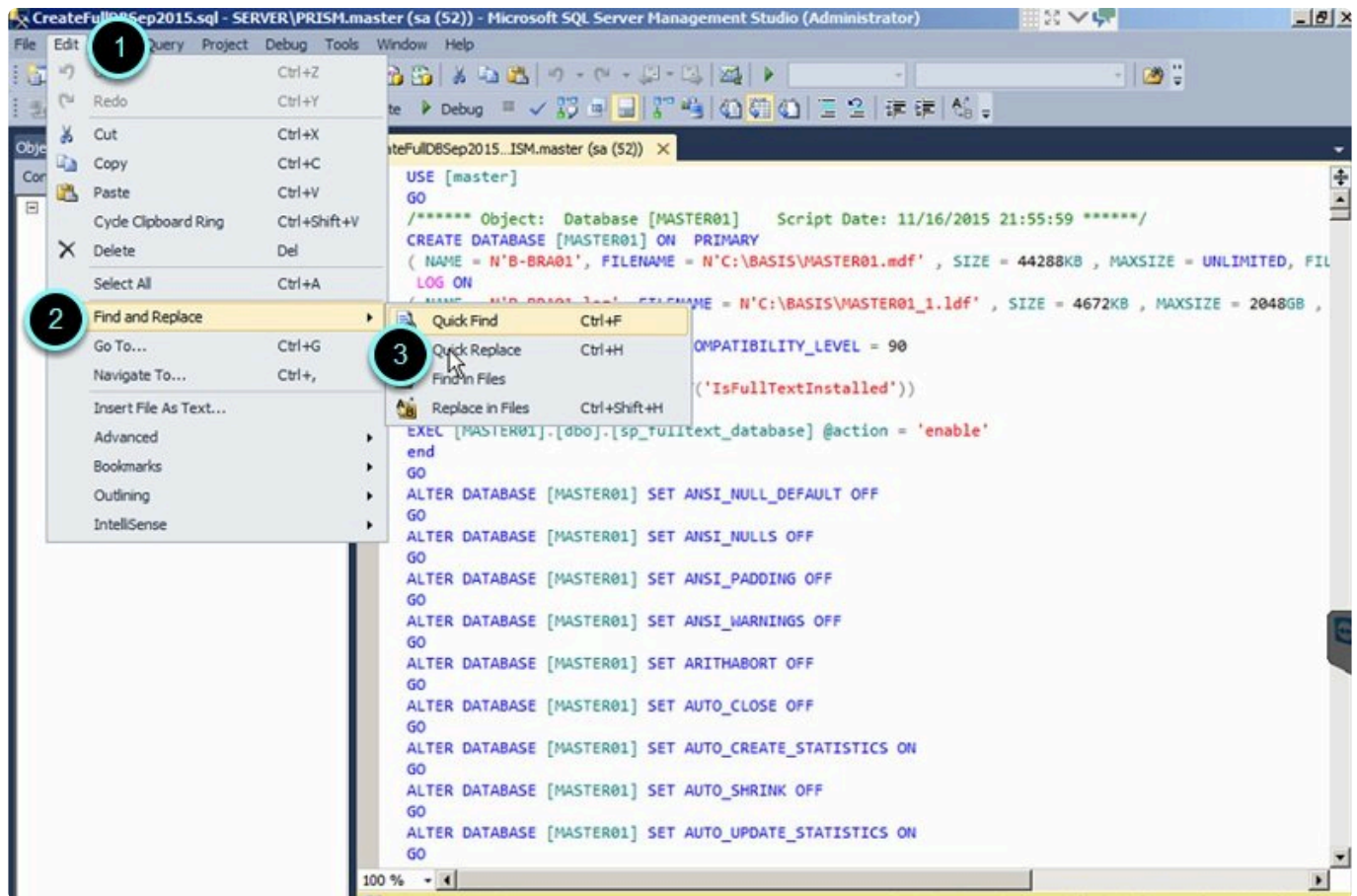
Open SQL SCRIPT located at C:\BASIS\SQL CreateFullDBSep2015.sql.



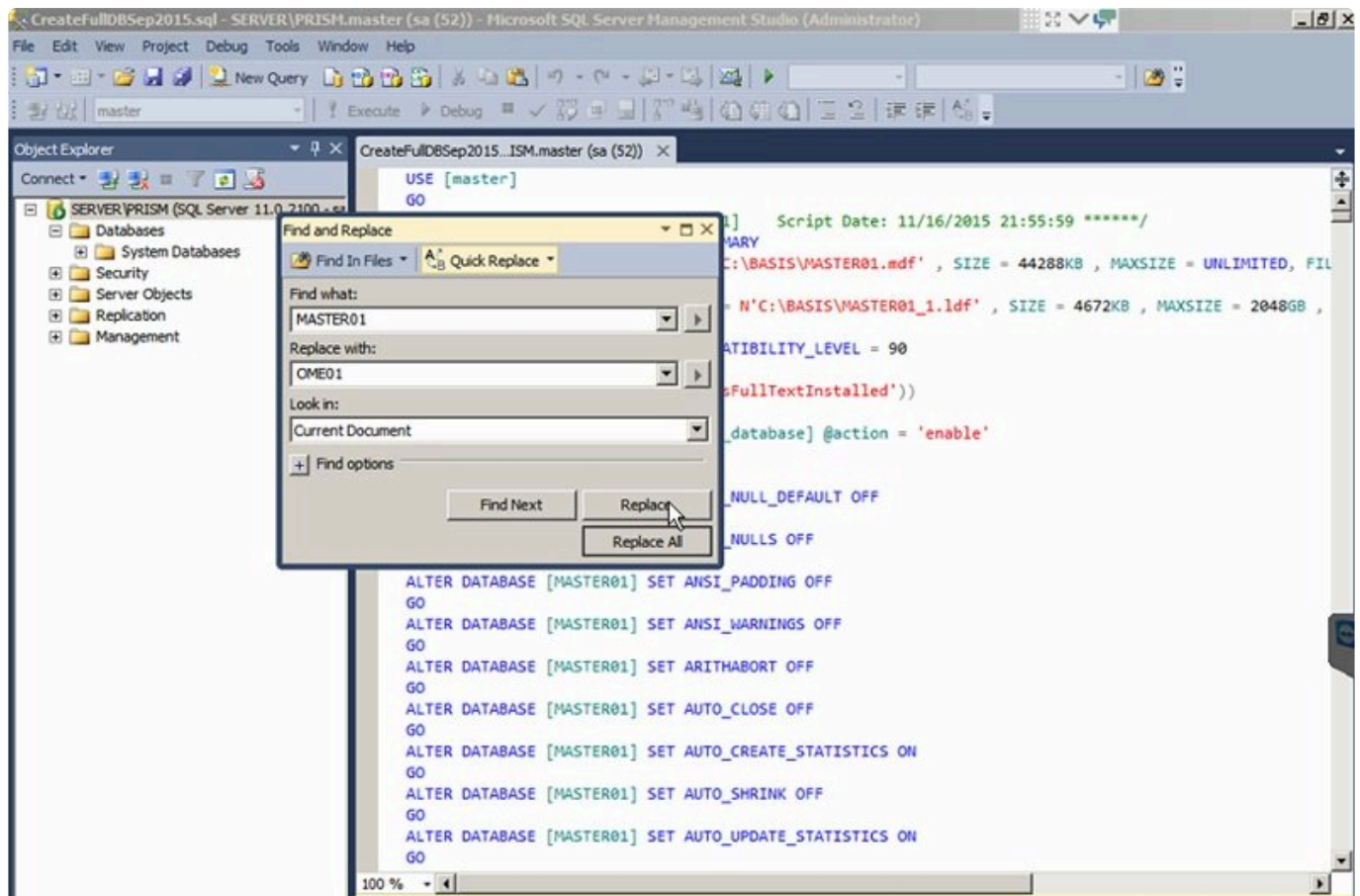
Click No.



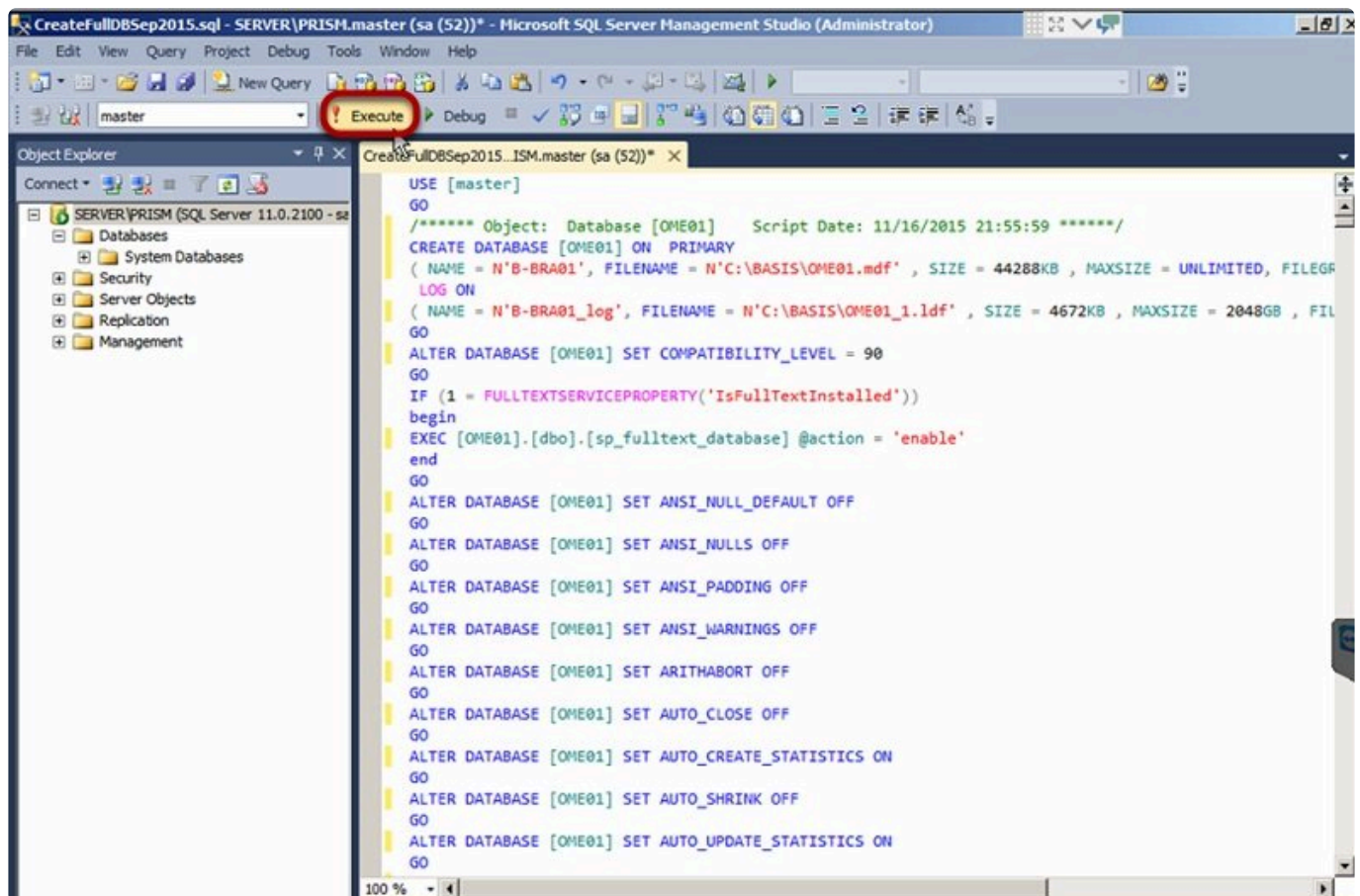
Click on Edit > Find and Replace > Quick Replace.



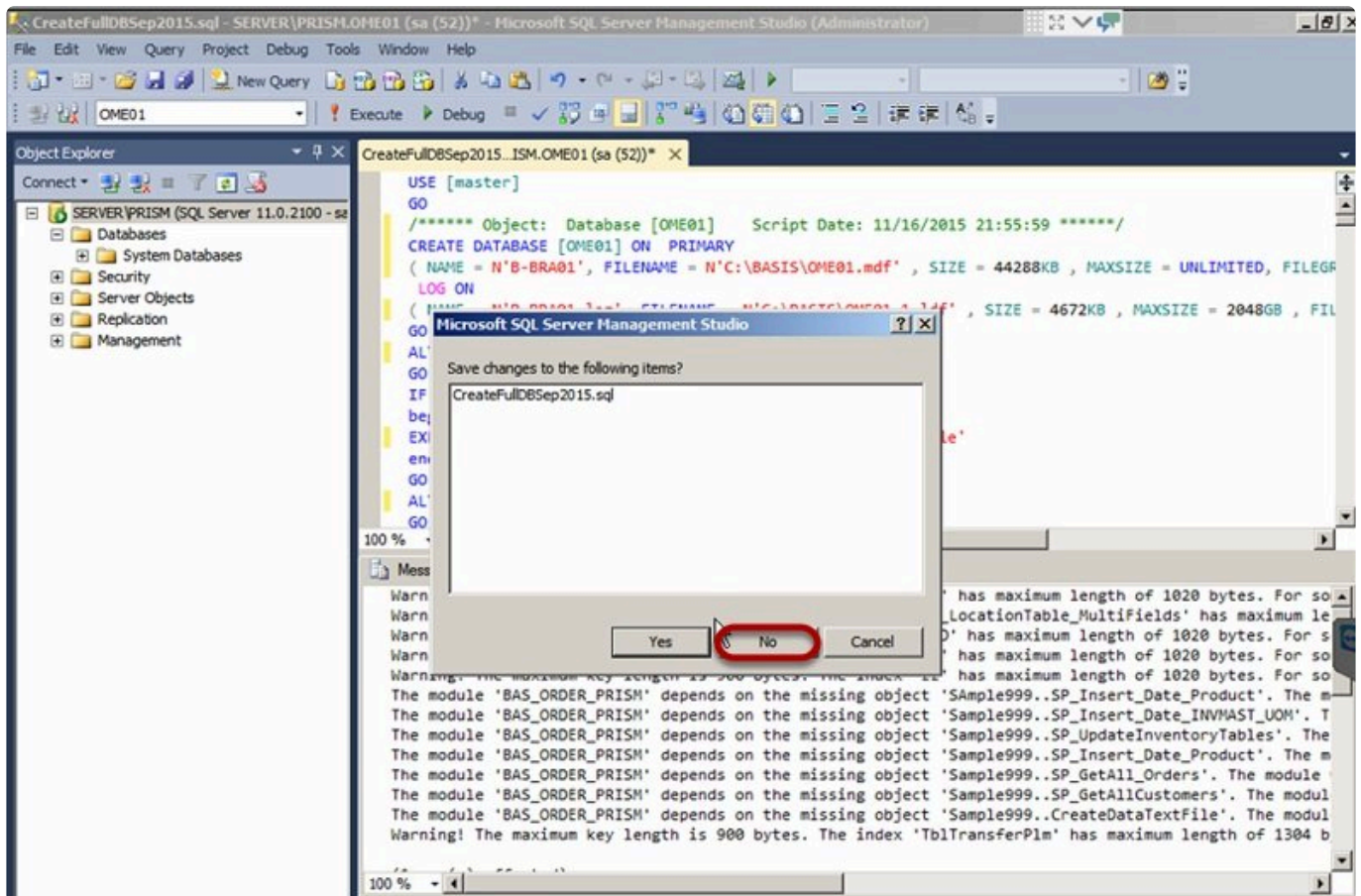
Replace MASTER01 with the new company's manuf code (e.g. OME01) then click Replace All button.



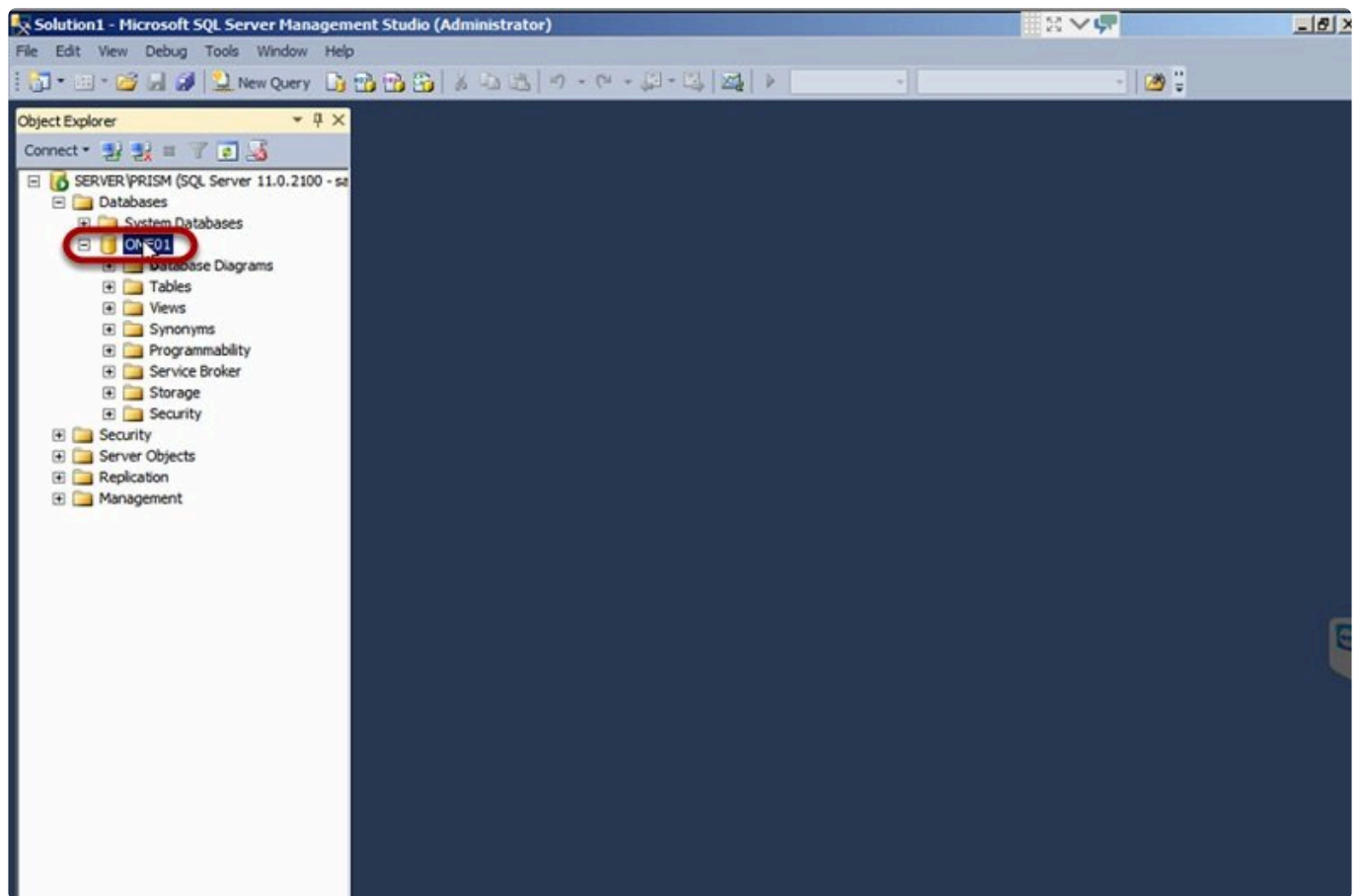
Click Execute.



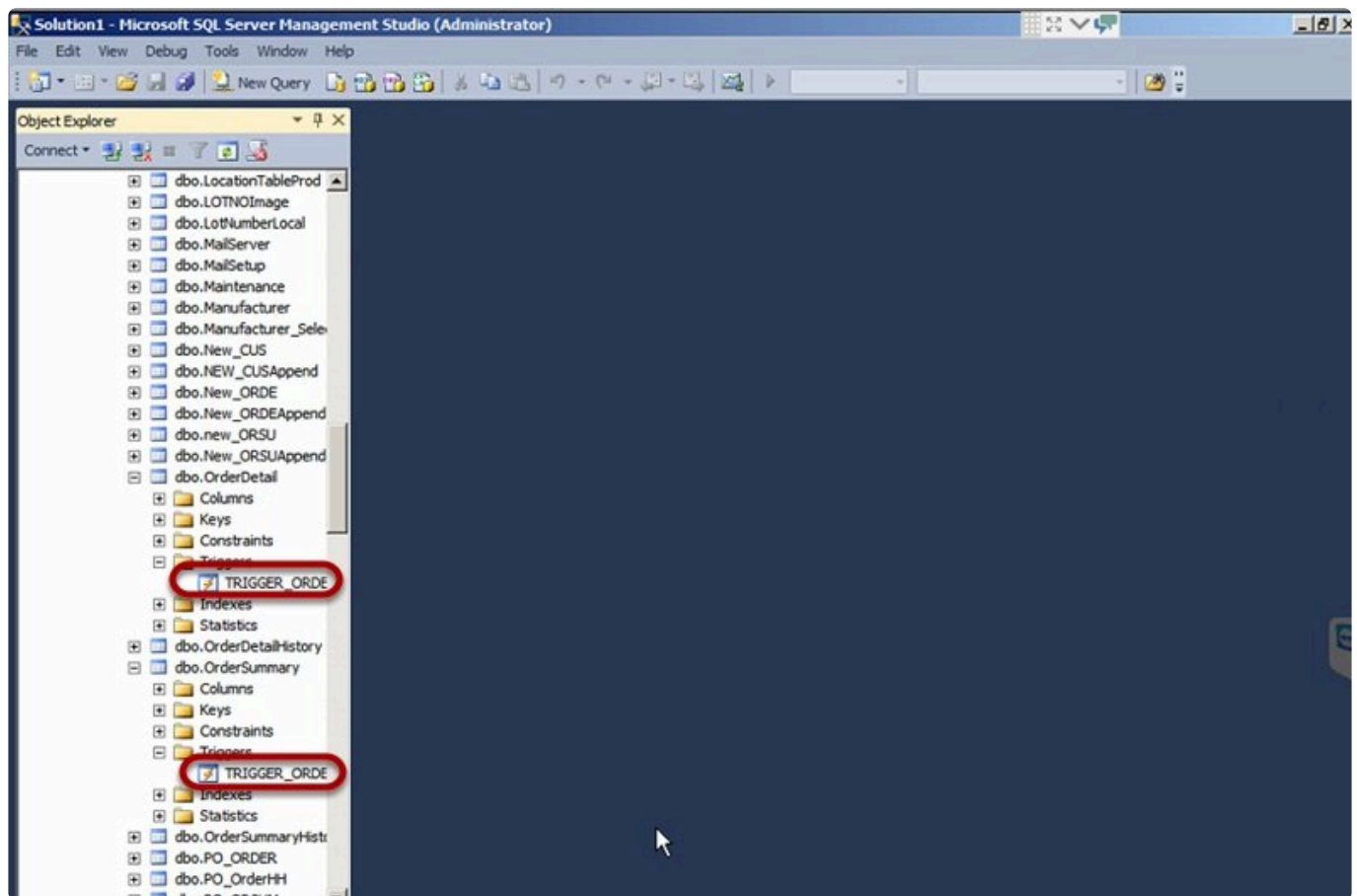
Click No.



Database OME01 is now created.

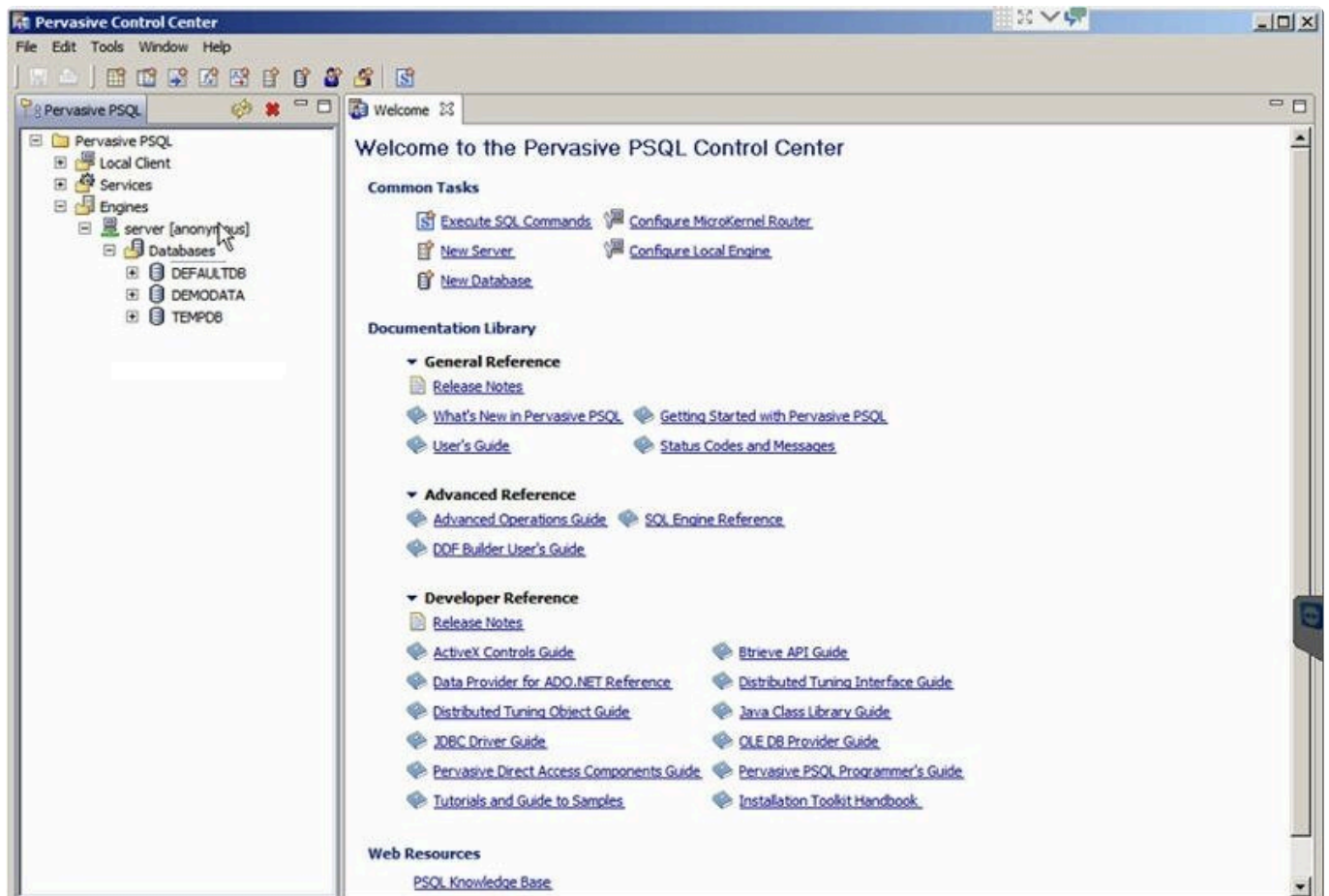


Ensure that the tables `dBo.OrderDetail` and `dBo.OrderSummary` have triggers setup.

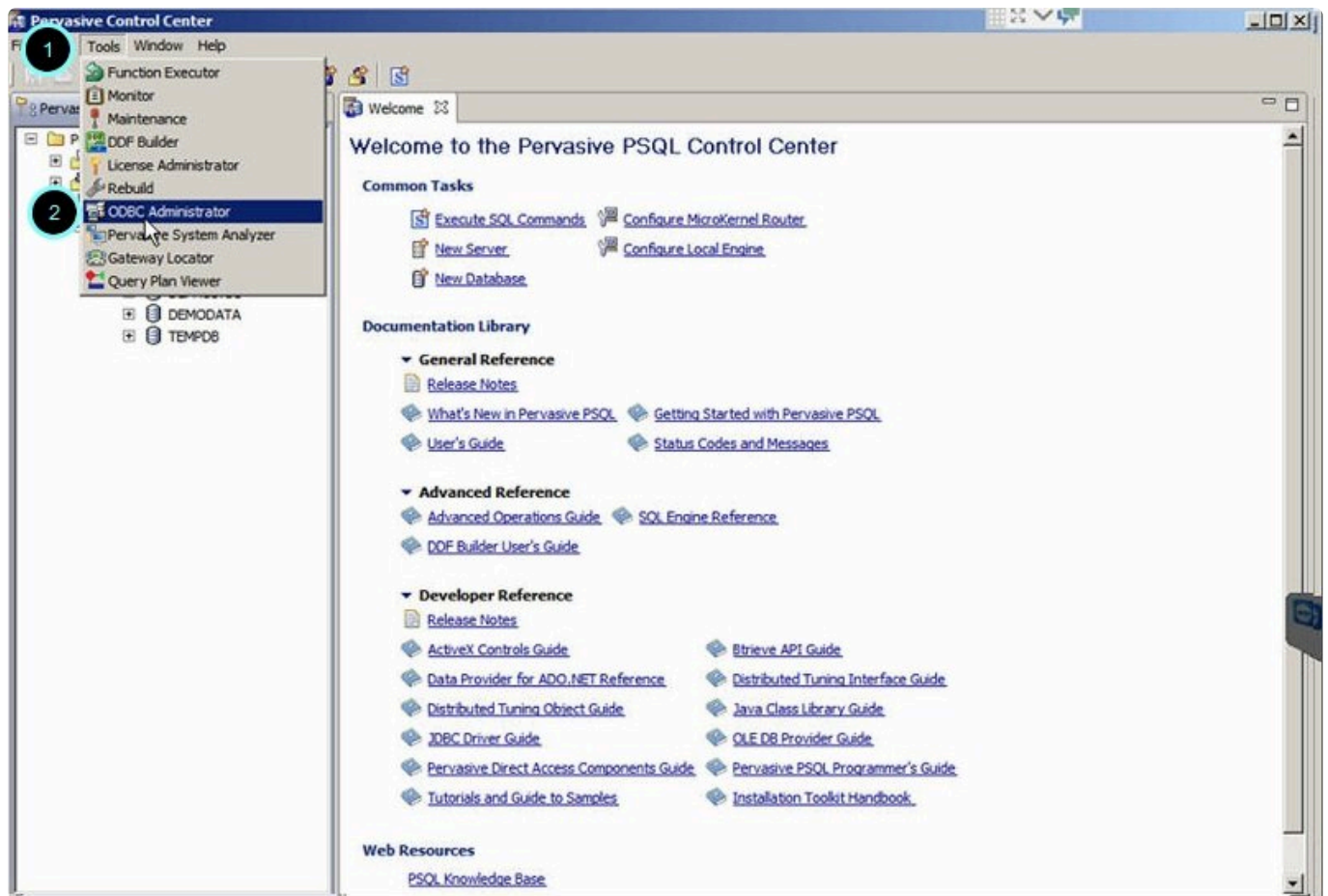


PERVASIVE ENGINE ODBC SETUP

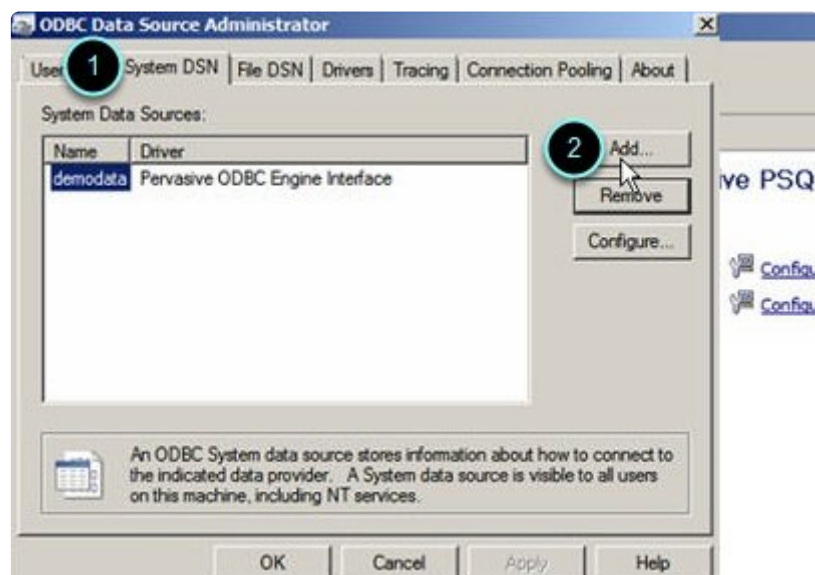
Open Pervasive Control Center. All Programs > Pervasive > PSQL 10 >Control Center and Documentation.



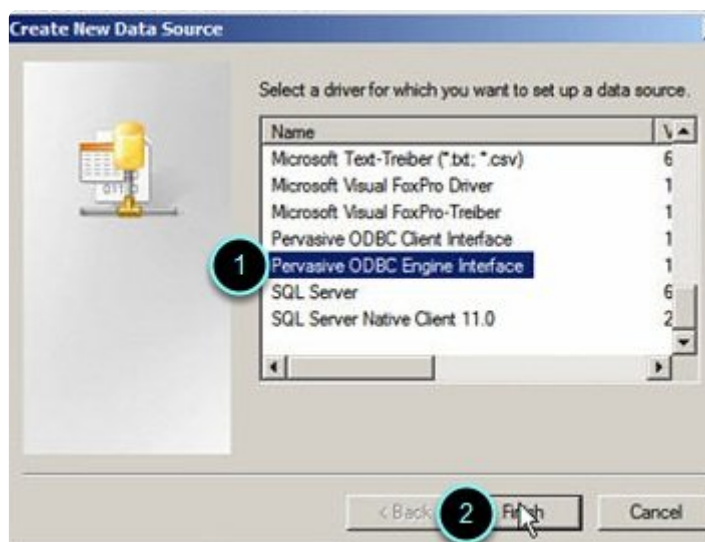
Click on Tools > ODBC Administrator.



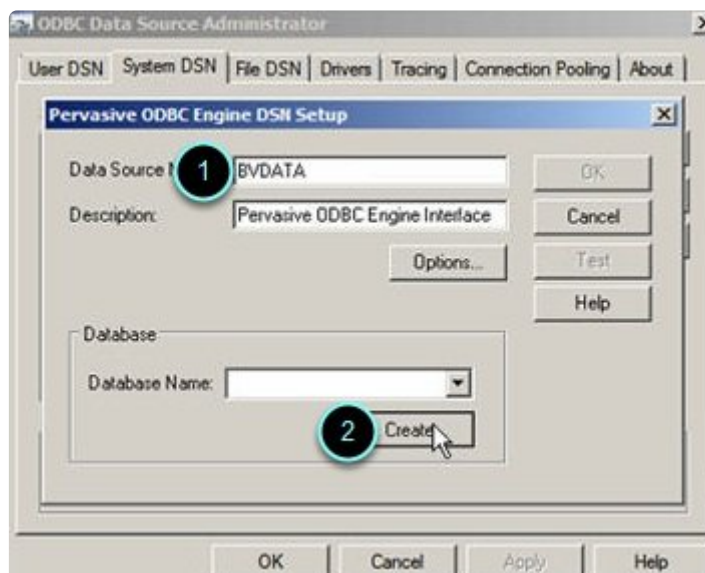
Open System DSN then click Add.



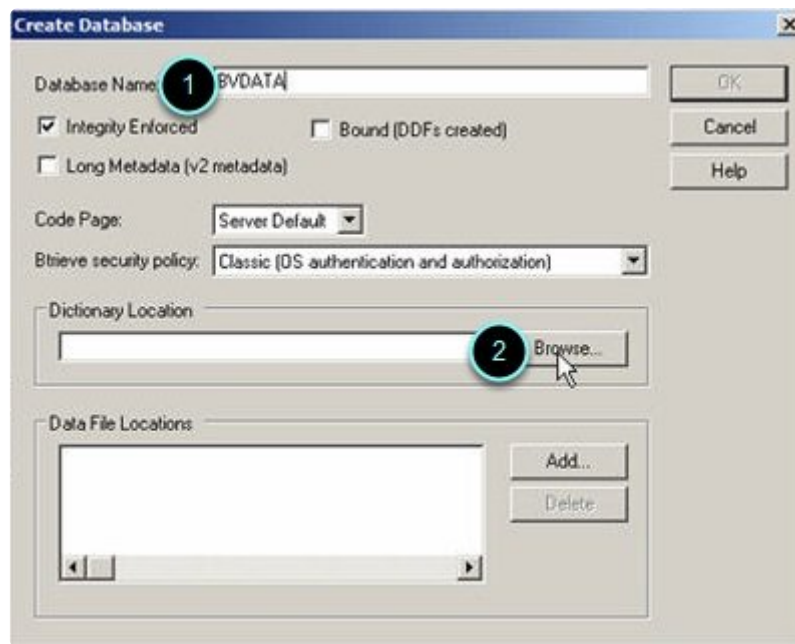
Select Pervasive ODBC Engine Interface then click on Finish.



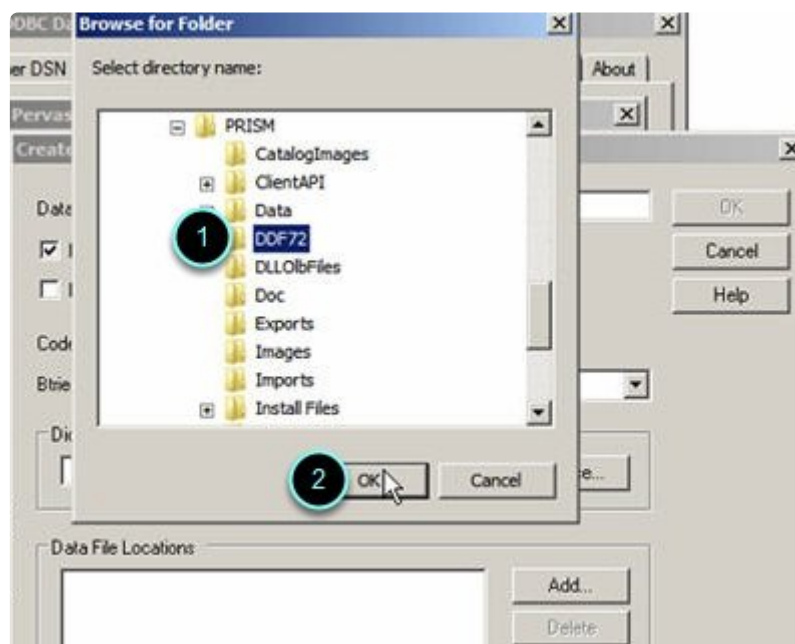
Type in BVDATA on the Data Source Name field and then click on Create.



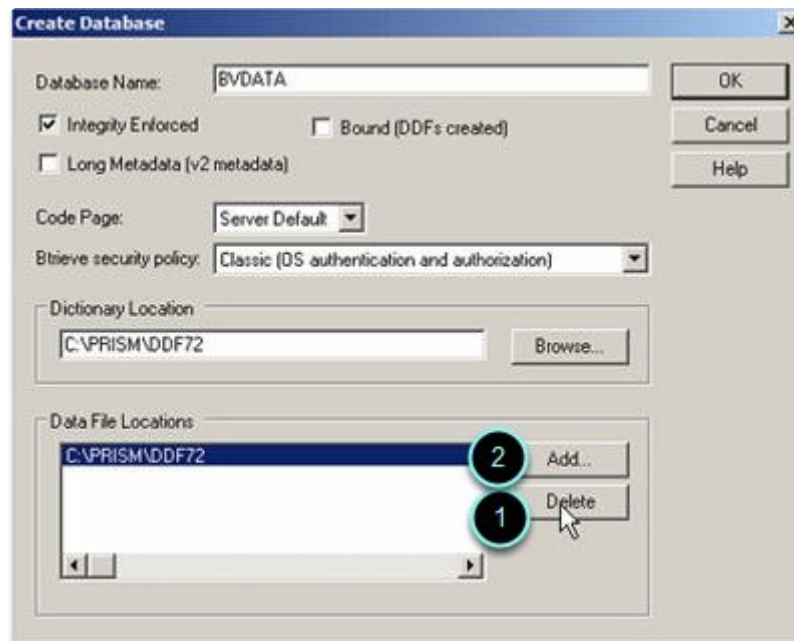
Type in BVDATA on the Data Name field then click on Browse.



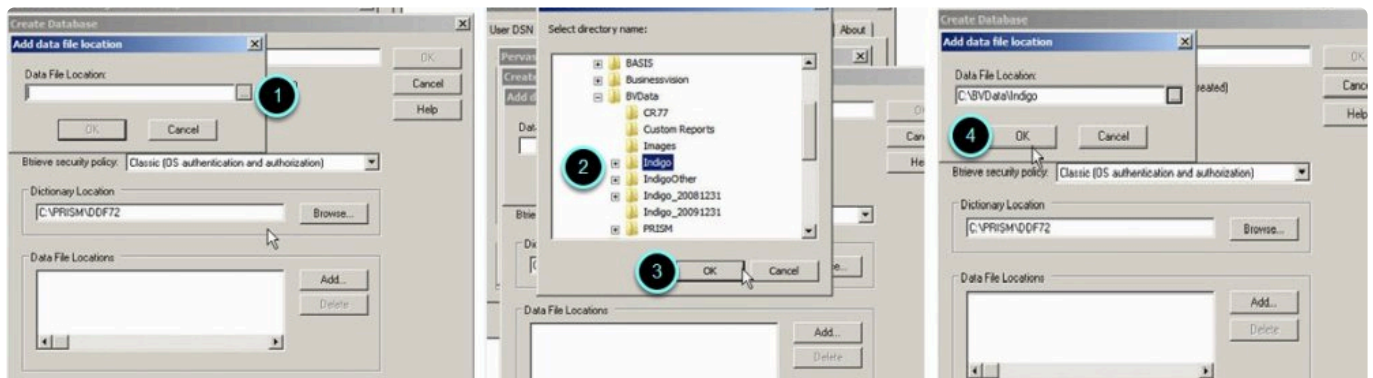
Locate the DFF72 folder under PRISM (C:/PRISM/DFF72) and then click on Ok.



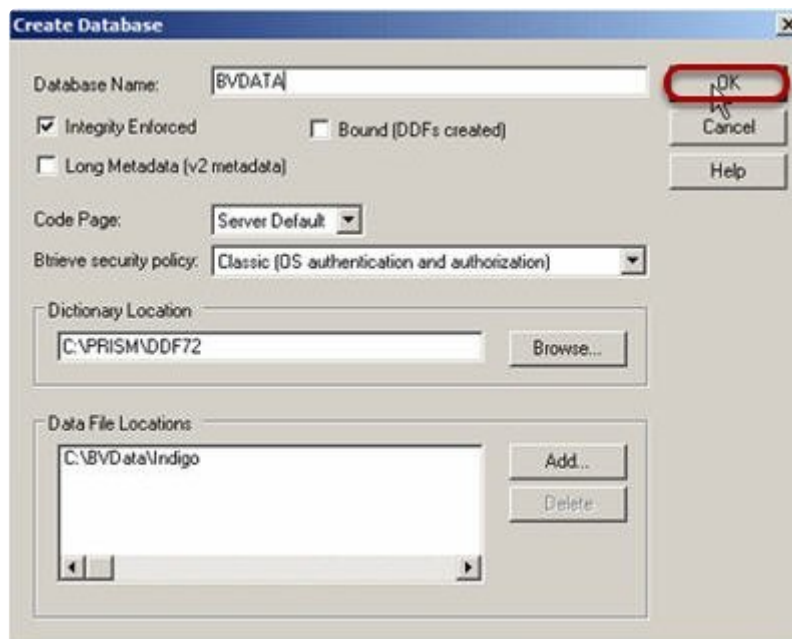
Click Delete. Then click Add.



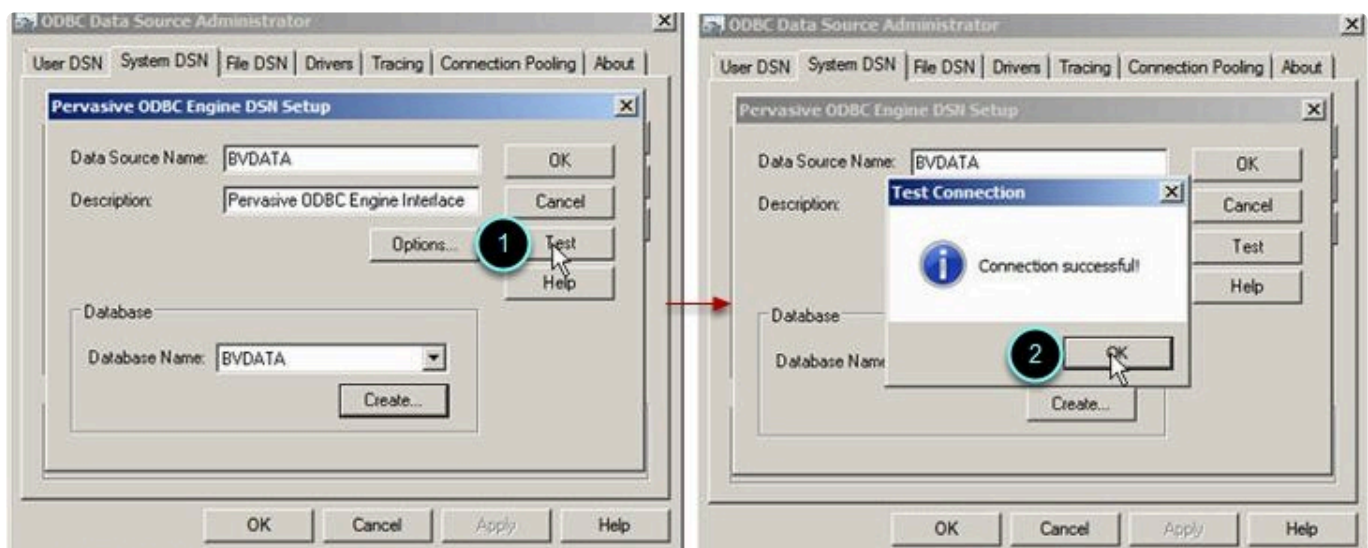
Locate the BV Data File Location.



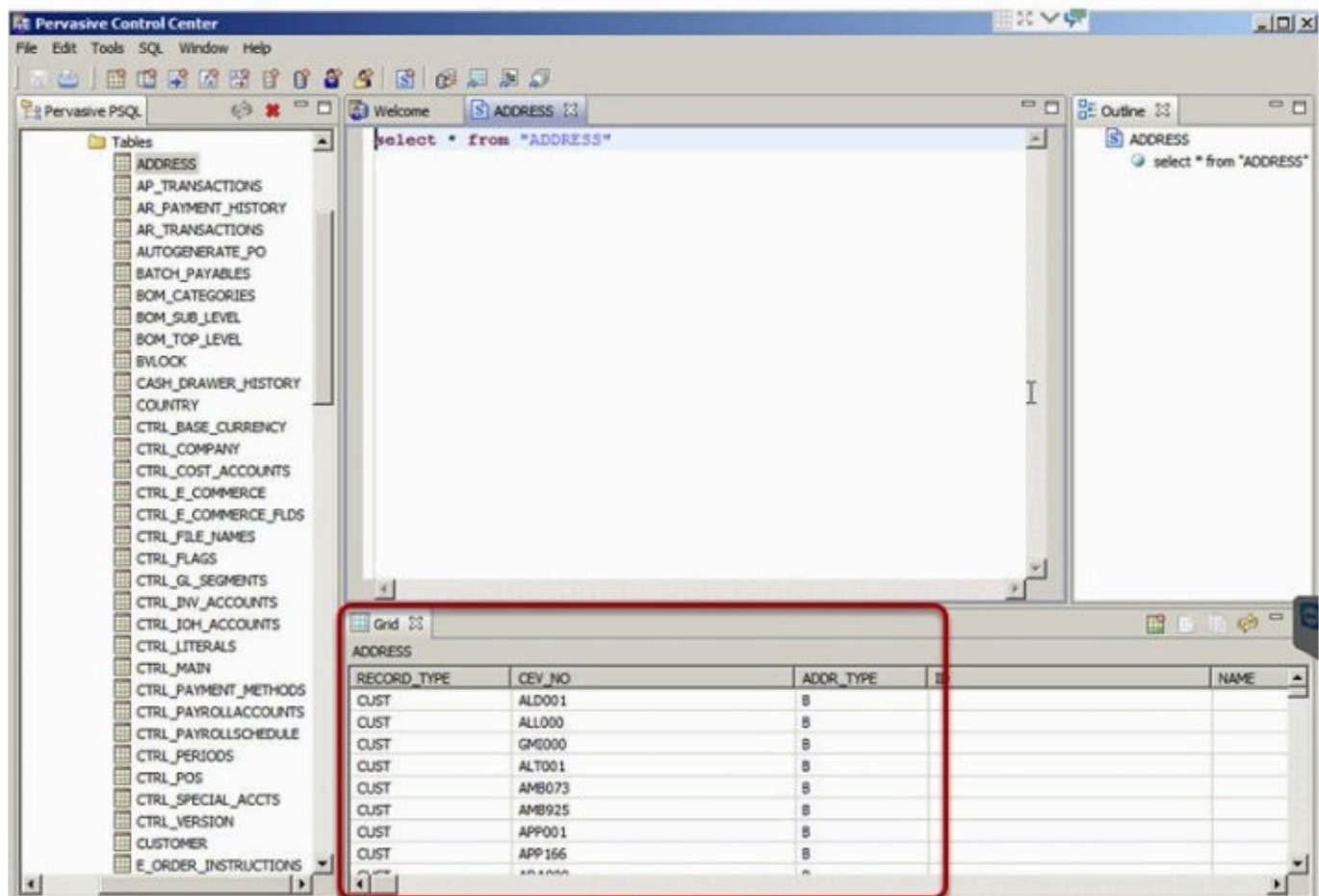
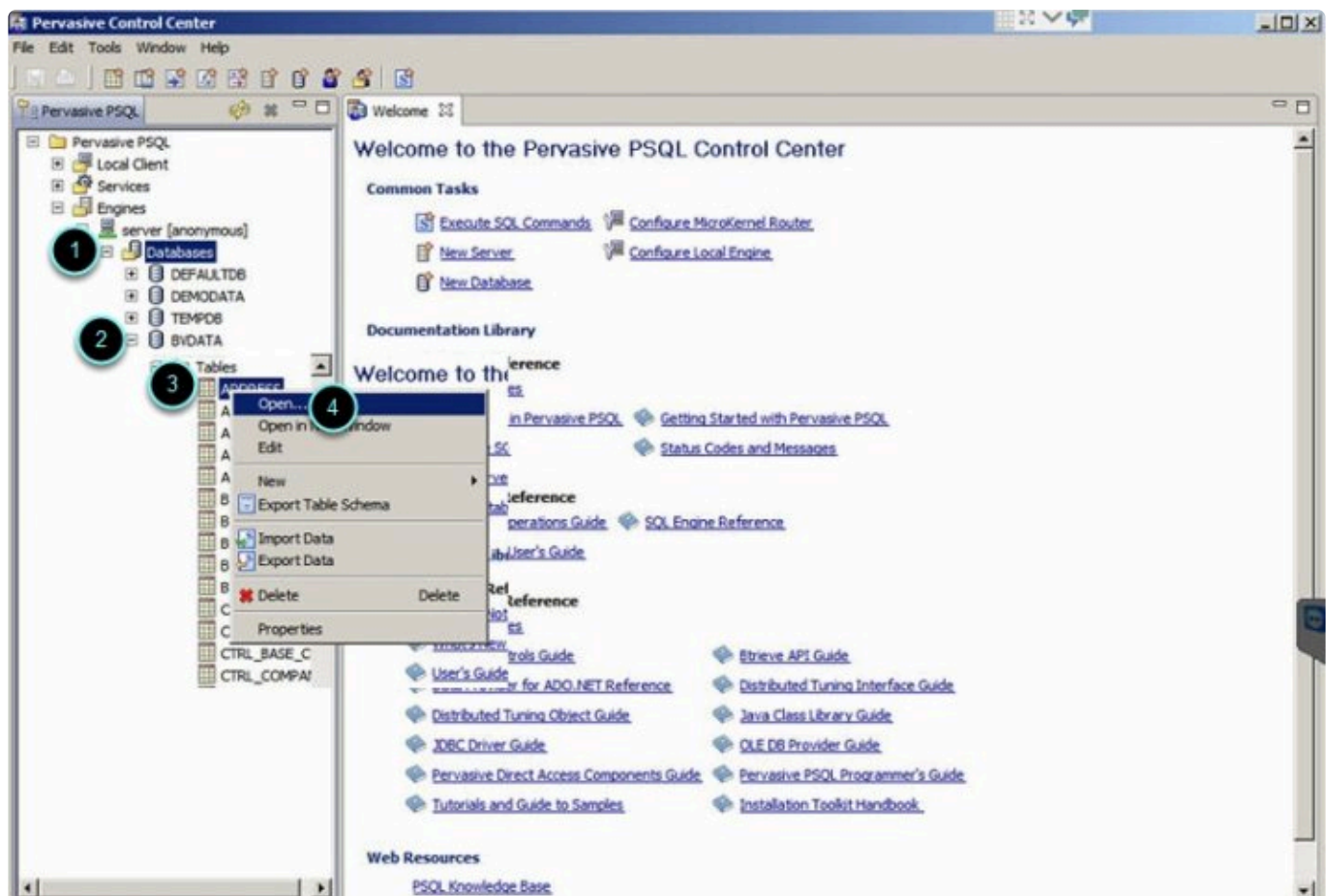
Click OK to proceed on creating the database.



Click on test to verify if the configuration is correct and then click OK.

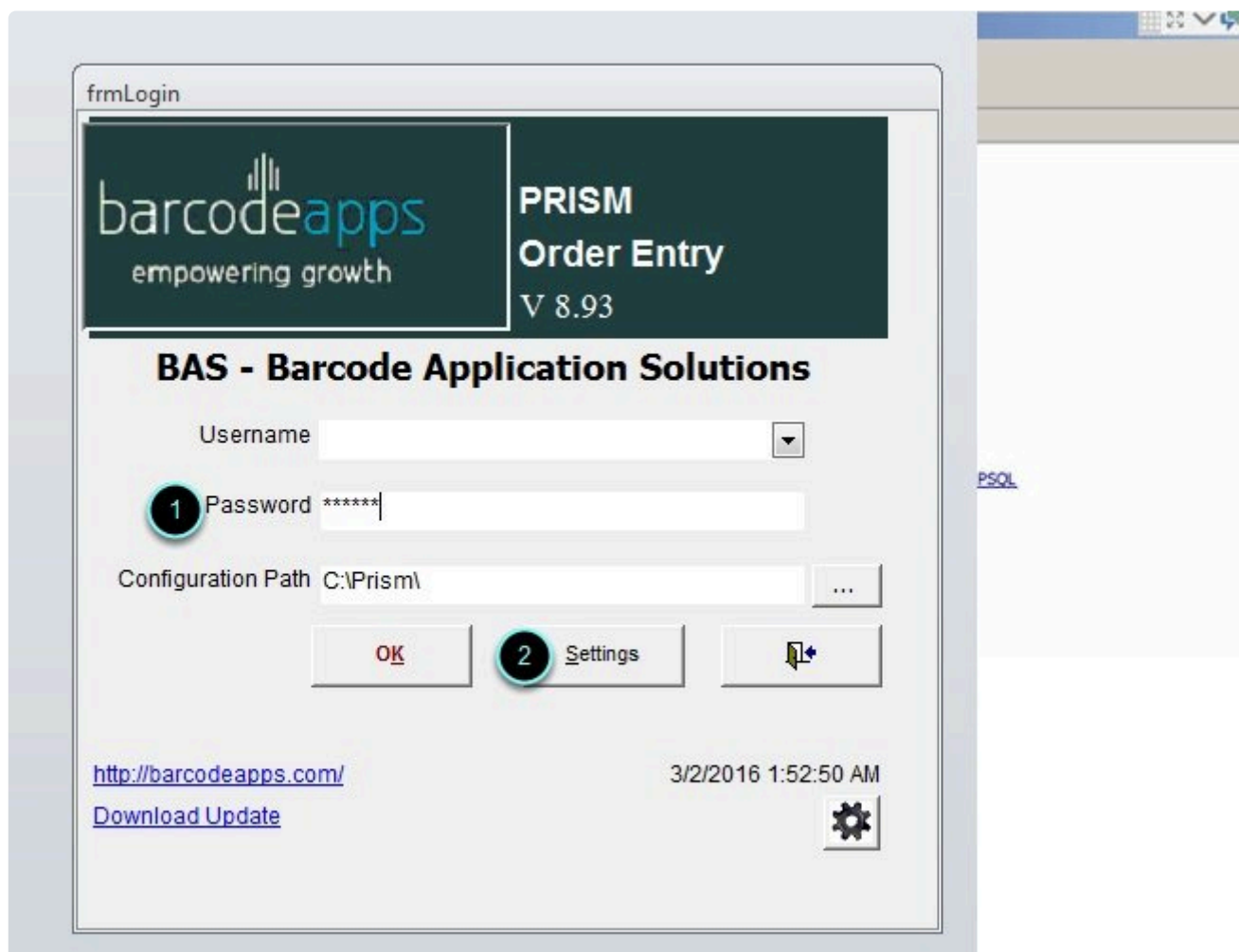


Open the newly created database, then open any table (the table will open without an error if the database is setup properly).



PRISM DESKTOP SETTINGS CONFIGURATION

Open PRISM desktop. Type in the universal password e.g. 2016322 then click Settings.



Edit SQL string with the correct SQL server and database information.

P.R.I.S.M DATABASE

Prism Database SQL Server

SQLString ODBC;Driver={SQL Server};Server=DADDYPG-PC\PRISM;Database=BAR01;Uid=sa;Pwd=prism12345#

Data Directory
C:\PRISM\

Link to Prism Database

Table On Local	Table On Server	Type	Status
<input checked="" type="checkbox"/>	CRM	CRM	Prism
<input checked="" type="checkbox"/>	CRM_Objectives	CRM_Objectives	Prism
<input checked="" type="checkbox"/>	CRM_OrderType	CRM_OrderType	Prism
<input checked="" type="checkbox"/>	CRM_Selected...	CRM_Selected...	Prism
<input checked="" type="checkbox"/>	CUSTDETAILS...	CUSTDETAILS...	Prism
<input checked="" type="checkbox"/>	Customer	Customer	Prism
<input checked="" type="checkbox"/>	DparaTbl	DparaTbl	Prism
<input checked="" type="checkbox"/>	ExportOrders	ExportOrders	Prism
<input checked="" type="checkbox"/>	for_catCreator_c...	for_catCreator_c...	Prism
<input checked="" type="checkbox"/>	for_catCreator_p...	for_catCreator_p...	Prism
<input checked="" type="checkbox"/>	HelpTable	HelpTable	Prism
<input checked="" type="checkbox"/>	IntroBU	IntroBU	Prism
<input checked="" type="checkbox"/>	InvfullLocal	InvfullLocal	Prism
<input checked="" type="checkbox"/>	Invoice	Invoice	Prism

Accounting Package Database

Integrate To : BusinessVision 7

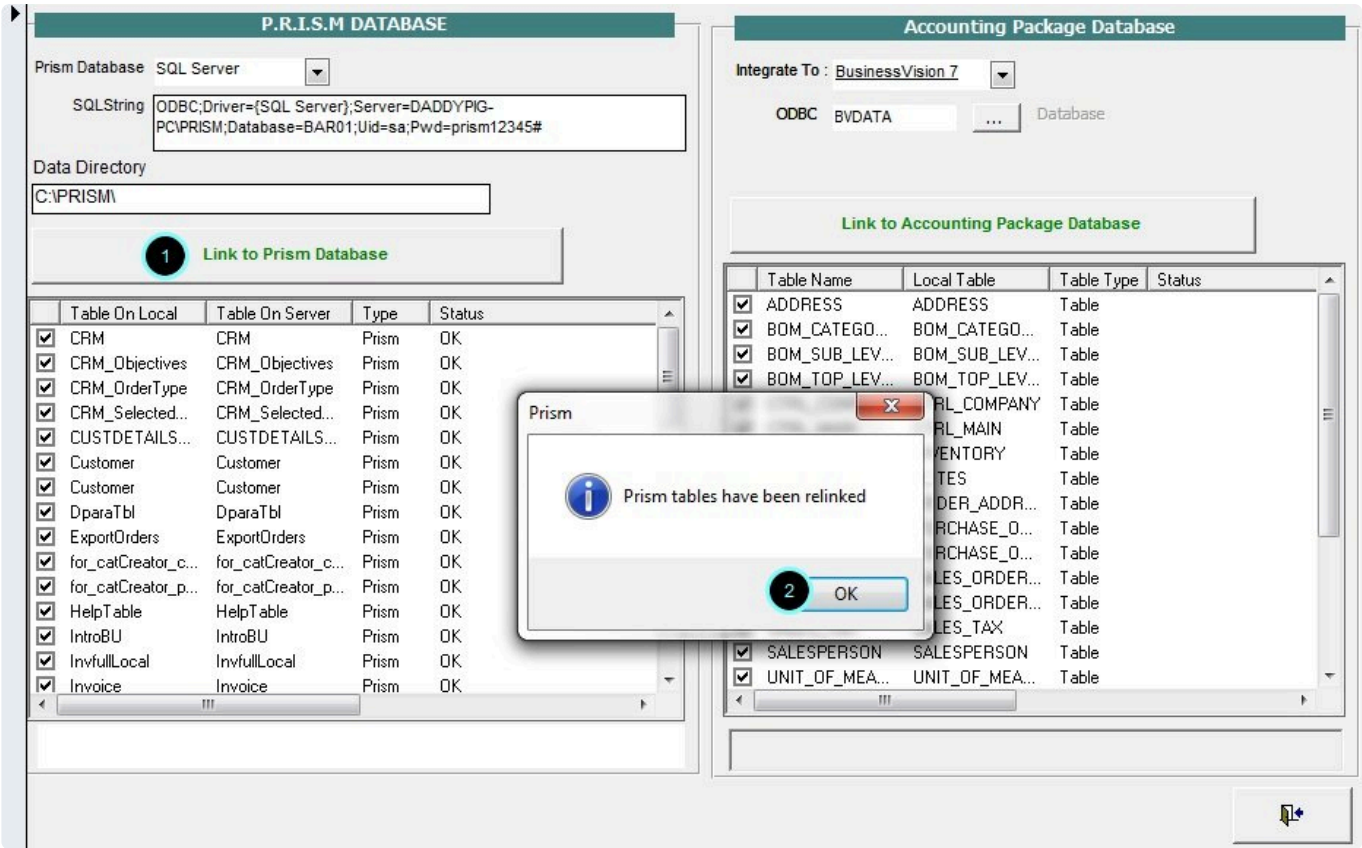
ODBC BVDATA Database

Link to Accounting Package Database

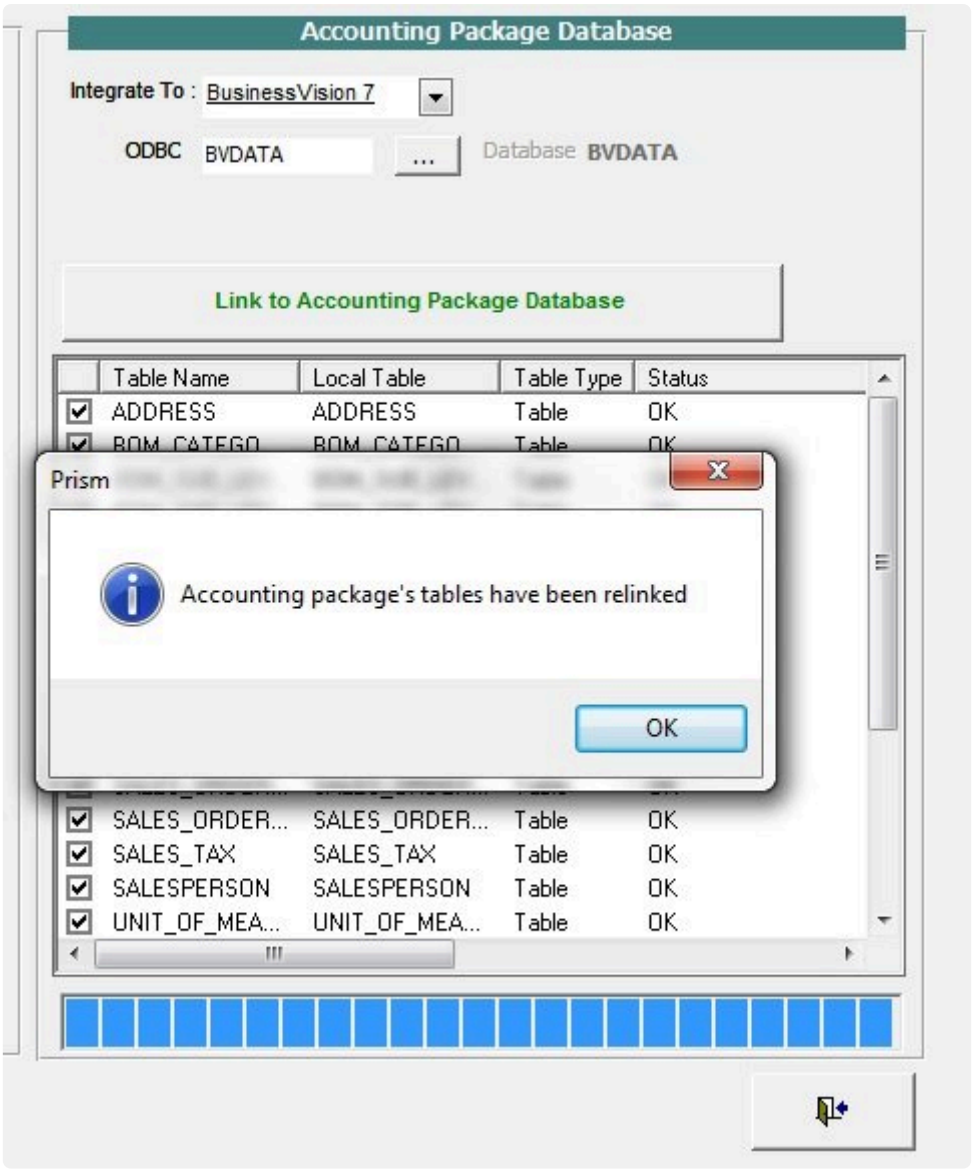
Table Name	Local Table	Table Type	Status
<input checked="" type="checkbox"/>	ADDRESS	ADDRESS	Table
<input checked="" type="checkbox"/>	BOM_CATEGO...	BOM_CATEGO...	Table
<input checked="" type="checkbox"/>	BOM_SUB_LEV...	BOM_SUB_LEV...	Table
<input checked="" type="checkbox"/>	BOM_TOP_LEV...	BOM_TOP_LEV...	Table
<input checked="" type="checkbox"/>	CTRL_COMPANY	CTRL_COMPANY	Table
<input checked="" type="checkbox"/>	CTRL_MAIN	CTRL_MAIN	Table
<input checked="" type="checkbox"/>	INVENTORY	INVENTORY	Table
<input checked="" type="checkbox"/>	NOTES	NOTES	Table
<input checked="" type="checkbox"/>	ORDER_ADDR...	ORDER_ADDR...	Table
<input checked="" type="checkbox"/>	PURCHASE_O...	PURCHASE_O...	Table
<input checked="" type="checkbox"/>	PURCHASE_O...	PURCHASE_O...	Table
<input checked="" type="checkbox"/>	SALES_ORDER...	SALES_ORDER...	Table
<input checked="" type="checkbox"/>	SALES_ORDER...	SALES_ORDER...	Table
<input checked="" type="checkbox"/>	SALES_TAX	SALES_TAX	Table
<input checked="" type="checkbox"/>	SALESPERSON	SALESPERSON	Table
<input checked="" type="checkbox"/>	UNIT_OF_MEA...	UNIT_OF_MEA...	Table

RELINK FORM

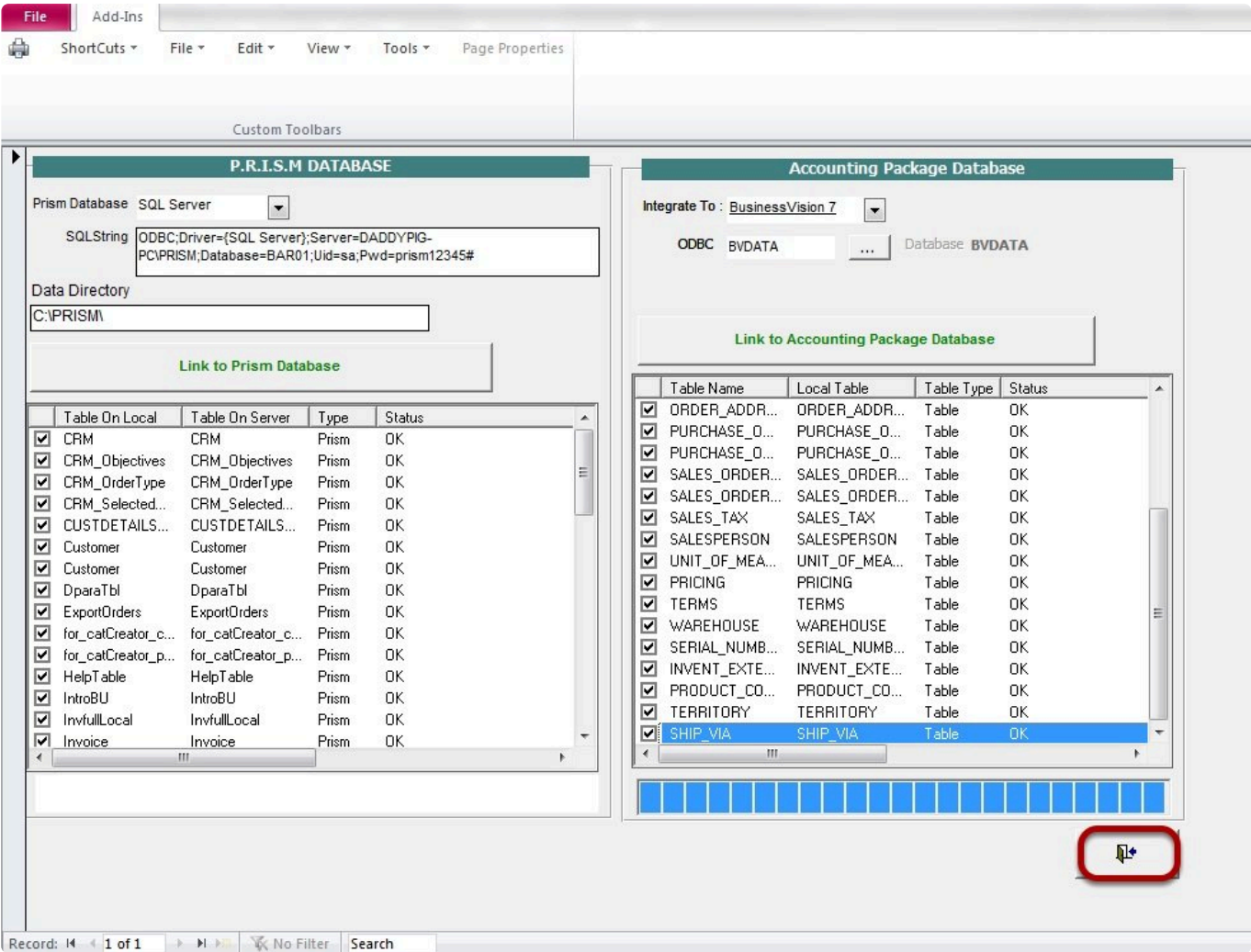
Click on Link to Prism Database and then click on OK.



Next table to relink is Business Vision. Click on Link to Accounting Package Database and then click OK.



Click Exit.

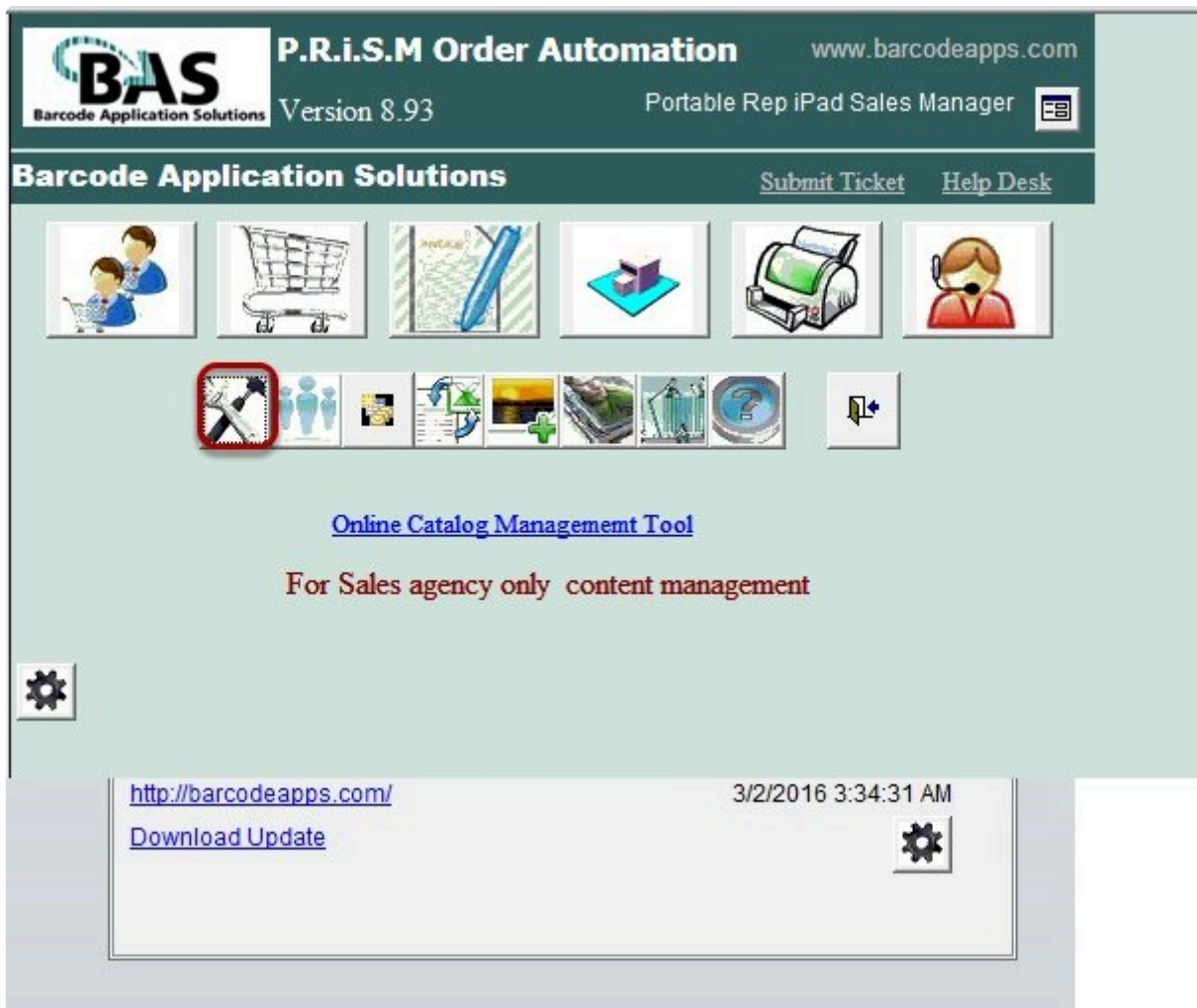


LOGGING IN TO PRISM DESKTOP

Login to PRISM as Administrator. Password is prism.




Click on the Settings icon.



Edit your company settings information then click Save.

OWNER MAINTENANCE FORM

Company Settings

Name: Barcode Application Solutions Logo:  100 x 80 bmp drag here

Address: 5511 Tomken Rd Unit 208

City: Mississauga

Prov/State: ON Zip: M4W 4B8

Email: Prism@barcodeapps.com

Website:

Tel: 416 822 3434 Fax:

Accounting Package Required

☐ BV ☐ BVEssentials ☒ Manufacturer Onl

☒ BV7 ☒ BV7.2 ☐ Auto-Import

☐ Quickbook ☒ iPad Active

☐ Simply Accounting ☐ Receive Orders Only

☐ Sage 50 (Peachtree) ☒ Novasoft

DATA DIRECTORIES

Description	Name	Value	Reference	NoChange
BV DSN Name		BVDATA	dsname	<input checked="" type="checkbox"/>
Ignore the WB Tables 0 Not: -1		C:\PRISM\	BVWB	<input checked="" type="checkbox"/>
Rep d path		C:\PRISM\	repdbPath	<input type="checkbox"/>
Path to palm files		C:\PRISM\	DBFPPath	<input type="checkbox"/>

Record: 1 of 20 No Filter Search

Import Additional Inventory Information From Excel

Excel File Import: Import

Excel File Export: C:\PRISM\XFile.xls Export

Import Additional Customer Information From Excel

2 Save Initial Setup Relink - Connect to Databases Setup Selling Lines

B. Client Installation

Download PRISM Main Installer and PRISM Updater.

Open and Run setupprism.exe.

Click Next.

Click Install.

Default location should be C:\PRISM then click Next.

Click Finish.

Open and Run updateprism.exe.

Click Next.

Default location should be C:\PRISM then click Next. (You will be prompted if you wish to overwrite C:\Prism, click Yes).

Click Install.

Click Finish.

2.2.2. C. Local API Setup

CLIENT API CONFIGURATION

Go to C:\PRISM\ClientAPI\PrismCloudExe

Ensure that you're running the latest API version. Ensure that the cloud settings specified are correct
e.g. SVR IP, SVR

Prism - API [1.2.119]

Svr IP: http://basmax.dyndns.biz Svr Name: BASMAX1\PFA1

UName: sa Pwd: prism12345numeral

Svr DB: OME01 Manuf Cd: OME01

Service: Products Action: uploadProducts

Op Type: Delete and insert

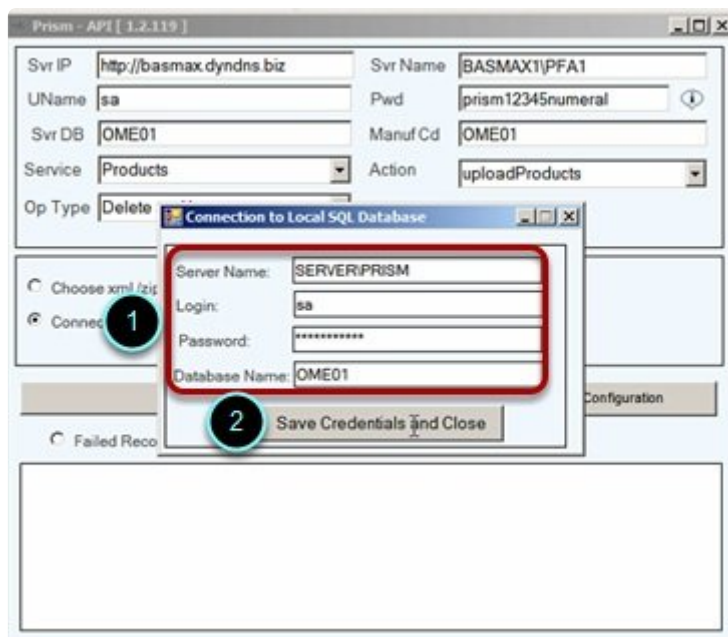
Choose xml /zip/pdf file

1 Connect to a local DB 2 Connect Local DB not connected

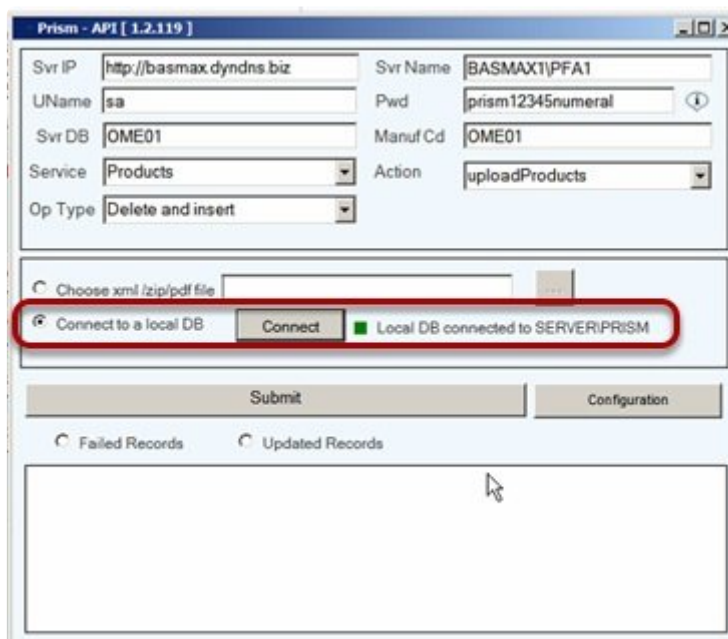
Submit Configuration

Failed Records Updated Records

Name, Uname, Pwd. Svr DB and Manuf Cd. Select Connect to a local DB and click Connect.



Specify the local SQL settings e.g. Server Name, Login, Password and Database Name. Click Save Credentials and Close.



Connect button should show GREEN when local database is setup correctly. Click Configuration.

Prism - API [1.2.119]

Svr IP: Svr Name:

UName: Pwd:

Svr DB: Manuf Cd:

Service: Action:

Op Type:

☐ Choose xml/zip/pdf file

☒ Connect to a local DB Local DB connected to SERVER\PRISM

☐ Failed Records ☐ Updated Records

Set Chunk Size to 3000. The Save Config.

Configuration

Manufacture Server Information

Manuf IP: Server Name:

User Name: Password:

Database: Manuf Code:

Local Database Information

Name: Database:

User Name: Password:

Others

Chunk Size: 1 ☐ Enable Email Notification

EmailSvr: Availability:

From: Port:

To: FromPwd:

BasisUser: ODBC Name:

WHSE Query:

Local Paths

Image: .. Prod-excel: ..

Cust-excel: .. Orders: ..

Cat-excel: ..

Accounting Package Paths

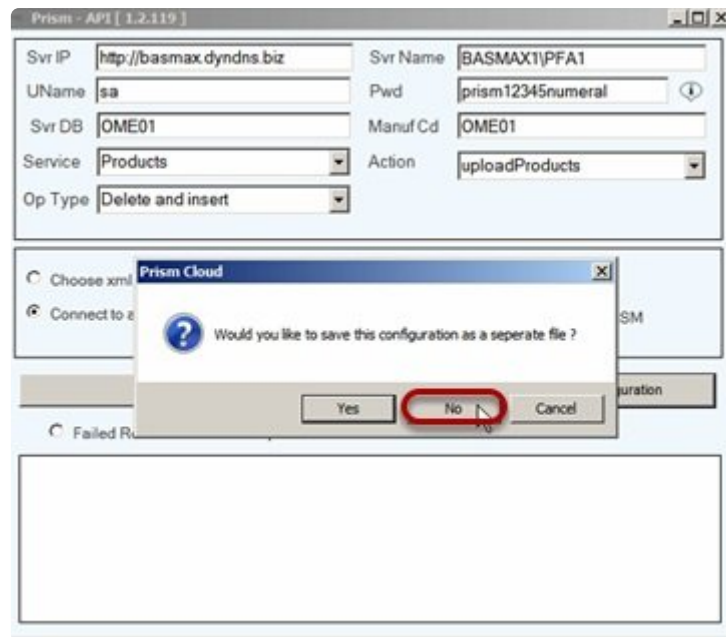
Name: CompPath: ..

CompUName: CompUPwd:

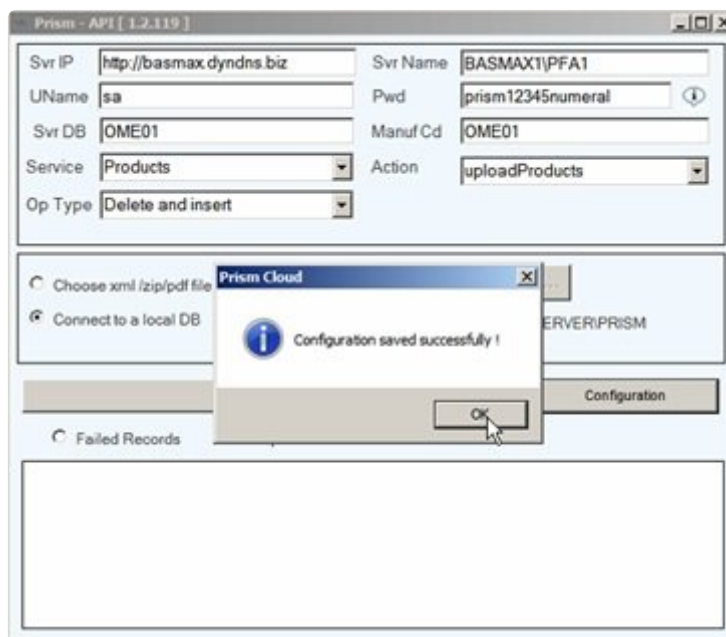
Path: .. LogFilePath: ..

2

When prompted click No.



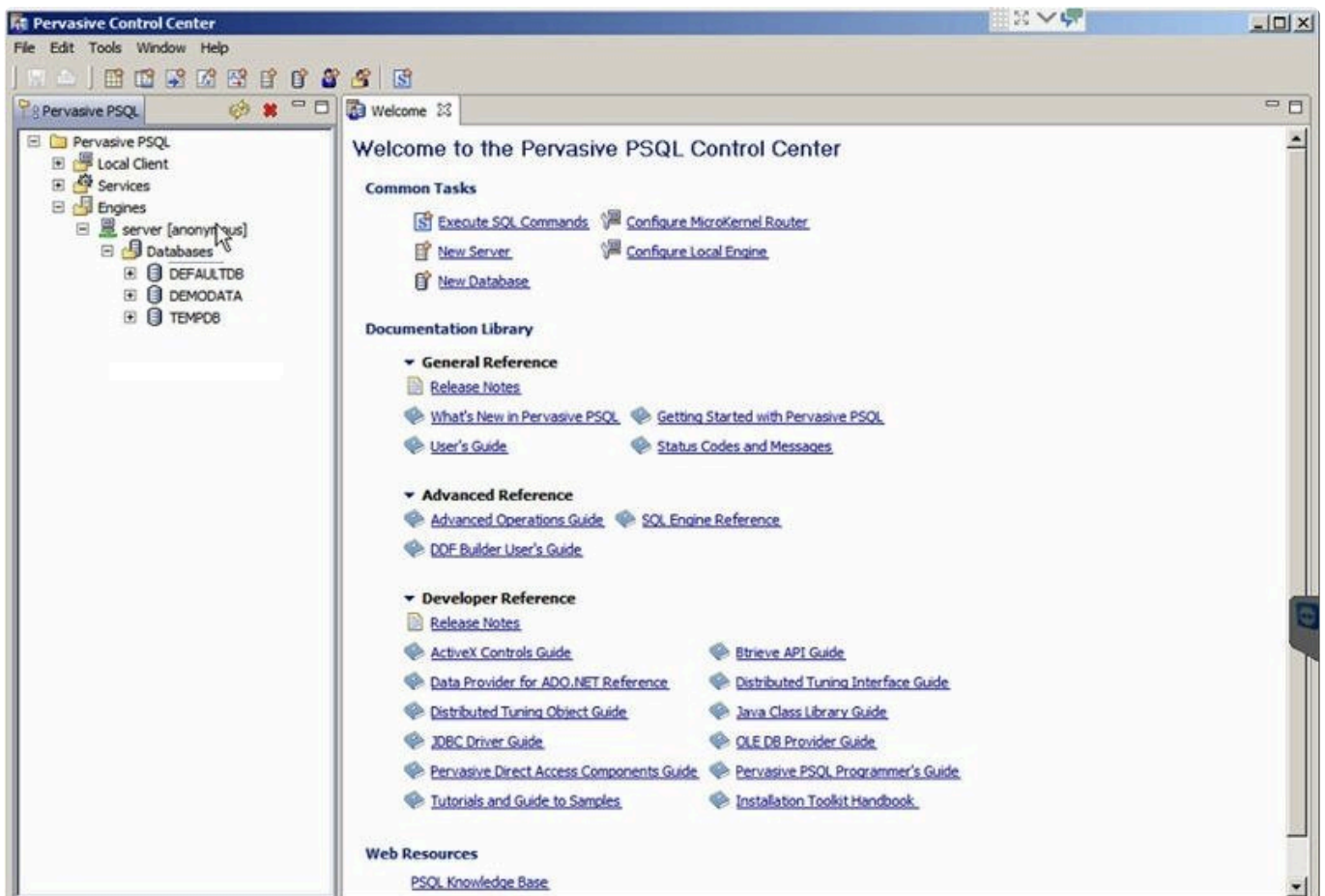
Click OK.



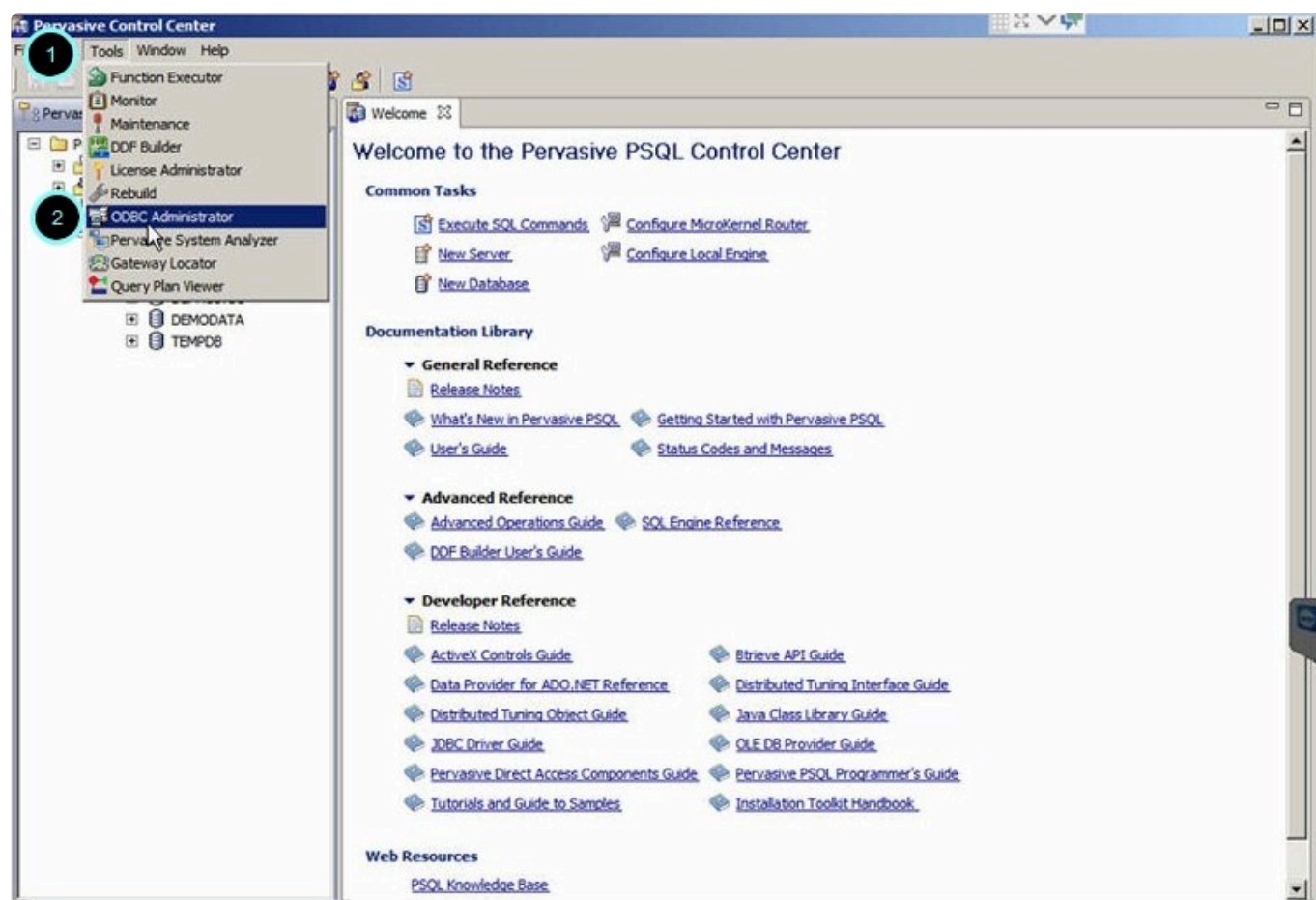
2.2.3. D. How To Create An Engine And Client ODBC Connection

PERVASIVE ENGINE ODBC SETUP

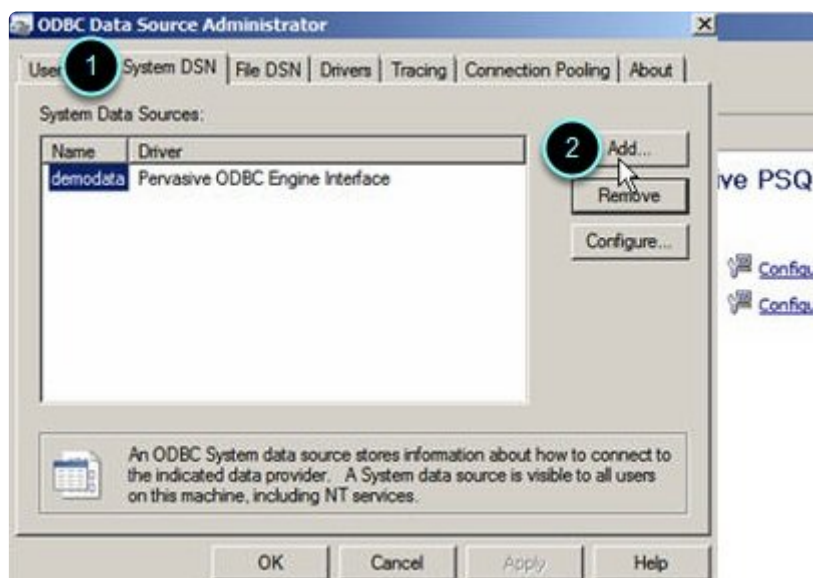
Open Pervasive Control Center. Go to All Programs > Pervasive > PSQL 10 > Control Center & Documentation.



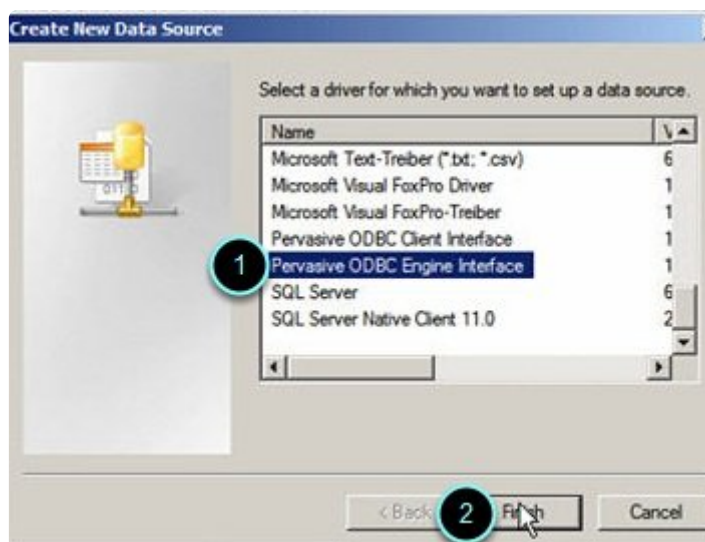
Click on Tools > ODBC Administrator.



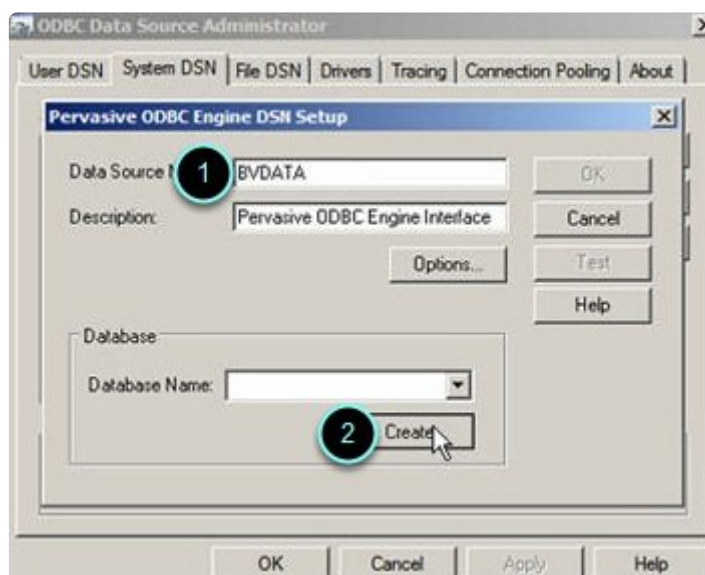
Open System DSN then click Add.



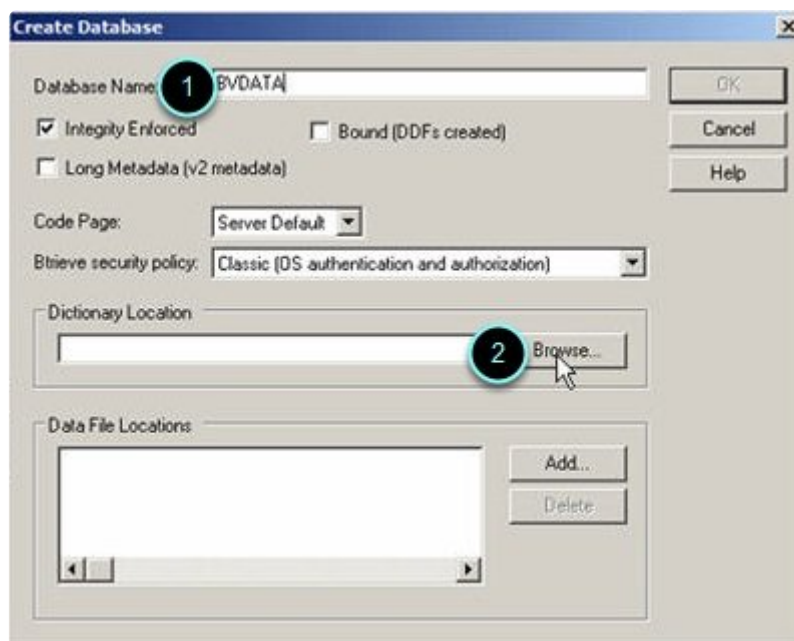
Select Pervasive ODBC Engine Interface then click on Finish.



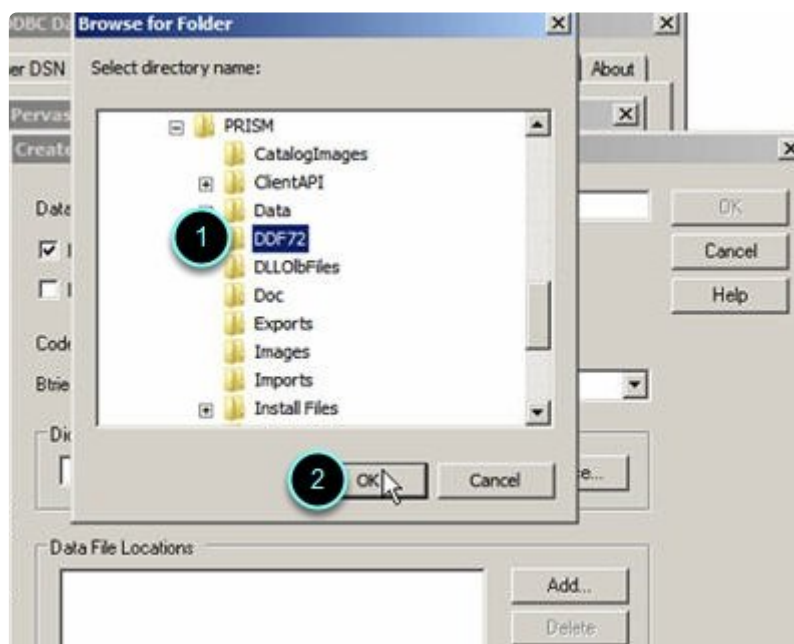
Type in BVDATA on the Data Source Name field and then click on Create.



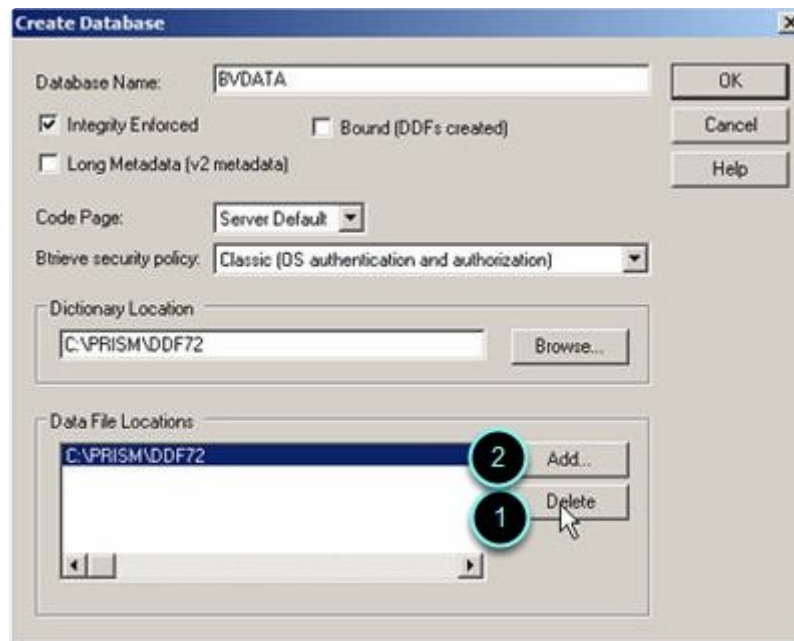
Type in BVDATA on the Data Name field then click on Browse.



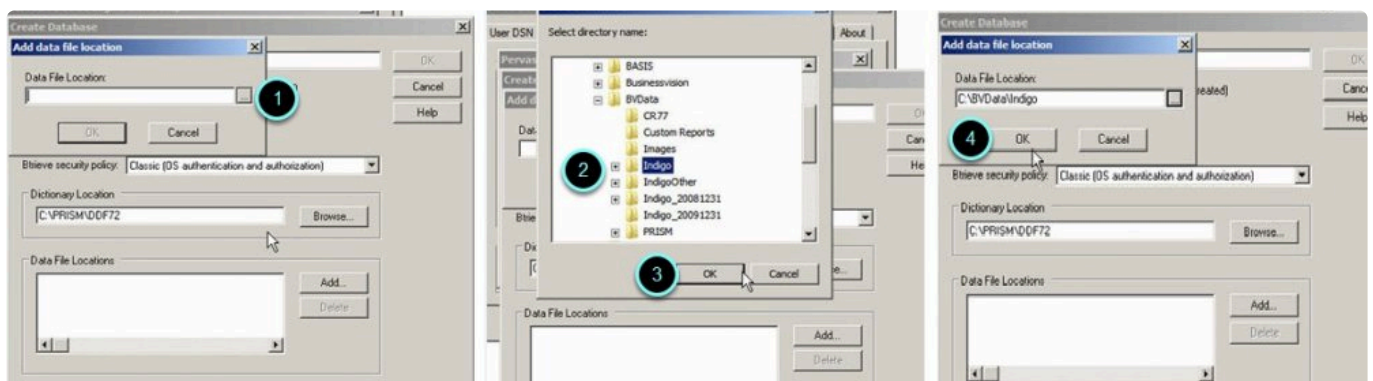
Locate the DFF72 folder under PRISM (C:/PRISM/DFF72) and then click on Ok.



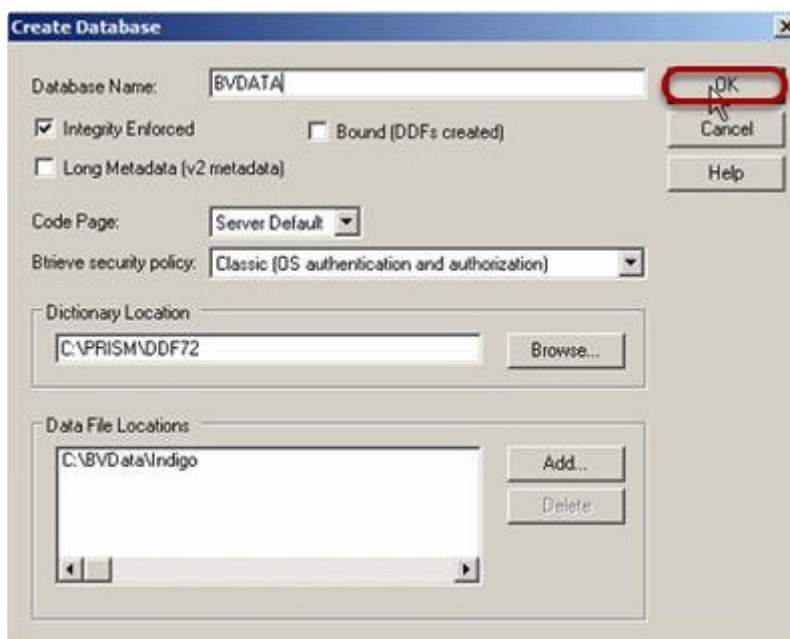
Click Delete. Then click Add.



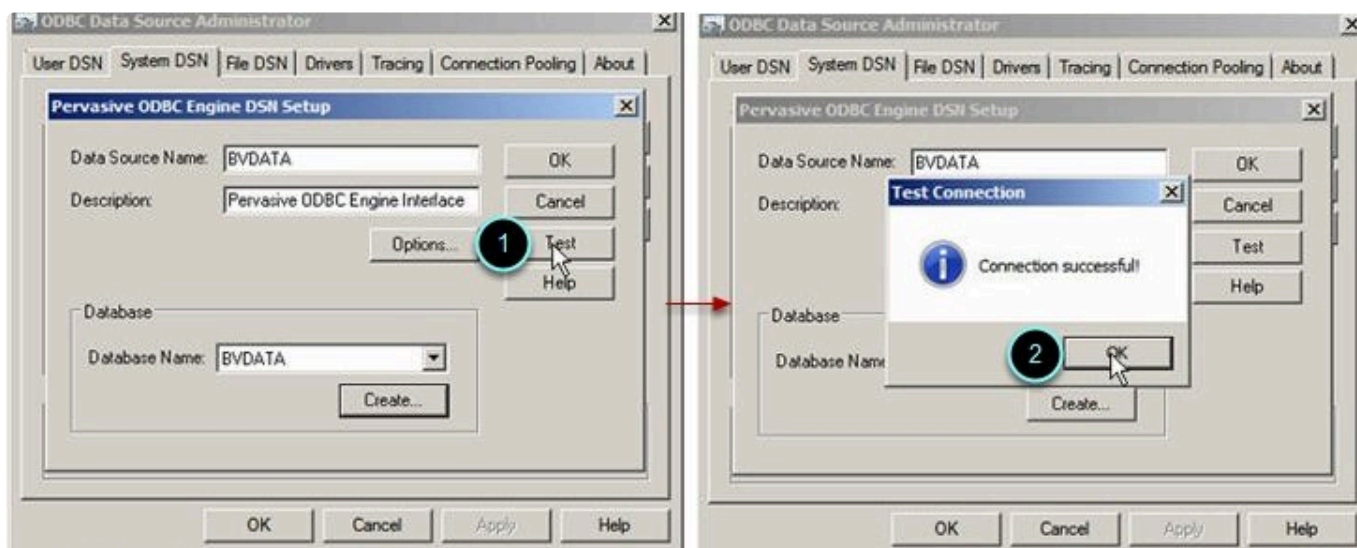
Locate the BV Data File Location.



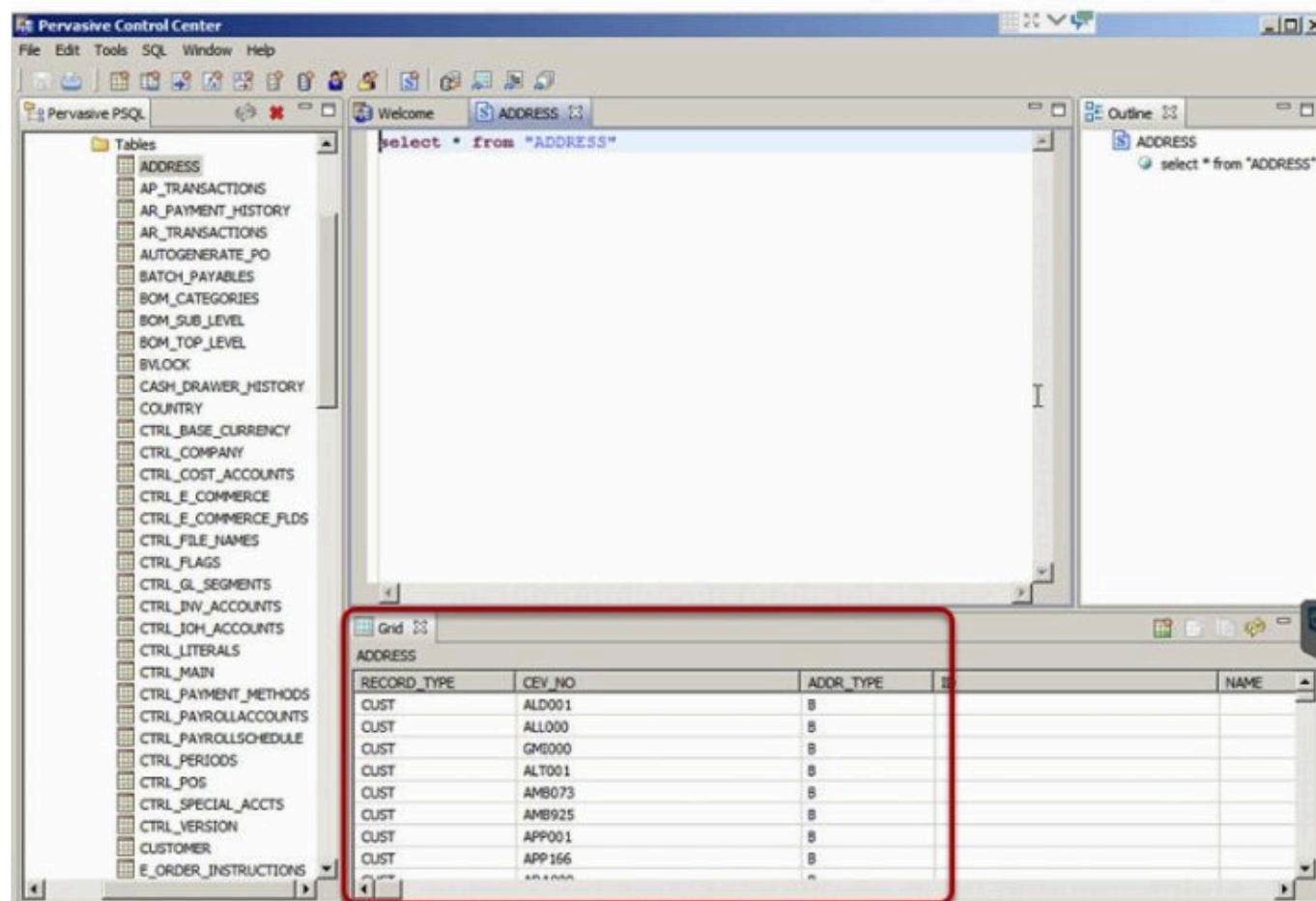
Click OK to proceed on creating the database.



Click on test to verify if the configuration is correct and then click OK.



Open the newly created database, then open any table (the table will open without an error if the database is setup properly).

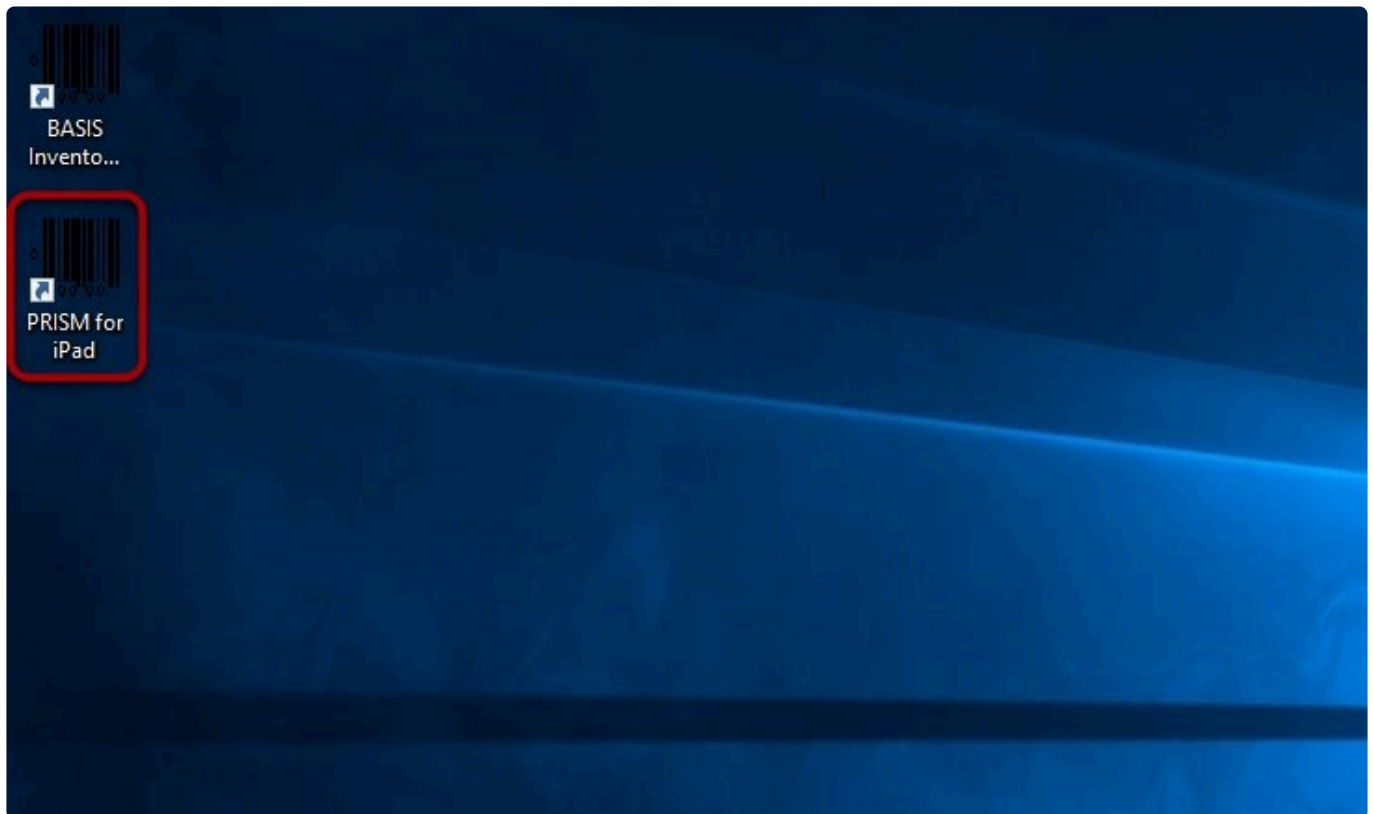


2.3. III. PRISM DESKTOP PROCEDURES

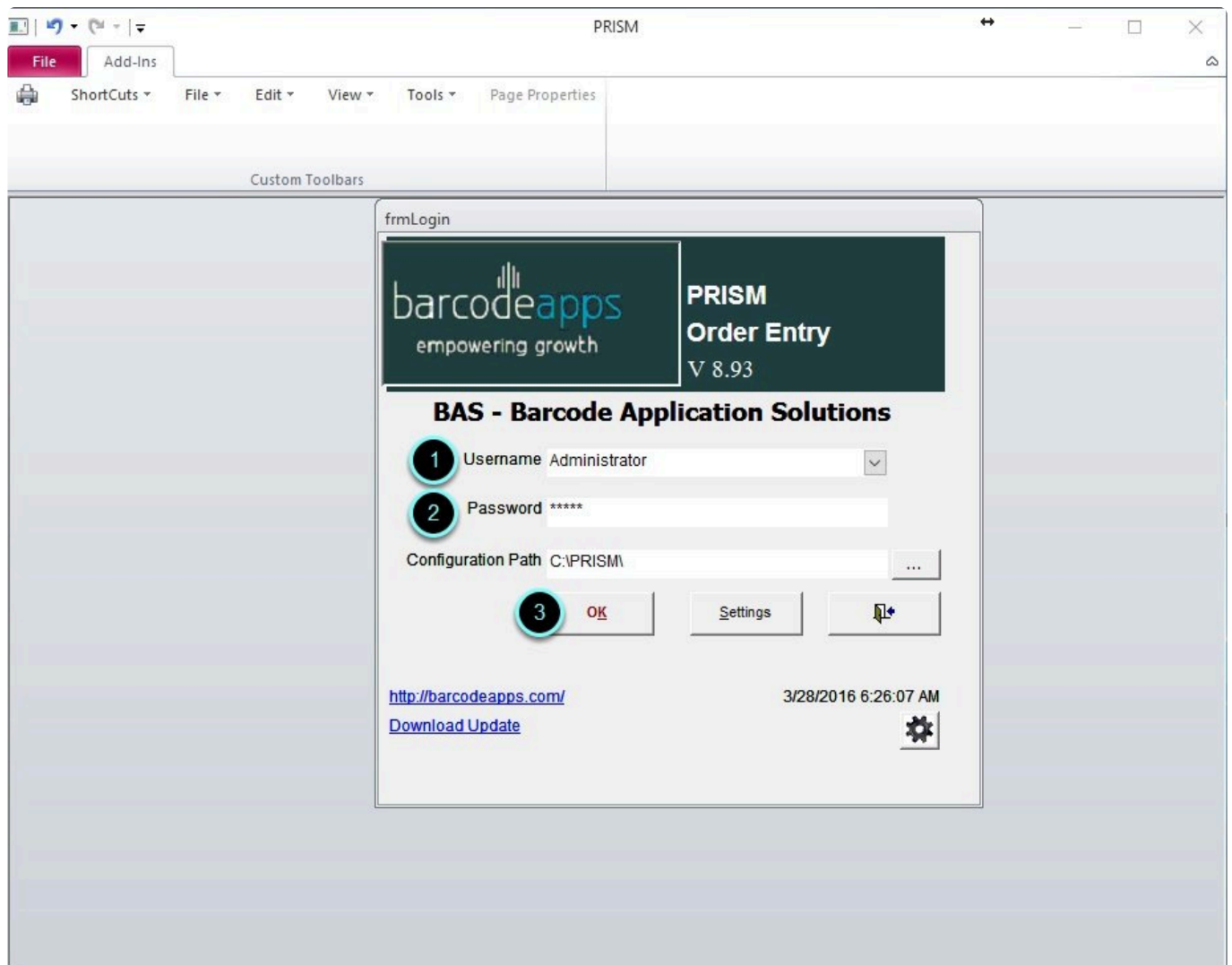
2.3.1. A. How To Login To PRISM Desktop

This knowledge base article will guide you on how to login to PRISM desktop.

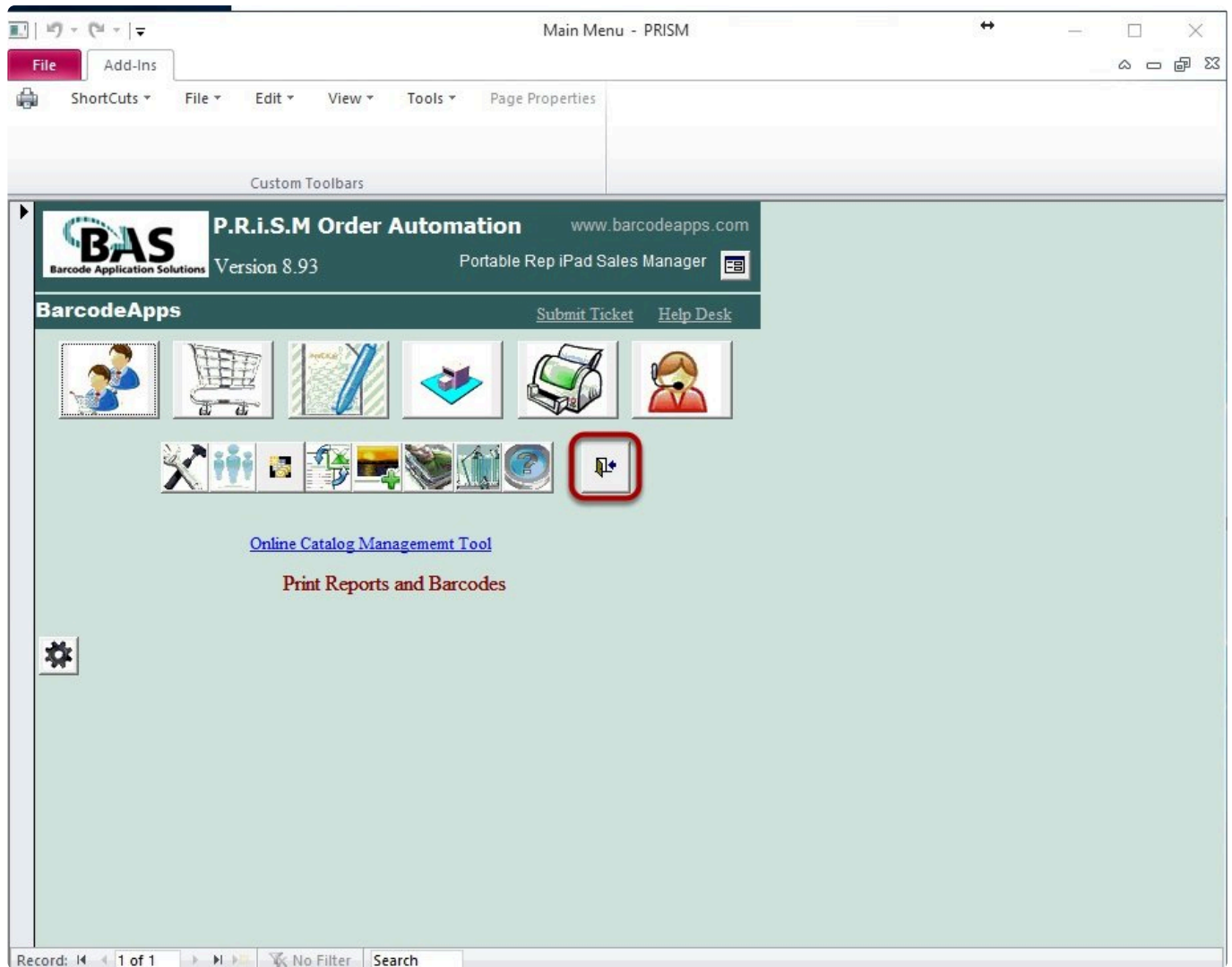
Click on the PRISM for iPad shortcut on your desktop.



Type in the username: Administrator and password: prism then click OK.



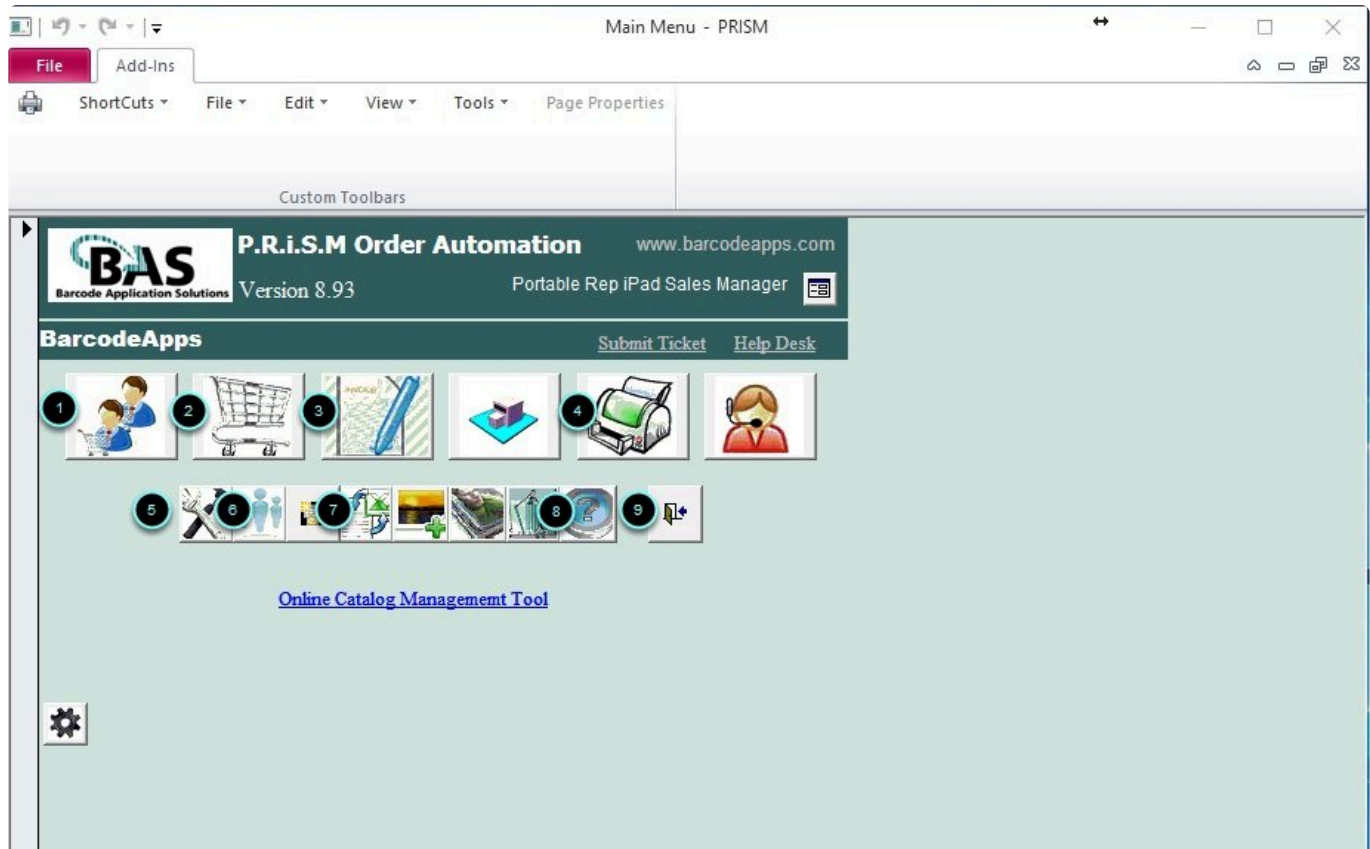
To sign out from PRISM desktop click on the Exit button.



2.3.2. B. PRISM Desktop Menus

This knowledge base article will explain the different important menus in PRISM desktop and their functions.

PRISM DESKTOP MENUS



1. Customer Information Form — Use to add or remove customers record.
2. Product Review Form — Use to add or remove products record.
3. Order Review Form — Use to review or remove orders record.
4. Reports and Labels — Use to print reports and barcode labels.
5. Owner Maintenance Form — Manage various settings and company information.
6. User Information Form — Use to add or remove desktop users record.
7. Import and Export Menu — Transfer data from your accounting program into PRISM desktop to the iPad.
8. Help Videos and Documentation — Open form to view links to Youtube videos and documentations.
9. Exit — Click on this button to exit from the program.

CUSTOMER INFORMATION FORM

Customer Form - PRISM

File Add-Ins

ShortCuts File Edit View Tools Page Properties

Custom Toolbars

CUSTOMER INFORMATION ENTRY FORM ☐ Show Non Valid Customers ☐ Save ☐ Del ☐ Exit ☐ New ☐ Del All ☐ CRM

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☐ Show Active Only ☐ Credit Info

Validated	Telephone	Name	Address	City	Rep	Cust ID
<input checked="" type="checkbox"/>	4164982381	Ace Electronics	1785 Rexway Ave. Suite 8	Toronto		1
<input checked="" type="checkbox"/>	9055953343	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35	Kinn City		2
<input checked="" type="checkbox"/>	5143648080	Access Technologies	380 St. Catherine St. Unit 15	Montreal		3
<input checked="" type="checkbox"/>	6046851212	British Columbia Audio	1433 West Georgia Street	Vancouver		4
<input checked="" type="checkbox"/>	4166563300	Canadian Speakers Limited	888 Progress Rd. Suite 400	Scarborough		5
<input checked="" type="checkbox"/>	2045846601	Creative Audio	6105 Lanee Drive Unit 6	Winnipeg		6
<input checked="" type="checkbox"/>	4166243333	Crazy Arnold's Stereo Inc.	623 York Street Building 3	Toronto		7
<input checked="" type="checkbox"/>	3064952713	Davis Electronics	231 Brixton Way Unit 9	Saskatoon		8
<input checked="" type="checkbox"/>	4163662900	Downtown Stereo Mart Ltd.	1250 Yonge Street	Toronto		9
<input checked="" type="checkbox"/>	5143919293	Davidson Sound Machine	2466 rue Grande	Quebec City		10
<input checked="" type="checkbox"/>	4164453434	East End Audio Inc.	3720 Kingston Road	Scarborough		11

Customer Name Ace Electronics Customer Code ACE Discount (%) 5

Address 1785 Rexway Ave. Suite 8 Bill To Code

City Toronto Rep

Prov/State ON Primary Contact Allen Dark

Postal/Zip M9A 2B2 Secondary Contact

Email adark@aceelectronics.com Type of Customer

Password Bill To ID 1

Telephone (416) 498-2381 Active (Y/N) ☒ Validated ☒

Fax Bill to Tel 4164982381 Harmc 13

Cell Price List 2 0

Terms Net 30 days

BVWh: 00

Add Stamp

Change Stamp

Clear Emails Use Customer Codes as passwords

Record: 1 of 33 Unfiltered Search

Save — Save changes made to a customer record.

Del — Deletes a customer record.

Exit — Exits the program.

New — Adds a new customer record.

Del All — Delete ALL customer records.

Locate By — Filter customers by Name, Tel, Zip, or Code.

Clear Emails — Clears ALL email addresses in the email field for ALL customers.

Use Customer Codes as passwords — Assigns customer code as password for ALL customers when logging in to webstore.

PRODUCT REVIEW FORM

Product Form - PRISM

File Add-Ins

ShortCuts File Edit View Tools Page Properties

Custom Toolbars

PRODUCT REVIEW FORM

Search By Descr / Manuf / Code / Barcode (Double click to cancel)

Save Delete Exit Delete All Show Discontinued

Locate By Manufacturer Item Code Description Barcode Whse

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec	Discd	Bode	Item ID
BAR01	CD-204	Compact Disk Player with Autoskip	\$323.70	0	00					1
BAR01	CD-800	Compact Disk Player - 5 disk capaci	\$528.30	0	00					2
BAR01	EN-BATD	Energizer ACCU Rechargeable D Bat	\$9.99	0	00					3
BAR01	EQ-1245	Equalizer (7 band)	\$111.00	0	00					4
BAR01	EQ-1800	Equalizer (10 band)	\$195.90	0	00					5
BAR01	FCB-250	Finished cabinet for SP-250	\$300.00	0	00					6
BAR01	FX-280	All-in-one Printer/Scanner/Copier	\$318.50	0	00					7
BAR01	FX-500	Multi-fax Printer Copier Scanner	\$528.00	0	00					8
BAR01	GR-250	Speaker Grill for SP-250	\$9.70	0	00					9

General Pricing Size Color Matrix Other

Manufacturer BAR01 On Hand 210 Whse 00

Item Code CD-204 Comments

Barcode On Special PREPACK Parent Productt

Description Compact Disk Player with Autoskip

Description 2 0

Min Order Qty 0 Add Stamp 3/29/2016 1:57:56 AM

Case Pack 0 Change Stamp 3/29/2016 1:57:56 AM

Catalog Page Pic # Category COM Top Category

Picture Name (no ext)

Switch Languages Min = 1 Suggested = Min Use All Item codes as UPC Use Item codes for missing UPCs Remove Spaces From UPC

Record: 1 of 50 Unfiltered Search

Save — Save changes made to a product record.

Del — Deletes a product record.

Exit — Exits the program.

New — Adds a new product record.

Del All — Delete ALL product records.

Locate By — Filter products by Item Code, Description, Barcode or Warehouse.

Pricing Levels Tab

ShortCuts ▾File ▾Edit ▾View ▾Tools ▾Page Properties

Custom Toolbars

PRODUCT REVIEW FORM

SaveDelete ExitDelete All

New

ECDE All

ECDE None

Product Category Setup

Search By Descr / Manuf / Code / Barcode (Double click to cancel)

Locate By

Manufacturer

Item Code

Description

Barcode

Whse

Manufacturer

Item Code

Description

Wholesale

Min Order

Whse

% Dis

On Spec

Discd

Bode

Item ID

BAR01

CD-204

Compact Disk Player with Autoskip

\$323.70

0

00

1

BAR01

CD-800

Compact Disk Player - 5 disk capaci

\$528.30

0

00

2

BAR01

EN-BATD

Energizer ACCU Rechargeable D Bat

\$9.99

0

00

3

BAR01

EQ-1245

Equalizer (7 band)

\$111.00

0

00

4

BAR01

EQ-1800

Equalizer (10 band)

\$195.90

0

00

5

BAR01

FCB-250

Finished cabinet for SP-250

\$300.00

0

00

6

BAR01

FX-280

All-in-one Printer/Scanner/Copier

\$318.50

0

00

7

BAR01

FX-500

Multi-fax. Printer. Copier. Scanner

\$528.00

0

00

8

BAR01

GR-250

Speaker Grill for SP-250

\$9.70

0

00

9

GeneralPricingSize Color MatrixOther

Wholesale Price

\$323.70

Price 2

Price 3

Price 4

Price 5

Price 6

Price 7

Price 8

Price 9

Price 10

Price 11

\$313.70

\$297.20

\$282.40

\$267.50

\$240.80

\$228.80

\$217.40

\$0.00

\$0.00

\$0.00

Price 12

Price 13

Price 14

Price 15

Price 16

Price 17

Price 18

Price 19

Price 20

\$0.00

\$0.00

\$0.00

\$339.90

\$357.00

\$0.00

\$0.00

\$0.00

\$0.00

UPC2

Expected

Packing

Size

Weight

00/00/0000

Case Price

\$0.00

Old Price

Discount Rate

Top Category

Switch Languages

Min = 1

Suggested = Min

Use All Item codes as UPC

Use Item codes for missing UPCs

Remove Spaces From UPC

Record: 14 1 of 50 Unfiltered Search

Size Color Matrix Tab

ShortCuts ▾File ▾Edit ▾View ▾Tools ▾Page Properties

Custom Toolbars

PRODUCT REVIEW FORM

SaveDelete ExitDelete All

New

ECDE All

ECDE None

Product Category Setup

Search By Descr / Manuf / Code / Barcode (Double click to cancel)

Locate By

Manufacturer

Item Code

Description

Barcode

Whse

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec	Discd	Bcde	Item ID
BAR01	CD-204	Compact Disk Player with Autoskip	\$323.70	0	00					1
BAR01	CD-800	Compact Disk Player - 5 disk capaciti	\$528.30	0	00					2
BAR01	EN-BATD	Energizer ACCU Rechargeable D Bat	\$9.99	0	00					3
BAR01	EQ-1245	Equalizer (7 band)	\$111.00	0	00					4
BAR01	EQ-1800	Equalizer (10 band)	\$195.90	0	00					5
BAR01	FCB-250	Finished cabinet for SP-250	\$300.00	0	00					6
BAR01	FX-280	All-in-one Printer/Scanner/Copier	\$318.50	0	00					7
BAR01	FX-500	Multi-fax. Printer. Copier. Scanner	\$528.00	0	00					8
BAR01	GR-250	Speaker Grill for SP-250	\$9.70	0	00					9

GeneralPricingSize Color MatrixOther

Parent

Other 4

Size Color Matrix Data

Style

Suggested Order Quantity

Alternate Picture (StyleColor)

Picture management and Manipulation

Picture Folder

Disc products without images

Uppercase Product Names

Top Category

Switch Languages

Min = 1

Suggested = Min

Use All Item codes as UPC

Use Item codes for missing UPCs

Remove Spaces From UPC

Record: 14 1 of 50 Unfiltered Search

ORDER REVIEW FORM

Validate All — Validates ALL orders to be uploaded to BV.

Delete — Deletes an order record.

Exit — Exits the program.

Save — Save changes to the order.

New — Add a new order record.

Delete All — Deletes ALL order records.

Backup and Clear Orders — Backups orders and removes order records in order screen.

Locate By — Filter orders by Order Number or Customer.

Print Order — Prints order selected.

Print All — Prints ALL orders.

REPORTS AND LABELS

BarcodeApps
Reports Menu
Portable Rep Integrated Sales Manager

Report Start Date: 3/29/2016
Report End Date: 3/29/2016

Sales by Product by Date
Sales by Rep by Date
Sales by Customer by Date
Sales by Whse by Date
Summary by Warehouse
Open Label Menu
Exit

Print Barcodes List and Labels

Select Manufacturer: [Dropdown]
Select Catalog: [Dropdown]

Alphabetical
Avery
5160 5267 PL [Dropdown]
Price List 2up

By Page
Avery
5160 5267
Price List 2up

Customer Lists

By Rep Alphabetically
Alphabetically
By City Alphabetically

Product List

Price List Complete

Catalog

ON ANY REPORT CLICK CTRL P TO SELECT PAGES TO PRINT

Record: 1 of 1 | No Filter | Search


OWNER MAINTENANCE FORM

ShortCuts File Edit View Tools Page Properties

Custom Toolbars

OWNER MAINTENANCE FORM

Company Settings

Name BarcodeApps Logo:  100 x 80 bmp drag here

Address 474 Atwell Dr

City Toronto

Prov/State ON Zip

Email Prism@barcodeapps.com

Website AccountMate

Tel Fax

Accounting Package *Required*

☐ BV ☐ BVEssentials ☒ Manufacturer Onl

☒ BV7 ☒ BV7.2 ☐ Auto-Import

☐ Quickbook ☒ iPad Active

☐ Simply Accounting ☐ Receive Orders Only

☐ Sage 50 (Peachtree) ☐ Novasoft

DATA DIRECTORIES

Description	Name	Value	Reference	NoChange
BV DSN Name		BVDATA	dsname	<input checked="" type="checkbox"/>
Path for BV Text File	Orders.txt	C:\PRISM\	BVTA00Out	<input checked="" type="checkbox"/>
Rep d path		C:\PRISM\	repdbPath	<input type="checkbox"/>
Ignore the W/B Tables 0 Not: -1		C:\PRISM\	BVwB	<input checked="" type="checkbox"/>

Record: 14 1 of 20 No Filter Search

Import Additional Inventory Information From Excel

Excel File Import Import Save Initial Setup Relink - Connect to Databases Setup Selling Lines

Record: 14 1 of 1 No Filter Search

Company Settings — Use to update company information.

Logo — Use for changing company logo in sales order.

Accounting Package — Select the proper accounting program used.

Save — Saves changes to the owner maintenance form.

USER INFORMATION FORM

ShortCuts ▾File ▾Edit ▾View ▾Tools ▾Page Properties

Custom Toolbars

USER INFORMATION ENTRY FORM

Access Codes

C: Customers	O: Orders	T: Commission Table	P: Products
M: Manufacturers	N: Commissions	Z: Prism Rep Menu	I: Invoices
S: Sales Reps	R: Reports	Y: Send Orders	U: Users

Duplicate

Delete

Exit

	Initials	Name	Tel	System Permissions	Password
▶	AD	Administrator		CMSPUOINRXYTXZ	****
	SH	SHOWROOM		CMSPUOINRXYTZ	**
	TST	Test Partial Function		CMSPOIZ	***
*					

Record: 14 1 of 3▶▶▶No FilterSearch

Type in the Initials, Name and Password then hit Enter to add a new record. Click on the Delete button to remove a user.

IMPORT AND EXPORT MENUS

The screenshot shows the 'BarcodeApps Import/Export Menu' window. At the top, there are fields for 'Import Directory' (C:\PRISM\imports\), 'Export Directory' (C:\PRISM\exports\), and 'FTP Directory' (C:\PRISM\ftpd\), along with a checked 'Export To FTP' checkbox and a 'Close' button. The main area is divided into several sections:

- Imports (Callout 1):** Includes a 'Key' field with 'ORDe' and a 'Conn' dropdown. Below is an 'Import Orders' button and a 'filename' input field. At the bottom of this section is a checked 'Web Import' checkbox.
- Exports to Cloud via exe (Callout 2):** Contains two buttons: 'EXPORT CUSTOMERS TO CLOUD' and 'EXPORT PRODUCTS TO CLOUD'.
- Exports to Cloud via API (Callout 3):** Contains three buttons: 'EXPORT CUSTOMERS TO CLOUD', 'EXPORT PRODUCTS TO CLOUD', and 'EXPORT IMAGES TO CLOUD'.
- Generate XML (Callout 3):** Contains two buttons: 'Export Product Tables To XL / XML' and 'Export Customer Tables To XL / XML'.
- Winsol Integration (Callout 4):** At the bottom, it has two buttons: 'Import products from Winsol' and 'Import customers from Winsol', followed by an 'Inventory File Name' input field.

1. IMPORTS

- Excel Imports: Customer / Products — Used for importing customers and products from excel file.
- Business Vision 7 Import Export Form — Click on this button to import customers and products from BV.
- Export Orders to Excel — Click on this button to export orders to an excel file.
- Export Orders to Txt — Click on this button to export orders to a text file.

2. EXPORTS TO CLOUD VIA API

- Export Customers to Cloud — Sends customers to iPad.
- Export Products to Cloud — Sends products to iPad.
- Export Images to Cloud — Sends images to iPad. Images must be in C:\PRISM\Images folder.


3. GENERATE XML

- Export Products table to XL / XML — Exports products to excel file or xml file.
- Export Customer table to XL / XML — Exports customers to excel file or xml file.

4. WINSOL INTEGRATION

- Import Products from Winsol — Imports products from Winsol.
- Import Customers from Winsol — Imports customers from Winsol.

HELP VIDEOS AND DOCUMENTATION

Links to Youtube help videos and other information 				
Click here to Watch video				
Top Level	Module	Function	Select function first	
Overall	Overview	Youtube channel	<input type="checkbox"/>	
PRISM Desktop	Desktop General	General review	<input type="checkbox"/>	
PRISM Desktop	Desktop	Overview	<input type="checkbox"/>	
PRISM Desktop	Import and Export	Import and export	<input type="checkbox"/>	
PRISM Desktop	Images	Image management	<input type="checkbox"/>	
PRISM Desktop	Products	Category management	<input type="checkbox"/>	
PRISM Desktop	Products	Size Color Matrix Setup	<input type="checkbox"/>	
PRISM Desktop	Catalogs	Creating Catalogs in PRISM	<input type="checkbox"/>	
			<input type="checkbox"/>	
iPad	iPad	iPad function overview	<input type="checkbox"/>	
iPad	iPad	iPad User Manual	<input type="checkbox"/>	
			<input type="checkbox"/>	
Other	Catalog Digitizer	Tutorial	<input checked="" type="checkbox"/>	
Other	Trade Show Setup Guide	Document	<input type="checkbox"/>	
*			<input type="checkbox"/>	

Alternatively, please visit <https://barcodeapps.freshdesk.com/> for the updated knowledgebase articles, walk throughs and video tutorials.

2.3.3. C. How To Import Customers From BV

This knowledge base article will guide users on how to import customers from Sage BusinessVision.

To import customers from BV click on the Import and Export button.



Click on the BusinessVision 7 Import Export Form.

Import DirectoryC:\PRISM\imports\
Export DirectoryC:\PRISM\exports\
FTP DirectoryC:\PRISM\ftpdir
☒ Export To FTP

BarcodeApps
Import/Export Menu

Close

KeyORDe ☐ Conf.
Import Orders
filename
☒ Web Import

Imports
Excel Imports: Customers / Products etc
BusinessVision 7 Import Export Form
Export Orders to Excel
Export Orders to Txt

Exports to Cloud via exe
EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API
EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD

Generate XML
Export Product Tables To XL / XML
Export Customer Tables To XL / XML

Import products from Winsol
Import customers from Winsol

Inventory File Name

Click on Update Customers from BV to PRISM.

Sage BusinessVision 7 Connectivity Form

☒ BV7

Import Only ☒ Wh INVENTORY.WHSE = '00'

☐ Total from all ☐ Non Inventory **BV Next Order Number:** Division

PRISM Local File Updates

☐ On Hand Only ☐ Min Buy SPEC CODE X NOT IMPORTED

☐ Use Sales Dep ☐ Use Salesperson

Ignore: ☐ upc's ☐ Min ☐ CP ☐ Don't import held cust

☐ Ignore Price 20 ☐ UPC Each Only ☐ Ignore Email Address

Item FilterFrom BV Alternate field

Item FilterFrom BV NOTES field

Exclude if Location is:

☐ Don't import Inactive

Export to BV

Warehouse for orders

☒ Use Customer's Warehouse

☐ Use Rep's Warehouse

☐ Use HH Warehouse

☐ Use Product Warehouse ☐ Sort items in the order they were entered ☐ Upload as Quotes

☒ Commit Quantities if On Hand (Place on BO otherwise)

☒ Lock Prices (Do not change when tabbing)

☒ Do Not Import Products On Hold

☒ Import warehouses in Categories

☐ Assign 1 level categories automatically

☐ Import Extended Description into comments

Directory to Export Text Orders To:

Orders File:

A pop up message will show once the customers import has been completed. Click OK.

Manufacturer code **Sage BusinessVision 7 Connectivity Form** ☒ BV7

Import Only ☒ Wh INVENTORY.WHSE = '00'

☐ Total from all ☐ Non Inventory **BV Next Order Number:** Division

☐ Casepacks

PRISM Local File Updates

☐ On Hand Only ☐ Min Buy SPEC CODE X NOT IMPORTED

☐ Use Sales Dep ☐ Use Salesperson

PRISM Info X

Customers imported and updated from BV

☐ Warehouse for orders ☒ Use Customer's Warehouse ☐ Use Rep's Warehouse ☐ Use HH Warehouse ☐ Use Product Warehouse

☐ Sort items in the order they were entered ☐ Upload as Quotes

☒ Commit Quantities if On Hand (Place on BO otherwise)
☒ Lock Prices (Do not change when tabbing)
☒ Do Not Import Products On Hold
☒ Import warehouses in Categories
☐ Assign 1 level categories automatically
☐ Import Extended Description into comments

Directory to Export Text Orders To:
Orders File:

2.3.4. D. How To Import Products From BV

This knowledge base article will guide users on how to import products from Sage BusinessVision.

To import products from BV click on the Import and Export button.



Click on the BusinessVision 7 Import Export Form.

Import Directory

C:\PRISM\imports\

Export Directory

C:\PRISM\exports\

FTP Directory

C:\PRISM\ftpd\

☒ Export To FTP

BarcodeApps

Import/Export Menu

Close

Key ☐ Conf.

Import Orders

filename

Excel Imports: Customers / Products etc

BusinessVision 7 Import Export Form

Export Orders to Excel

Export Orders to Txt

☒ Web Import

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Generate XML

Export Product Tables To XL / XML

Export Customer Tables To XL / XML

Import products from Winsol

Import customers from Winsol

Inventory File Name

Click on Update Inventory from BV to PRISM.

Sage BusinessVision 7 Connectivity Form

☒ BV7

Import Only ☒ Wh INVENTORY.WHSE ='00'

☐ Total from all ☐ Non Inventory **BV Next Order Number:** **Division**

PRISM Local File Updates

☐ On Hand Only ☐ Min Buy SPEC CODE X NOT IMPORTED

☐ Use Sales Dep ☐ Use Salesperson

☐ Ignore: ☐ upc's ☐ Min ☐ CP ☐ Don't import held cust

☐ Ignore Price 20 ☐ UPC Each Only ☐ Ignore Email Address

Item FilterFrom BV Alternate field


Item FilterFrom BV NOTES field

Exclude if Location is:

☐ Don't import Inactive

Export to BV

Warehouse for orders

☒ Use Customer's Warehouse 

☐ Use Rep's Warehouse

☐ Use HH Warehouse

☐ Use Product Warehouse ☐ Sort items in the order they were entered ☐ Upload as Quotes

☒ Commit Quantities if On Hand (Place on BO otherwise)

☒ Lock Prices (Do not change when tabbing)

☒ Do Not Import Products On Hold

☒ Import warehouses in Categories

☐ Assign 1 level categories automatically

☐ Import Extended Description into comments

Directory to Export Text Orders To:

Orders File:

A pop up message will show once the products import has been completed. Click OK.

Sage BusinessVision 7 Connectivity Form ☒ BV7

Import Only ☒ Wh INVENTORY.WHSE ='00'

☐ Total from all ☐ Non Inventory **BV Next Order Number:** Division

PRISM Local File Updates

☐ On Hand Only ☐ Min Buy SPEC CODE X NOT IMPORTED

☐ Use Sales Dep ☐ Use Salesperson

PRISM Info

Products imported and updated from BV

☐ Warehouse for orders ☒ Use Customer's Warehouse ☐ Use Rep's Warehouse ☐ Use HH Warehouse ☐ Use Product Warehouse ☐ Sort items in the order they were entered ☐ Upload as Quotes

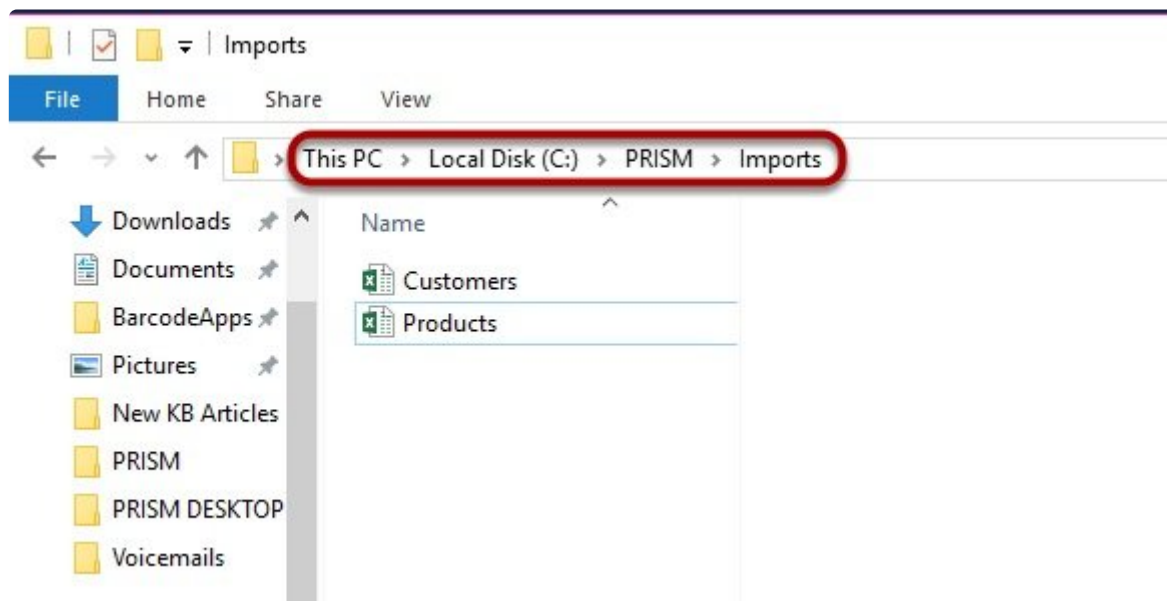
☒ Commit Quantities if On Hand (Place on BO otherwise)
☒ Lock Prices (Do not change when tabbing)
☒ Do Not Import Products On Hold
☒ Import warehouses in Categories
☐ Assign 1 level categories automatically
☐ Import Extended Description into comments

Directory to Export Text Orders To:
Orders File:

2.3.5. F. How To Upload Products From Excel Template

This knowledge base article will guide users on how to upload products from an excel file.

Put the product.xls file in C:\PRISM\imports\ folder.



Go to Import and Export Menu.



Click on Excel Imports: Customers / Products button.

Import DirectoryC:\PRISM\imports\
Export DirectoryC:\PRISM\exports\
FTP DirectoryC:\PRISM\ftpdirexport to ftp

BarcodeApps
Import/Export Menu

Close

Imports

KeyORDeConf.
Import Orders
Orders.xlsx
Excel Imports: Customers / Products etc
BusinessVision 7 Import Export Form
Export Orders to Excel
Export Orders to Txt
Web Import

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API
EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD
EXPORT IMAGES TO CLOUD

Generate XML
Export Product Tables To XL / XML
Export Customer Tables To XL / XML

Import products from WinsolImport customers from Winsol
Inventory File Name

Select your manufacturer code in the manufacturer drop down menu.

**BarcodeApps
Startup Import Menu**

Import Directory: C:\PRISM\imports\
Export Directory: C:\PRISM\exports\
Review Imported File

1 Manufacturer: **BAR01** | BAR01

Prod Key	Prod	Manufacturer Key	Manu	Terms Key	terms	Cust Key	Cust	MatrixKey	MatrixF	Rep Key	Rep	Catalog Key	Catalog
Import Product File	filename	Import Manufacturer File	filename	Import Terms File	filename	Import Customer File	Customers.xls	Import Matrix Setup File	filename	Import Rep File	filename	Import Catalog File	filename
				State / Prov Key	State								
				Import State / Province File	filename								

Select file and click to highlight. To import, click on Import button. Double-click to open file in Excel format for review.

Select file for Size/Color Setup

Select file for Sales Reps

Select your excel file (Products.xls) and then click on Import Product File.

**BarcodeApps
Startup Import Menu**

Import Directory: C:\PRISM\imports\
Export Directory: C:\PRISM\exports\
Review Imported File

Manufacturer: **BAR01** | BAR01

Web Import

Prod Key	Prod	Manufacturer Key	Manu	Terms Key	terms	Cust Key	Cust	MatrixKey	MatrixF	Rep Key	Rep	Catalog Key	Catalog
Import Product File	filename	Import Manufacturer File	filename	Import Terms File	filename	Import Customer File	Customers.xlsx	Import Matrix Setup File	filename	Import Rep File	filename	Import Catalog File	filename
				State / Prov Key	State								
				Import State / Province File	filename								

Select file and click to highlight. To import, click on Import button. Double-click to open file in Excel format for review.

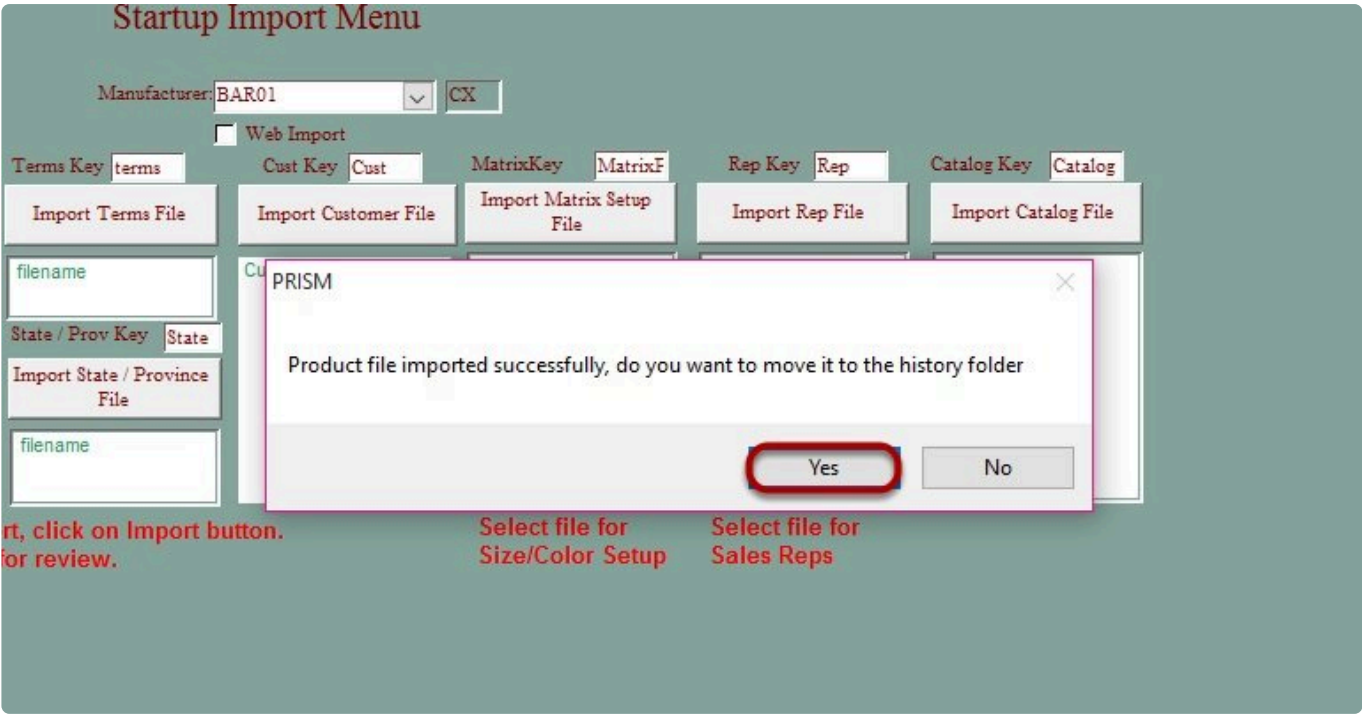
Select file for Size/Color Setup

Select file for Sales Reps

Click Yes.

The screenshot shows the 'Startup Import Menu' interface. At the top, there is a 'Manufacturer' dropdown menu set to 'BAR01' and a 'CX' button. Below this, there are several input fields and buttons: 'Terms Key' (terms), 'Cust Key' (Cust), 'MatrixKey' (MatrixF), 'Rep Key' (Rep), and 'Catalog Key' (Catalog). Each of these has a corresponding 'Import' button (e.g., 'Import Terms File', 'Import Customer File', etc.). There are also 'filename' input fields and a 'Web Import' checkbox. A modal dialog box titled 'PRISM' is open in the center, asking 'Do you want to import products in the respective categories?'. The 'Yes' button in the dialog is highlighted with a red circle. At the bottom of the interface, there are red instructions: 'rt, click on Import button. for review.', 'Select file for Size/Color Setup', and 'Select file for Sales Reps'.

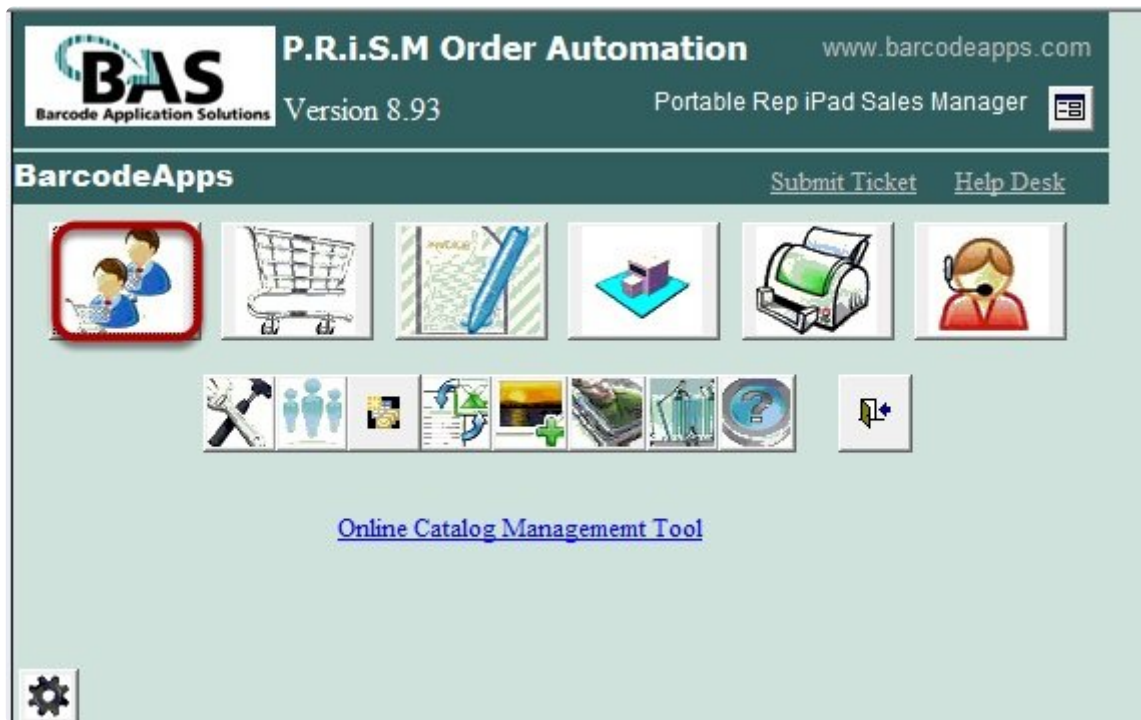
A notification window will appear if the product excel upload is successful. Click Yes.



2.3.6. G. How To Update Customer

This knowledge base article will guide users on how to update their customer information.

Click on Customers menu.



Click on the customer that you'd like to update.

CUSTOMER INFORMATION ENTRY FORM ☐ Show Non Valid Customers

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☐ Show Active Only ☐ Credit Info

Validated Telephone Name Address City Rep Cust ID

<input checked="" type="checkbox"/>	4166243338	Talbo Speakers	214 York Street Building 3	Toronto	FS1	1	FS1
<input checked="" type="checkbox"/>	4164982381	Ace Electronics	1785 Rexway Ave. Suite 8	Toronto	AB1	2	AB1
<input checked="" type="checkbox"/>	9055953343	Acme Electronics Corp.	13444 Mockingbird Drive. Unit 35	King City	FS1	3	FS1
<input checked="" type="checkbox"/>	5143648080	Access Technologies	380 St. Catherines St. Unit 15	Montreal	TC1	4	TC1
<input checked="" type="checkbox"/>	6046851212	British Columbia Audio	1433 West Georgia Street	Vancouver	FS1	5	FS1
<input checked="" type="checkbox"/>	4166563300	Canadian Speakers Limited	888 Progress Rd. Suite 400	Scarborough	CK1	6	CK1
<input checked="" type="checkbox"/>	2045846601	Creative Audio	6105 Lange Drive Unit 6	Winnipeg	DC2	7	DC2
<input checked="" type="checkbox"/>	4166243333	Crazy Arnold's Stereo Inc.	623 York Street Building 3	Toronto	OC1	8	OC1
<input checked="" type="checkbox"/>	3064952713	Davis Electronics	231 Brixton Way Unit 9	Saskatoon	HSE	9	HSE
<input checked="" type="checkbox"/>	4163662900	Downtown Stereo Mart Ltd.	1250 Yonge Street	Toronto	DC1	10	DC1
<input checked="" type="checkbox"/>	5143919293	Davidson Sound Machine	2466 rue Grande	Quebec City	RR1	11	RR1
<input checked="" type="checkbox"/>	4164453434	East End Audio Inc.	3720 Kingston Road	Scarborough	HA1	12	HA1
<input checked="" type="checkbox"/>	9057348122	Entertainment Centre	42 Penn Street Unit 6	Markham	WA1	13	WA1
<input checked="" type="checkbox"/>	5145867660	Florence Radio Systems	1891 Main Street Unit 3	Hull	HA1	14	HA1
<input checked="" type="checkbox"/>	9028856500	Freemont Radio Corp.	444 Barrington Street. Suite 200	Halifax	HSE	15	HSE
<input checked="" type="checkbox"/>	7052521616	Georgian Hi-fidelity Corp.	1835 Cliff Valley	Huntsville	TC1	16	TC1
<input checked="" type="checkbox"/>	9055559700	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 11	Malton	HA1	17	HA1
<input checked="" type="checkbox"/>	9055559696	Harding TV Repairs	252 Gladstone Boulevard Suite 6	Willowdale	HSE	18	HSE
<input checked="" type="checkbox"/>	6045554321	Harmons Home Theatre System	283 Jane Street	Calgary	TC1	19	TC1

Customer Name Talbo Speakers Customer Code TS1 Discount (%) 0

Address 214 York Street Building 3 Bill To Code Same Credit Card

City Toronto Rep FS1 Frank Smith Notes

Prov/State ON Primary Contact (416) 624-3338 Ship Via

Postal/Zip M7T 4J8 Secondary Contact

Email TalboSpeakersInc@gmail.com Type of Customer Terms

Password Bill To ID 0 BVWh:

Telephone (416) 624-3338 Active (Y/N) ☒ Validated ☒ Add Stamp #####

Fax Bill to Tel Price List 1 Change Stamp #####

Cell 0 0 0

Make the necessary changes.

Customer Name Talbo Speakers Customer Code TS1 Discount (%) 0

Address 214 York Street Building 3 Bill To Code Same Credit Card

City Toronto Rep FS1 Frank Smith Notes

Prov/State ON Primary Contact (416) 624-3338 Ship Via

Postal/Zip M7T 4J8 Secondary Contact

Email TalboSpeakersInc@gmail.com Type of Customer Terms





Password Bill To ID 0 BVWh:

Telephone (416) 624-3338 Active (Y/N) ☒ Validated ☒ Add Stamp #####

Fax Bill to Tel Price List 1 Change Stamp #####

Cell 0 0 0

Click on the Save button once done.

CUSTOMER INFORMATION ENTRY FORM ☐ Show Non Valid Customers    New  CRM

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☐ Show Active Only ☐ Credit Info

Validated	Telephone	Name	Address	City	Rep	Cust ID
<input checked="" type="checkbox"/>	4166243338	Talbo Speakers	214 York Street Building 3	Toronto	FS1	1 FS1
<input checked="" type="checkbox"/>	4164982381	Ace Electronics	1785 Rexway Ave. Suite 8	Toronto	AB1	2 AB1
<input checked="" type="checkbox"/>	9055953343	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35	King City	FS1	3 FS1
<input checked="" type="checkbox"/>	5143648080	Access Technologies	380 St. Catherines St. Unit 15	Montreal	TC1	4 TC1
<input checked="" type="checkbox"/>	6046851212	British Columbia Audio	1433 West Georgia Street	Vancouver	FS1	5 FS1
<input checked="" type="checkbox"/>	4166563300	Canadian Speakers Limited	888 Progress Rd. Suite 400	Scarborough	CK1	6 CK1
<input checked="" type="checkbox"/>	2045846601	Creative Audio	6105 Lange Drive Unit 6	Winnipeg	DC2	7 DC2
<input checked="" type="checkbox"/>	4166243333	Crazy Arnold's Stereo Inc.	623 York Street Building 3	Toronto	OC1	8 OC1
<input checked="" type="checkbox"/>	3064952713	Davis Electronics	231 Brixton Way Unit 9	Saskatoon	HSE	9 HSE
<input checked="" type="checkbox"/>	4163662900	Downtown Stereo Mart Ltd.	1250 Yonge Street	Toronto	DC1	10 DC1
<input checked="" type="checkbox"/>	5143919293	Davidson Sound Machine	2466 rue Grande	Quebec City	RR1	11 RR1
<input checked="" type="checkbox"/>	4164453434	East End Audio Inc.	3720 Kingston Road	Scarborough	HA1	12 HA1
<input checked="" type="checkbox"/>	9057348122	Entertainment Centre	42 Penn Street Unit 6	Markham	WA1	13 WA1
<input checked="" type="checkbox"/>	5145867660	Florence Radio Systems	1891 Main Street Unit 3	Hull	HA1	14 HA1
<input checked="" type="checkbox"/>	9028856500	Freemont Radio Corp.	444 Barrington Street, Suite 200	Halifax	HSE	15 HSE
<input checked="" type="checkbox"/>	7052521616	Georgian Hi-fidelity Corp.	1835 Cliff Valley	Huntsville	TC1	16 TC1
<input checked="" type="checkbox"/>	9055559700	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 11	Malton	HA1	17 HA1
<input checked="" type="checkbox"/>	9055559696	Harding TV Repairs	252 Gladstone Boulevard Suite 6	Willowdale	HSE	18 HSE
<input checked="" type="checkbox"/>	6045554321	Harmons Home Theatre System	283 Jane Street	Calgary	TC1	19 TC1

Customer Name Talbo Speakers Customer Code TS1 Discount (%) 0

Address 214 York Street Building 3 Bill To Code Same Credit Card

City Toronto Rep FS1 Frank Smith Notes

Prov/State ON Primary Contact (416) 624-3338 Ship Via

Postal/Zip M7T 4J8 Secondary Contact

Email TalboSpeakersInc@gmail.com Type of Customer

Password Bill To ID 0 Terms

Telephone (416) 624-3338 Active (Y/N) ☒ Validated ☒ BVWh:

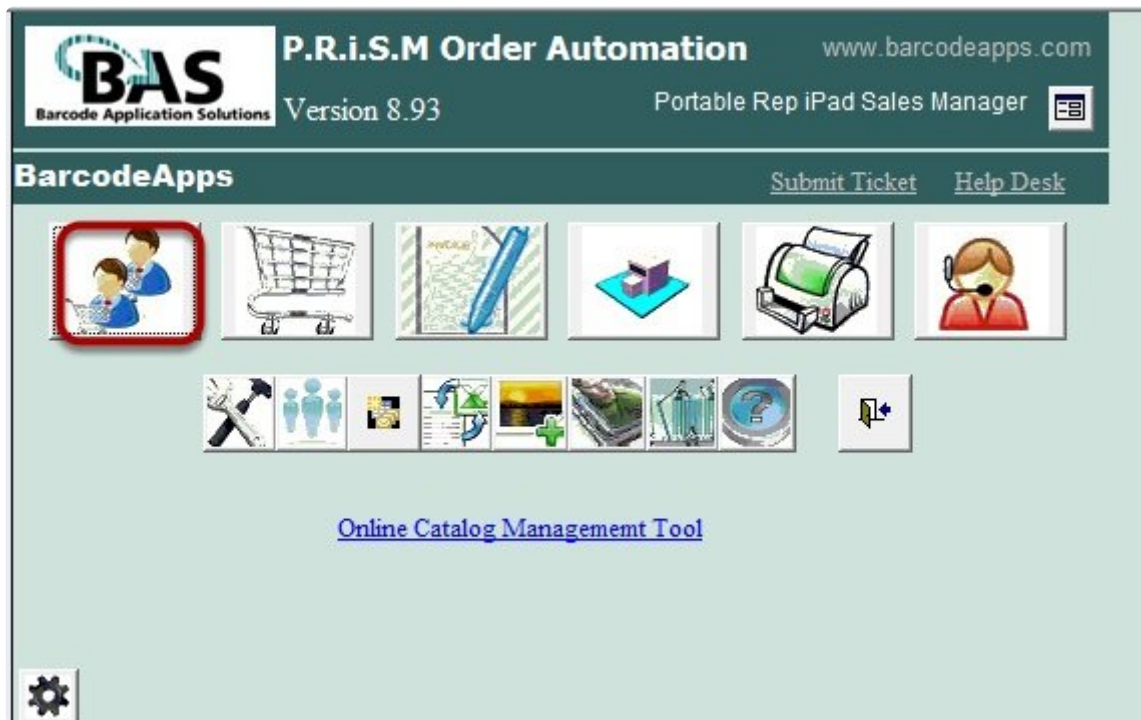
Fax Bill to Tel 0 Add Stamp #####

Cell Price List 1 Change Stamp #####

2.3.7. H. How To Delete Customer

This knowledge base article will guide users on how to delete a customer.

Click on Customers menu.



Click on the customer that you'd like to delete then click on the Delete button.

CUSTOMER INFORMATION ENTRY FORM ☒ Show Non Valid Customers 2 ✖ + New ✖! CRM

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☒ Show Active Only ☐ Credit Info

Validated	Telephone	Name	Address	City	Rep	Cust ID	
<input checked="" type="checkbox"/>	2048224901	Integrated Sound Solutions	1402 West Street Suite 200	Lethbridge	RR1	21	RR1
<input checked="" type="checkbox"/>	9056589445	Jackson Electronics	600 Niagara Way	Niagara Falls	AB1	22	AB1
<input checked="" type="checkbox"/>	9024249787	Long Brothers Stereo Inc.	8041 Newman Avenue	Yarmouth	FS1	23	FS1
<input checked="" type="checkbox"/>	5197223654	Masters Computer Systems	104 Griffin Road North High Cour	Windsor	WA1	24	WA1
1 <input checked="" type="checkbox"/>	4165394575	North York Audio Specialists	823 Griffin Way	North York	RR1	25	RR1
<input checked="" type="checkbox"/>	4165556262	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard	Toronto	CD1	26	CD1
<input checked="" type="checkbox"/>	9052547699	Radio Land	103 MacArthur Drive Suite 459	Willowdale	WA1	27	WA1
<input checked="" type="checkbox"/>	7052726339	Smith Evans Hi-Fi Design Inc.	412 River Street	Brockville	TC1	28	TC1
<input checked="" type="checkbox"/>	4168835656	Sound Machine	1137 West Park Drive	Mississauga	TC1	29	TC1
<input checked="" type="checkbox"/>	4162222323	Terrace Sound Effects	78 Christopher Avenue	Toronto	CD1	30	CD1
<input checked="" type="checkbox"/>	4166655400	Toronto Radio Limited	2316 Avenue Road	Toronto	CD1	31	CD1
<input checked="" type="checkbox"/>	6046224900	Western Electronics	1265 Madison Street	Vancouver	HA1	32	HA1
<input checked="" type="checkbox"/>	2049275540	West Heights Distributors Inc.	5550 Independence Avenue	Winnipeg	HSE	33	HSE
<input checked="" type="checkbox"/>	4165908333	Winston s Computer Consultant	9000 Front St. West Side	Toronto	OC1	34	OC1
<input checked="" type="checkbox"/>	CustID	CustomerCode	CustomerName	Address	RepId	1002	RepId
<input checked="" type="checkbox"/>	1				0	1003	0
<input checked="" type="checkbox"/>	2	ACE	Ace Electronics	1785 Rexway Ave.	1	1004	1
<input checked="" type="checkbox"/>	3	ACME	Acme Electronics Corp.	13444 Mockingbird	7	1005	7
<input checked="" type="checkbox"/>	4	ACTECH	Access Technologies	380 St. Catherines S	12	1006	12

Customer Name

Address

City

Prov/State

Postal/Zip

Email

Password

Telephone

Fax

Cell

Customer Code

Bill To Code

Rep

Primary Contact

Secondary Contact

Type of Customer

Bill To ID

Active (Y/N) ☒ Validated ☒

Bill to Tel

Price List

Discount (%)

Credit Card

Notes

Ship Via

Terms

BVWh:

Add Stamp

Change Stamp

Clear Emails

Click Yes to confirm deletion

CUSTOMER INFORMATION ENTRY FORM ☒ Show Non Valid Customers

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☒ Show Active Only ☐ Credit Info

Validated Telephone Name Address City Rep Cust ID

<input checked="" type="checkbox"/>	2048224901	Integrated Sound Solutions	1402 West Street Suite 200	Lethbridge	RR1	21	RR1
<input checked="" type="checkbox"/>	9056589445	Jackson Electronics	600 Niagara Way	Niagara Falls	AB1	22	AB1
<input checked="" type="checkbox"/>	9024249787	Long Brothers Stereo Inc.	8041 Newman Avenue	Yarmouth	FS1	23	FS1
<input checked="" type="checkbox"/>	5197223654	Masters Computer Systems	104 Griffin Road North High Cour	Windsor	WA1	24	WA1
<input checked="" type="checkbox"/>	4165394575	North York Audio Specialists	823 Griffin Way	North York	RR1	25	RR1
<input checked="" type="checkbox"/>	4165556262	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard	Toronto	CD1	26	CD1
<input checked="" type="checkbox"/>	9052547699	Radio Land	1023 MacArthur Drive Suite 450	Scarborough	WA1	27	WA1
<input checked="" type="checkbox"/>	7052726339	Smith Evans Hi		Markham	TC1	28	TC1
<input checked="" type="checkbox"/>	4168835656	Sound Machine		Mississauga	TC1	29	TC1
<input checked="" type="checkbox"/>	416222323	Terrace Sound E		Ontario	CD1	30	CD1
<input checked="" type="checkbox"/>	4166655400	Toronto Radio		Ontario	CD1	31	CD1
<input checked="" type="checkbox"/>	6046224900	Western Electro		Vancouver	HA1	32	HA1
<input checked="" type="checkbox"/>	2049275540	West Heights D		Winnipeg	HSE	33	HSE
<input checked="" type="checkbox"/>	4165908333	Winston's Computer Consultant	9000 Front St. West Side	Toronto	OC1	34	OC1
<input checked="" type="checkbox"/>	CustID	CustomerCode	CustomerName	Address	RepId	1002	RepId
<input checked="" type="checkbox"/>	1				0	1003	0
<input checked="" type="checkbox"/>	2	ACE	Ace Electronics	1785 Rexway Ave.	1	1004	1
<input checked="" type="checkbox"/>	3	ACME	Acme Electronics Corp.	13444 Mockingbird	7	1005	7
<input checked="" type="checkbox"/>	4	ACTECH	Access Technologies	380 St. Catherines S	12	1006	12

PRISM Warning

Are you sure you want to delete this Customer?

Customer Name Customer Code Discount (%)

Address Bill To Code

City Rep

Prov/State Primary Contact

Postal/Zip Secondary Contact

Email Type of Customer

Password Bill To ID

Telephone Active (Y/N) ☒ Validated ☒

Fax Price List

Cell

Notes

Ship Via

Terms

BVWh:

Add Stamp

Change Stamp

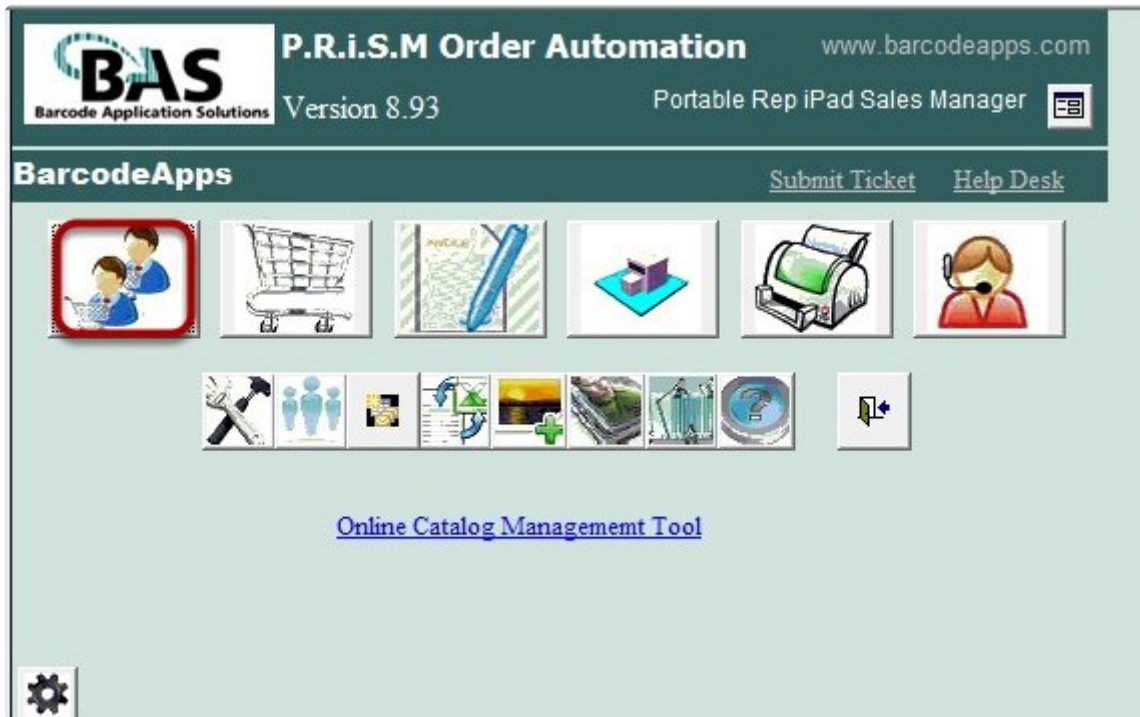


For Accounting Package users Deleting a customer in PRISM will not delete the customer on the accounting package (e.g. Business Vision, ACCPAC,...).






2.3.8. I. How To Create Customer Login For PRISM Webstore

This knowledge base article will guide users on how to setup a customer login for PRISM webstore.

Click on Customers menu.



Select the customer that you'd like updated and ensure that the email address and password fields are populated. Make sure that Active and Validated check boxes are checked. Alternatively, if updating ALL customers you may use Clear Emails option (deletes all email addresses in the email field) and Use Customer Codes as passwords (assigns customer codes as passwords). Once done click Save button.

CUSTOMER INFORMATION ENTRY FORM ☐ Show Non Valid Customers **4**      CRM

Search By Name / Phone / City (Double click to cancel)

Locate By Name Tel Zip Code ☐ Show Active Only ☐ Credit Info

Validated	Telephone	Name	Address	City	Rep	Cust ID
1	4166243338	Talbo Speakers	214 York Street Building 3	Toronto	FS1	1 FS1
	4164982381	Ace Electronics	1785 Rexway Ave. Suite 8	Toronto	AB1	2 AB1
<input checked="" type="checkbox"/>	9055953343	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35	King City	FS1	3 FS1
<input checked="" type="checkbox"/>	5143648080	Access Technologies	380 St. Catherines St. Unit 15	Montreal	TC1	4 TC1
<input checked="" type="checkbox"/>	6046851212	British Columbia Audio	1433 West Georgia Street	Vancouver	FS1	5 FS1
<input checked="" type="checkbox"/>	4166563300	Canadian Speakers Limited	888 Progress Rd. Suite 400	Scarborough	CK1	6 CK1
<input checked="" type="checkbox"/>	2045846601	Creative Audio	6105 Lange Drive Unit 6	Winnipeg	DC2	7 DC2
<input checked="" type="checkbox"/>	4166243333	Crazy Arnold's Stereo Inc.	623 York Street Building 3	Toronto	OC1	8 OC1
<input checked="" type="checkbox"/>	3064952713	Davis Electronics	231 Brixton Way Unit 9	Saskatoon	HSE	9 HSE
<input checked="" type="checkbox"/>	4163662900	Downtown Stereo Mart Ltd.	1250 Yonge Street	Toronto	DC1	10 DC1
<input checked="" type="checkbox"/>	5143919293	Davidson Sound Machine	2466 rue Grande	Quebec City	RR1	11 RR1
<input checked="" type="checkbox"/>	4164453434	East End Audio Inc.	3720 Kingston Road	Scarborough	HA1	12 HA1
<input checked="" type="checkbox"/>	9057348122	Entertainment Centre	42 Penn Street Unit 6	Markham	WA1	13 WA1
<input checked="" type="checkbox"/>	5145867660	Florence Radio Systems	1891 Main Street Unit 3	Hull	HA1	14 HA1
<input checked="" type="checkbox"/>	9028856500	Freemont Radio Corp.	444 Barrington Street, Suite 200	Halifax	HSE	15 HSE
<input checked="" type="checkbox"/>	7052521616	Georgian Hi-fidelity Corp.	1835 Cliff Valley	Huntsville	TC1	16 TC1
<input checked="" type="checkbox"/>	9055559700	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 11	Malton	HA1	17 HA1
<input checked="" type="checkbox"/>	9055559696	Harding TV Repairs	252 Gladstone Boulevard Suite 6	Willowdale	HSE	18 HSE
<input checked="" type="checkbox"/>	6045554321	Harmons Home Theatre System	283 Jane Street	Calgary	TC1	19 TC1

Customer Name Talbo Speakers Customer Code TS1 Discount (%) 0

Address 214 York Street Building 3 Bill To Code Same Credit Card

City Toronto Rep FS1 Frank Smith Notes

Prov/State ON Primary Contact (416) 624-3338 Ship Via

Postal/Zip M7T 4J8 Secondary Contact

2 Email TalboSpeakersInc@gmail.com Type of Customer

Password Bill To ID 0

Telephone (416) 624-3338 **3** Active (Y/N) ☒ Validated ☒

Fax Bill to Tel 0

Call Price List 1 0

Terms BVWh:

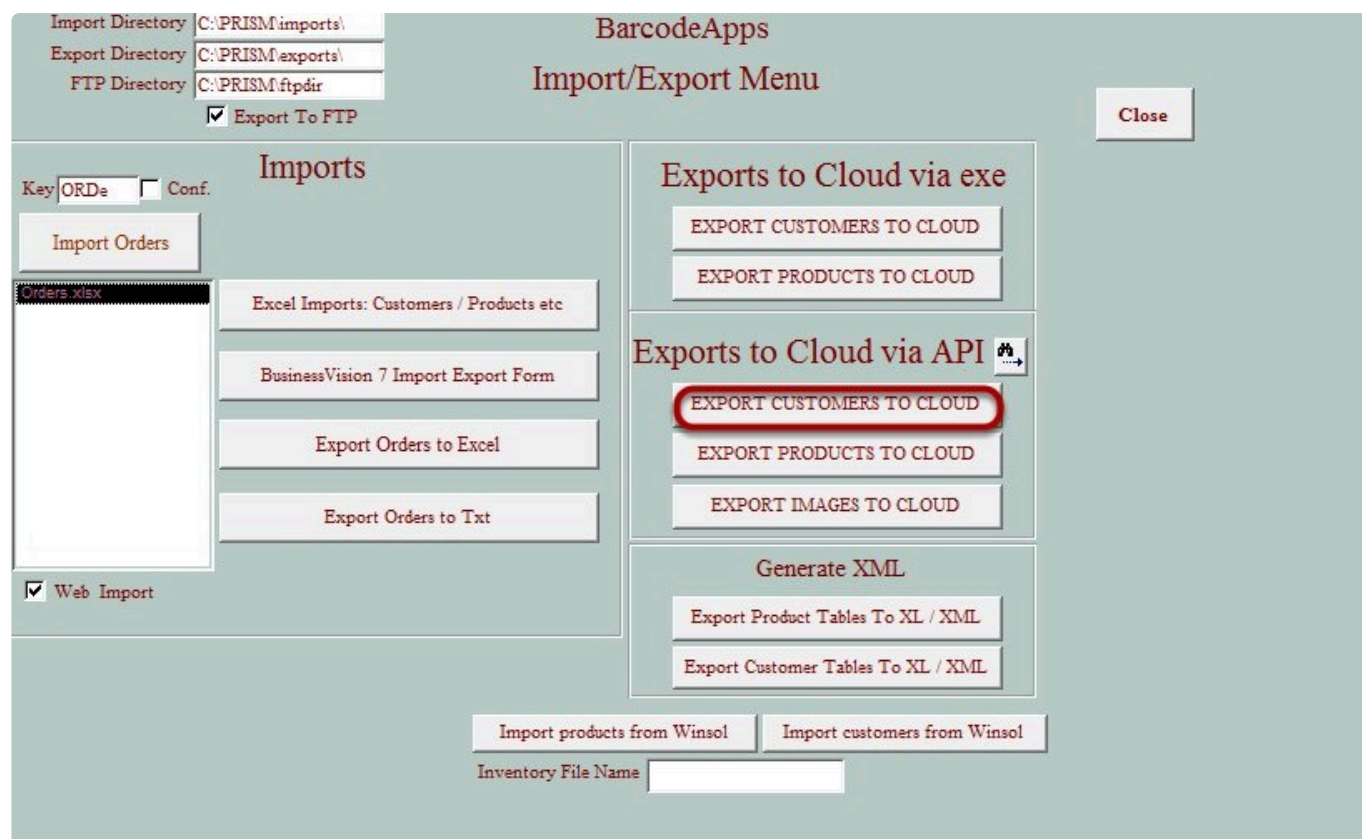
Add Stamp #####

Change Stamp #####

To activate the customer login go to Import / Export menu.



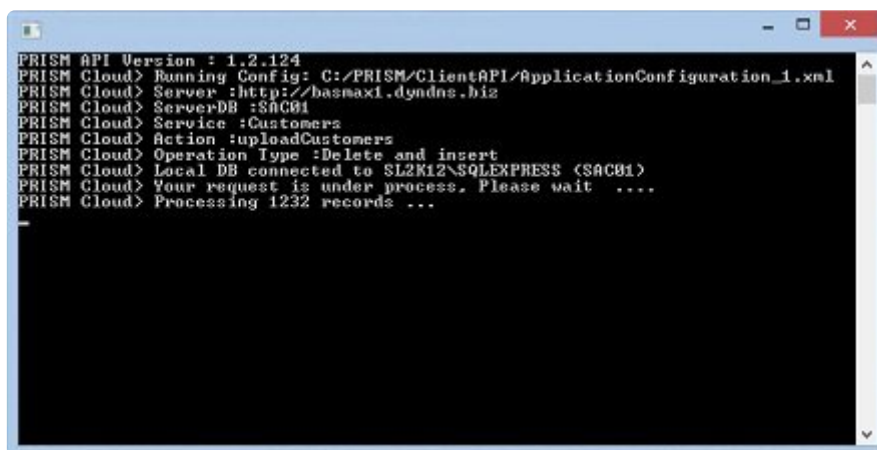
Click on Export Customers to cloud.



The screenshot shows the 'BarcodeApps Import/Export Menu' window. At the top, there are fields for 'Import Directory' (C:\PRISM\imports\), 'Export Directory' (C:\PRISM\exports\), and 'FTP Directory' (C:\PRISM\ftpd\), along with a checked 'Export To FTP' checkbox. A 'Close' button is in the top right. The main area is divided into several sections:

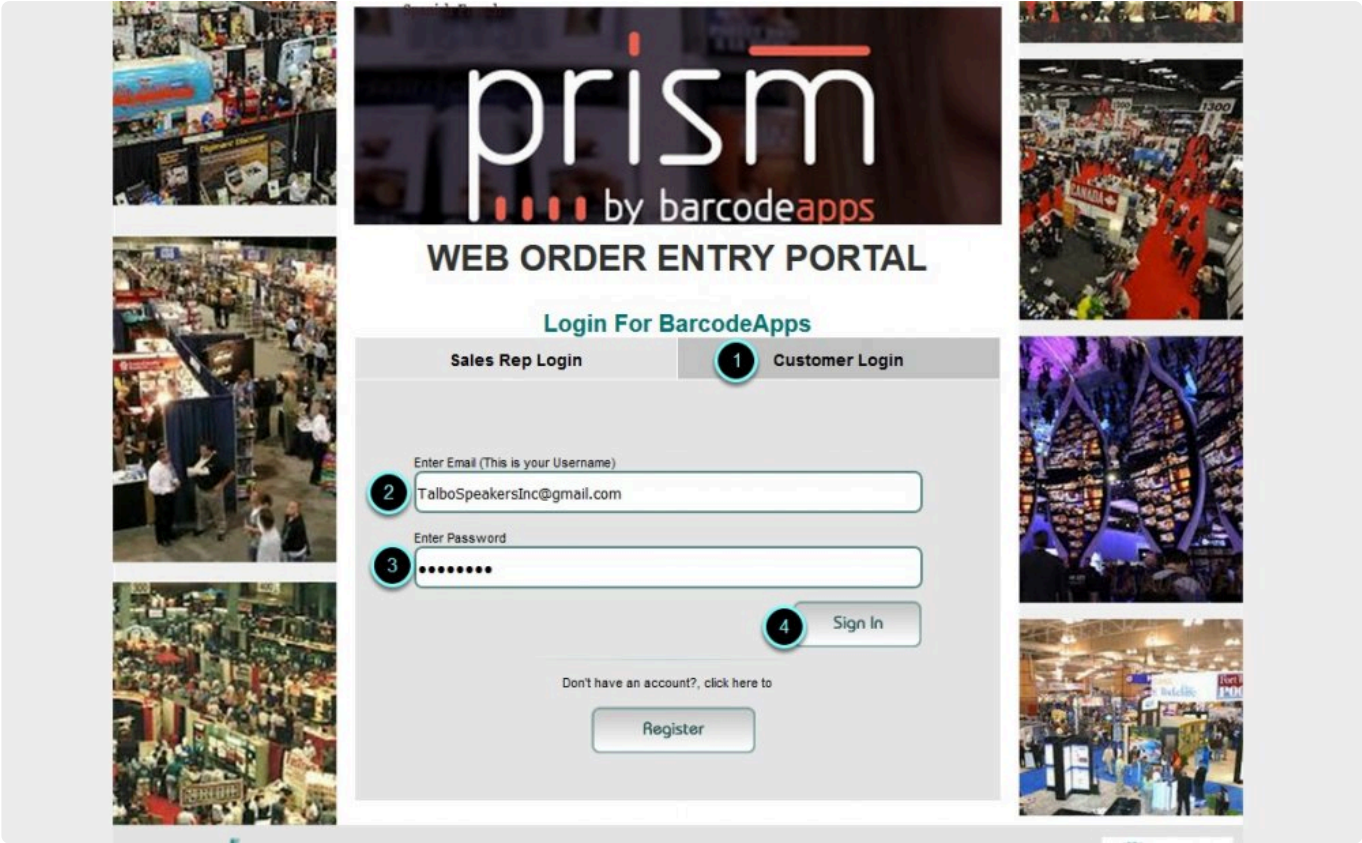
- Imports:** Includes a 'Key' field with 'ORDe' and a 'Conf.' checkbox. Below is an 'Import Orders' button and a list box containing 'Orders.xlsx'. To the right of the list box are buttons for 'Excel Imports: Customers / Products etc', 'BusinessVision 7 Import Export Form', 'Export Orders to Excel', and 'Export Orders to Txt'. At the bottom left of this section is a checked 'Web Import' checkbox.
- Exports to Cloud via exe:** Contains buttons for 'EXPORT CUSTOMERS TO CLOUD' and 'EXPORT PRODUCTS TO CLOUD'.
- Exports to Cloud via API:** Contains buttons for 'EXPORT CUSTOMERS TO CLOUD' (highlighted with a red circle), 'EXPORT PRODUCTS TO CLOUD', and 'EXPORT IMAGES TO CLOUD'.
- Generate XML:** Contains buttons for 'Export Product Tables To XL / XML' and 'Export Customer Tables To XL / XML'.
- Bottom Section:** Contains buttons for 'Import products from Winsol' and 'Import customers from Winsol', followed by an 'Inventory File Name' text field.

Sending customers to cloud... Once done, go to your company's PRISM web store address.




```
PRISM API Version : 1.2.124
PRISM Cloud> Running Config: C:/PRISM/ClientAPI/ApplicationConfiguration_1.xml
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :SAC01
PRISM Cloud> Service :Customers
PRISM Cloud> Action :uploadCustomers
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to SI2K12\SQLEXPRESS (SAC01)
PRISM Cloud> Your request is under process. Please wait ....
PRISM Cloud> Processing 1232 records ...
```

Click Customer tab, type in the customer email and password. Then click Sign In.



Login successful.




5080 Timberlea Blvd Suite
203, Mississauga
Prov, L4W 4M2

jun@barcodeapps.com

- CMP
- DVD
- CPL
- PMD
- MAN
- SWT
- HOM
- TV
- SPK
- SMARTD

Spanish French

Logged in as: TalboSpeakersInc@gmail.com [Logout](#)

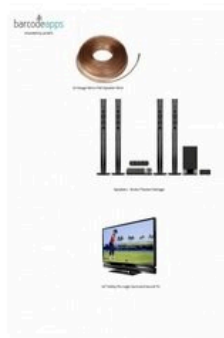




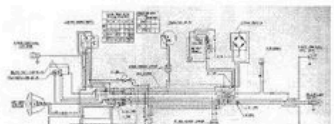
[Home](#) [Products](#) [Catalogs](#) [Orders](#) [About us](#)  [0 item\(s\) in cart](#)

Home >

Shop by Category

Search

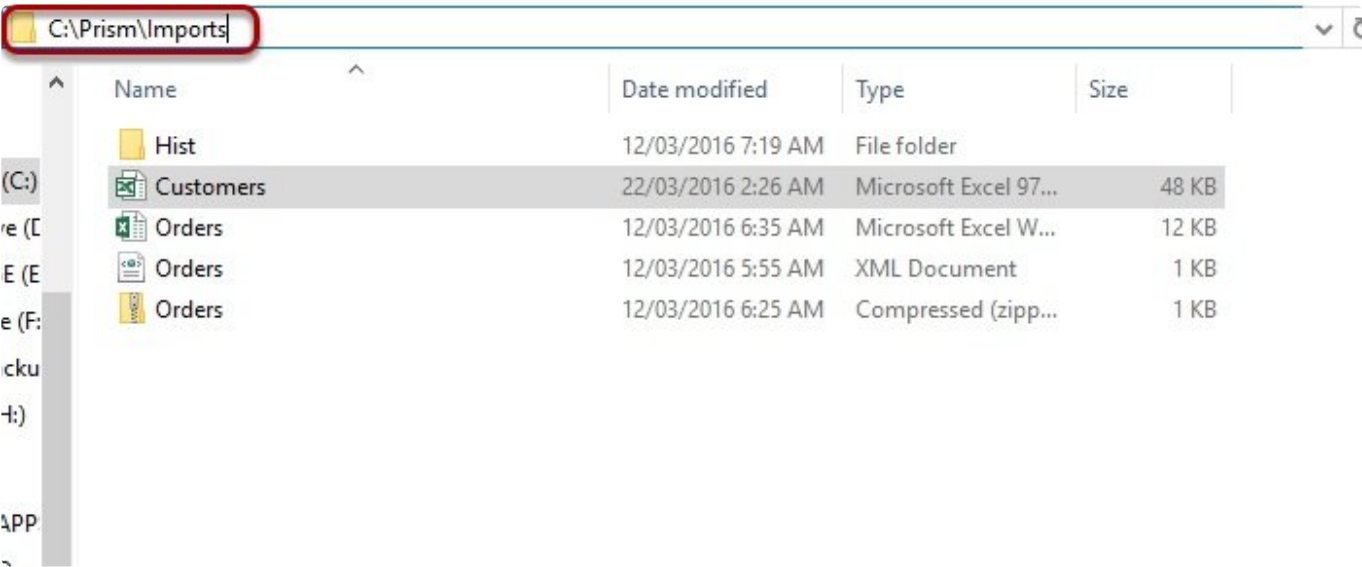
Show Page 1 of 1 1

<div>Catalogs</div> <div>Click image to view</div> <div></div>	<div>CMP</div> <div></div> <div>3 SubCategories 0 Items</div>	<div>DVD</div> <div></div> <div>0 SubCategories 4 Items</div>
<div>CPL</div> <div></div>	<div>PMD</div> <div></div>	<div>MAN</div> <div></div>

2.3.8.1. E. How To Upload Customers From Excel Template

This knowledge base article will guide users on how to upload customers from an excel file.

Put the customer.xls file in C:\PRISM\imports\ folder.



Go to Import and Export Menu.



Click on Excel Imports: Customers / Products button.

Import DirectoryC:\PRISM\imports\
Export DirectoryC:\PRISM\exports\
FTP DirectoryC:\PRISM\ftpdirexport to ftp

BarcodeApps
Import/Export Menu

Close

KeyORDeConf.
Import Orders
Orders.xlsx
Excel Imports: Customers / Products etc
BusinessVision 7 Import Export Form
Export Orders to Excel
Export Orders to Txt
Web Import

Exports to Cloud via exe
EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD
Exports to Cloud via API
EXPORT CUSTOMERS TO CLOUD
EXPORT PRODUCTS TO CLOUD
EXPORT IMAGES TO CLOUD
Generate XML
Export Product Tables To XL / XML
Export Customer Tables To XL / XML
Import products from Winsol
Import customers from Winsol
Inventory File Name

Select your manufacturer code in the manufacturer drop down menu.

BarcodeApps
Startup Import Menu

Import Directory: C:\PRISM\imports\
Export Directory: C:\PRISM\exports\
Review Imported File

1 Manufacturer: BAR01 | BAR01

Prod Key: Prod Manufacturer Key: Manu Terms Key: terms Cust Key: Cust MatrixKey: MatrixF Rep Key: Rep Catalog Key: Catalog

Import Product File Import Manufacturer File Import Terms File Import Customer File Import Matrix Setup File Import Rep File Import Catalog File

filename filename filename Customers.xls filename filename filename

State / Prov Key: State
Import State / Province File
filename

Select file and click to highlight. To import, click on Import button.
Double-click to open file in Excel format for review.

Select file for Size/Color Setup

Select file for Sales Reps

Select your excel file (Customers.xls) and then click on Import Customer File.

BarcodeApps
Startup Import Menu

Import Directory: C:\PRISM\imports\
Export Directory: C:\PRISM\exports\
Review Imported File

Manufacturer: BAR01

☐ Web Import

Prod Key: Prod Manufacturer Key: Manu Terms Key: terms Cust Key: Cust MatrixKey: MatrixF Rep Key: Rep Catalog Key: Catalog

Import Product File Import Manufacturer File Import Terms File 2 Import Customer File Import Matrix Setup File Import Rep File Import Catalog File

filename filename filename 1 Customers.xls filename filename filename

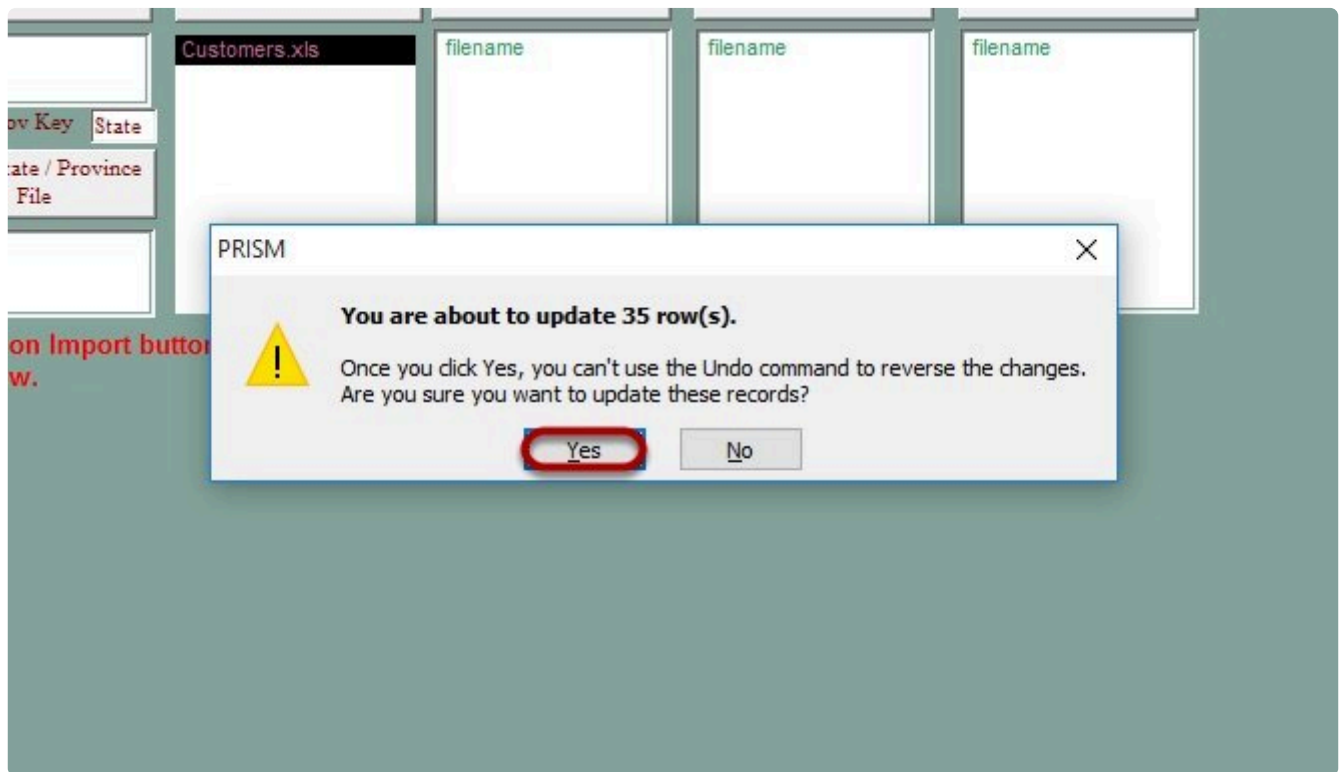
State / Prov Key: State
Import State / Province File
filename

Select file and click to highlight. To import, click on Import button.
Double-click to open file in Excel format for review.

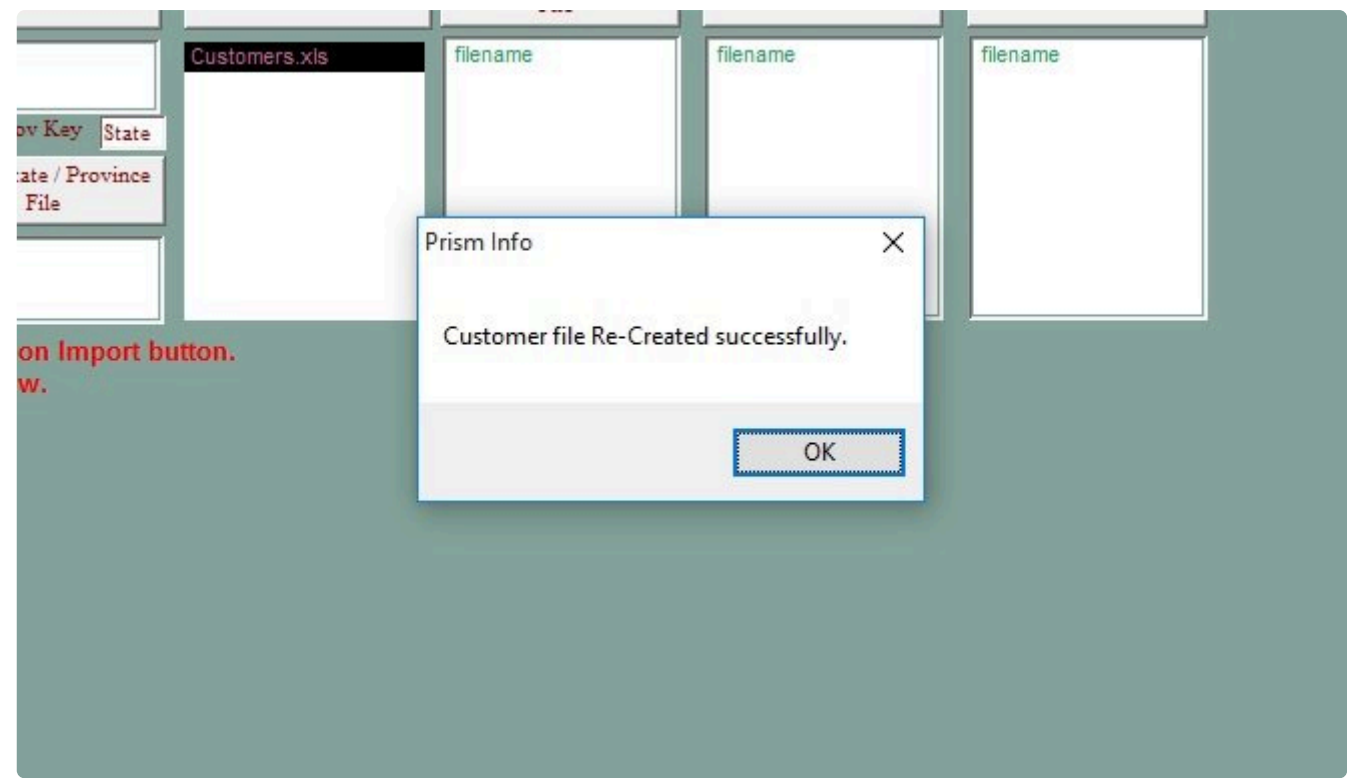
Select file for Size/Color Setup

Select file for Sales Reps

Click Yes.



A notification window will appear if the customer excel upload is successful. Click OK and go back to customer screen to check if the customer records have been updated.



2.3.9. J. How To Update Product

This knowledge base article will guide users on how to update their products information.

Click on the Products Menu.



Select the product that you'd like updated. Make the necessary changes. Once done, click the Save button.

PRODUCT REVIEW FORM

Search By Descr / Manuf / Code / Barcode (Double click to cancel)

Locate By Manufacturer Item Code Description Barcode Whse

3

Save Delete Exit Delete All

☐ Show Discontinued

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec	Discd	Bode	Item ID
BAR01	CD-204	Compact Disk Player with Autoskip	\$323.70	0	00					1
BAR01	CD-800	Compact Disk Player - 5 disk capaci	\$528.30	0	00					2
BAR01	EN-BATD	Energizer ACCU Rechargeable D Bat	\$9.99	0	00					3
BAR01	EQ-1245	Equalizer (7 band)	\$111.00	0	00					4
BAR01	EQ-1800	Equalizer (10 band)	\$195.90	0	00					5
BAR01	FCB-250	Finished cabinet for SP-250	\$300.00	0	00					6
BAR01	FX-280	All-in-one Printer/Scanner/Copier	\$318.50	0	00					7
BAR01	FX-500	Multi-fax, Printer, Copier, Scanner	\$528.00	0	00					8
BAR01	GR-250	Speaker Grill for SP-250	\$9.70	0	00					9
BAR01	MCB-250	Entertainment Center	\$3,525.00	0	00					10
BAR01	MD46	6" Midrange Cone Speaker	\$37.40	0	00					11
BAR01	N142	Screws for Speakers (SP-250)	\$0.50	0	00					12
BAR01	P1210A	Semi-gloss resin paint (SP-250)	\$59.99	0	00					13
BAR01	PCM3550	Personal Hand-held Organizer	\$424.80	0	00					14
BAR01	PCM8420	Personal Organizer	\$599.00	0	00					15
BAR01	PRCB-250	Unfinished Speaker Cabinet	\$129.00	0	00					16
BAR01	PS-2	Sony Playstation 2	\$199.00	0	00					17
BAR01	RC2400	Receiver - 100 watts	\$438.10	0	00					18
BAR01	RC4850	Receiver - 220 watts	\$651.10	0	00					19

General Pricing Size Color Matrix Other

2

Manufacturer On Hand Whse

Item Code Comments

Barcode ☐ On Special ☐ PREPACK ☐ Parent ☒ Productt

Description

Description 2

Min Order Qty Add Stamp

Case Pack Change Stamp

Catalog Page Pic # Category Top Category

Picture Name (no ext)

Switch Languages

Min = 1

Suggested = Min

Use All Item codes as UPC

Use Item codes for missing UPCs

Remove Spaces From UPC

2.3.10. K. How To Delete Product

This knowledge base article will guide users on how to delete a product.

Go to Products menu.



Select the product you want to delete and click the delete button. Click Yes.

PRODUCT REVIEW FORM

2

New

BCDE AS

BCDE None

Product Category Setup

Search By

Descr / Manuf / Code / Barcode

(Double click to cancel)

Locate By

Manufacturer

Item Code

Description

Barcode

Whse

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec	Discd	Bode	Item ID
BAR01	AAAA	Test description for AAAA	\$3.00	3	00		<input checked="" type="checkbox"/>			51

1

PRISM Warning

Are you sure you want to delete this item

3

Yes

No

General

Pricing

Size Color Matrix

Other

Manufacturer

BAR01

On Hand

3

Whse

00

Item Code

AAAA

Comments

Barcode

1234567

☒ On Special

☐ PREPACK

☐ Parent

☒ Productt

Description

Test description for AAAA

Description 2

Min Order Qty

3

Add Stamp

3/29/2016 8:04:13 AM

Case Pack

1

Change Stamp

3/29/2016 8:06:06 AM

! For Accounting Package users. Deleting a product in PRISM will not delete the product on the accounting package (e.g. Business Vision, ACCPAC,...).

2.3.11. L. How To Send Customer To Cloud

This knowledge base article will guide users on how to send customers to cloud.

Click on the Import and Export menu.



Click on Export Customers To Cloud button.

Import DirectoryC:\PRISM\imports\

Export DirectoryC:\PRISM\exports\

FTP DirectoryC:\PRISM\ftpd\

☒ Export To FTP

BarcodeApps

Import/Export Menu

Close

KeyORDe ☐ Conf.

Import Orders

Orders.xlsx

☒ Web Import

Imports

Excel Imports: Customers / Products etc

BusinessVision 7 Import Export Form

Export Orders to Excel

Export Orders to Txt

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

EXPORT IMAGES TO CLOUD

Generate XML

Export Product Tables To XL / XML

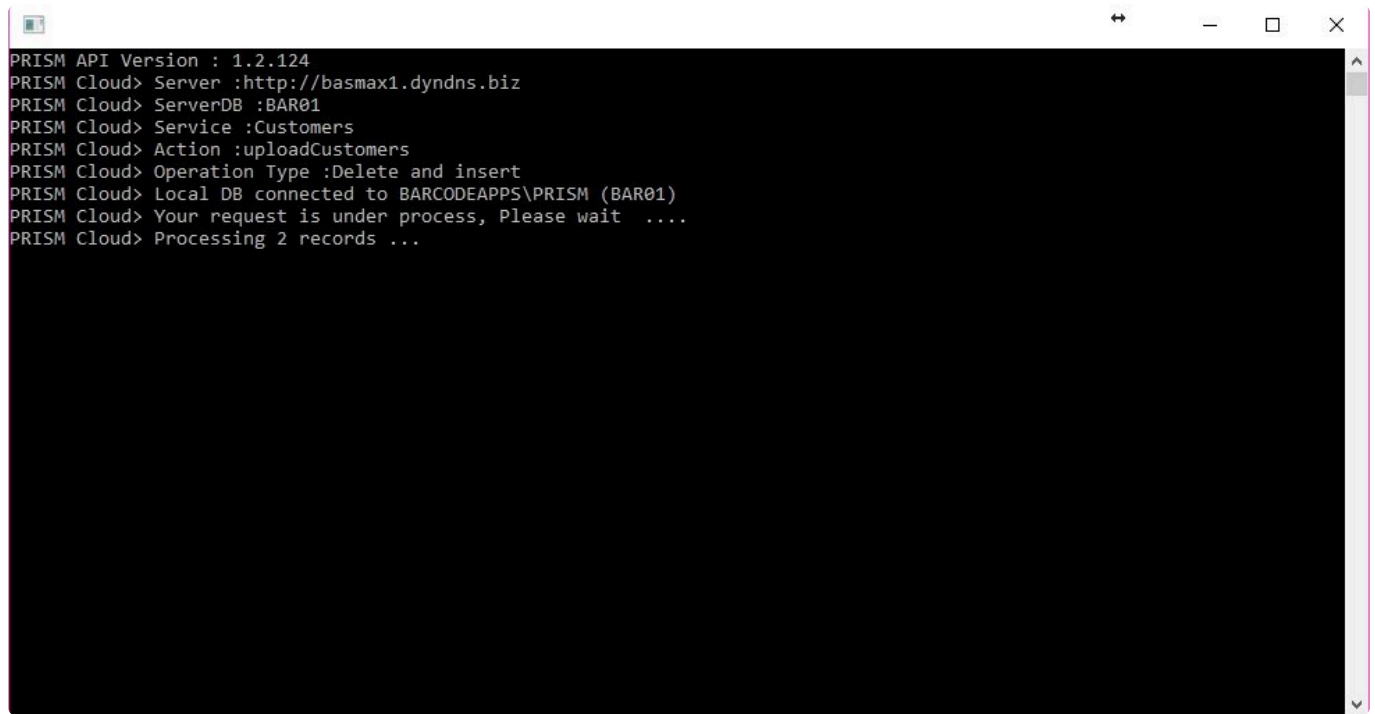
Export Customer Tables To XL / XML

Import products from Winsol

Import customers from Winsol

Inventory File Name

Sending customers to cloud... This window will automatically close once sending customer to cloud is completed.

A screenshot of a terminal window titled "PRISM Cloud". The window has a black background with white text. The text shows the PRISM API version and a series of commands and responses. The commands include setting the server, server database, service, and action, followed by an operation type and a confirmation of local database connection. The final response indicates that the request is under process and that 2 records are being processed.

```
PRISM API Version : 1.2.124
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :Customers
PRISM Cloud> Action :uploadCustomers
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to BARCODEAPPS\PRISM (BAR01)
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> Processing 2 records ...
```

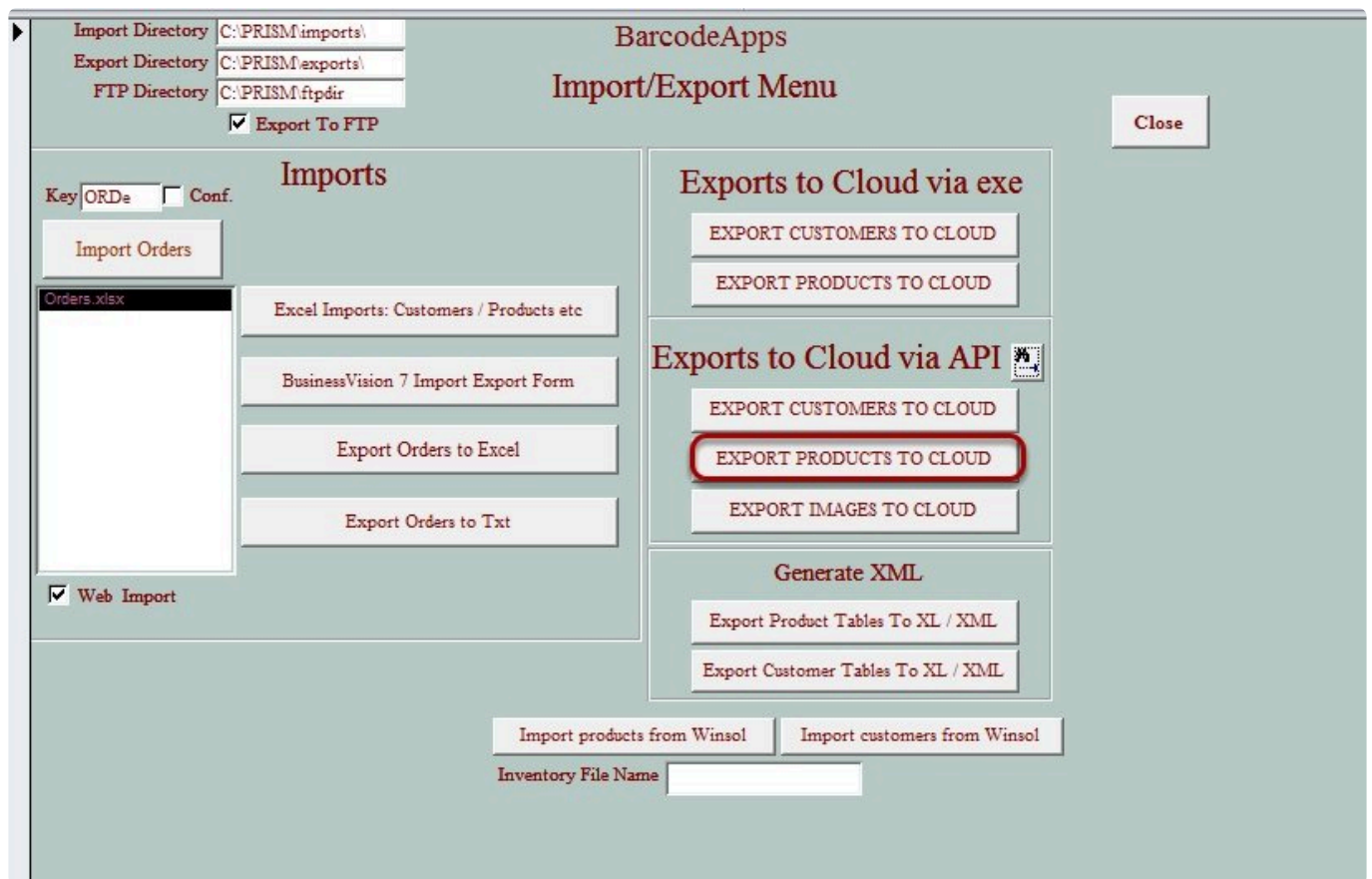
2.3.12. M. How To Send Products To Cloud

This knowledge base article will guide users on how to send products to cloud.

Click on the Import and Export menu.



Click on Export Products To Cloud button.



The screenshot shows the 'BarcodeApps Import/Export Menu' window. At the top, there are fields for 'Import Directory' (C:\PRISM\imports\), 'Export Directory' (C:\PRISM\exports\), and 'FTP Directory' (C:\PRISM\ftpd\), along with a checked 'Export To FTP' checkbox and a 'Close' button. The main area is divided into two columns. The left column, titled 'Imports', contains a 'Key' field with 'ORDe' and a 'Conf.' checkbox, an 'Import Orders' button, a list box showing 'Orders.xlsx', and buttons for 'Excel Imports: Customers / Products etc', 'BusinessVision 7 Import Export Form', 'Export Orders to Excel', and 'Export Orders to Txt'. A checked 'Web Import' checkbox is at the bottom left. The right column contains 'Exports to Cloud via exe' with buttons for 'EXPORT CUSTOMERS TO CLOUD' and 'EXPORT PRODUCTS TO CLOUD', 'Exports to Cloud via API' with buttons for 'EXPORT CUSTOMERS TO CLOUD', 'EXPORT PRODUCTS TO CLOUD' (highlighted with a red border), and 'EXPORT IMAGES TO CLOUD', and a 'Generate XML' section with buttons for 'Export Product Tables To XL / XML' and 'Export Customer Tables To XL / XML'. At the bottom, there are buttons for 'Import products from Winsol' and 'Import customers from Winsol', and an 'Inventory File Name' text field.

BarcodeApps
Import/Export Menu

Import Directory C:\PRISM\imports\
Export Directory C:\PRISM\exports\
FTP Directory C:\PRISM\ftpd\
☒ Export To FTP

Close

Key ORDe ☐ Conf.

Import Orders

Orders.xlsx

Excel Imports: Customers / Products etc

BusinessVision 7 Import Export Form

Export Orders to Excel

Export Orders to Txt

☒ Web Import

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

EXPORT IMAGES TO CLOUD

Generate XML

Export Product Tables To XL / XML

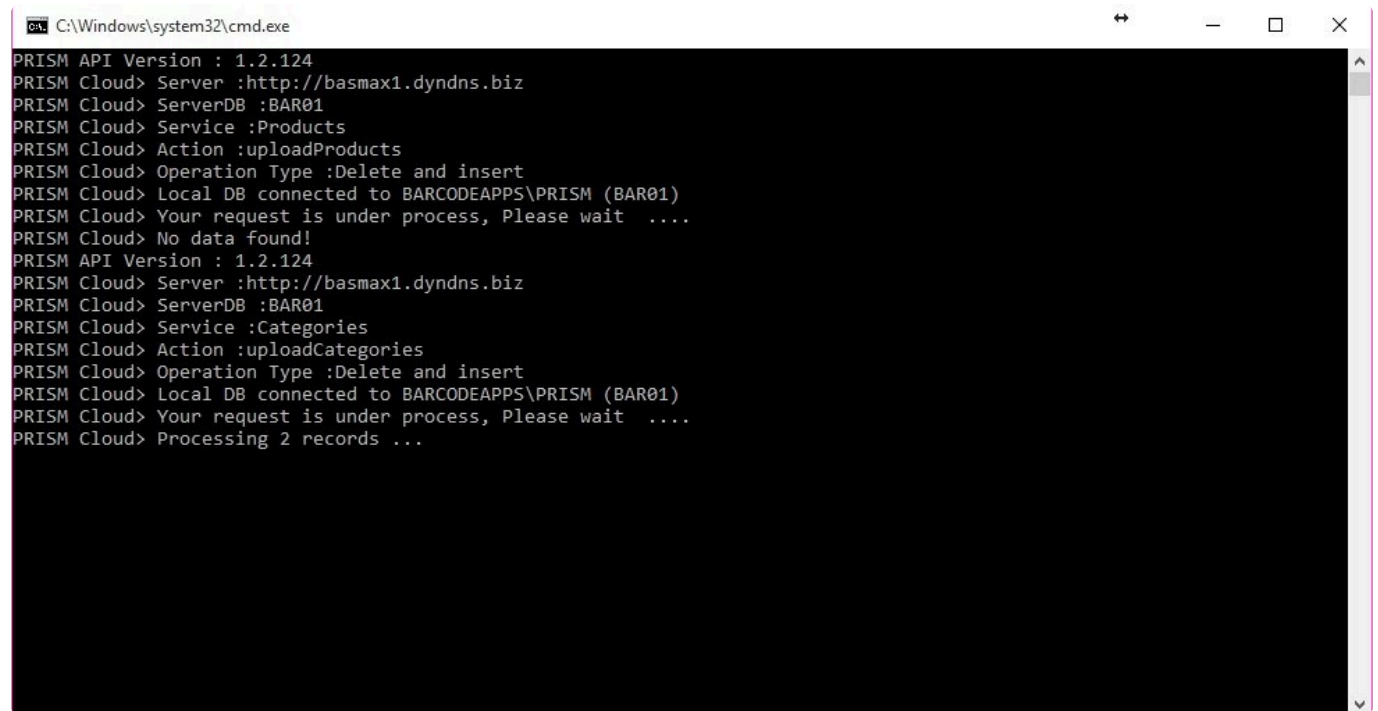
Export Customer Tables To XL / XML

Import products from Winsol

Import customers from Winsol

Inventory File Name

Sending products to cloud... This window will automatically close once sending products to cloud is completed.



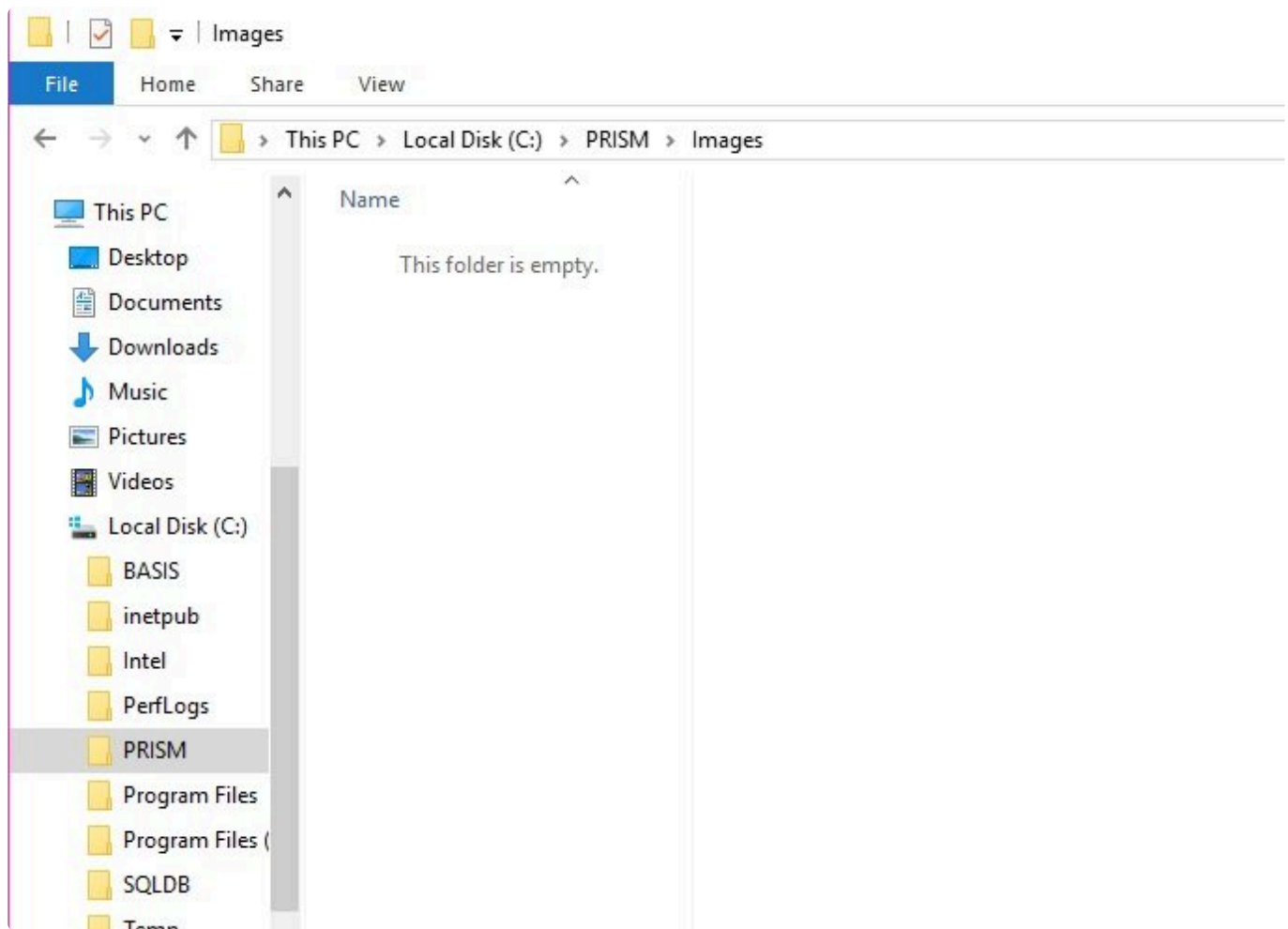
```
C:\Windows\system32\cmd.exe
PRISM API Version : 1.2.124
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :Products
PRISM Cloud> Action :uploadProducts
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to BARCODEAPPS\PRISM (BAR01)
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> No data found!
PRISM API Version : 1.2.124
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :Categories
PRISM Cloud> Action :uploadCategories
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to BARCODEAPPS\PRISM (BAR01)
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> Processing 2 records ...
```

2.3.13. N. How To Send Images To Cloud

This knowledge base article will guide users on how to upload product images to cloud.

Product Images Upload Guidelines

1. Copy all product images in C:\Prism\Images folder.
2. Make sure to create a backup of all images to be uploaded. PRISM will delete all images in C:\Prism\Images Folder once uploaded.
3. The name of the product image should exactly match the product code or item code. E.g.
010-001.JPG or
dairymilk.JPG
4. All image formats are accepted and there is no need to resize the images.



To upload product images click on the Import and Export menu.



Click on Export Images to Cloud.

Import DirectoryC:\PRISM\imports\

Export DirectoryC:\PRISM\exports\

FTP DirectoryC:\PRISM\ftpd\

☒ Export To FTP

BarcodeApps

Import/Export Menu

Close

KeyORDe ☐ Conf.

Import Orders

Orders.xlsx

☒ Web Import

Imports

Excel Imports: Customers / Products etc

BusinessVision 7 Import Export Form

Export Orders to Excel

Export Orders to Txt

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API

EXPORT CUSTOMERS TO CLOUD

EXPORT IMAGES TO CLOUD

Generate XML

Export Product Tables To XL / XML

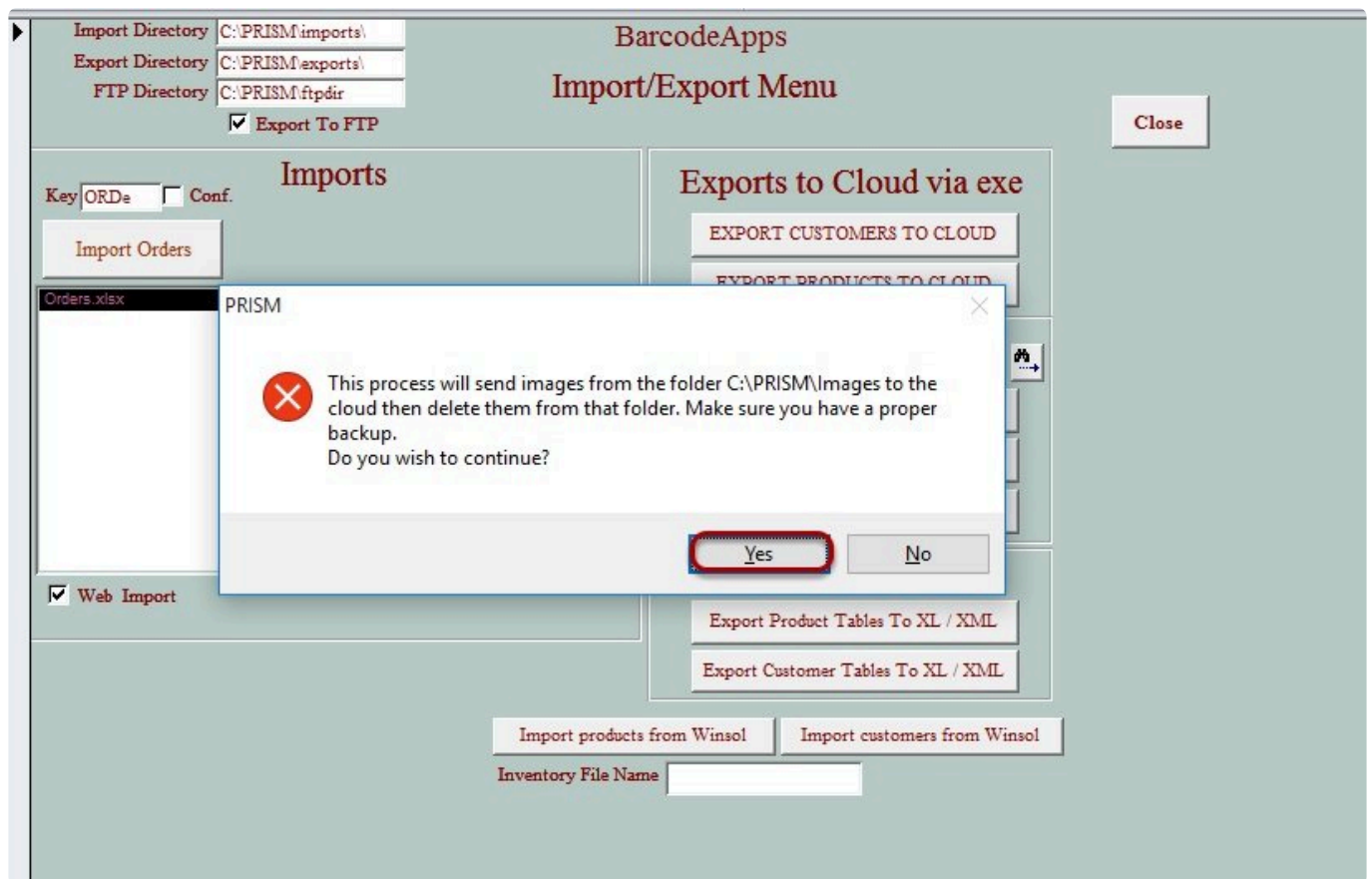
Export Customer Tables To XL / XML

Import products from Winsol

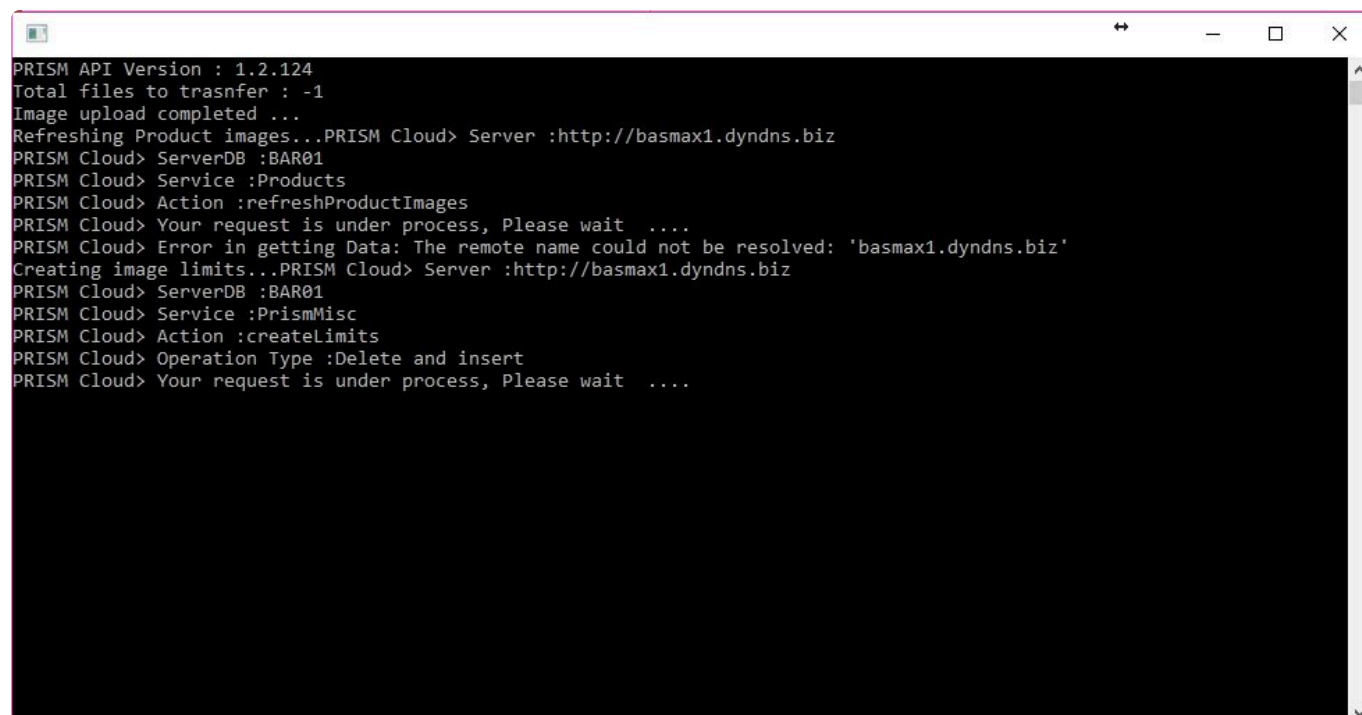
Import customers from Winsol

Inventory File Name

Click Yes to proceed.



Sending product images to cloud... This window will automatically close once sending product images to cloud is completed.



```
PRISM API Version : 1.2.124
Total files to transfer : -1
Image upload completed ...
Refreshing Product images...PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :Products
PRISM Cloud> Action :refreshProductImages
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> Error in getting Data: The remote name could not be resolved: 'basmax1.dyndns.biz'
Creating image limits...PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :PrismMisc
PRISM Cloud> Action :createLimits
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Your request is under process, Please wait ....
```



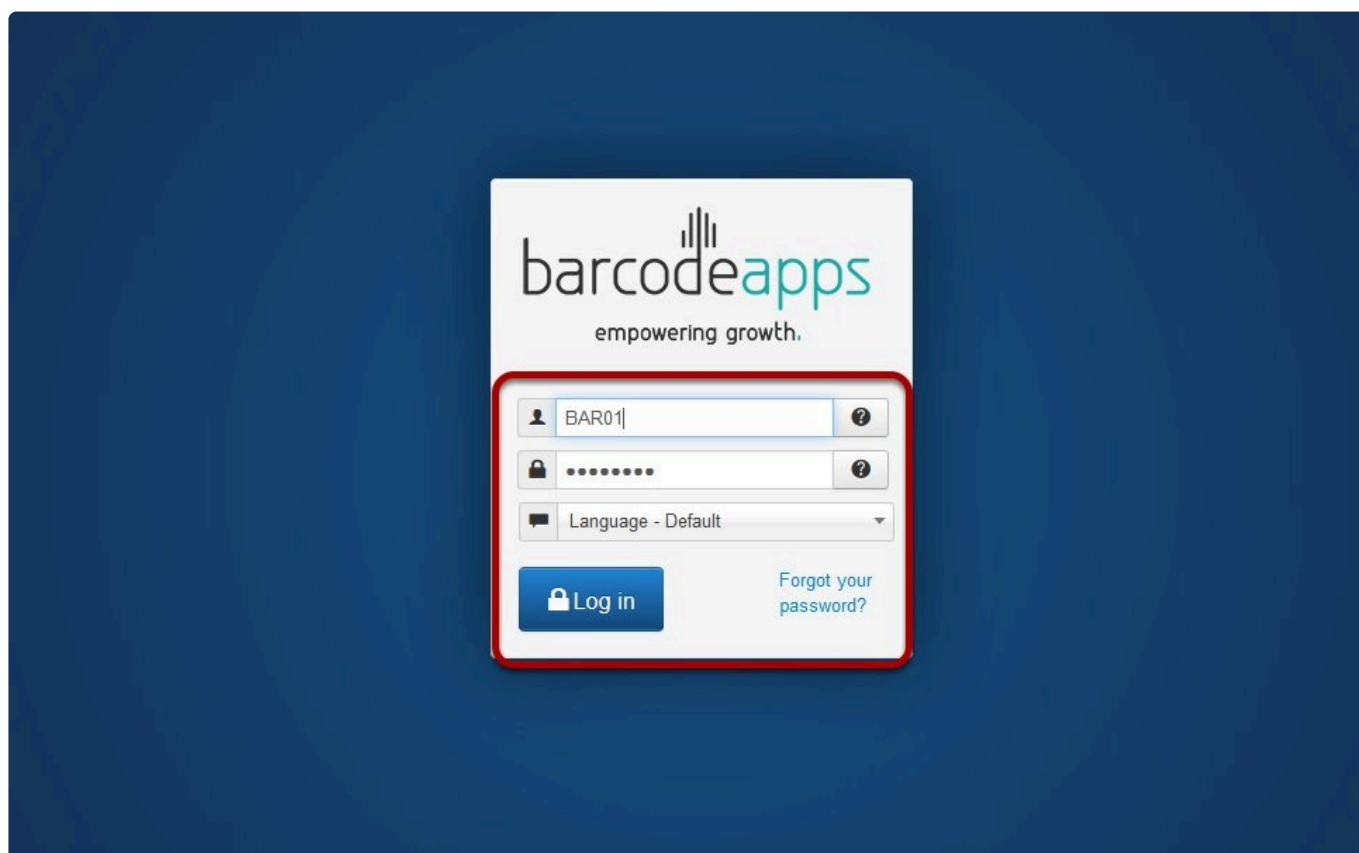
NOTE: For uploading **category images** to cloud. The same process will be followed.

2.3.14. O. How To Re-Import Orders from XML File

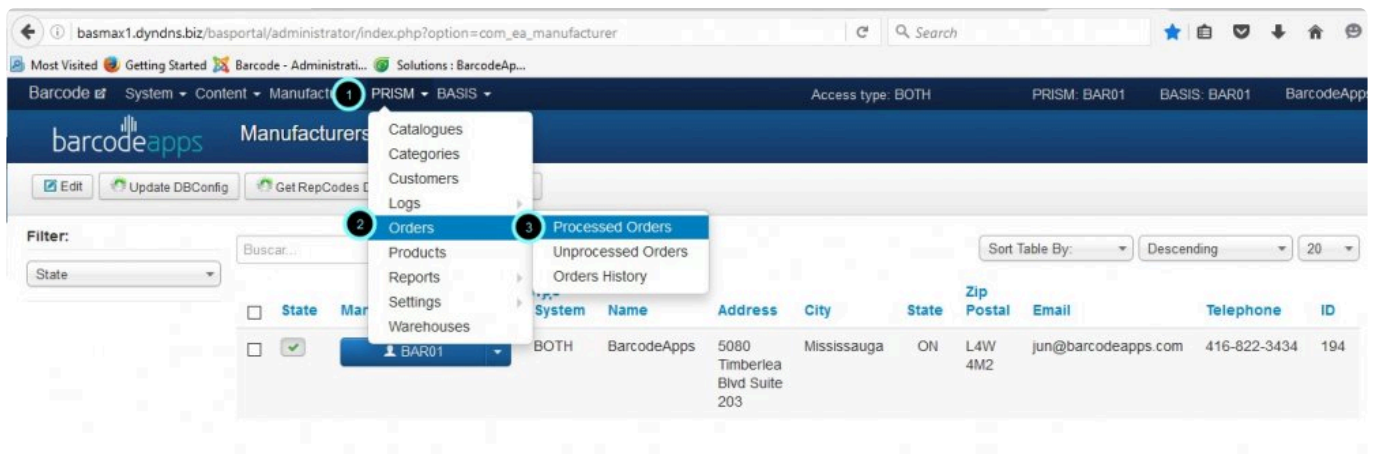
This knowledge base article will guide PRISM users on how to re-import missing orders from a XML file into PRISM desktop.

RETRIEVING ORDER XML FILE FROM PRISM PORTAL

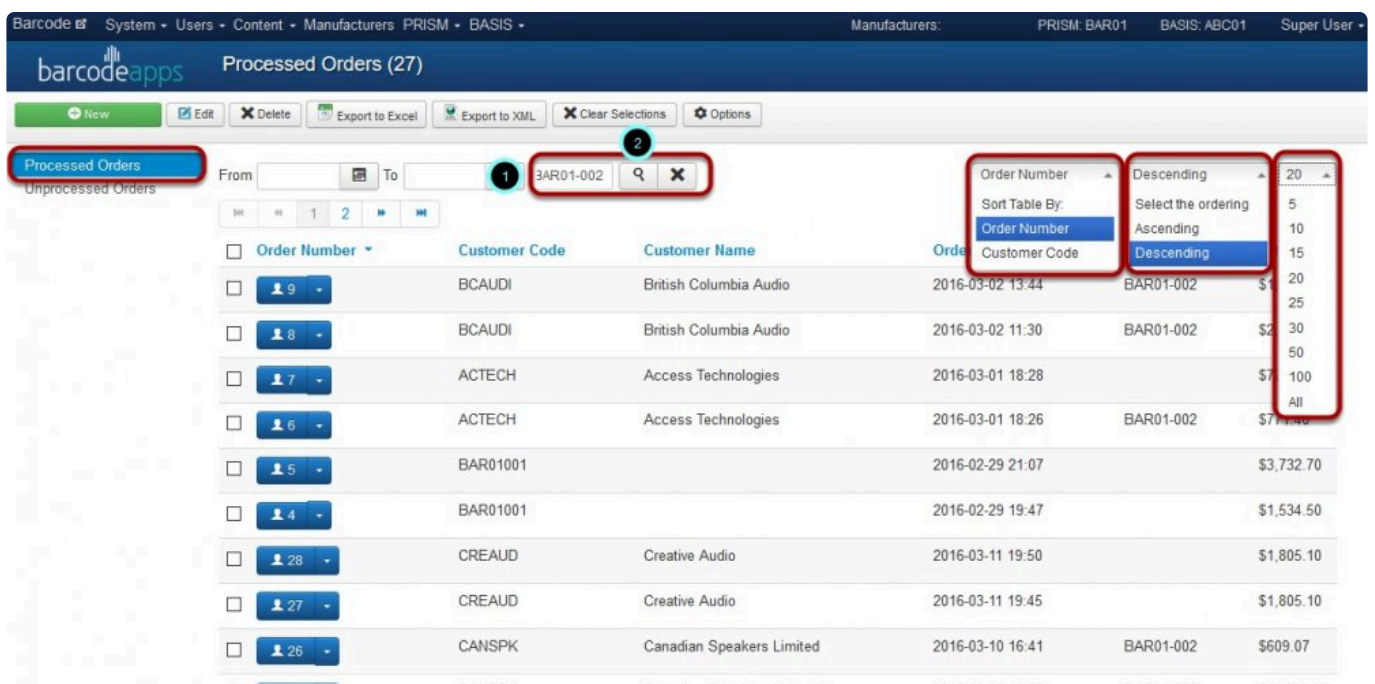
Login to PRISM portal using your Administrator account.



Click on the PRISM menu, select Orders then go to Processed Orders.



Type in the customer code, customer name or rep code in the search field then click on the magnifying button to search. Click on the X button to clear the search field. Alternatively, you may also use the drop down menus to filter your searches.



Select the order you want to export by placing a checkmark on it and click Export to XML.

From [] To [] BAR01-002 [Q] [X]

[Order Number] [Descending] [20]

	Order Number	Customer Code	Customer Name	Order Date	RepCode	Total
<input checked="" type="checkbox"/>	9	BCAUDI	British Columbia Audio	2016-03-02 13:44	BAR01-002	\$1,347.10
<input checked="" type="checkbox"/>	8	BCAUDI	British Columbia Audio	2016-03-02 11:30	BAR01-002	\$2.30
<input checked="" type="checkbox"/>	7	ACTECH	Access Technologies	2016-03-01 18:28		\$771.40
<input type="checkbox"/>	6	ACTECH	Access Technologies	2016-03-01 18:26	BAR01-002	\$771.40
<input type="checkbox"/>	5	BAR01001		2016-02-29 21:07		\$3,732.70
<input type="checkbox"/>	4	BAR01001		2016-02-29 19:47		\$1,534.50
<input type="checkbox"/>	28	CREAUD	Creative Audio	2016-03-11 19:50		\$1,805.10
<input type="checkbox"/>	27	CREAUD	Creative Audio	2016-03-11 19:45		\$1,805.10
<input type="checkbox"/>	26	CANSPK	Canadian Speakers Limited	2016-03-10 16:41	BAR01-002	\$609.07

Select Save File and then click on OK.

The screenshot shows a web application interface for managing orders. At the top, there are buttons for 'Edit', 'Delete', 'Export to Excel', 'Export to XML', 'Clear Selections', and 'Options'. Below these, there's a search bar and a table of orders. The table has columns for 'Order Number', 'RepCode', and 'Total'. A modal dialog box titled 'Opening Orders.xml' is open in the center. The dialog contains the following text: 'You have chosen to open: Orders.xml which is: XML Document (2.5 KB) from: http://basmax1.dyndns.biz'. Below this, it asks 'What should Firefox do with this file?' with two radio button options: 'Open with XML Editor (default)' and 'Save File' (which is selected). A red circle with the number '1' is placed next to the 'Save File' option. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. A red circle with the number '2' is placed next to the 'OK' button. The background table shows several order entries, including one with Order Number 02, RepCode BAR01-002, and Total \$1,347.10.

RE-IMPORTING ORDER XML INTO PRISM DESKTOP

Login to PRISM DESKTOP and go to Import Export module.



Click on the API icon.

BarcodeApps
Import/Export Menu

Import Directory: C:\PRISM\imports\
Export Directory: C:\PRISM\exports\
FTP Directory: C:\PRISM\ftpdire
☒ Export To FTP

Close

Key: ORDe ☐ Conf.

Imports

Import Orders

filename

Excel Imports: Customers / Products etc

BusinessVision 7 Import Export Form

Export Orders to Excel

Export Orders to Txt

☒ Web Import

Exports to Cloud via exe

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

Exports to Cloud via API

EXPORT CUSTOMERS TO CLOUD

EXPORT PRODUCTS TO CLOUD

EXPORT IMAGES TO CLOUD

Generate XML

Export Product Tables To XL / XML

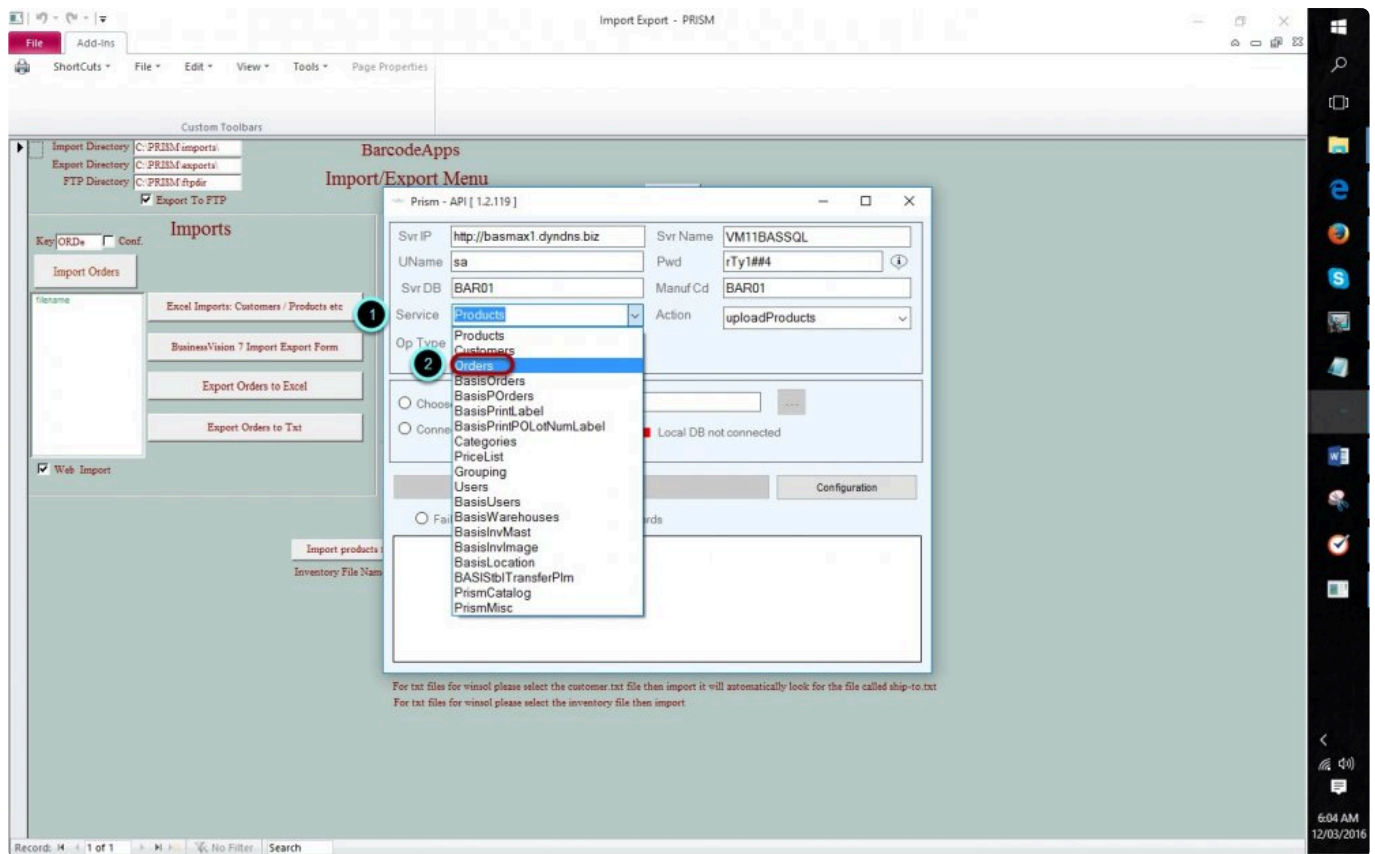
Export Customer Tables To XL / XML

Import products from Winsol

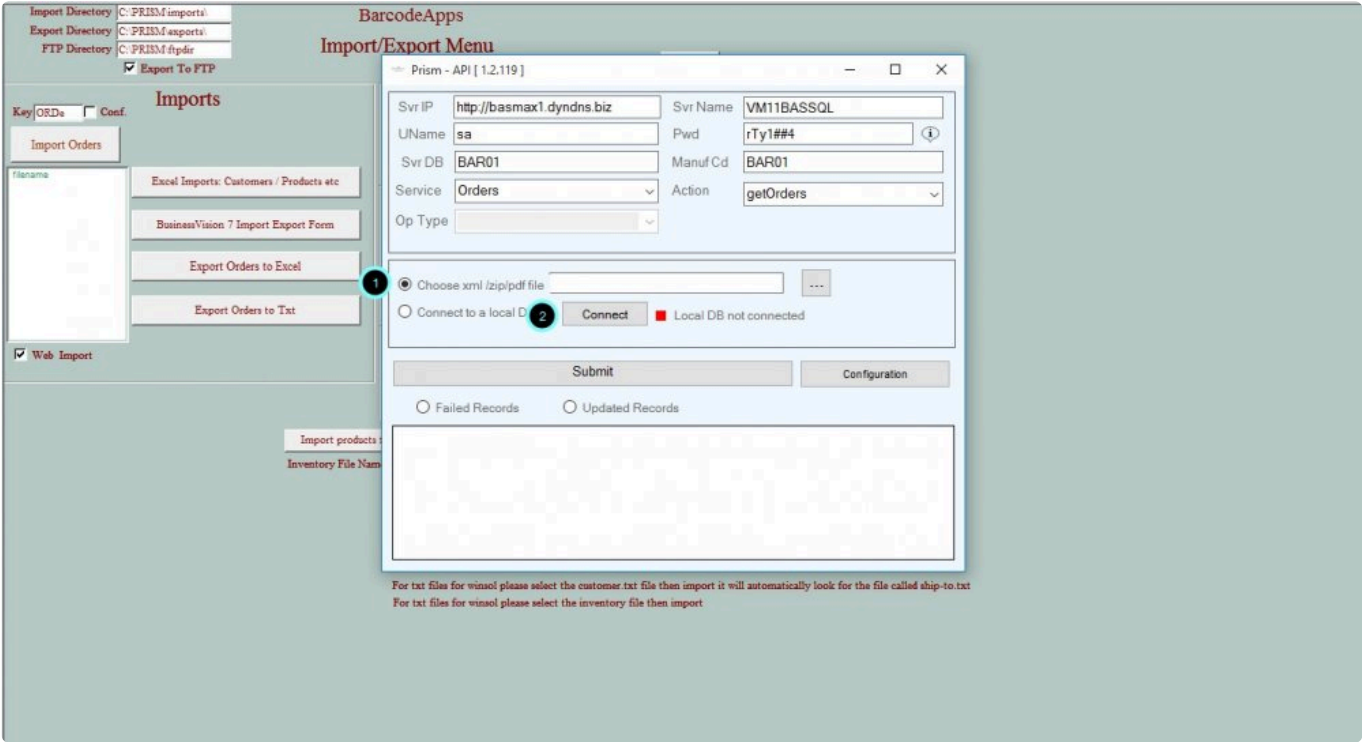
Import customers from Winsol

Inventory File Name

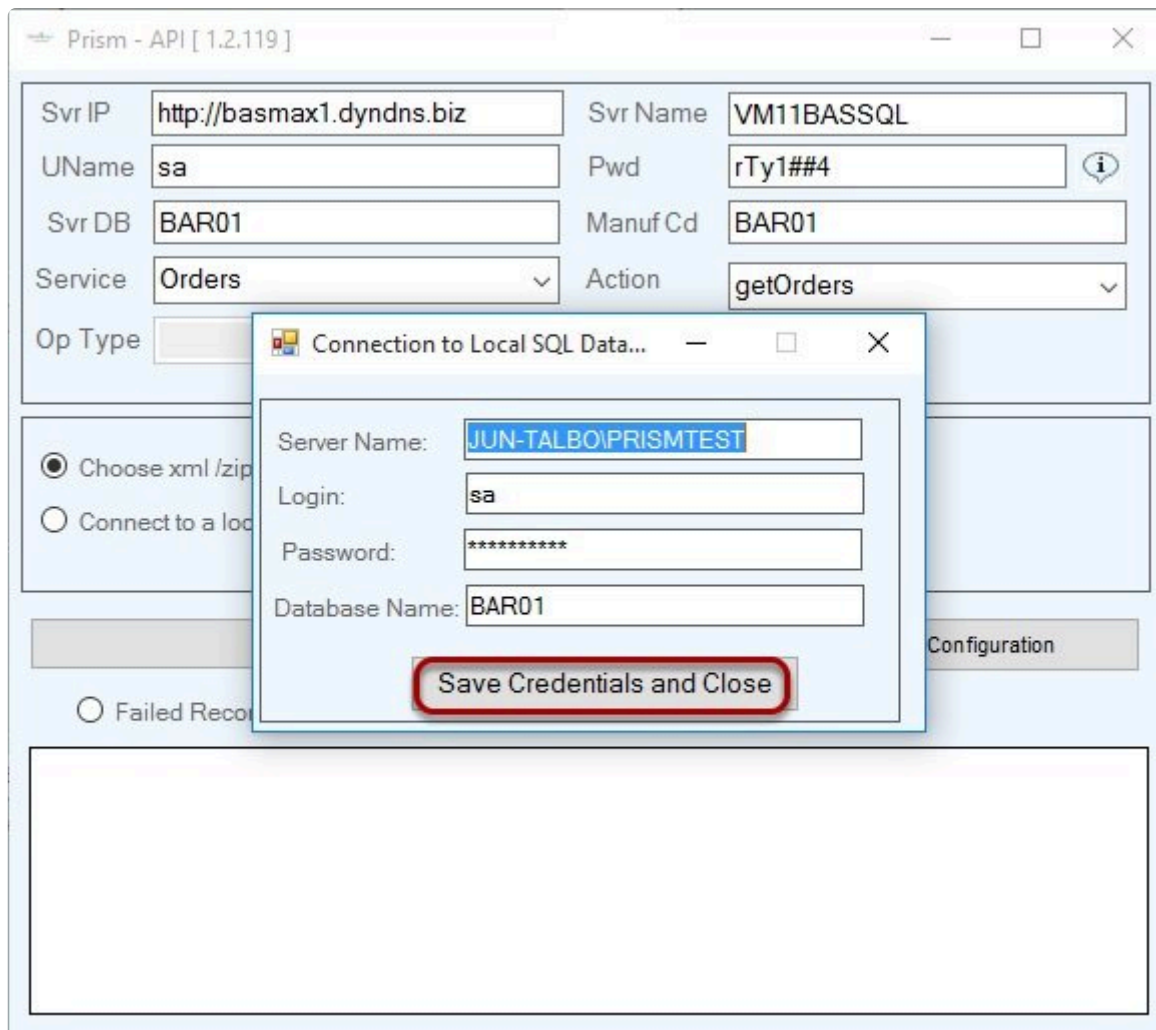
On the API window, go to Service and select Orders on the drop down menu.



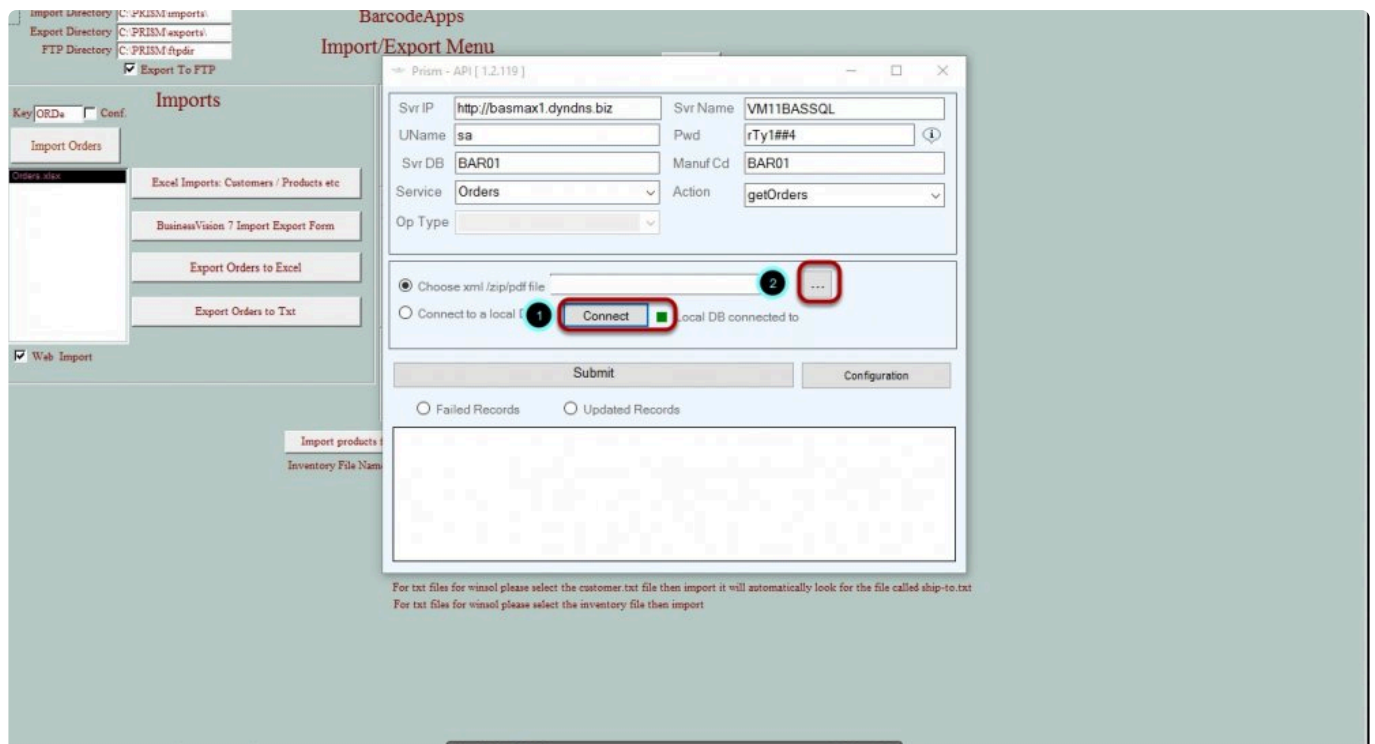
Select Choose xml/zip/pdf file option then click Connect button.



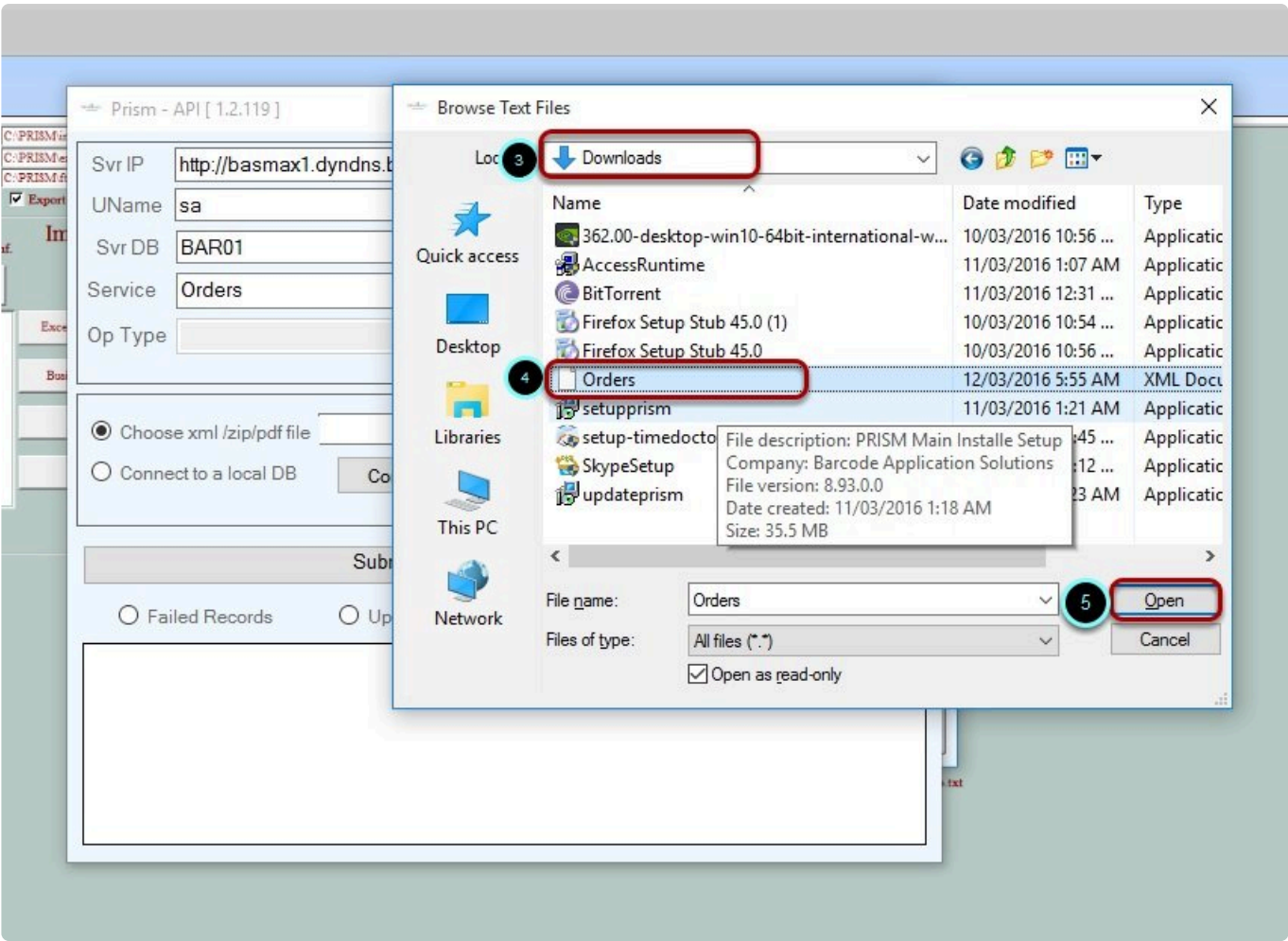
Click on Save Credentials and Close.



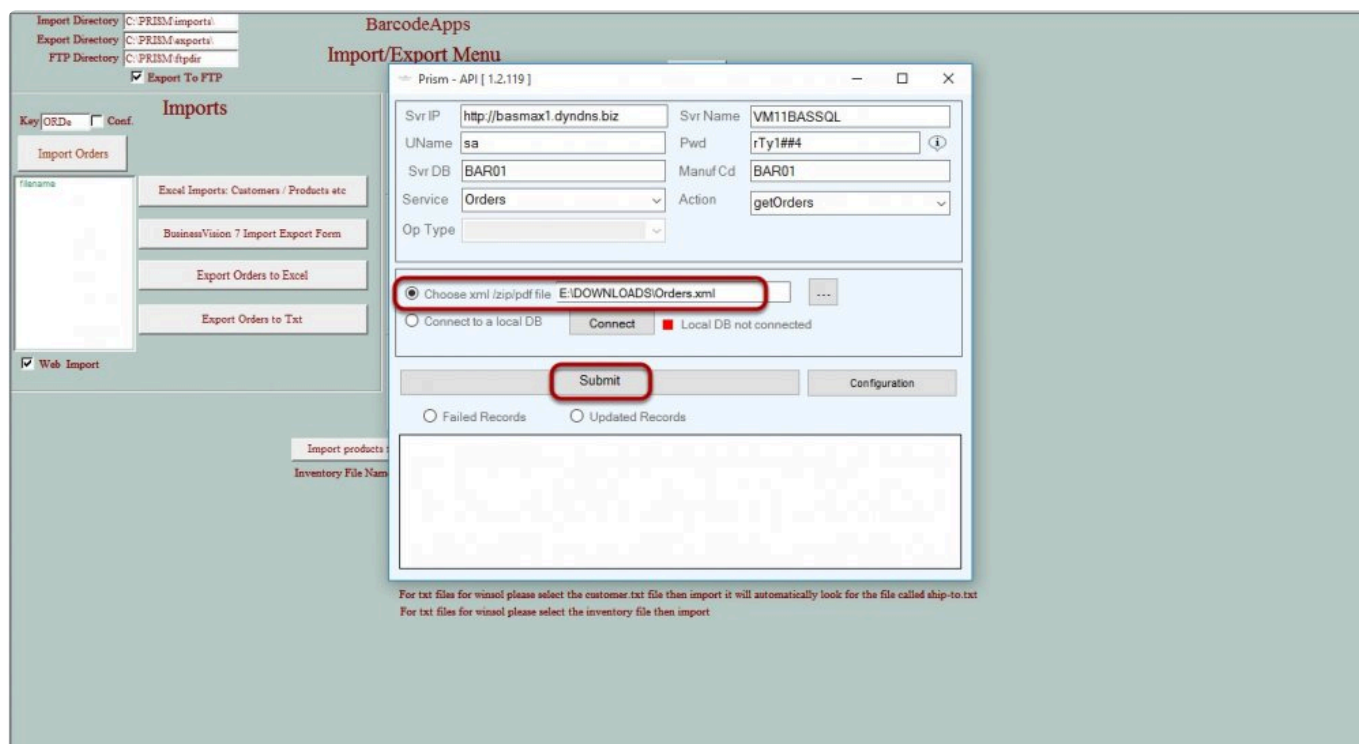
Make sure that the Local DB connected status is green and now click on the browse location button.



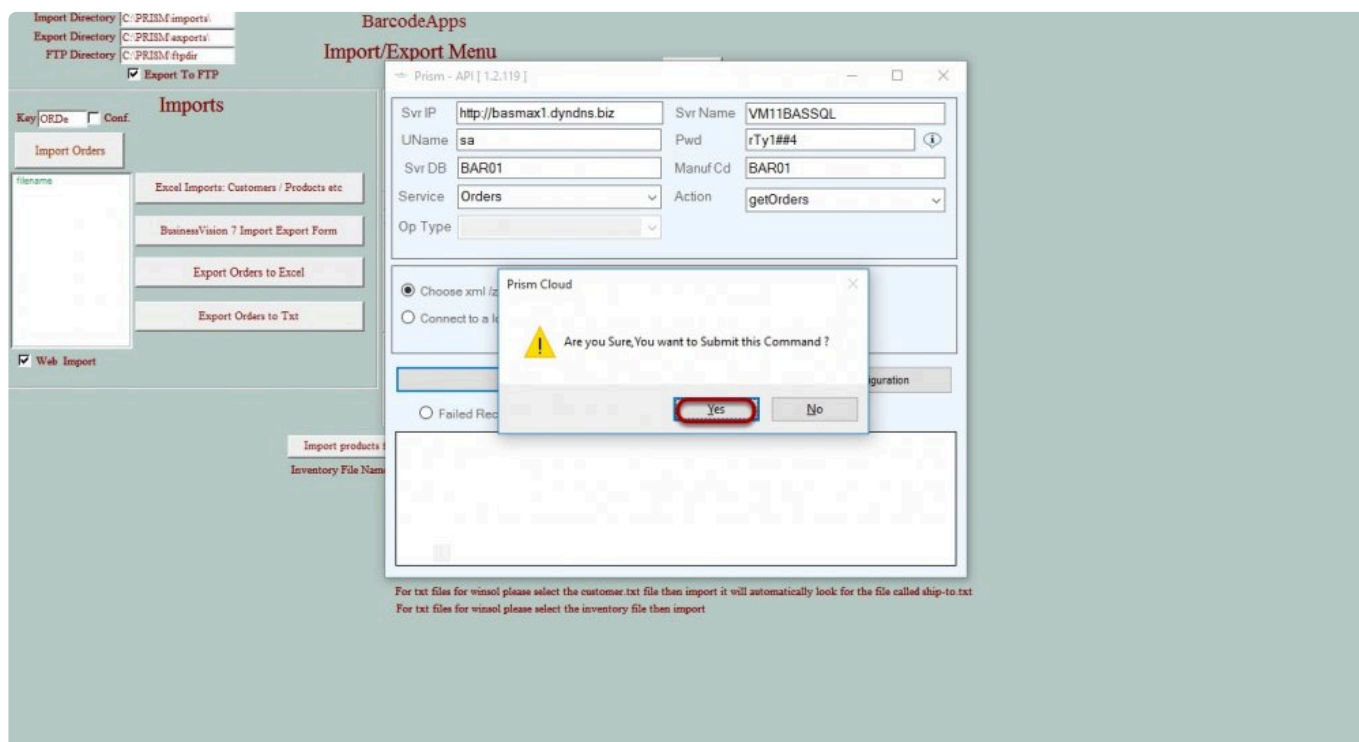
Go to the location of the file, select the Orders.xml file then click Open.



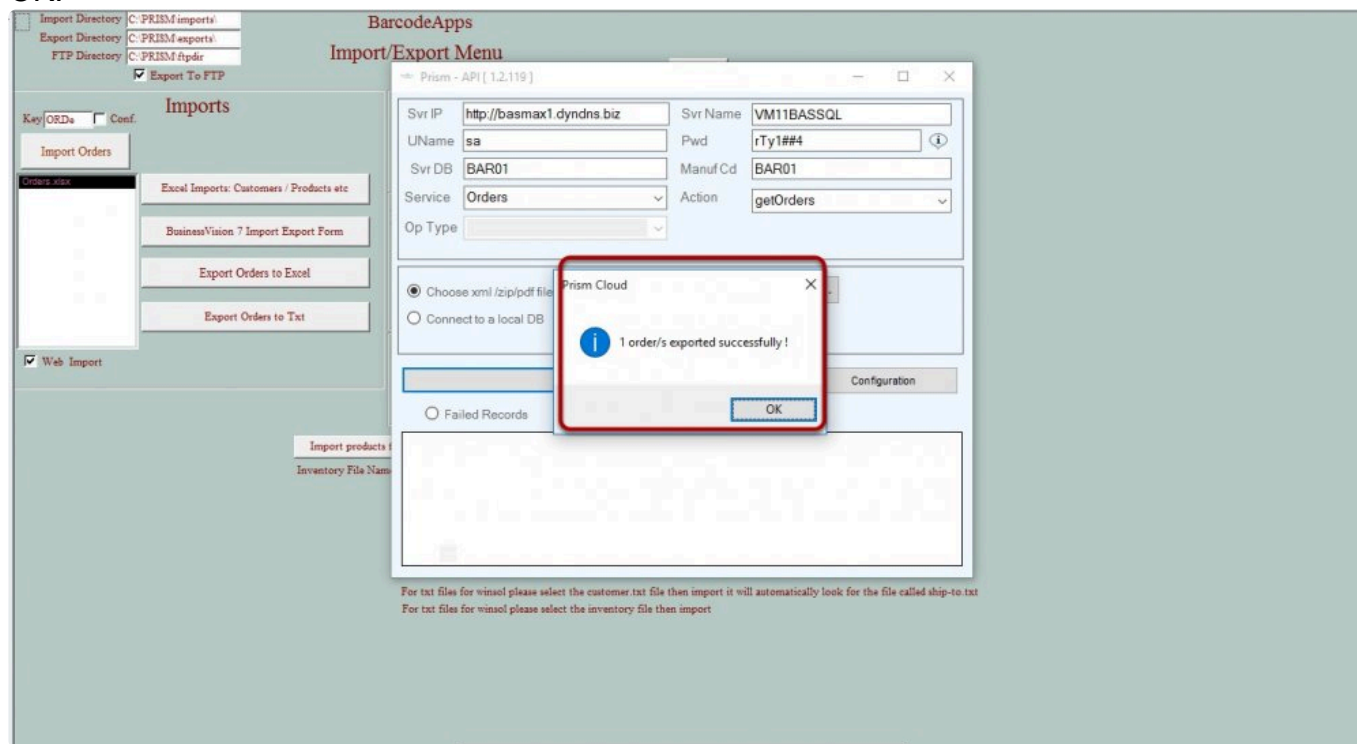
Click Submit button.



Click on Yes to re-import the orders.



A confirmation message will pop up once the orders have been successfully re-imported. Click OK.



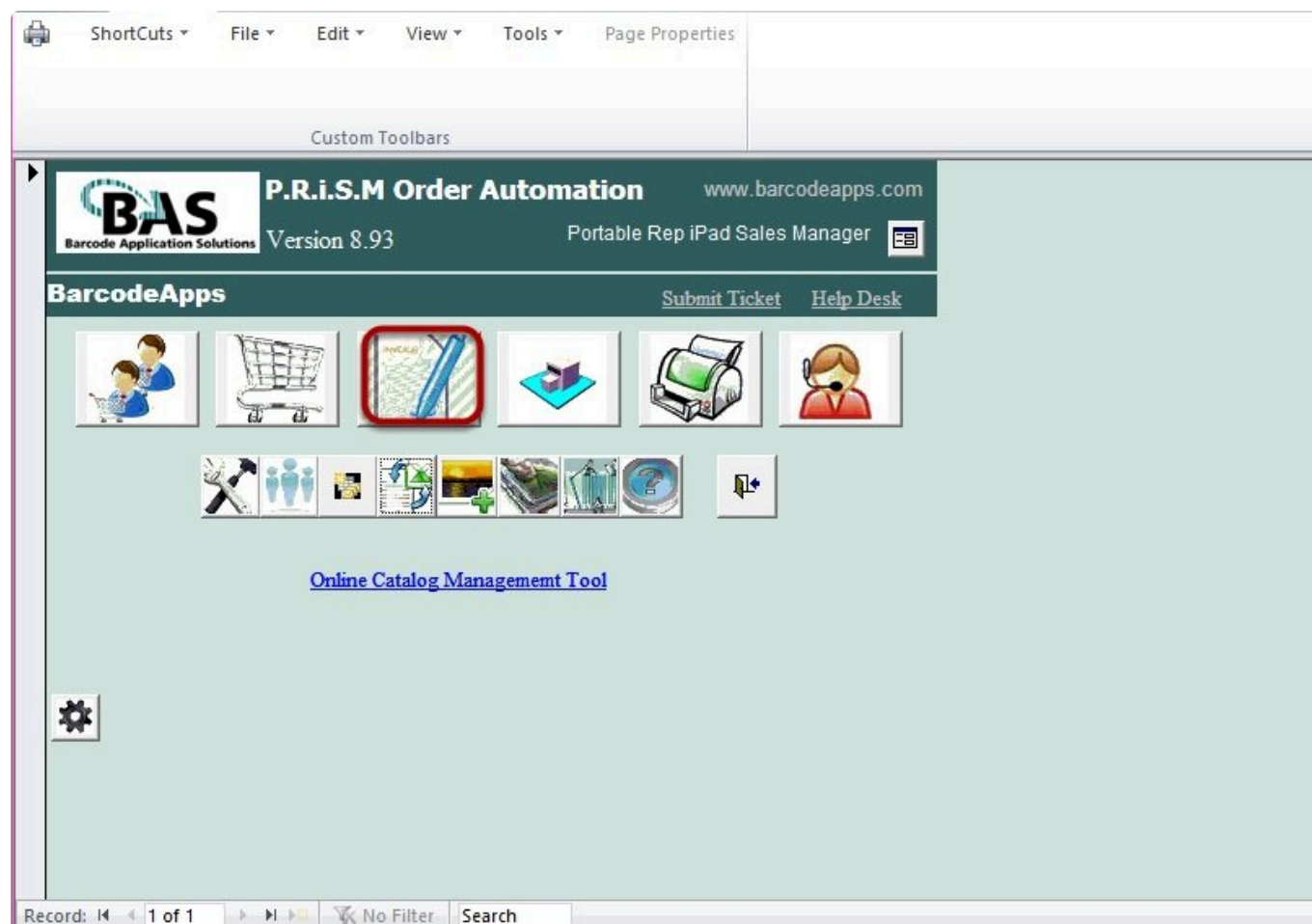
Now check in the Order Entry and Review module if the orders imported appear.

ORDER ENTRY AND REVIEW														
<div> <input checked="" type="checkbox"/> BV7 <div> <input checked="" type="checkbox"/> Hide Detail <input checked="" type="checkbox"/> Show All Orders <input type="checkbox"/> Validate All <input type="checkbox"/> Validate <input type="checkbox"/> Delete <input type="checkbox"/> Exit <input type="checkbox"/> Save <input type="button" value="NEW"/> <input type="button" value="Del All"/> <input type="button" value="Sources"/> <input type="button" value="Back Up and clear Orders"/> <input type="button" value="History"/> <input type="button" value="New Customers in orders"/> <input type="button" value="Refresh Customers"/> <input type="button" value="Refresh Products"/> </div> </div>														
<div> Search By: <input type="text"/> Locate By: <input type="text"/> Order Number: <input type="text"/> Customer: <input type="text"/> Manufacturer: <input type="text"/> </div>														
Valid	Manuf	Order Num	Cost	Change	Total	Imported	T	Ship Date	Terms	Discount	Sent	Hold	Sent	ID
<input checked="" type="checkbox"/>	BAL	21	Western Electronics		\$700.00	\$0.00		12/03/2016	Net 30					9
<input checked="" type="checkbox"/>	BAL	21	Access Technologies		\$6,384.00	\$0.00			Net 30					7
<input checked="" type="checkbox"/>	BAL	20	Access Technologies		\$1,837.40	\$0.00			Net 30					5
<input checked="" type="checkbox"/>	BAL	16	Access Technologies		\$1,837.40	\$0.00			Net 30					4
<input checked="" type="checkbox"/>	BAL	8	British Columbia Audio		\$2.30	\$0.00			Net 30					2
<input checked="" type="checkbox"/>	BAL													(New)

2.3.15. P. How To Print An Order

This knowledge base article will guide users on how to print an order from PRISM desktop.

Go to Orders module.



Select the order you want to print then click Print Order. Alternatively, you can select Print All to print all orders.

Custom Toolbars

✓ BV7 **ORDER ENTRY AND REVIEW** ☒ Hide Detail ☒ Show All Orders ☒ iPad Every Minutes ☒ Print Auto Import

Search By Manuf / Number / Cust / Date (Double click to cancel)

Locate By Order Number Customer Manufacturer

Valid	Manuf	Order Num	Cust	Change	Total	Imported T	Ship Date	Terms	Discount	Send	Hold	Sent	ID	Printed	Order Num
1	BAI	34			\$2,520.40	\$0.00	3/23/2016	Net 30		0			1	0	1-002-03-24-2016
	BAI												(New)		

ItemCode	Description	Qua	Price	
		2	\$3.70	SPW-
		1	\$318.50	FX-21
		1	\$2,194.50	STS-
*				

Record: 14 1 of 3

Cust PO
 Imported Rep
 Sales Person
 Order Date 3/29/2016
 Cancel Date 3/23/2016
 Ship Date 3/23/2016

2

Validate Msg


Email #Name? Will update cust. file

Price List 0 BO ☐ French

Print order screen should open. Click on the print icon to print the order.

Print Size Margins ☐ Show Margins ☐ Print Data Only

Portrait Landscape Columns Page Setup Zoom One Page Two Pages More Pages Refresh All PDF or XPS Data Close Print Preview Close Preview



BarcodeApps
474 Atwell Dr
Toronto ON,

4/1/2016
OrderDate 3/29/2016
ShipDate 3/23/2016
CancelDate 3/23/2016

Purchase Order Number: 34
Customer: 10

Customer #
Email
Telephone
Fax

Customer PO
iPad Order No: BAR01-002-03-24-2016-1
Manufacturer BAR01
BO:
Bill to Phone:

Terms	Net 30 days	Discount:	0 %	Written By	Rep	Order Source
Whse	Item	Description	Qty	Price	Extension	
	32		2	\$3.70	\$7.40	
	7		1	\$318.50	\$318.50	
	38		1	\$2,194.50	\$2,194.50	

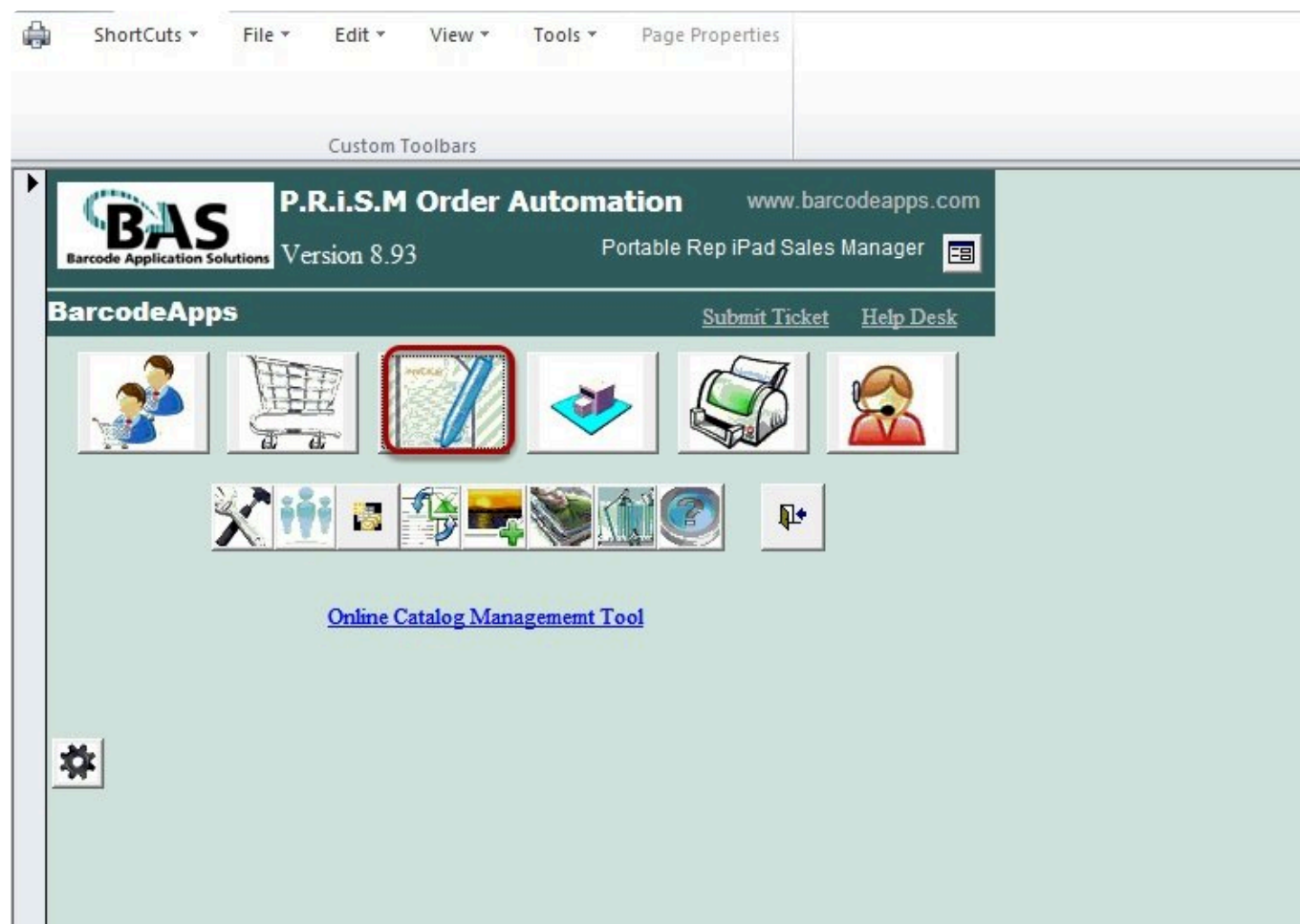
Note:

Total: \$2,520.40

2.3.16. Q. How To Upload Orders To BV

This knowledgebase article will guide users on how to upload orders to Sage BusinessVision.

Go to Order module screen.



Validate the order you want to upload by clicking on the V button. Alternatively, click on Validate All to validate all orders.

ShortCuts ▾ File ▾ Edit ▾ View ▾ Tools ▾ Page Properties

Custom Toolbars

BV7 **ORDER ENTRY AND REVIEW** ☒ Hide Detail **Validate All** ☒ Show All Orders ☒ Validate ☒ Delete ☒ Exit ☒ Save ☒ NEW ☒ Del All ☒ Sources ☒ Back Up and clear Orders ☒ History

Search By Manuf / Number / Cust / Date (Double click to cancel)

Locate By Order Number Customer Manufacturer

ValidManuf Order Numt Cust Change Total Imported T Ship Date Terms Discount Send Hold Sent ID Printed Order Number Custom

ValidManuf	Order Numt	Cust	Total	Imported T	Ship Date	Terms	Discount	Send	Hold	Sent	ID	Printed	Order Number	Custom
V	BAI	34	\$2,520.40	\$0.00	3/23/2016	Net 30		0			1	0	1-002-03-24-2016-1	DS
*	BAI										(New)			

ItemCode	Description	Qua	Price	SPW
		2	\$3.70	SPW
		1	\$318.50	FX-2
		1	\$2,194.50	STS
*				

Cust PO
Imported Rep
Sales Person
Order Date 3/29/2016
Cancel Date 3/23/2016
Ship Date 3/23/2016

Sort ☐ Print Order ☐ Print All ☐ Email to cust ☐ Print All with Var

Validate Msg
Save Local Orders
Email #Name? Will update cust. file

Once an order is validated, you should see a check mark on it. Click Exit.

ShortCuts ▾ File ▾ Edit ▾ View ▾ Tools ▾ Page Properties

Custom Toolbars

BV7 **ORDER ENTRY AND REVIEW** ☒ Hide Detail **Validate All** ☒ Show All Orders ☒ Validate ☒ Delete ☒ Exit ☒ Save ☒ NEW ☒ Del All ☒ Sources ☒ Back Up and clear Orders ☒ History

Search By Manuf / Number / Cust / Date (Double click to cancel)

Locate By Order Number Customer Manufacturer

ValidManuf Order Numt Cust Change Total Imported T Ship Date Terms Discount Send Hold Sent ID Printed Order Number Custom

ValidManuf	Order Numt	Cust	Total	Imported T	Ship Date	Terms	Discount	Send	Hold	Sent	ID	Printed	Order Number	Custom
V	BAI	34	\$2,520.40	\$0.00	3/23/2016	Net 30		0			1	0	1-002-03-24-2016-1	DS
*	BAI										(New)			

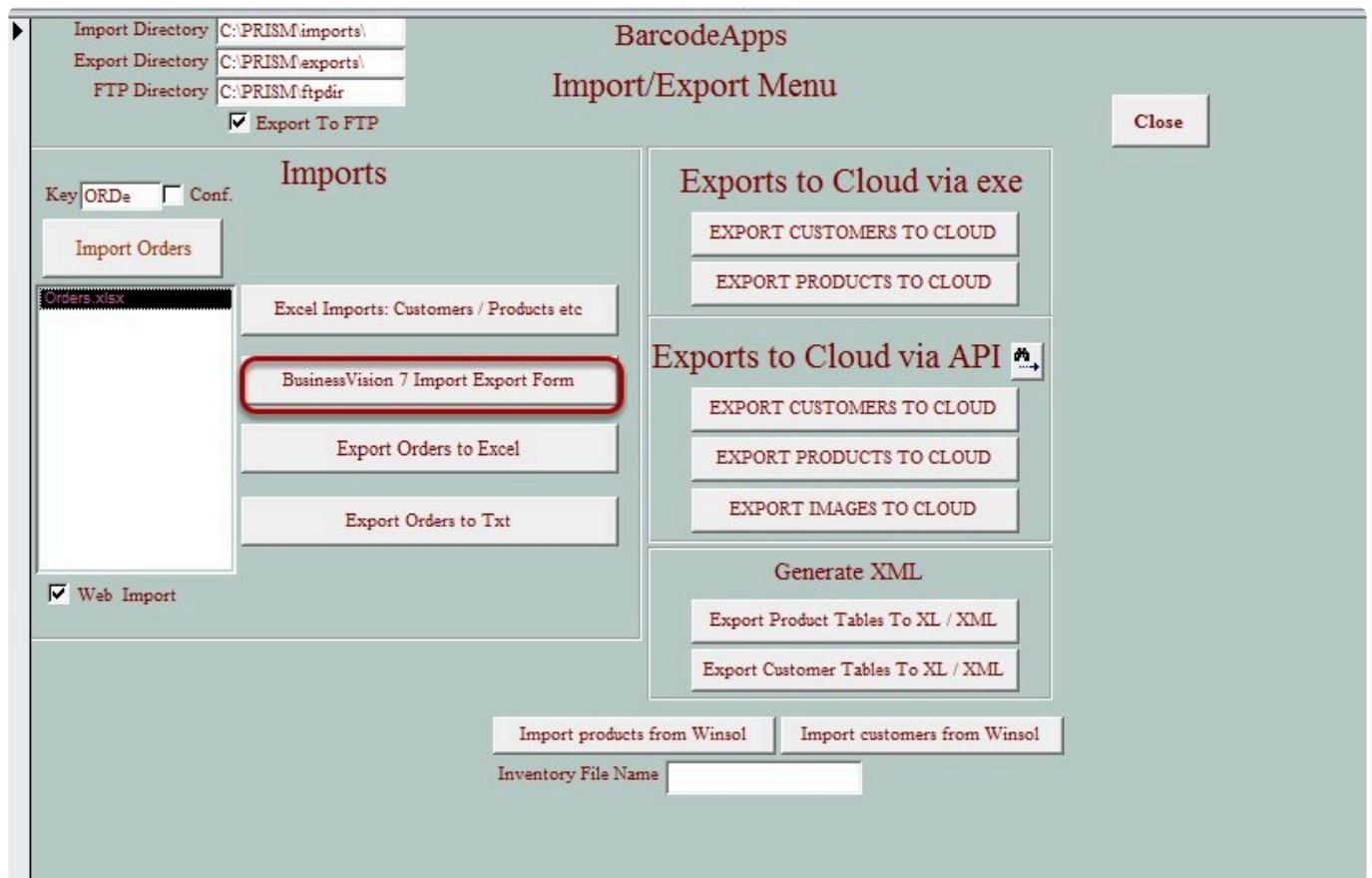
ItemCode	Description	Qua	Price	SPW
		2	\$3.70	SPW
		1	\$318.50	FX-2
		1	\$2,194.50	STS
*				

Cust PO
Imported Rep
Sales Person
Order Date 3/29/2016
Cancel Date 3/23/2016
Ship Date 3/23/2016

Sort ☐ Print Order ☐ Print All ☐ Email to cust ☐ Print All with Var

Validate Msg
Save Local Orders
Email #Name? Will update cust. file

Go to BusinessVision 7 Import Export Form.



The screenshot shows the 'BarcodeApps Import/Export Menu' window. At the top, there are fields for 'Import Directory' (C:\PRISM\imports\), 'Export Directory' (C:\PRISM\exports\), and 'FTP Directory' (C:\PRISM\ftpd\), along with a checked 'Export To FTP' checkbox and a 'Close' button. The main area is divided into several sections. On the left, under 'Imports', there is a 'Key' field with 'ORDe' and a 'Conf.' checkbox, an 'Import Orders' button, a file list showing 'Orders.xlsx', and a 'Web Import' checkbox. In the center, under 'Imports', there are buttons for 'Excel Imports: Customers / Products etc', 'BusinessVision 7 Import Export Form' (highlighted with a red rectangle), 'Export Orders to Excel', and 'Export Orders to Text'. On the right, under 'Exports to Cloud via exe', there are buttons for 'EXPORT CUSTOMERS TO CLOUD' and 'EXPORT PRODUCTS TO CLOUD'. Below that, under 'Exports to Cloud via API', there are buttons for 'EXPORT CUSTOMERS TO CLOUD', 'EXPORT PRODUCTS TO CLOUD', and 'EXPORT IMAGES TO CLOUD'. At the bottom right, under 'Generate XML', there are buttons for 'Export Product Tables To XL / XML' and 'Export Customer Tables To XL / XML'. At the very bottom, there are buttons for 'Import products from Winsol' and 'Import customers from Winsol', and an 'Inventory File Name' text field.

Click on Export Orders To BV.

Sage BusinessVision 7 Connectivity Form ☒ BV7

Import Only ☒ Wh INVENTORY.WHSE ='00'

☐ Total from all ☐ Non Inventory **BV Next Order Number:** Division

PRISM Local File Updates

☐ Use Sales Dep ☐ Use Salesperson

☐ On Hand Only ☐ Min Buy

☐ Ignore Price 20 ☐ Ignore UPC's

☐ Ignore Price 20 ☐ UPC Each Only

☐ Don't import held cust
☐ Ignore Email Address
☐ Ignore Ship To's
☐ Insert Balances
☐ Don't import Inactive

Item FilterFrom BV Alternate field
Item FilterFrom BV NOTES field
Exclude if Location is:

Export to BV

Warehouse for orders
☒ Use Customer's Warehouse
☐ Use Rep's Warehouse
☐ Use HH Warehouse
☐ Use Product Warehouse

☐ Sort items in the order they were entered ☐ Upload as Quotes

☒ Commit Quantities if On Hand (Place on BO otherwise)
☒ Lock Prices (Do not change when tabbing)
☒ Do Not Import Products On Hold
☒ Import warehouses in Categories
☐ Assign 1 level categories automatically
☐ Import Extended Description into comments

Directory to Export Text Orders To:
Orders File:

Click OK.

Custom Toolbars

Sage BusinessVision 7 Connectivity Form

☒ BV7

00 INVENTORY.WHSE ='00' Clear

il from all ☐ Non Inventory **BV Next Order Number:** 0000700545 Division 000

PRISM Local File Updates

Update Territories From BV Territories ☒ Use Salesperson

Recreate terms/ shipments from BV to PRISM

Update ☐ On Hand Only ☐ Min Buy ☐ Ignore Pri ☐ Ignore upc ☐ Item FilterFrom BV Alternate ☐ Item FilterFrom BV NOTES ☐ Exclude if Locati

Modify Names in BV

SPEC CODE X NOT IMPORTED

Export to BV

Export Orders to BV

☒ Sort items in the order they were entered ☐ Upload as Quotes

house for orders

stomer's Warehouse

p's Warehouse

duct Warehouse

uantities if On Hand (Place on BO otherwise)

Directory to Export Text Orders To:

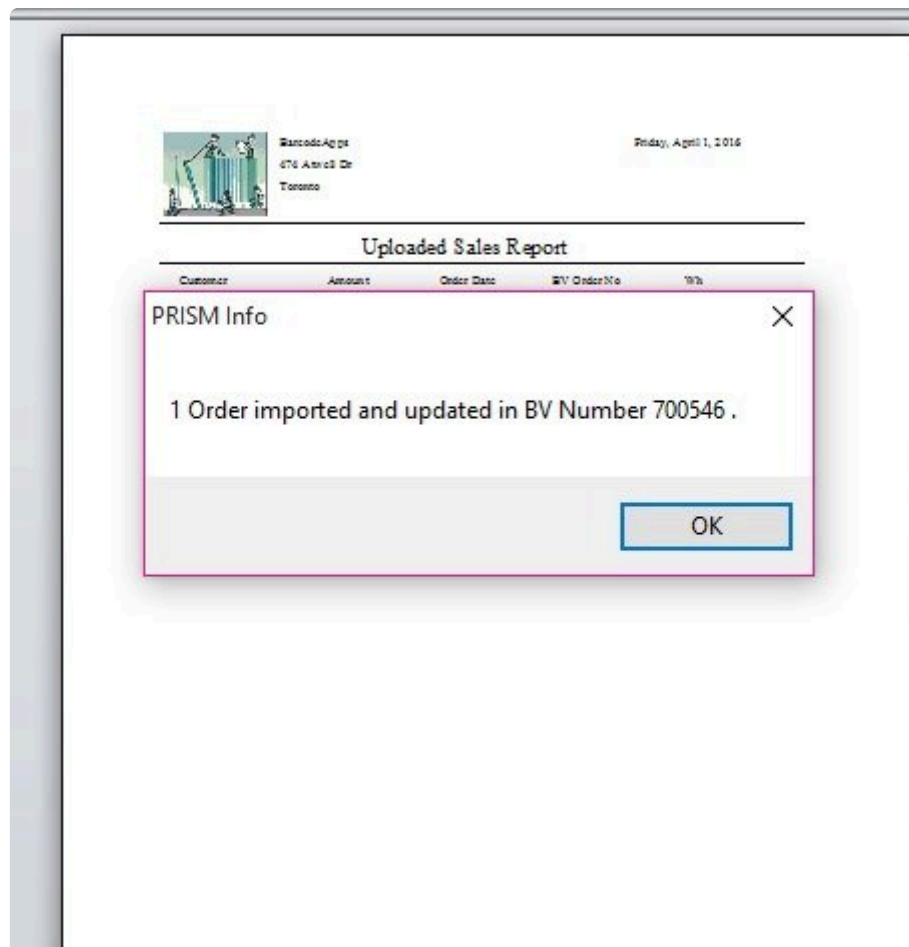
PRISM Info

You are about to send to BV: 1 Orders with 3 Total line of detail items.

Please make sure all users are SIGNED OFF Business Vision

OK Cancel

Order Import Successful... Click OK once done.



2.3.17. R. Catalog Digitization

2.3.18. S. Color Size Matrix

This knowledge base article will guide user on how to set up a size color matrix using the PRISM DESKTOP.

PRISM has a feature called the color size matrix which allows the application to group product items (see screenshot)

Using this feature we can group an item by size,color or the combination of both.

Screenshot below shows the Item XBOX live have 2 other available color (BLACK AND RED)

No Customer Selected

barcodeapps
empowering growth.

Customers Orders **Products** Catalogs Settings Reports Sign Out

XBX-123W

Price: \$ 866.67 Additional Info :

Desc : XBOX LIVE WHITE

xbox	DESC	WHSE	AVAILABLE	QTY
XBX-123B	XBOX LIVE BLACK	00	50	0
XBX-123R	XBOX LIVE RED	00	100	0
XBX-123W	XBOX LIVE WHITE	00	285	0

Select customer

Back to product


Suggested order

Set all Qty to 0

Back to order

Add to order

The same results will also show on the web store.



XBOX LIVE WHITE

Unit Price: \$866.67

Minimum Order Qty: 0

XBX-123B XBOX LIVE BLACK

XBX-123R XBOX LIVE RED

XBX-123W XBOX LIVE WHITE

Back to Order

Show Suggested Order

Reset to Zero

Add to Cart

[CLOSE](#)

VIA PRISM DESKTOP

Before getting started. We have to make sure that all items that will be part of the matrix are in PRISM.

PRODUCT REVIEW FORM

Search By Descr / Manuf / Code / Barcode (Double click to cancel) Save Delete Exit

Locate By Manufacturer Item Code Description Barcode ☐ Show Dis

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec
BAR01	STS-01MAN	Instruction Manual STS-01 Sound Sy	\$29.95	0	00		
BAR01	STS-02	Surround Sound Home Theater Syste	\$2,805.00	0	00		
BAR01	SY-MINI	Sony MiniDisc Walkman Player/Rec	\$199.00	0	00		
BAR01	TP-350	DVD Player/Hi-Fi VCR Combo	\$359.70	0	00		
BAR01	TP-560	Toshiba Progressive-Scan DVD/DVL	\$581.70	0	00		
BAR01	TV-2100	20" TV with Flat Picture Tube	\$336.70	0	00		
BAR01	TV-3600	36" DBX Stereo Color Television	\$468.10	0	00		
BAR01	TV-5200	52" Dolby Pro Logic Surround Sound	\$658.90	0	00		
BAR01	UAC-300	Recoton Universal AC Adapter	\$9.99	0	00		
BAR01	V1-2A	Digital-VHS VCR with HDTV-Recor	\$193.50	0	00		
BAR01	V1-4A	Hi-fi Stereo 4 Head VCR	\$473.90	0	00		
BAR01	VAIO-24	Desktop PC with Intel Pentium 4 Pro	\$1,199.00	0	00		
BAR01	XBX-123	XBOX LIVE	\$866.67	0	00		
BAR01	XBX-123B	XBOX LIVE BLACK	\$866.67	0	00		
BAR01	XBX-123R	XBOX LIVE RED	\$866.67	0	00		
BAR01	XBX-123W	XBOX LIVE	\$866.67	0	00		
BAR01							

There are 2 ways to set up the matrix inside the PRISM DESKTOP

1. Modifying item properties inside the PRISM DESKTOP
2. Modifying item properties via excel

To modify the item properties inside the PRISM DESKTOP. Click the item , click on the size color matrix tab.

USING PRISM DESKTOP VIA ITEM PROPERTIES

To modify the item properties inside the PRISM DESKTOP.

1. Click the item ,
2. Click on the size color matrix tab.
3. Define the Style
4. Define the name of the Image that will be used.

PRODUCT REVIEW FORM

Search By Descr / Manuf / Code / Barcode (Double click to cancel)

Locate By Manufacturer Item Code Description Barcode Whse

Manufacturer	Item Code	Description	Wholesale	Min Order	Whse	% Dis	On Spec	Discd	Bode	Item ID
BAR01	STS-02	Surround Sound Home Theater Syste	\$2,805.00	0	00					40
BAR01	SY-MINI	Sony MiniDisc Walkman Player/Rec	\$199.00	0	00					41
BAR01	TP-350	DVD Player/Hi-Fi VCR Combo	\$359.70	0	00					42
BAR01	TP-560	Toshiba Progressive-Scan DVD/DVI	\$581.70	0	00					43
BAR01	TV-2100	20" TV with Flat Picture Tube	\$336.70	0	00					44
BAR01	TV-3600	36" DBX Stereo Color Television	\$468.10	0	00					45
BAR01	TV-5200	52" Dolby Pro Logic Surround Sounc	\$658.90	0	00					46
BAR01	UAC-300	Recoton Universal AC Adapter	\$9.99	0	00					47
BAR01	V1-2A	Digital-VHS VCR with HDTV-Recor	\$193.50	0	00					48
BAR01	V1-4A	Hi-fi Stereo 4 Head VCR	\$473.90	0	00					49
BAR01	VAIO-24	Desktop PC with Intel Pentium 4 Pr	\$1,199.00	0	00					50
BAR01	XBX-123	XBOX LIVE	\$866.67	0	00					1052
1 BAR01	XBX-123B	XBOX LIVE BLACK	\$866.67	0	00					52
BAR01	XBX-123R	XBOX LIVE RED	\$866.67	0	00					53
BAR01	XBX-123W	XBOX LIVE	\$866.67	0	00					51
* BAR01										(New)

General P 2 Size Color Matrix Other

Parent GAM Other 4

3 xbox Suggested Order Quantity

Alternate Picture (Style) 4 xbox-123b

Picture management and Manipulation

Picture Folder

Disc products without images

Uppercase Product Names

Top Category

Switch Languages Min = 1 Suggested = Min Use All Item codes as UPC Use Item codes for missing UPCs Remove Spaces From UPC

USING PRISM DESKTOP VIA EXCEL TEMPLATE

To modify the item properties via excel. Click on settings on the main window.



Click on Export.

OWNER MAINTENANCE FORM

Company Settings

Name:

Address:

City:


Prov/State: Zip:

Email:

Website:

Tel: Fax:

Logo:



100 x 80 bmp drag here

Accounting Package Required

☐ BV ☐ BVEssentials ☒ Manufacturer Onl

☒ BV7 ☒ BV7.2 ☐ Auto-Import

☐ Quickbook ☒ iPad Active

☐ Simply Accounting ☐ Receive Orders Only

☐ Sage 50 (Peachtree) ☐ Novasoft

DATA DIRECTORIES

Description	Name	Value	Reference	NoChange
▶ BV DSN Name		BVDATA	dsnname	<input checked="" type="checkbox"/>
Path for BV Text File	Orders.txt	C:\PRISM\	BVTA00Out	<input checked="" type="checkbox"/>
Rep d path		C:\PRISM\	repdbPath	<input type="checkbox"/>
Ignore the WB Tables 0 Not: -1		C:\PRISM\	BVwWB	<input checked="" type="checkbox"/>

Record: 1 of 20 | No Filter | Search

Import Additional Inventory Information From Excel

Excel File Import:

Excel File Export:

Import Additional Customer Information From Excel

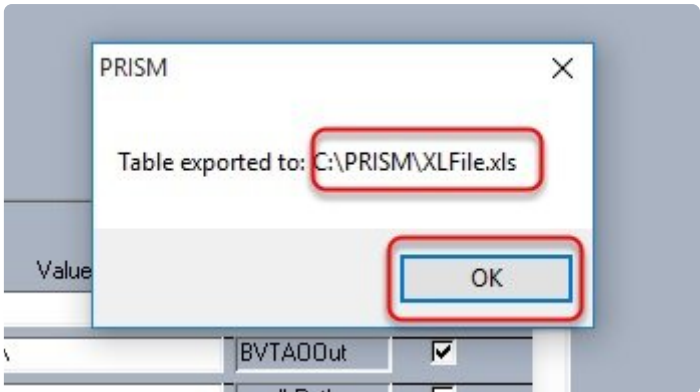
Excel File Import:

Excel File Export:

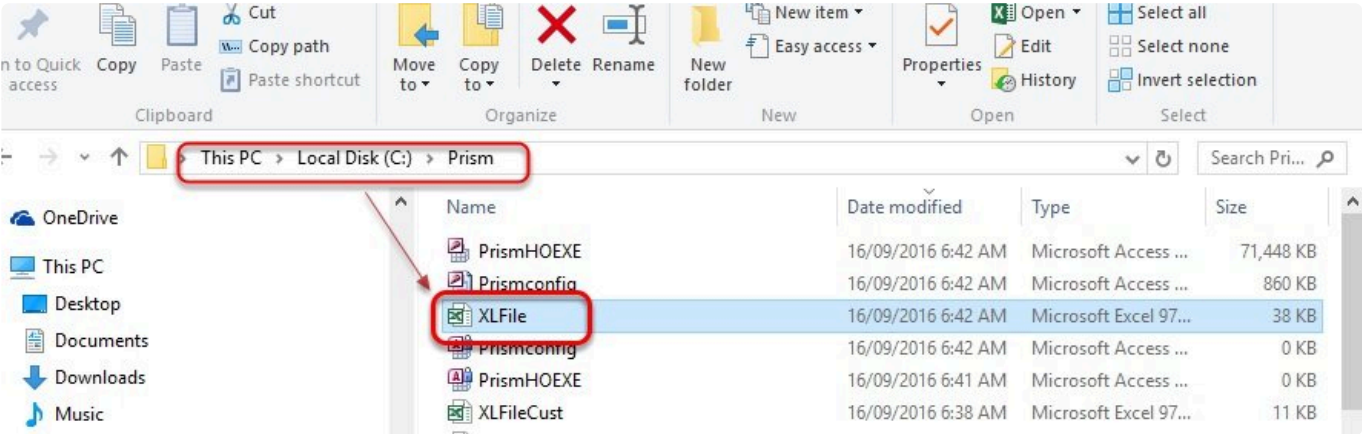


NOTE: Before we do an Export. We suggest that we do a product import from BV. To get the most updated product count and status.

The confirmation will show the location of the Exported file (XLFILE) now Click on Ok



Open the XLFILE in C:\PRISM\XLFILE .xls



Locate the item that will be part of the matrix.

	A	B	C	D	E	F	G	H	I	J	K
1	Code	Barcode	Min	Casepack	Price2	Available	PictureName	Style	SuggestedOrder	Category	UOM
50	V1-4A		0	0	\$0.00	1				DVD	EA
51	VAIO-24		0	0	\$0.00	1				CMP	EA
52	XBX-123		0	0	\$0.00	1				GAM	EA
53	XBX-123B	123B	0	0	\$0.00	1				GAM	EA
54	XBX-123R	123R	0	0	\$0.00	1					EA
55	XBX-123W	XBX-123	0	0	\$0.00	1				GAM	EA
56											
57											
58											

On the Picture Name column. We have to Key in the name of the image that the item will use.

G	
PictureName	
xbx-123b	xbc
xbx-123r	xbc
xbx-123	xbc

NOTE: If this field is left BLANK. It will follow the standard logic where the system will use the equation (Item name=Image name).

On the Style Column. We have to indicate in there the name of the GROUP name.

H	
Style	
xbox	
xbox	
xbox	

Once done. Save the changes on the excel file.

	A	B	C	D	E	F	G	H	I	J	K
	Code	Barcode	Min	Casepack	Price2	Available	PictureName	Style	SuggestedOrder	Category	UOM
50	V1-4A		0	0	\$0.00	1				DVD	EA
51	VAIO-24		0	0	\$0.00	1				CMP	EA
52	XBX-123		0	0	\$0.00	1				GAM	EA
53	XBX-123B	123B	0	0	\$0.00	1	xbx-123b	xbox		GAM	EA
54	XBX-123R	123R	0	0	\$0.00	1	xbx-123r	xbox			EA
55	XBX-123W	XBX-123	0	0	\$0.00	1	xbx-123	xbox		GAM	EA
56											
57											
58											

To upload the changes back to PRISM. The excel file On the setting window, click on the button with the three dots on it.

☐ Simply Accounting ☐ Receive Orders Only
☐ Sage 50 (Peachtree) ☐ Novasoft

DATA DIRECTORIES

Description	Name	Value	Reference	NoChange
BV DSN Name		BVDATA	dsrname	<input checked="" type="checkbox"/>
Path for BV Text File	Orders.txt	C:\PRISM\	BVTA00Out	<input checked="" type="checkbox"/>
Rep d path		C:\PRISM\	repdbPath	<input type="checkbox"/>
Ignore the WB Tables 0 Not: -1		C:\PRISM\	BVWB	<input checked="" type="checkbox"/>

Record: 1 of 20 No Filter Search

Import Additional Inventory Information From Excel

Excel File Import ... Import

Excel File Export C:\PRISM\XLFile.xls Export

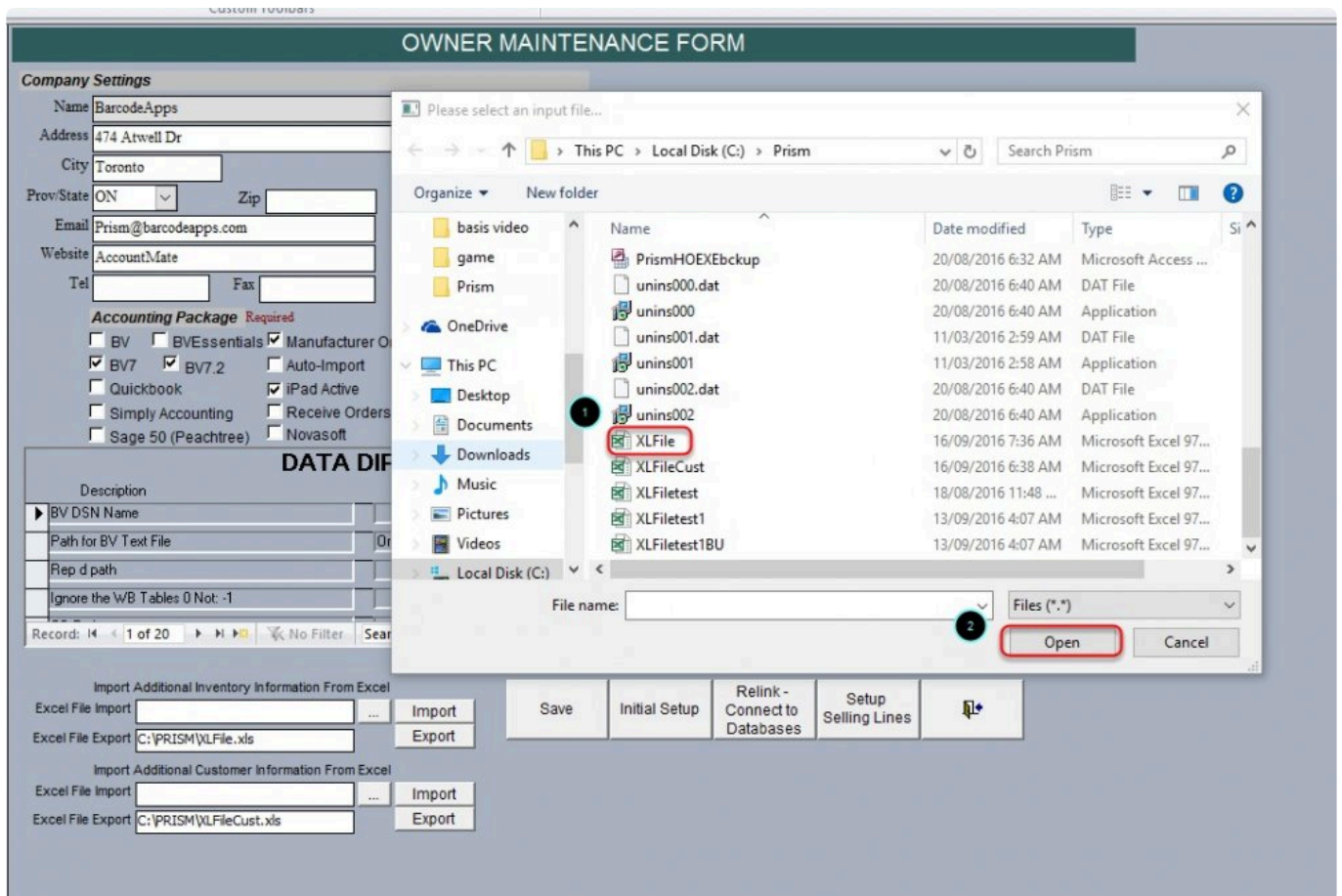
Import Additional Customer Information From Excel

Excel File Import ... Import

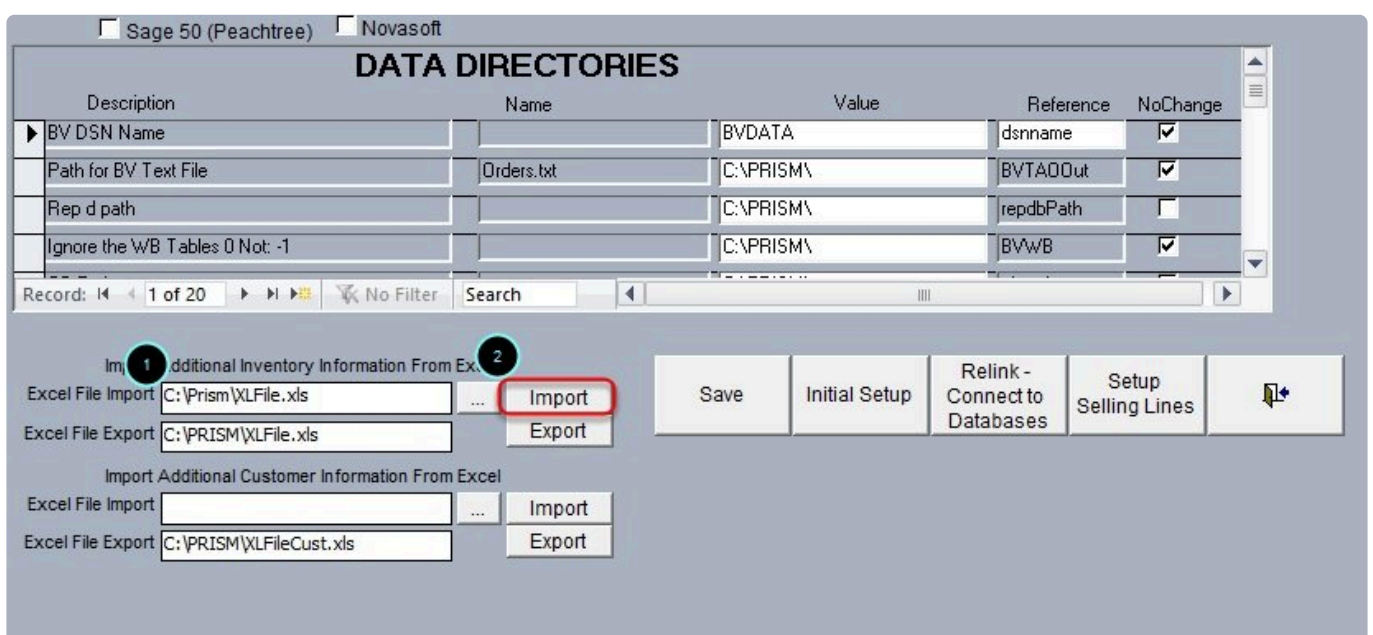
Excel File Export C:\PRISM\XLFileCust.xls Export

Save Initial Setup Relink - Connect to Databases Setup Selling Lines

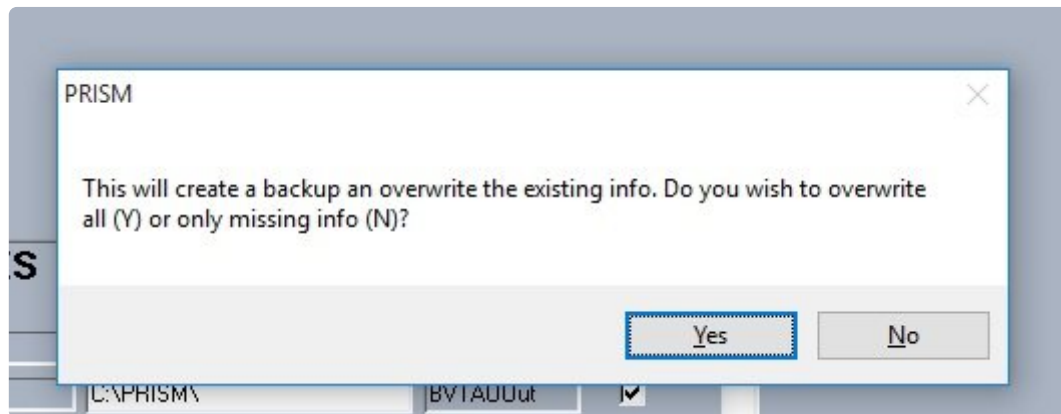
Click on the XLFILE and then click on open.



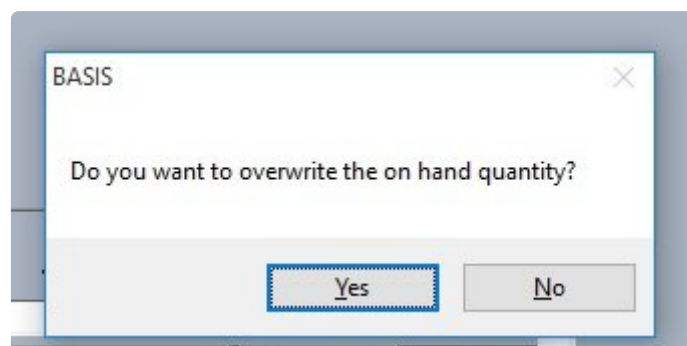
On the settings window. We can here verify the import path and then click on IMPORT.



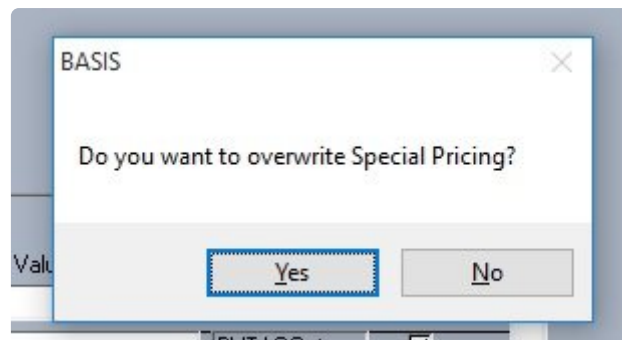
A notification will show that PRISM will create a back up copy of the XLFILE. Just click Yes to Overwrite ALL info. Otherwise No if you just need to update the info.



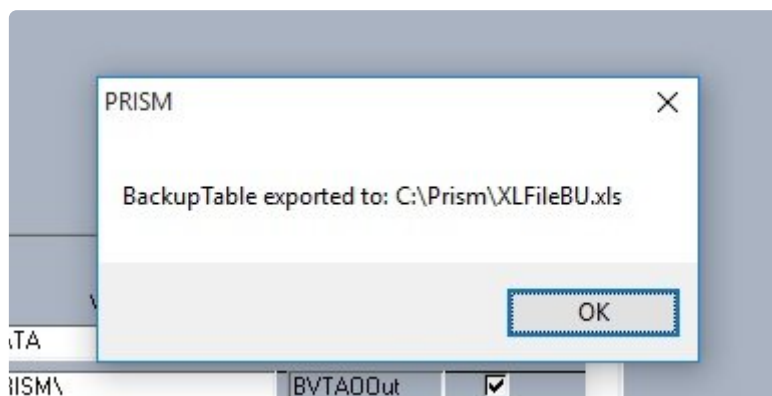
Click yes to Overwrite On hand Quantity



Click Yes to overwrite Special Pricing



Last notification will show the location of the Back up file. just click on Ok.



After the Import is complete. A product sync ([SEND PRODUCTS TO CLOUD](#)) can now be done on the PRISM DESKTOP

To Sync the iPad. Just do a [PRODUCT SYNC](#) AND AN [IMAGE SYNC](#) and everything will be good to go.

No Customer Selected

barcodeapps
empowering growth.

Customers

Orders

Products


Catalogs

Settings

Reports

Sign Out

XBX-123W



Price: \$ 866.67
Desc : XBOX LIVE WHITE

Additional Info :

Select customer

Back to product

Suggested order

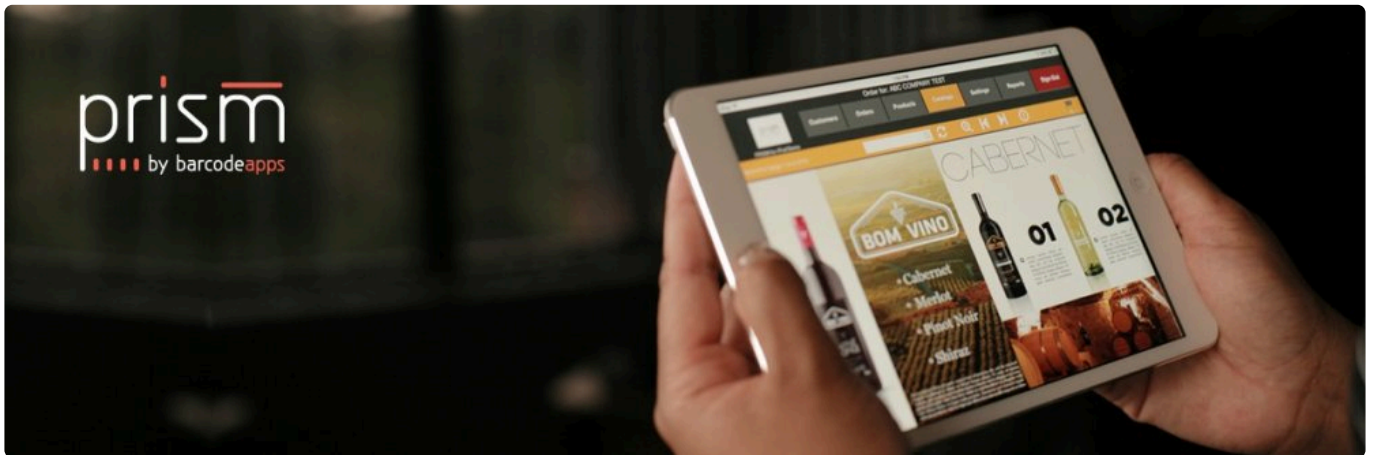
Set all Qty to 0

Back to order

Add to order

xbox	DESC	WHSE	AVAILABLE	QTY
XBX-123B	XBOX LIVE BLACK	00	50	0
XBX-123R	XBOX LIVE RED	00	100	0
XBX-123W	XBOX LIVE WHITE	00	285	0

2.4. IV. PRISM APP iOS



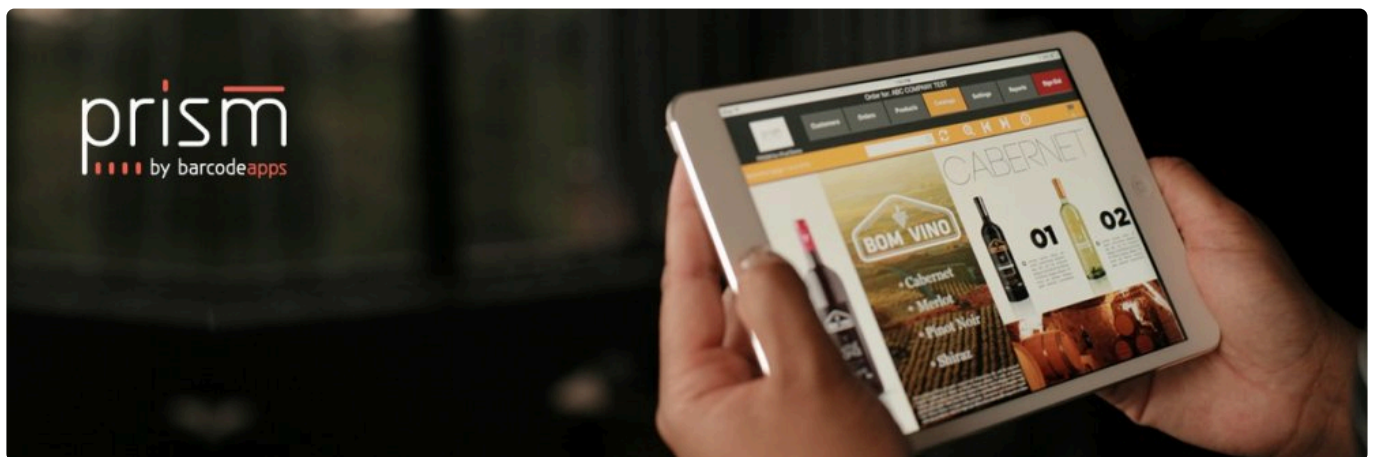
2.4.1. A. How To Install And Setup PRISM App

2.4.1.1. i. iOS

This KB will guide users on how to download and set up the PRISM App IOS.

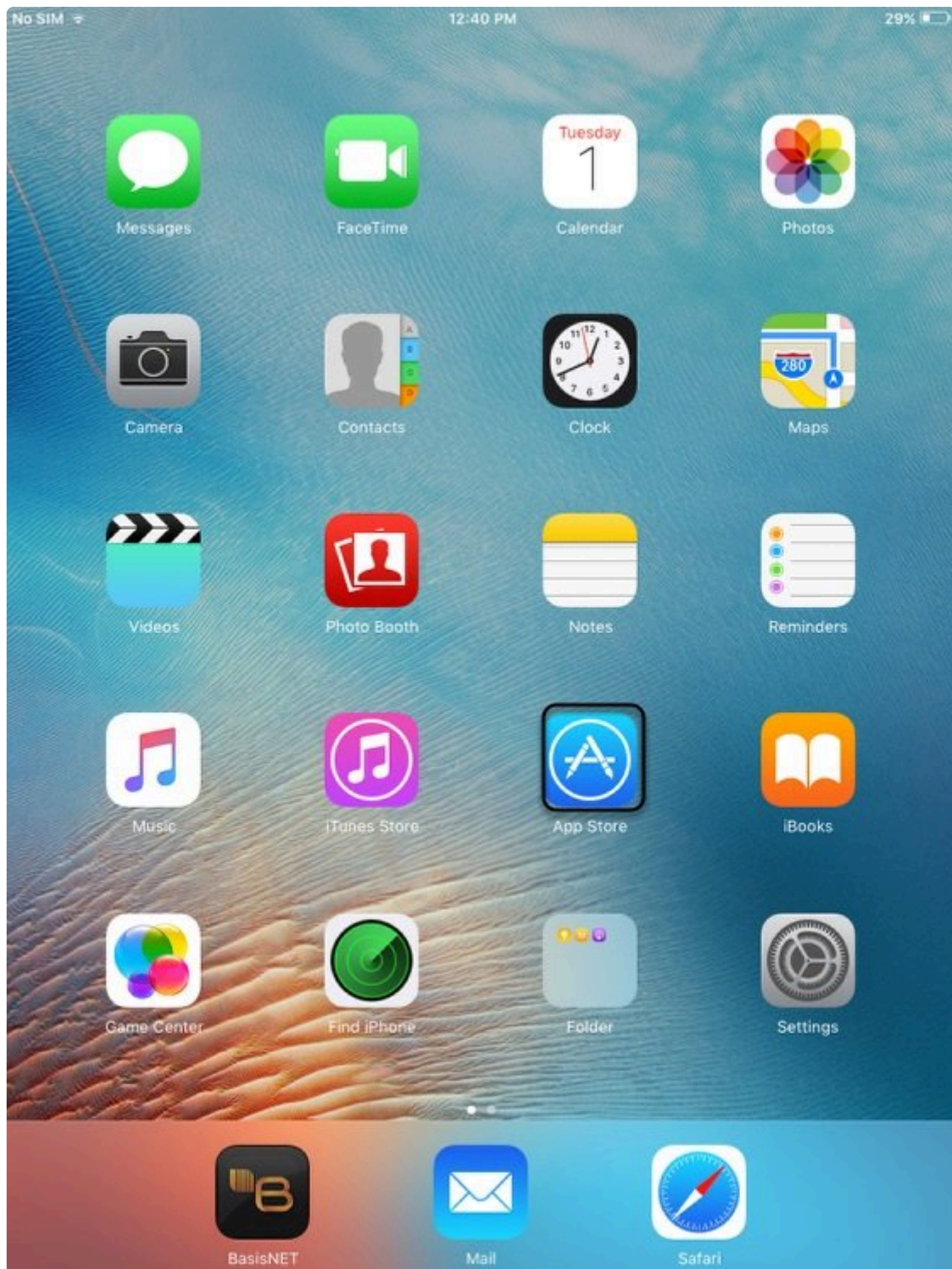
iOS REQUIREMENTS

- iOS 6 or newer
- 32 GB or up
- Strong wifi connection
- Working email client

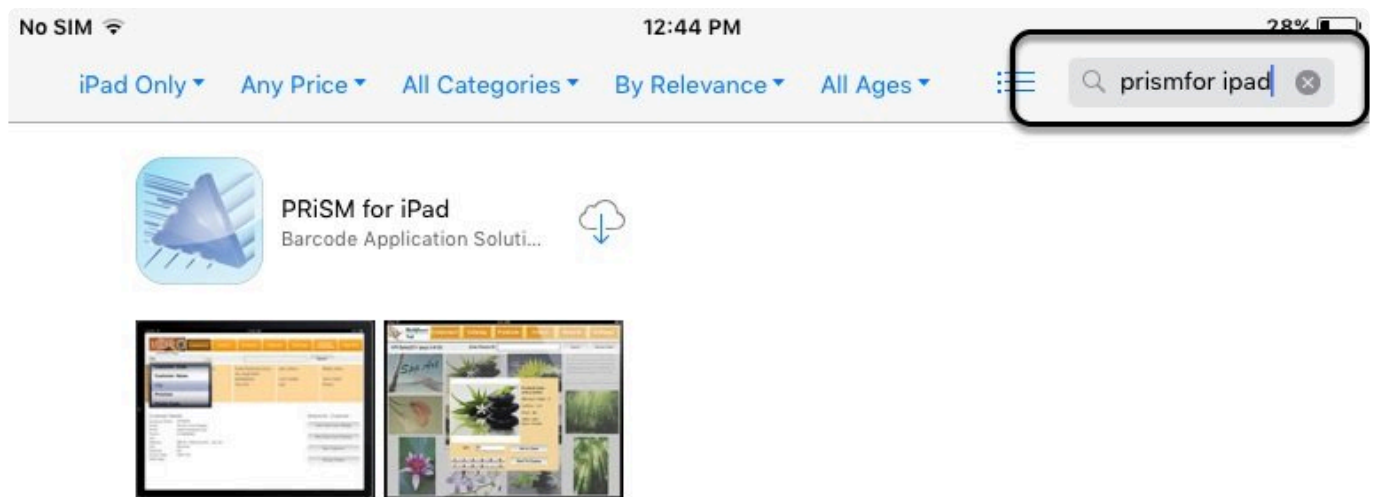


PRISM APP DOWNLOAD AND FIRST TIME SYNC

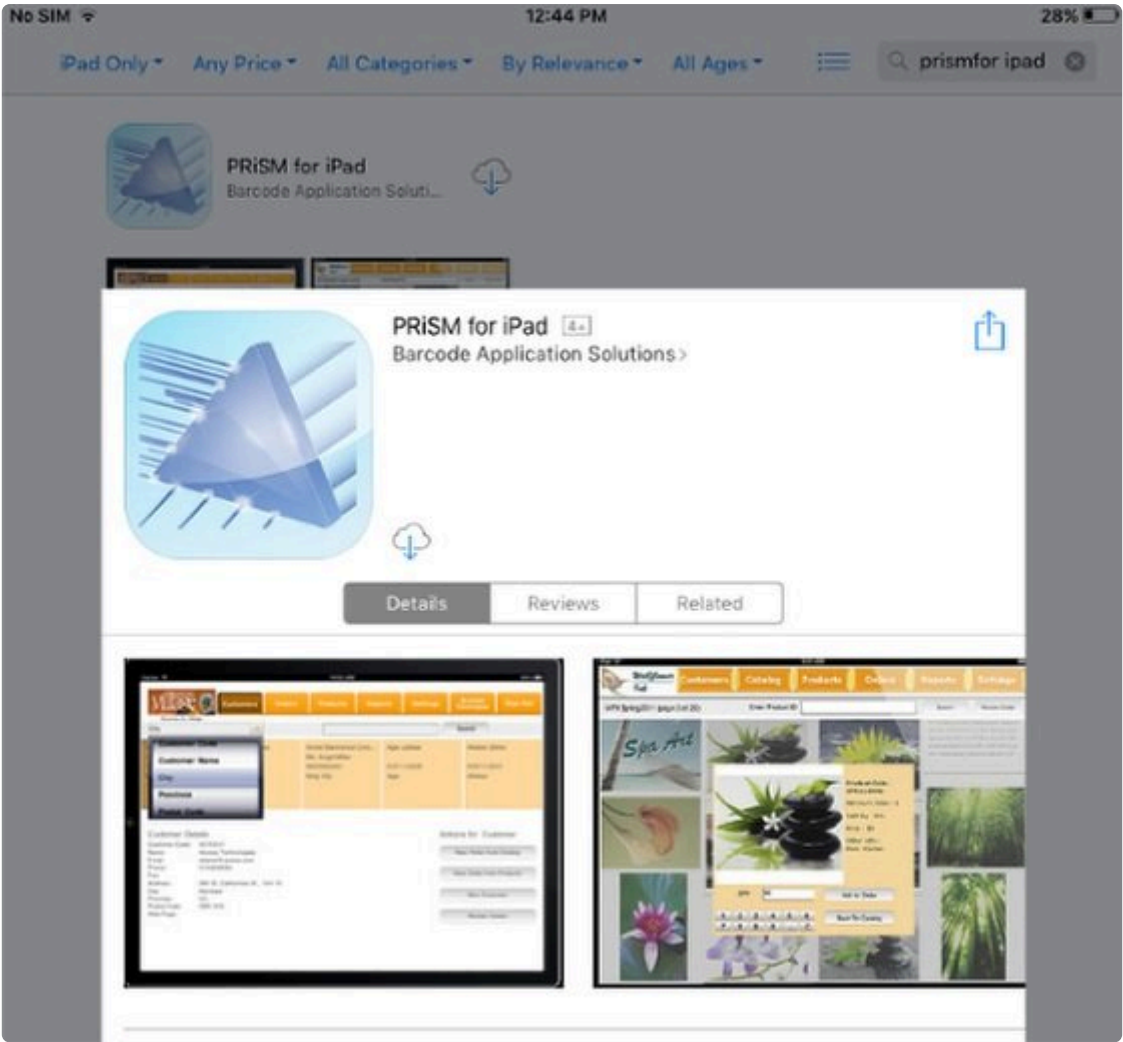
Open Appstore from your IOS device



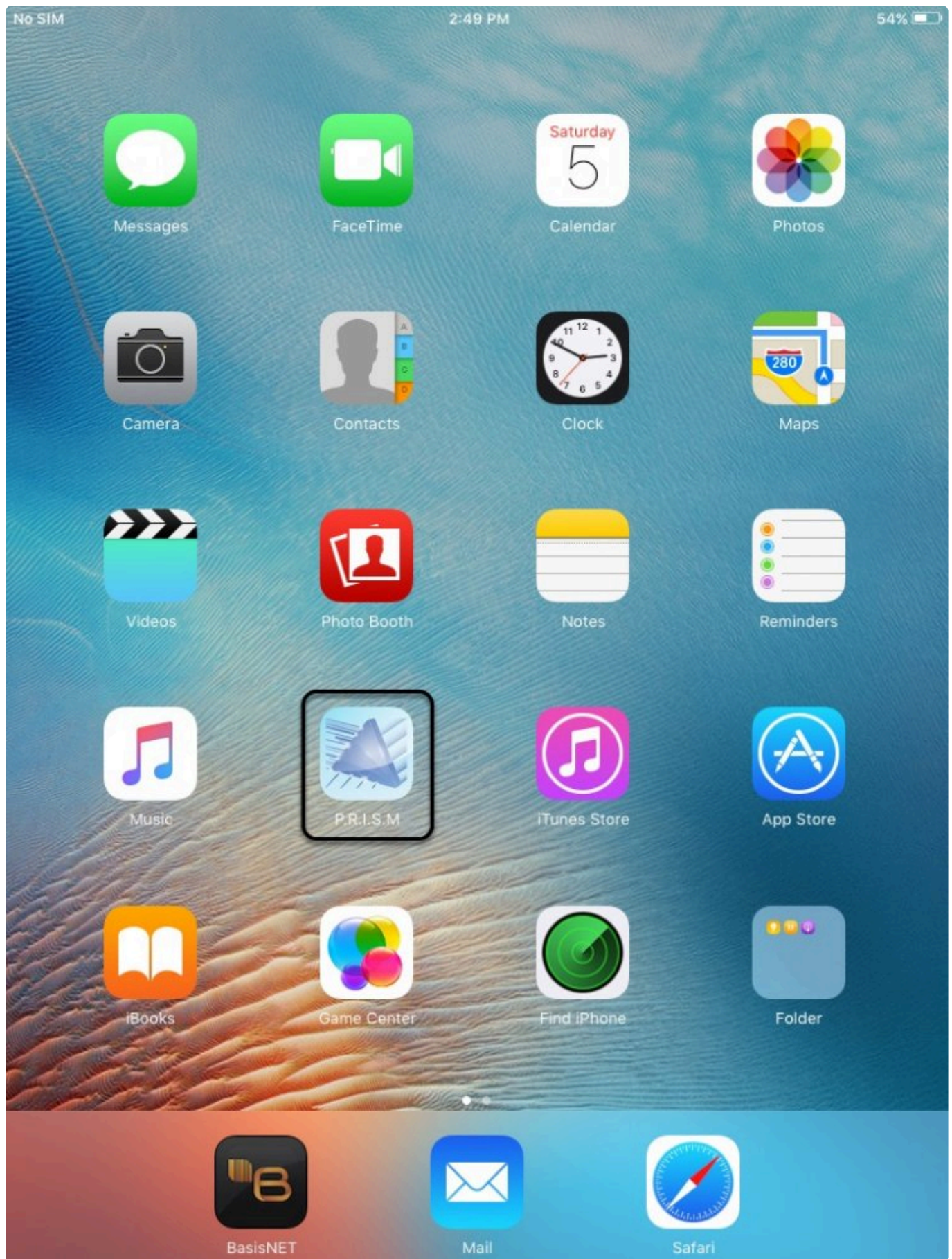
Search "prism for ipad"



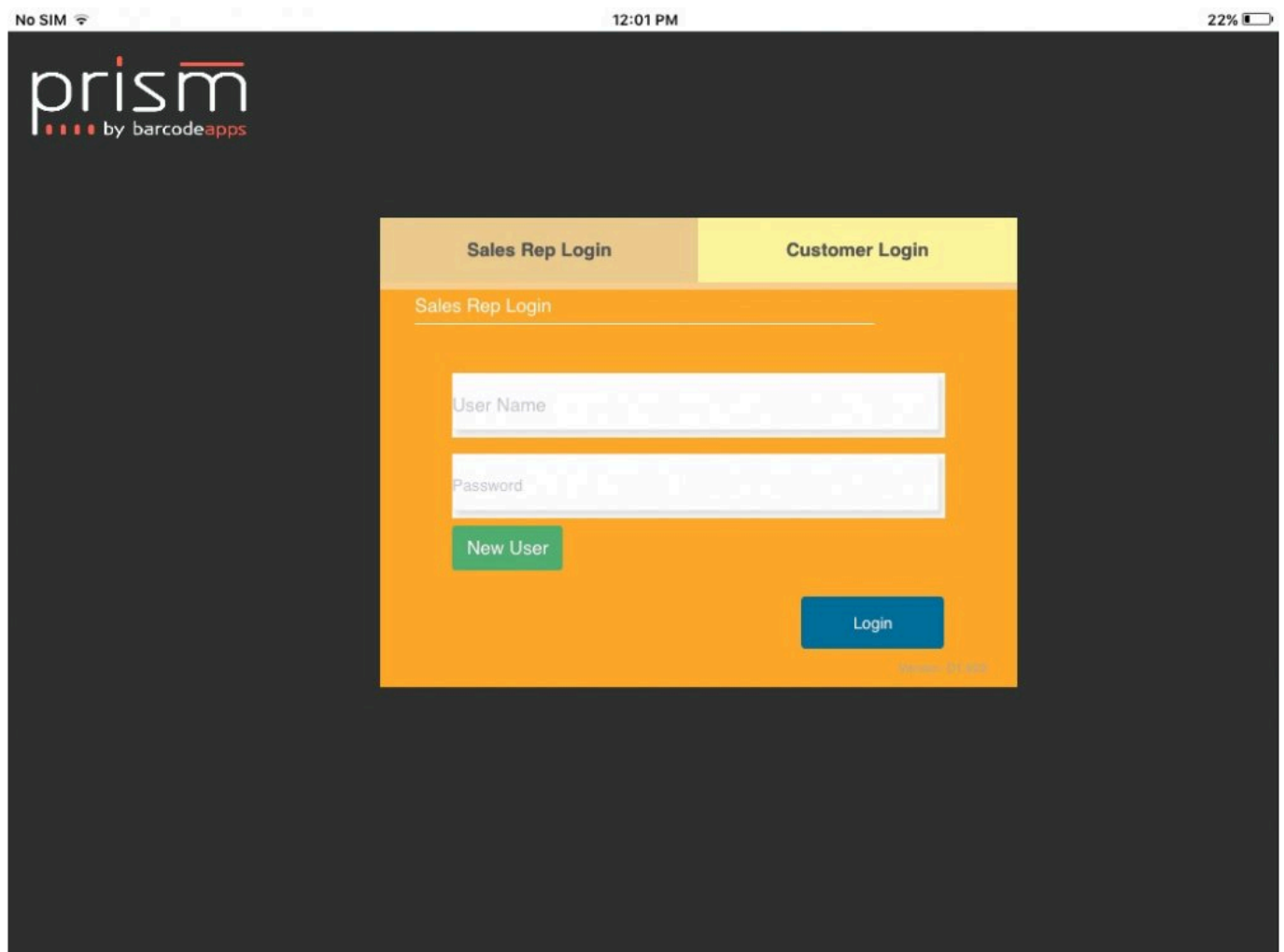
Tap on Install



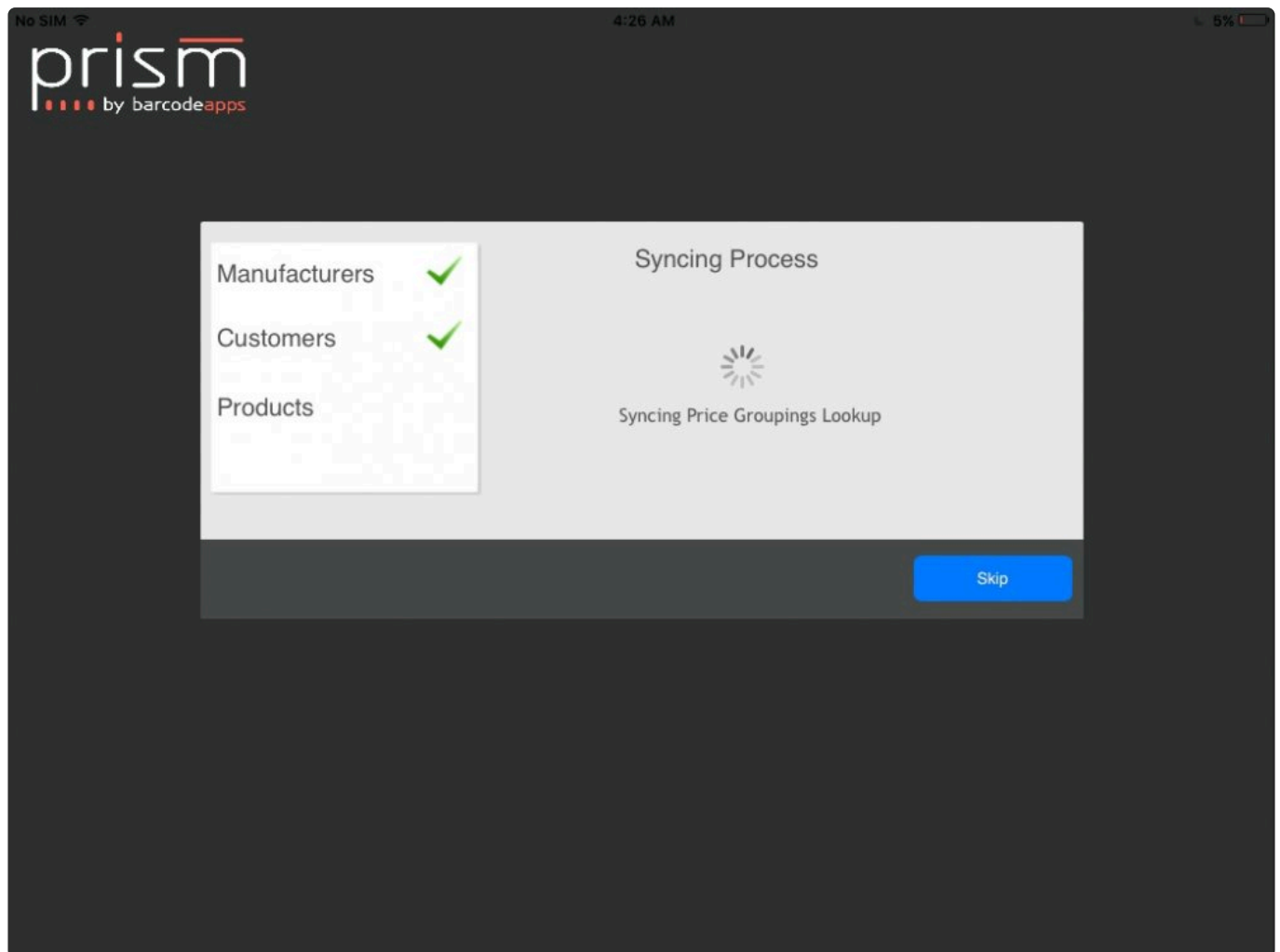
Tap on the PRISM APP



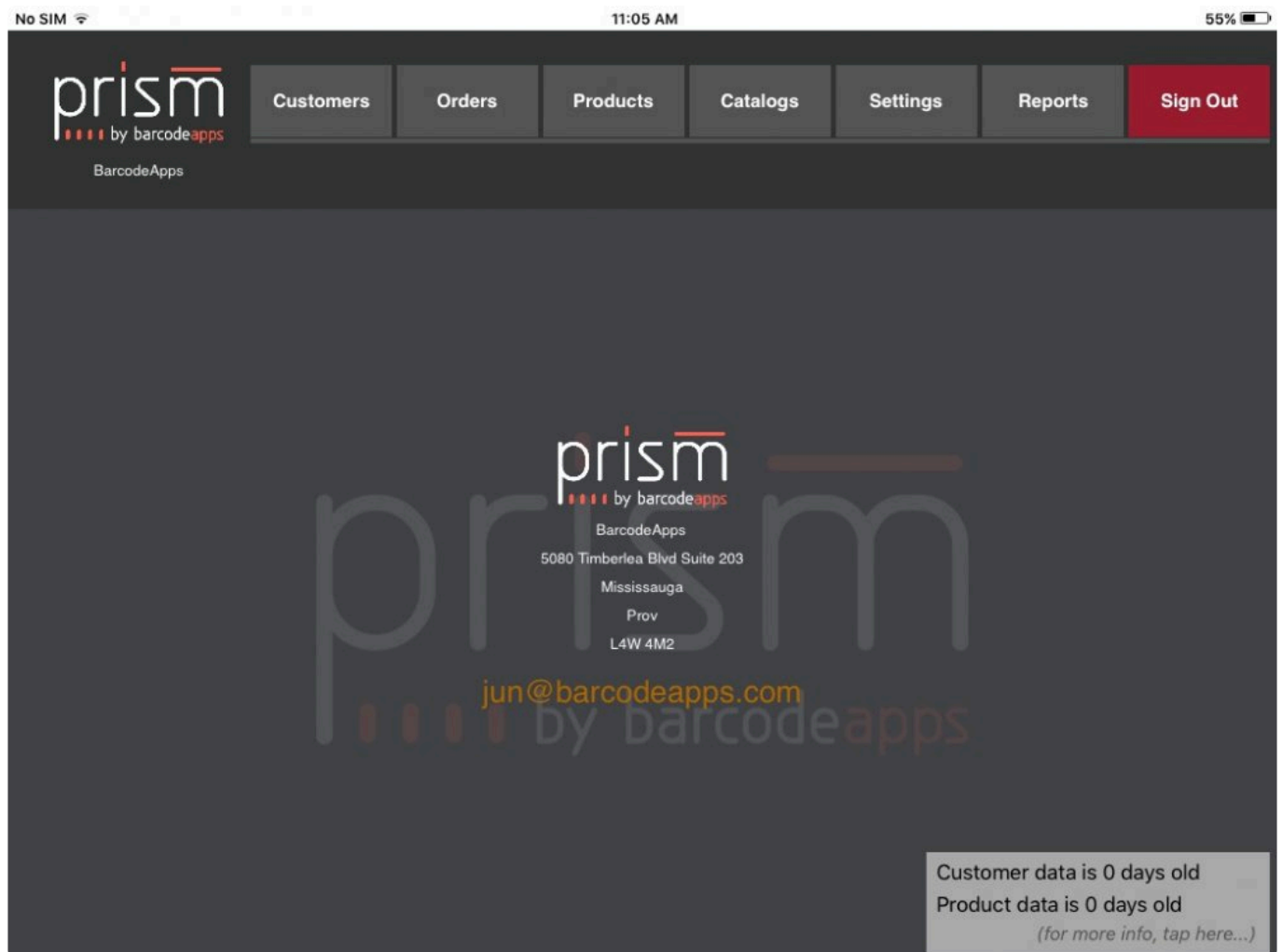
Login to the App using your credentials



Just wait for the sync to finish



The new login screen will display your company information as well as the status of your last synchronization



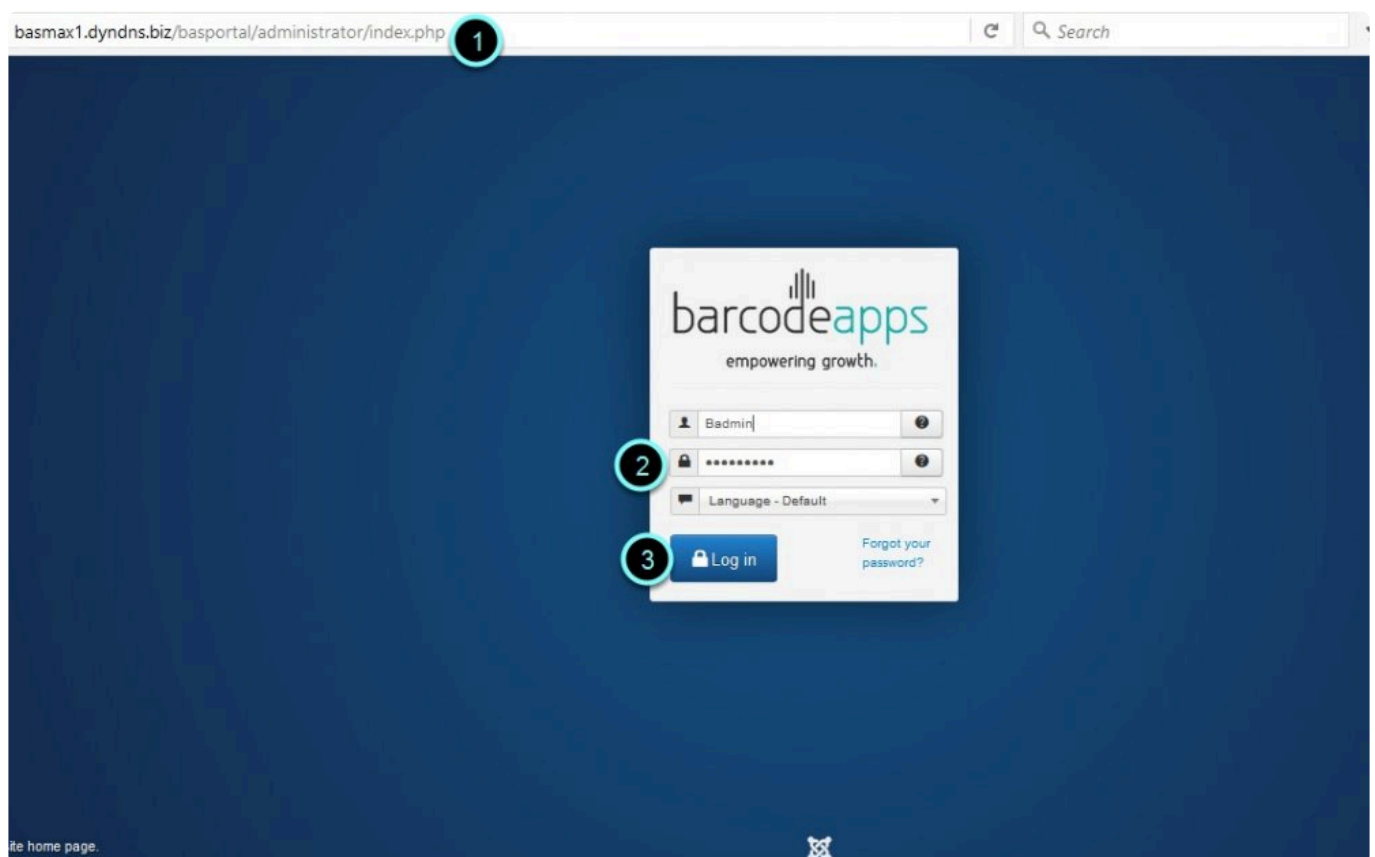
- * Tapping on the line at the bottom will give the statistics about the app and tapping on the company logo located at the top left corner will bring you back to the home page.

2.4.1.2. ii. How To Create A Sales Rep PRISM App Account

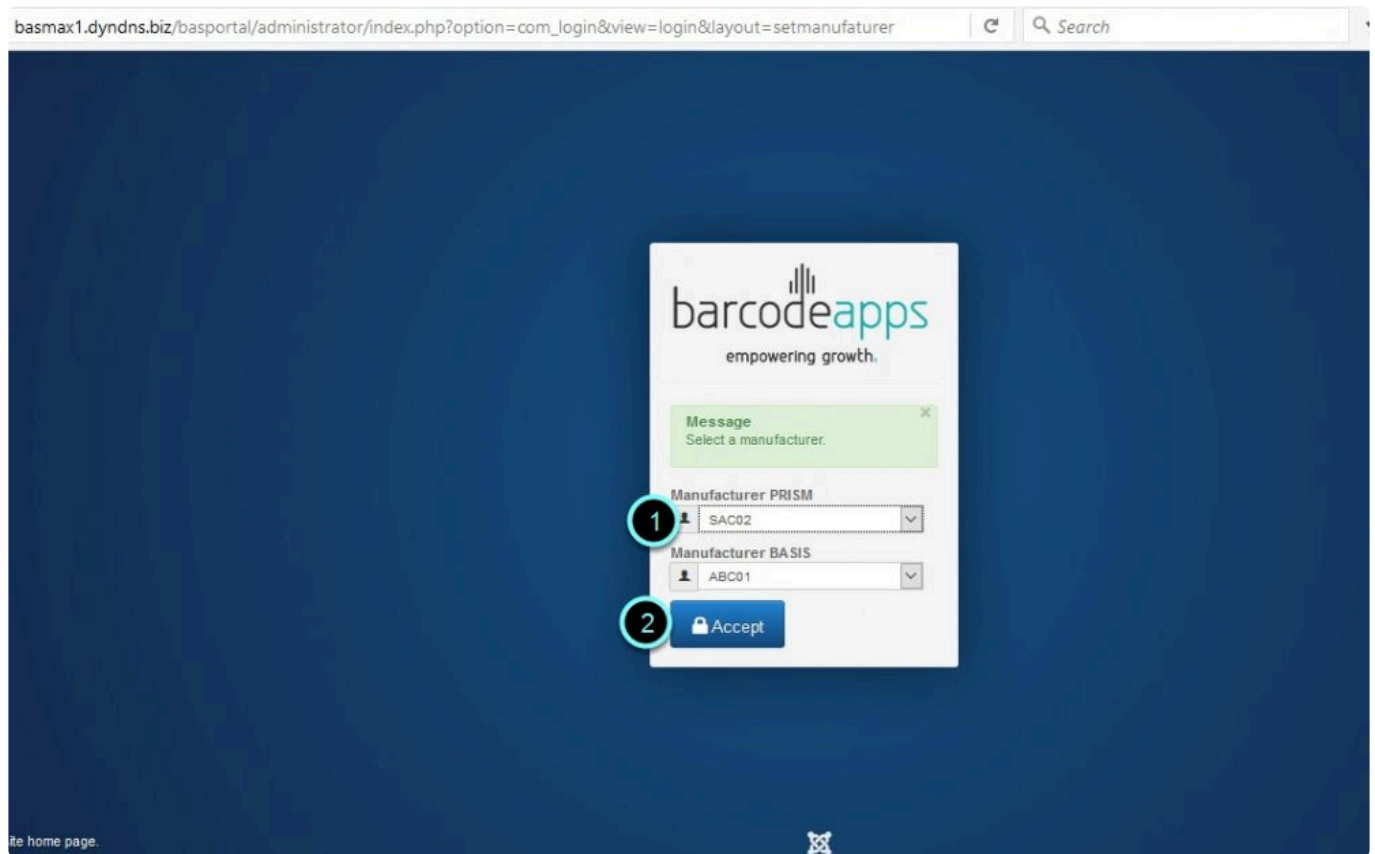
This knowledge base article will guide PRISM Joomla Administrators on how to create PRISM App accounts.

CREATING SALES REP PRISM ACCOUNT

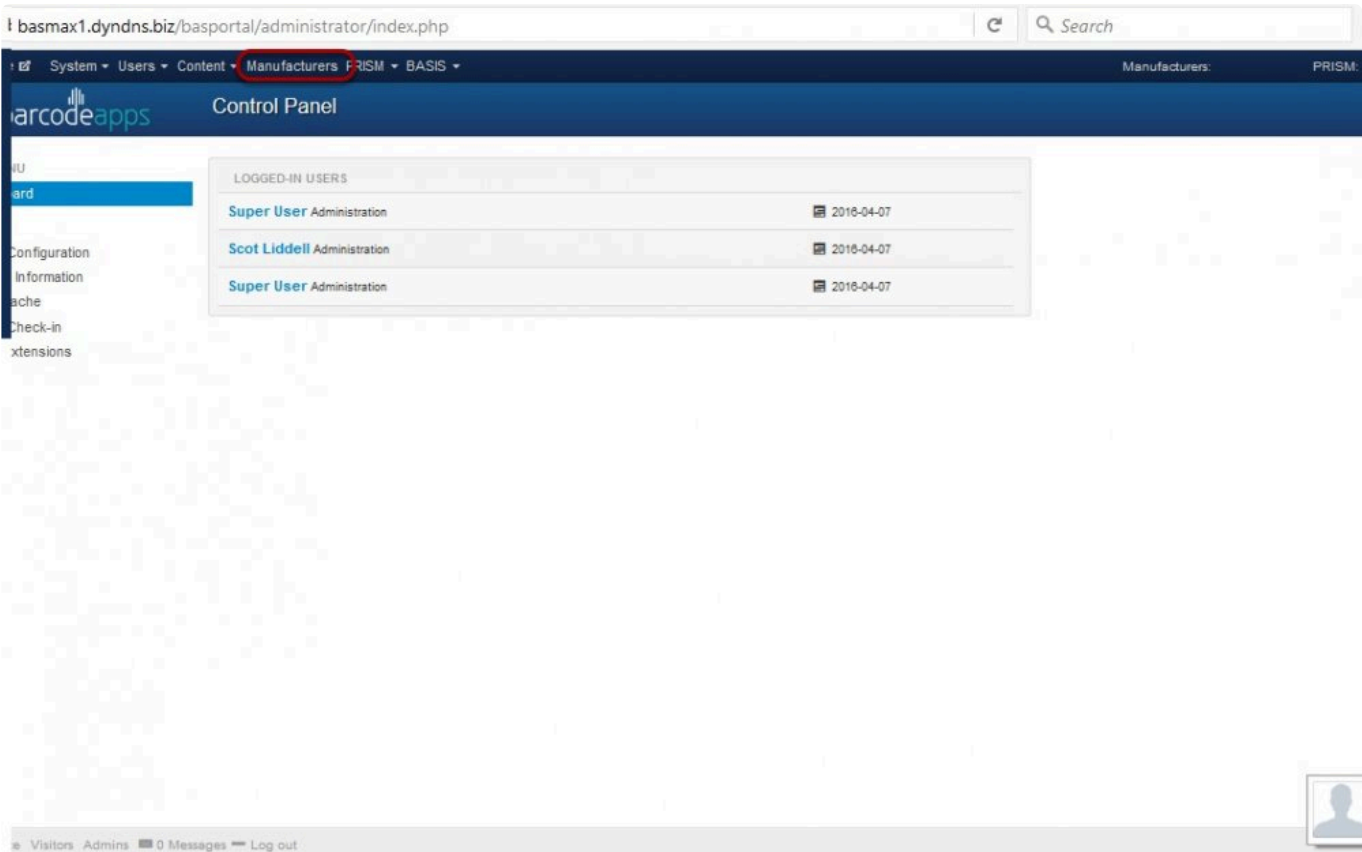
Login to PRISM Admin Portal with your administrator credentials.



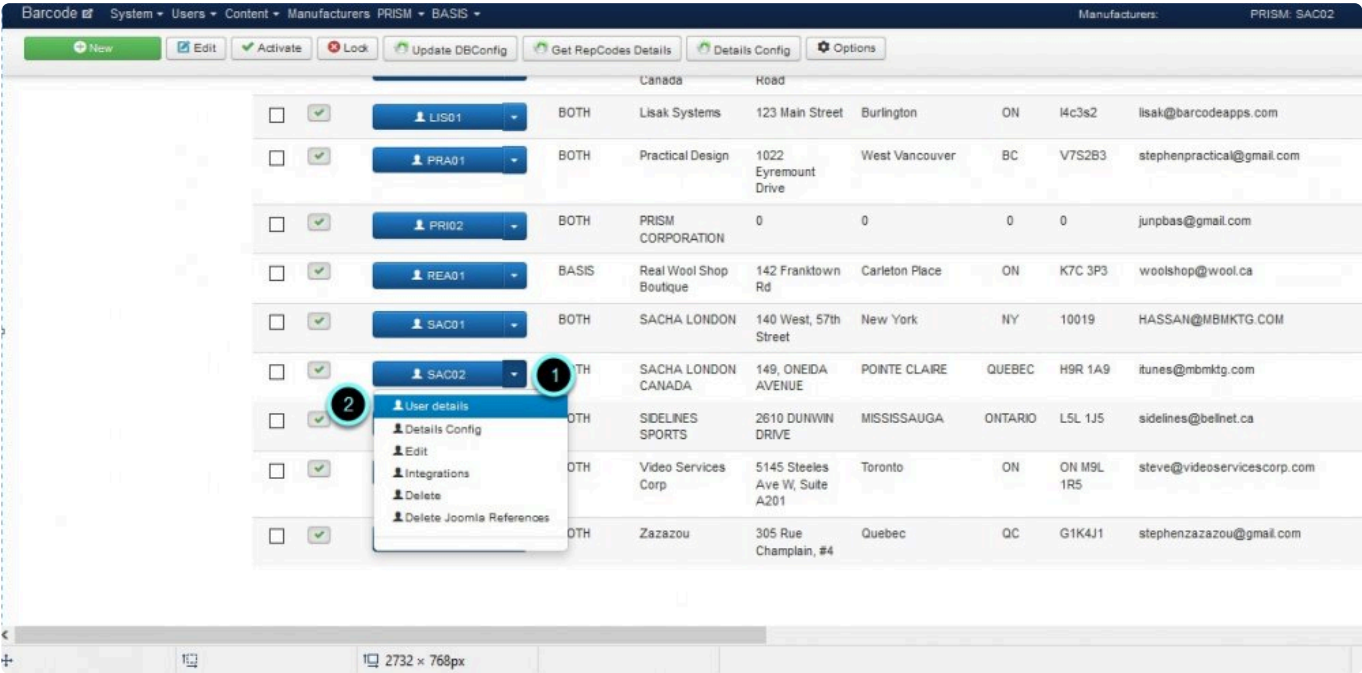
Select your manufacturer code from the Manufacturer PRISM menu and click Accept.



Click Manufacturers menu.



Select your manufacturer code and click on User Details.



Fill out the needed information to create the new account. Then click Save.

BarcodeApps Administrator Interface - Nuevo

Información básica

Repcode * SAC02-001

Paid True

Access Type 1

Username * trisha@barcodeapps.com

Password * *****

Name * welcome1

User Status Select an option

Email * trisha@barcodeapps.com

Session_Id

IpadTime

2 Save & Close Cancel

1

Manufacturers Edición

Manager Manufacturers

Manufacturers / Edición

View Site Visitors Admins 0 Messages Log out

A confirmation message should appear once the new user account has been created.

BarcodeApps System Users Content Manufacturers PRISM BASIS

barcodeapps Manufacturers (24)

New Edit Delete Cancel

Message
Manufacturer details save Succesfull

Filter: State

Buscar...

1 2

Username Pass

2.4.1.3. iii. Pairing With A Bluetooth Scanner

This knowledge base article will guide users to pair a Bluetooth scanner on the iPad device.

BP101 BLUETOOTH SCANNER

Before getting started, the standard Bluetooth scanner that we recommend is the BP101 scanner which is tested and compatible to work with the PRISM App.



To Pair the socket BP101 Bluetooth scanner. we have to make sure that the scanner is not paired to any device.



DE PAIRING SCANNER

Scan the Restore defaults barcode and UART 9600 barcode to depair the device.



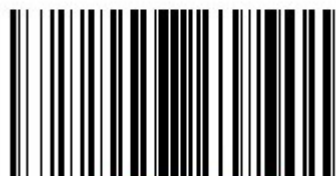
RESTORE DEFAULTS



UART 9600

PAIRING SCANNER

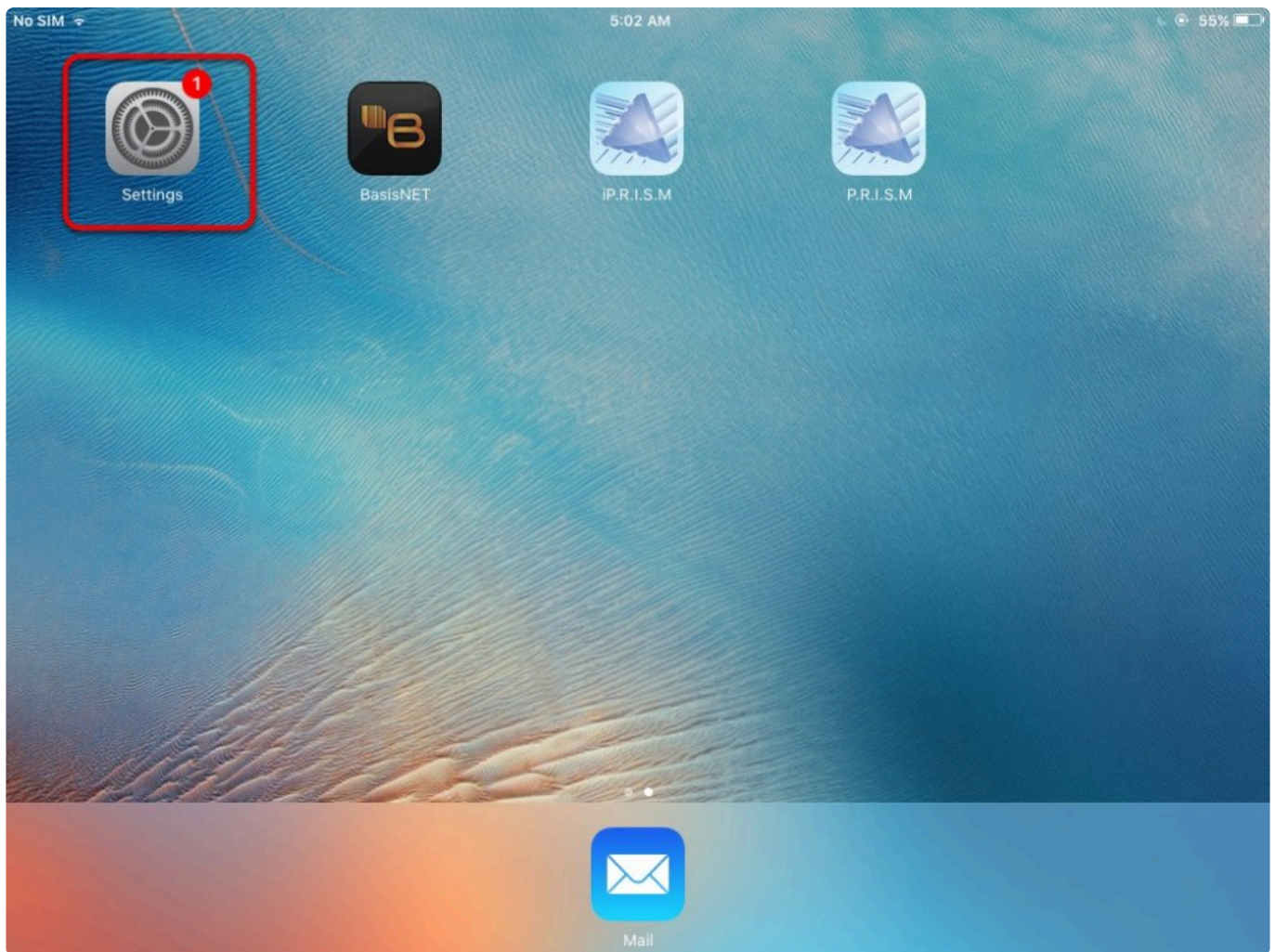
Now the scanner is depaired.



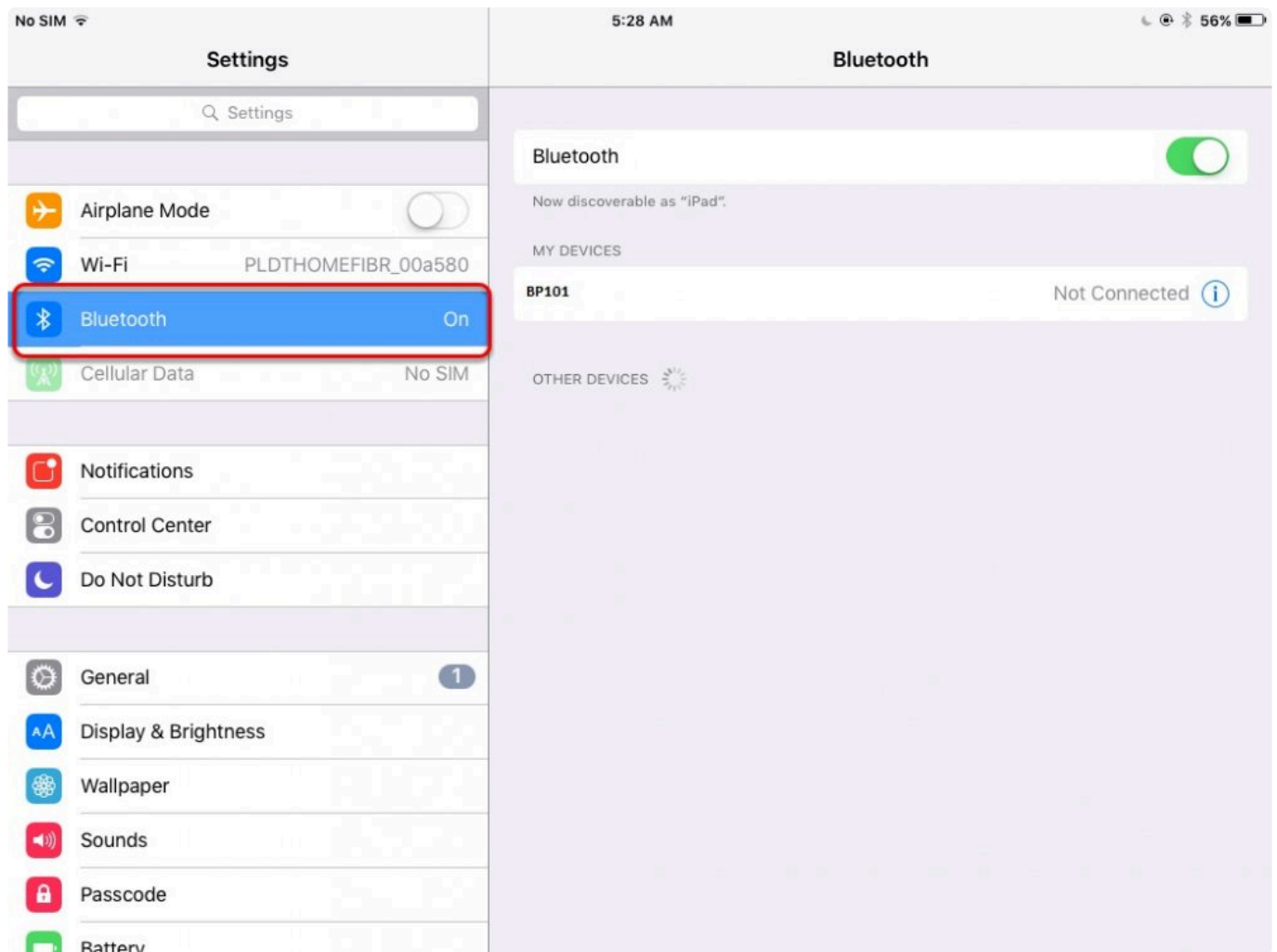
PAIR

- Press the trigger to start the scanner, If the red light is flashing the scanner is in search mode.
- If not scan the barcode below (called Pair) or hold the trigger for 8 seconds to enter pairing mode.

Go to the iPad settings window.



Tap on Bluetooth and then wait for the iPad to detect the scanner.

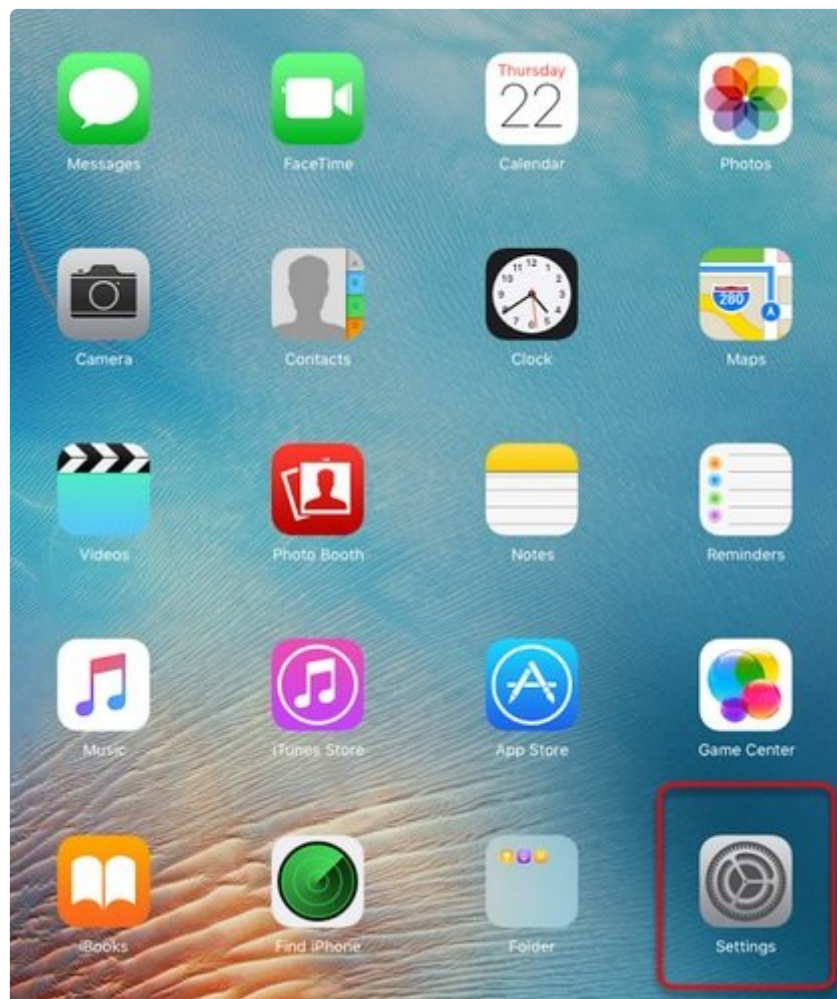


Once you have the scanner detected, tap on the scanner and wait for the status to say connected. on the scanner you will hear a double beep and the red light will go off and be replaced by a blue light.

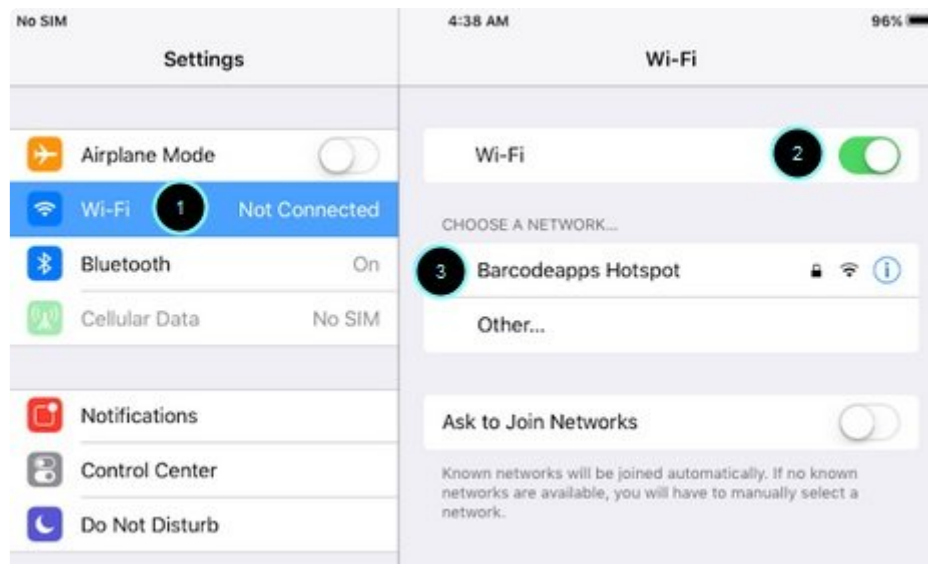
2.4.1.4. iv. Connecting to a Wi-Fi Network

This knowledge base will guide users on how to connect to a WiFi network using an iPad

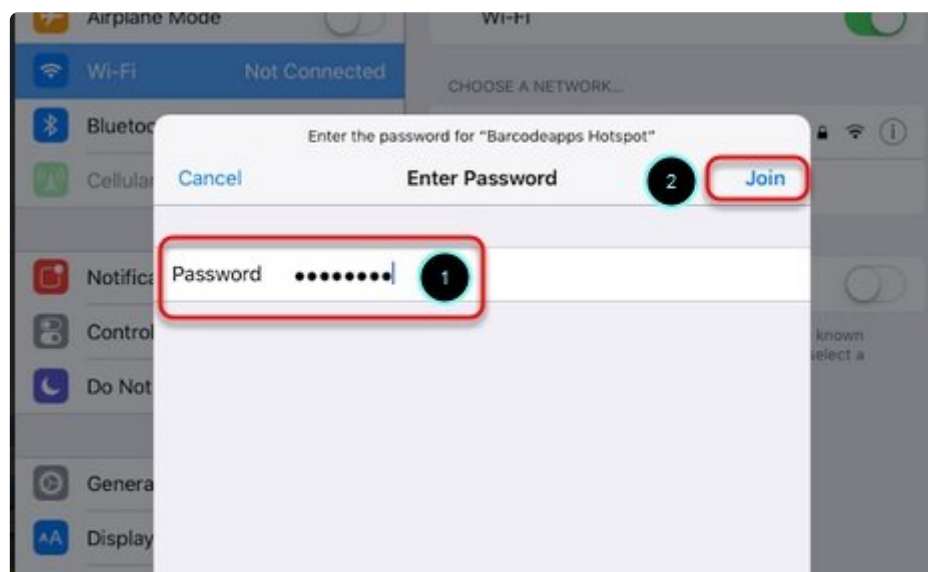
To connect to a hot spot. Tap on the settings option.



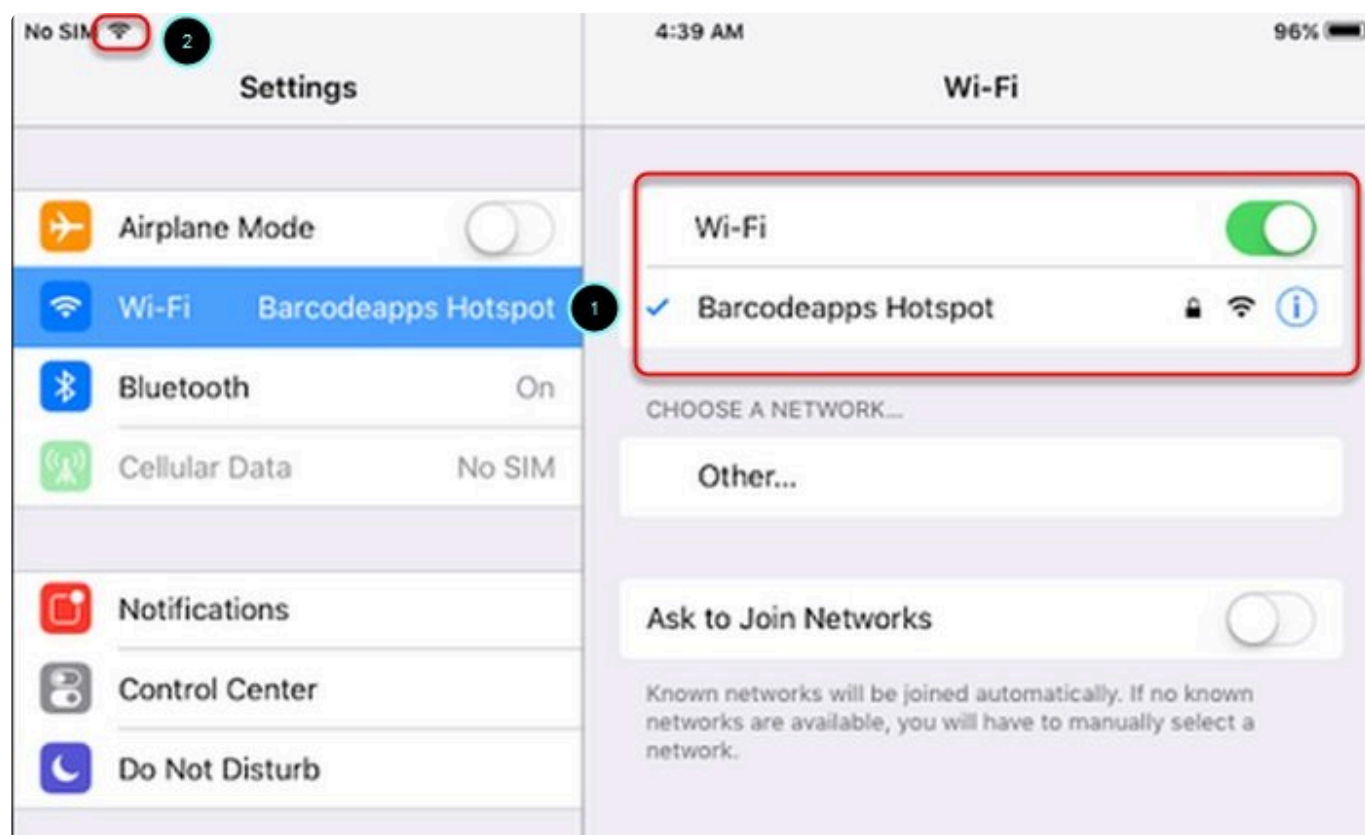
Tap on WI-Fi, Make sure that it is enabled, and then tap on the WI-Fi connection.



Enter the Password and then Tap on Join.



Once successfully connected. The wifi connection status icon will appear on the top left of the screen indicating that you are now connected to the wireless network.

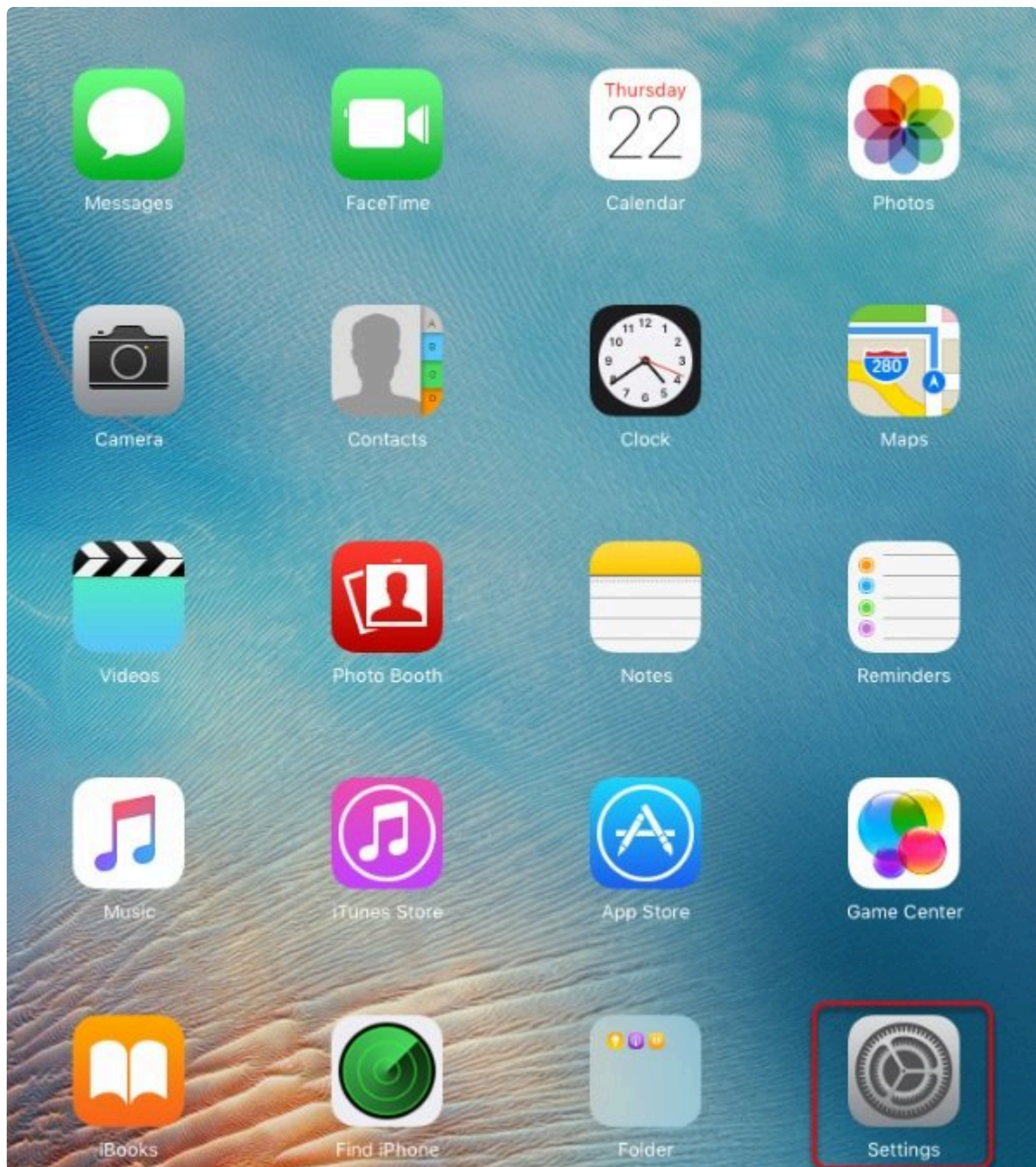


2.4.1.5. v. Email account set up

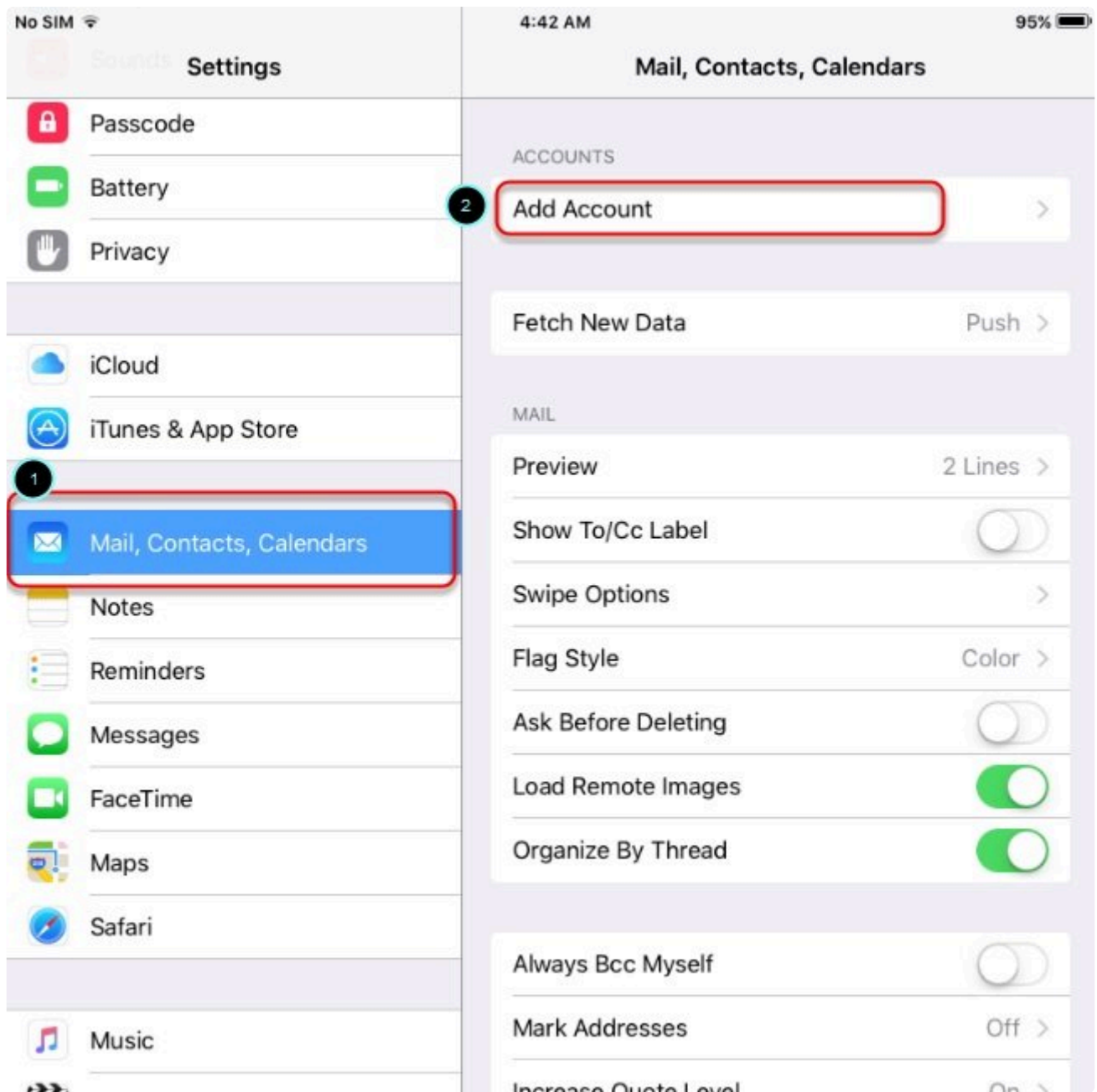
This knowledge base article will guide users on how to set up an email account on an iOS device.

An active email account is mandatory on the iOS device so that we can use the full feature of PRISM (Email quotes, Email confirmation, Support Email, etc..)

To set up an email account, tap on settings.



Under settings. Tap on Mail, Contacts, calendars and then tap on Add Account.

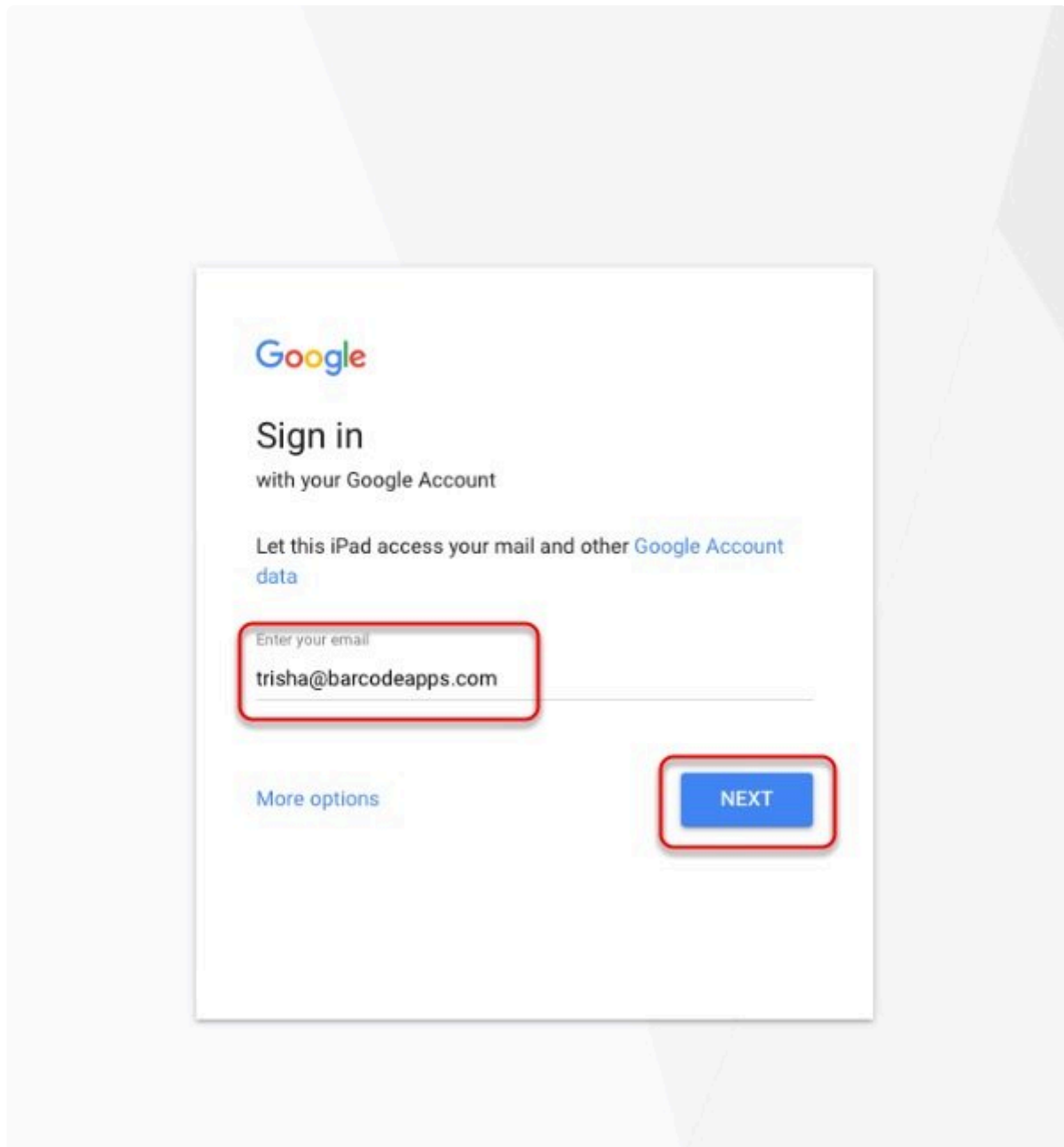


Tap the type of email account that you are using.

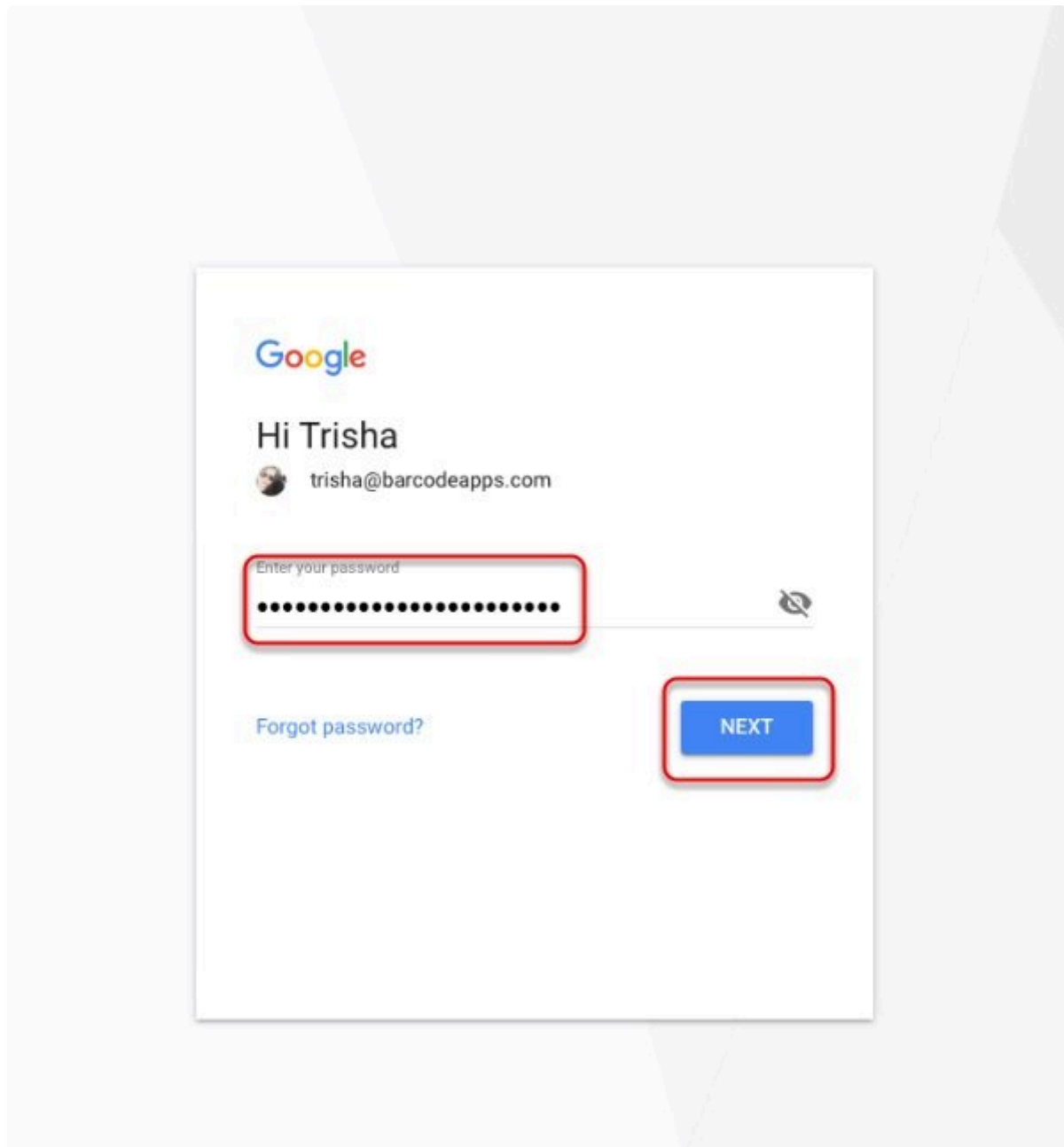


* In our example we will set up a GMAIL account

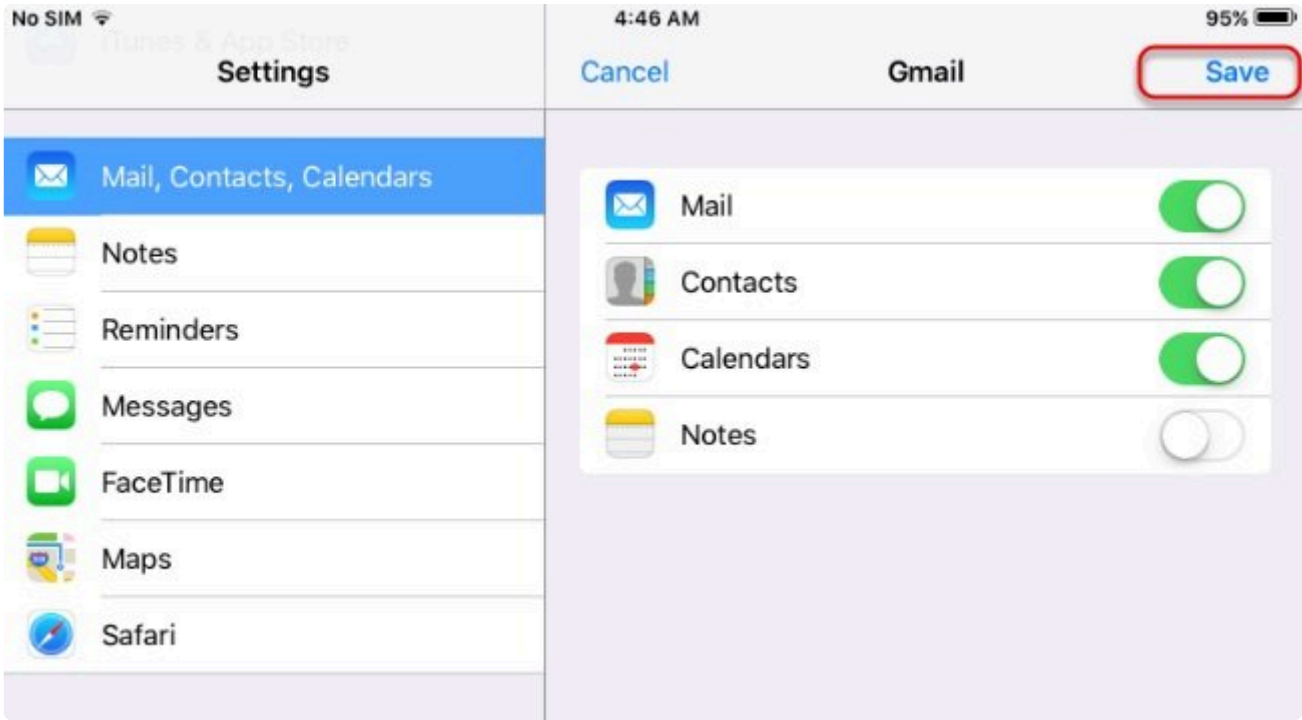
Type in the email address and then tap on next



Type in the password and then tap on next .



On the last page just tap on Save to finish the set up.



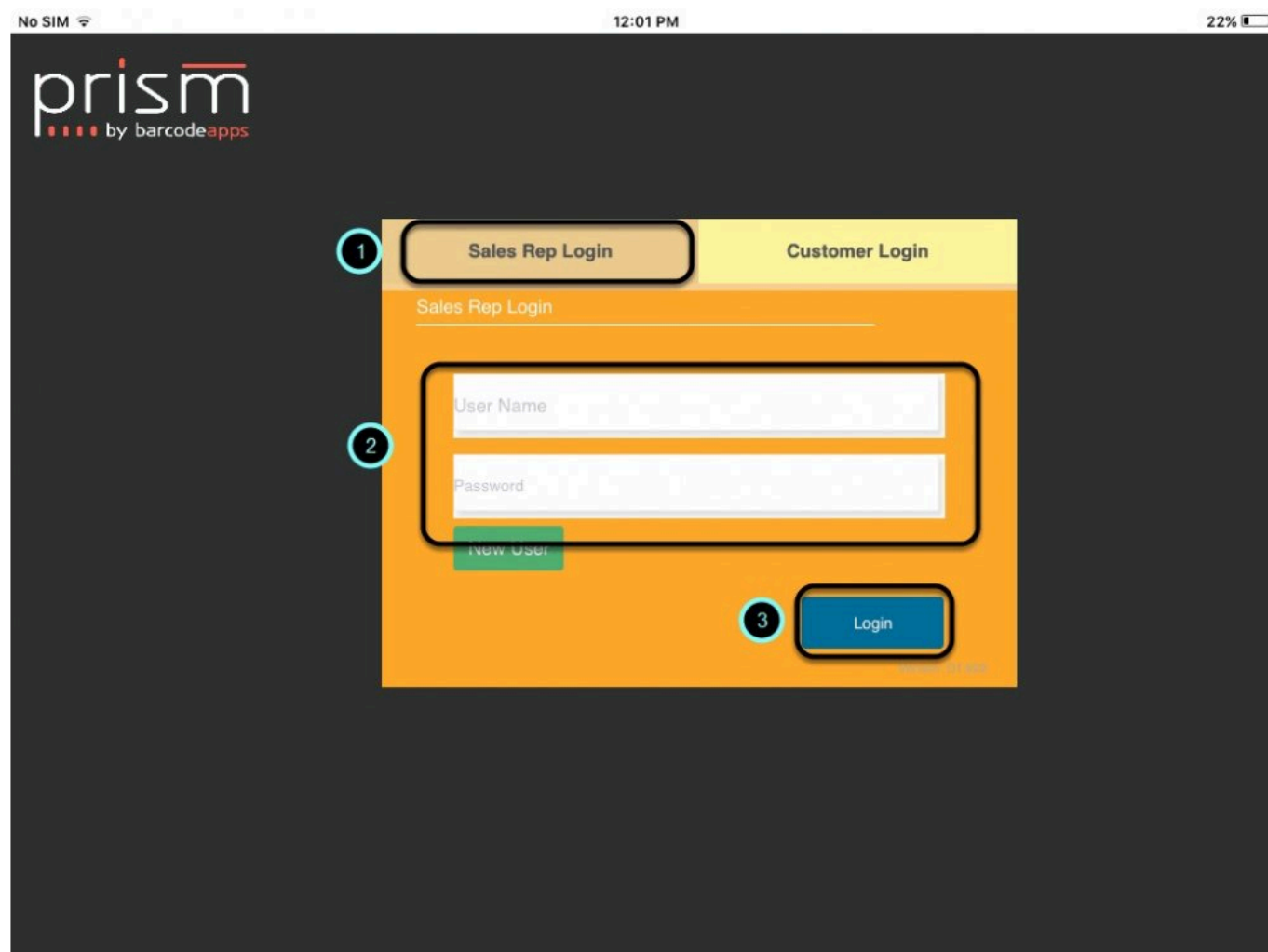
2.4.2. B. How To Login To PRISM App

2.4.2.1. i. For Salespeople

This knowledge base will guide users to login on the PRISM App.

For Sales People

To login as a Sales People in PRISM. On the PRISM Login page. Tap Sales Rep Login , Type in your username and password and then tap on Login.



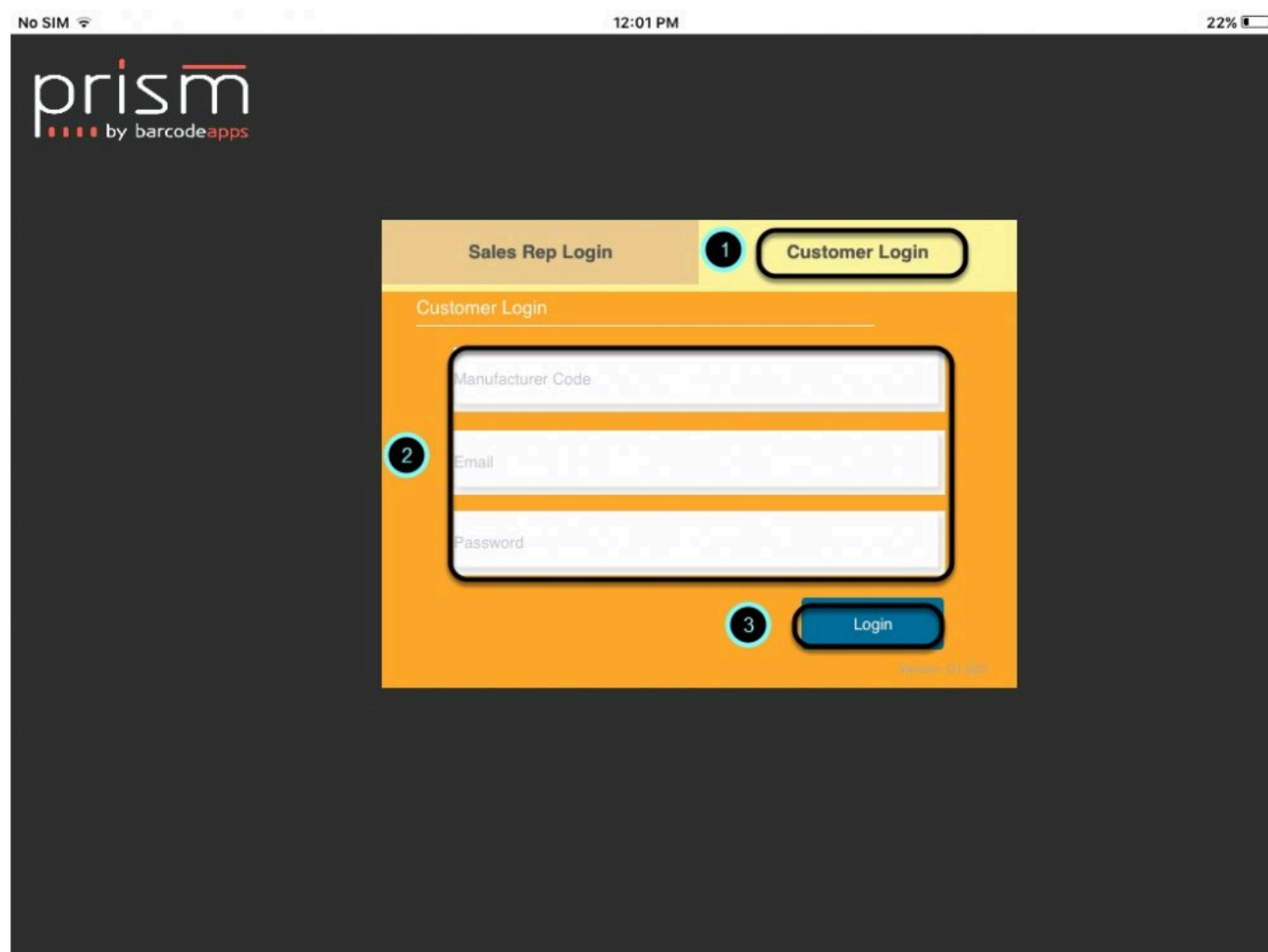
BarcodeApps © 2016

2.4.2.2. ii. For Customer

This knowledge base will guide users to login on the PRISM App.

For Customer

To login as a Customer in PRISM. On the PRISM Login page. Tap Customer Login , Type in the Manufacturer code ,Type in your username and password and then tap on Login.



2.4.3. C. How To Create An Order

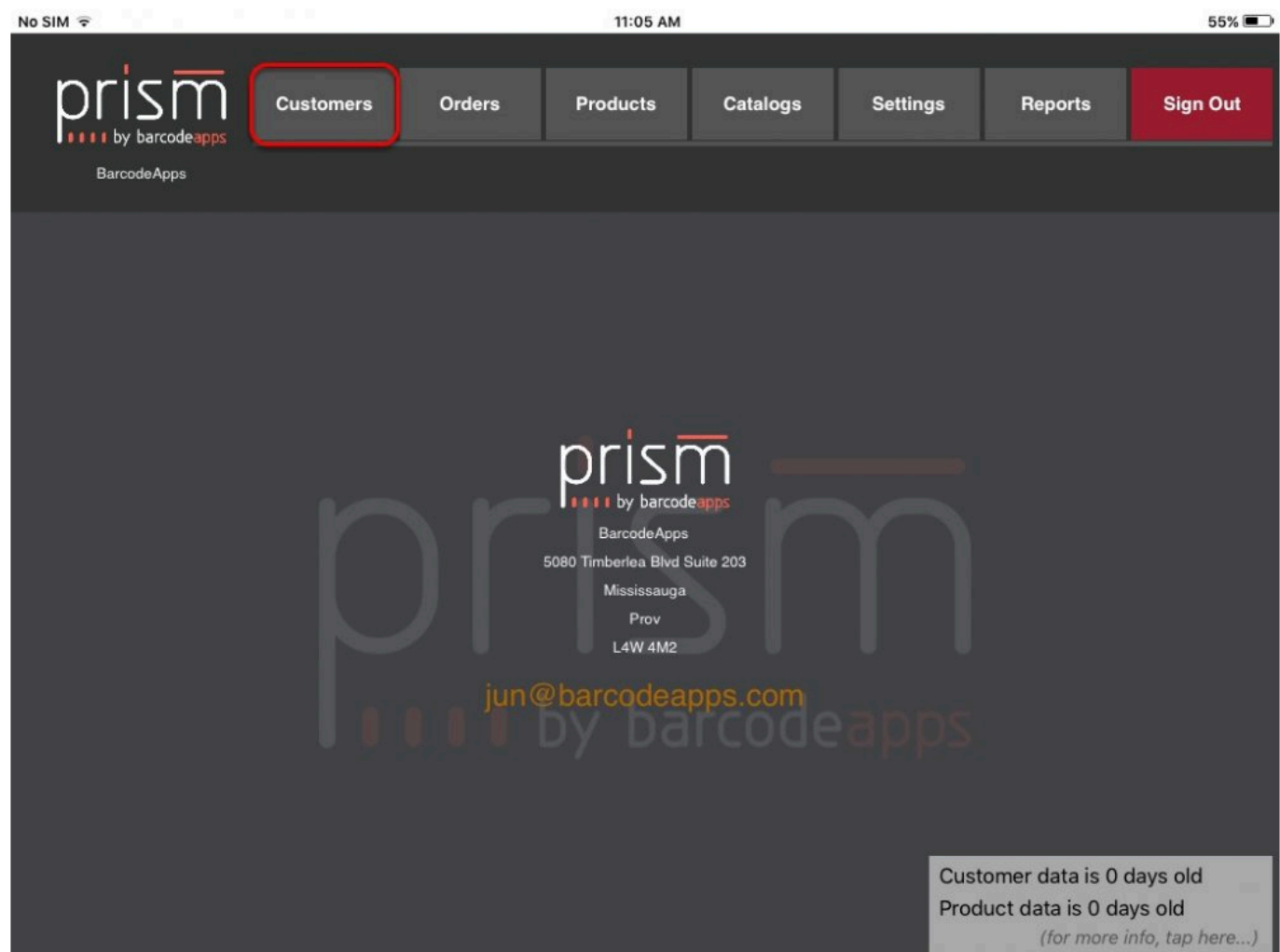
Order Management Using the PRISM App iOS

2.4.3.1. i. How To Add A New Customer

This knowledge base article will guide users on how to create a new customer when creating an order.

ADDING A NEW CUSTOMER

To add a customer tap on the Customers tab.



Tap on New Customer button.

No SIM8:25 AM69%

prismby barcodeappsBarcodeApps

CustomersOrdersProductsCatalogsSettingsReportsSign Out

Total Customers: 34Full Customer search resultsEnableDisable

Access Technologies	Ace Electronics	Acme Electronics Corp.	British Columbia Audio	Canadian Speakers Limited
Linda Adams	Allen Durk	Ms. Angel Miller	Mr. Doug Harris	Mrs. Lisa Oulette
514364808	416498238	905595334	604685121	416656330
Montreal	Toronto	King City	Vancouver	Scarborough

Customer Details

Customer Code:	BCAUDI
Name:	British Columbia Audio
Contact Name:	Mr. Doug Harris
Email:	dharris@bcaudio.com
Phone:	604685121
Fax:	
Address:	1433 West Georgia Street
City:	Vancouver
Province:	BC
Postal Code:	V6G 1X5
Web Page:	
Rep Code:	
Payment Terms:	Net 30 days
Customer Notes:	

Actions for Customer

New Order

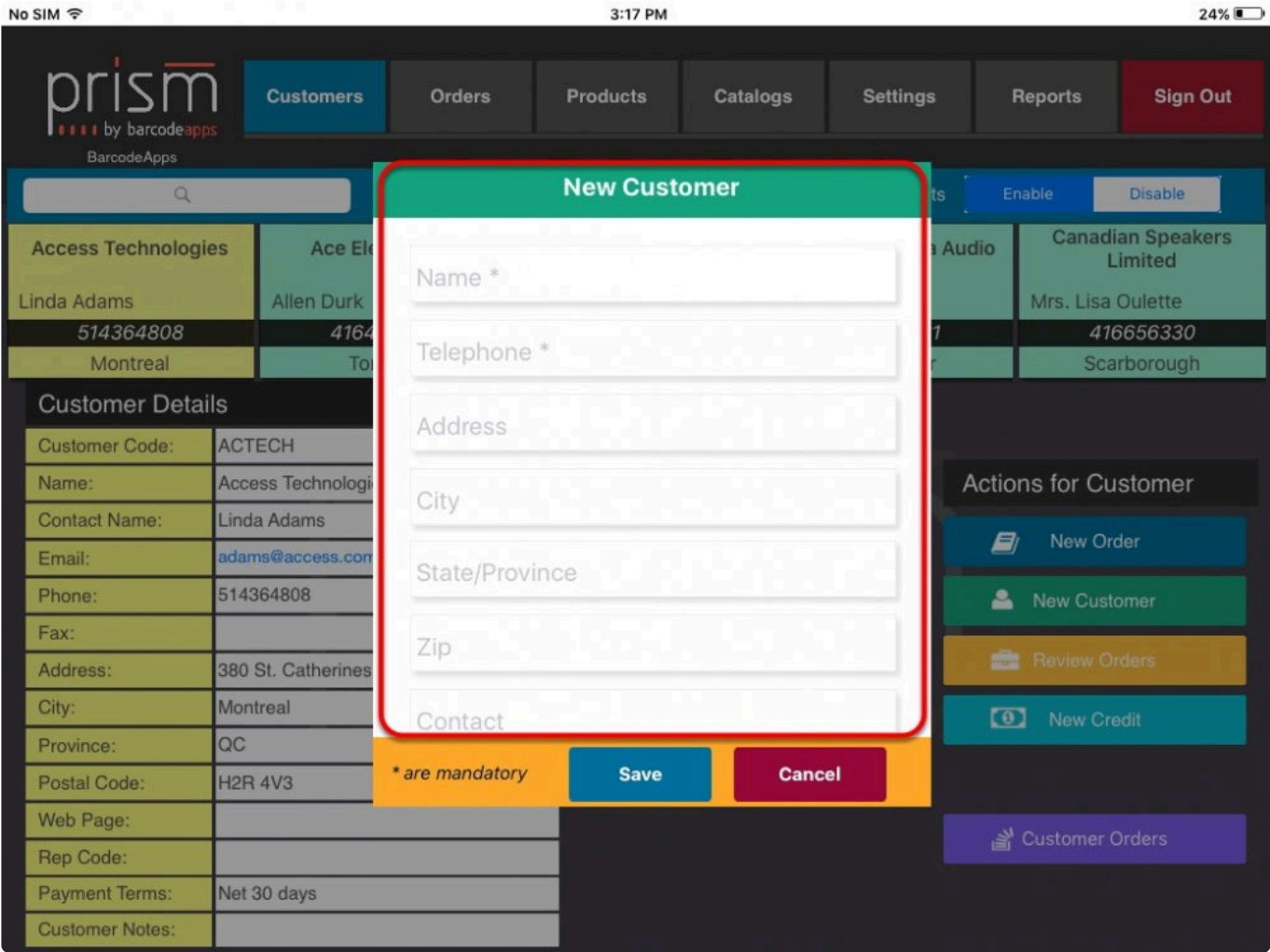
New Customer

Review Orders

New Credit

Customer Orders

Fill out the information needed.



Click on Save when done.

No SIM3:28 PM22%

prismby barcodeappsBarcodeApps

CustomersOrdersProductsCatalogsSettingsReportsSign Out

Access Technologies

Linda Adams

514364808

Montreal

Ace Electronics

Allen Durkin

4164

Toronto

Customer Details

Customer Code:	ACTECH
Name:	Access Technologies
Contact Name:	Linda Adams
Email:	adams@access.com
Phone:	514364808
Fax:	
Address:	380 St. Catherine's
City:	Montreal
Province:	QC
Postal Code:	H2R 4V3
Web Page:	
Rep Code:	
Payment Terms:	Net 30 days
Customer Notes:	

New Customer

Mau Telecoms

8009541234

canada

Canada

State/Province

1654

Contact

* are mandatory

Save

Cancel

EnableDisable

Audio

Canadian Speakers Limited

Mrs. Lisa Oulette

416656330

Scarborough

Actions for Customer

New Order

New Customer

Review Orders

New Credit

Customer Orders

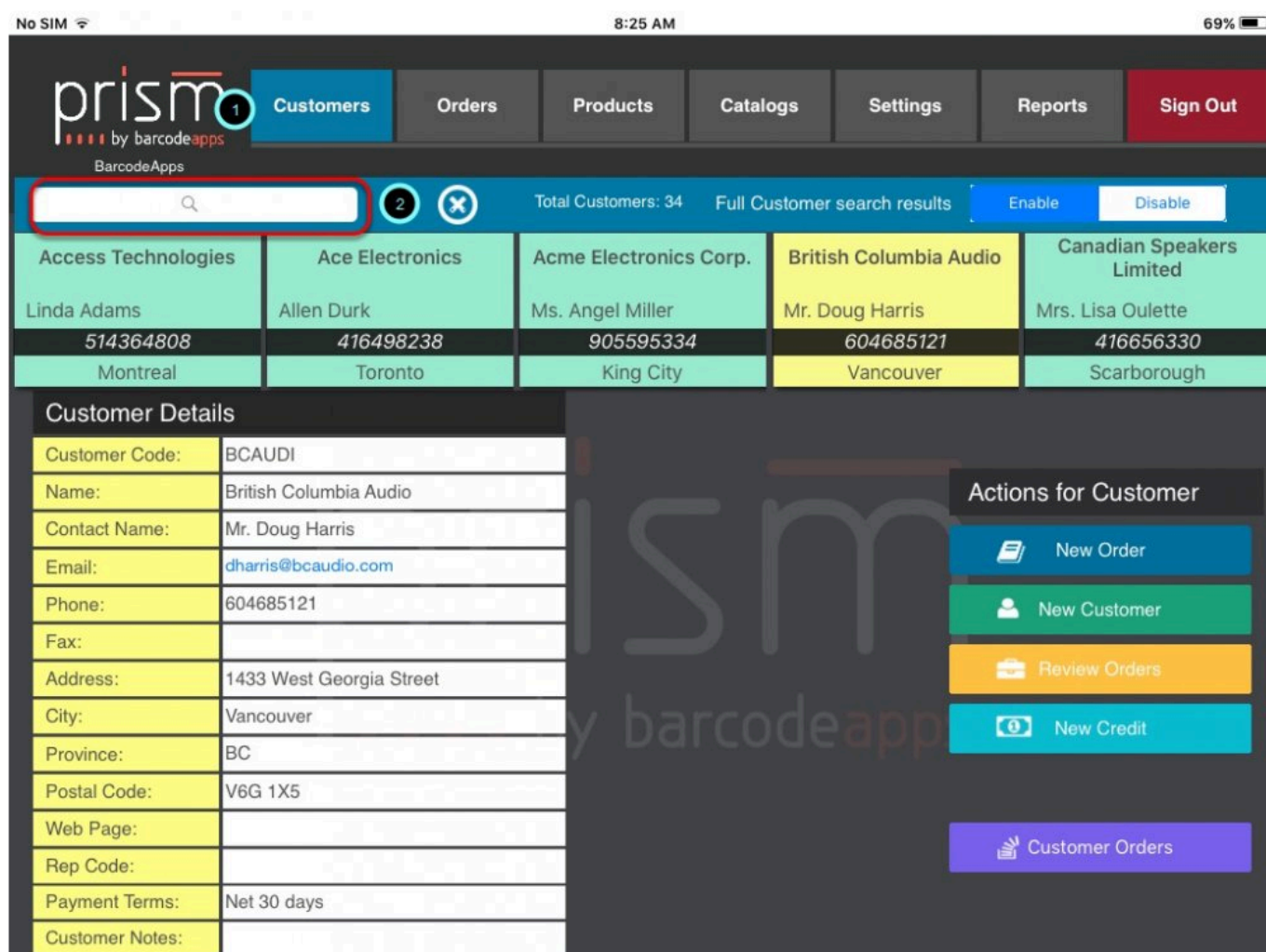
! Note: New Customers created in the PRISM App MUST be coordinated with the accounting package user so that they can manually create the customer inside the program and they can import the data to PRISM to build a two way sync between the programs.

2.4.3.2. ii. How To Search An Existing Customer

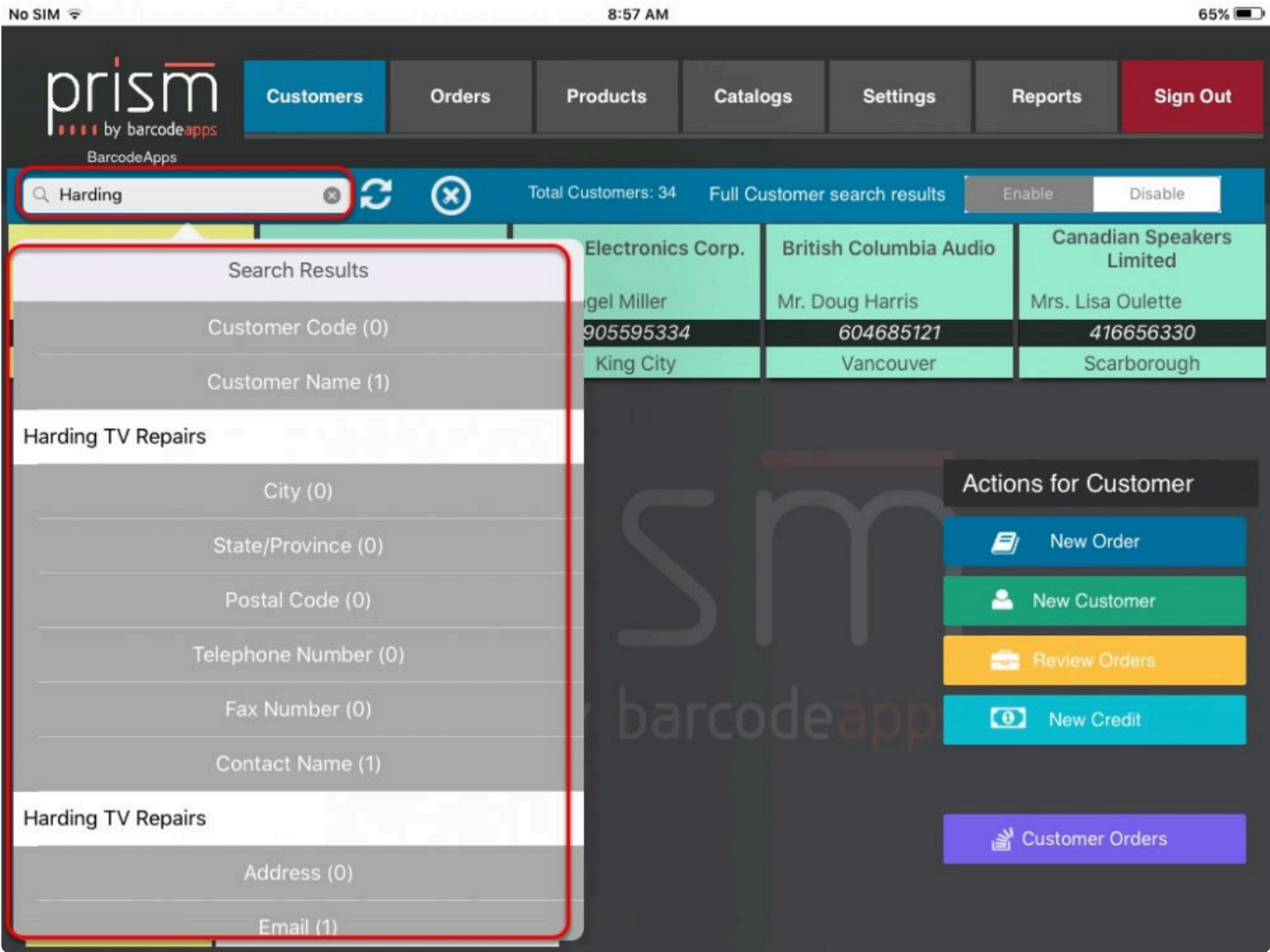
This knowledge base article will show users on how to search for a customer using the PRISM App iOS.

SEARCHING A CUSTOMER

Tap on the Customers tab and use the search field located on the top left corner of the screen.



Once you tap on the search field your keyboard should pop up. Type in the search criteria then tap on the Search button.



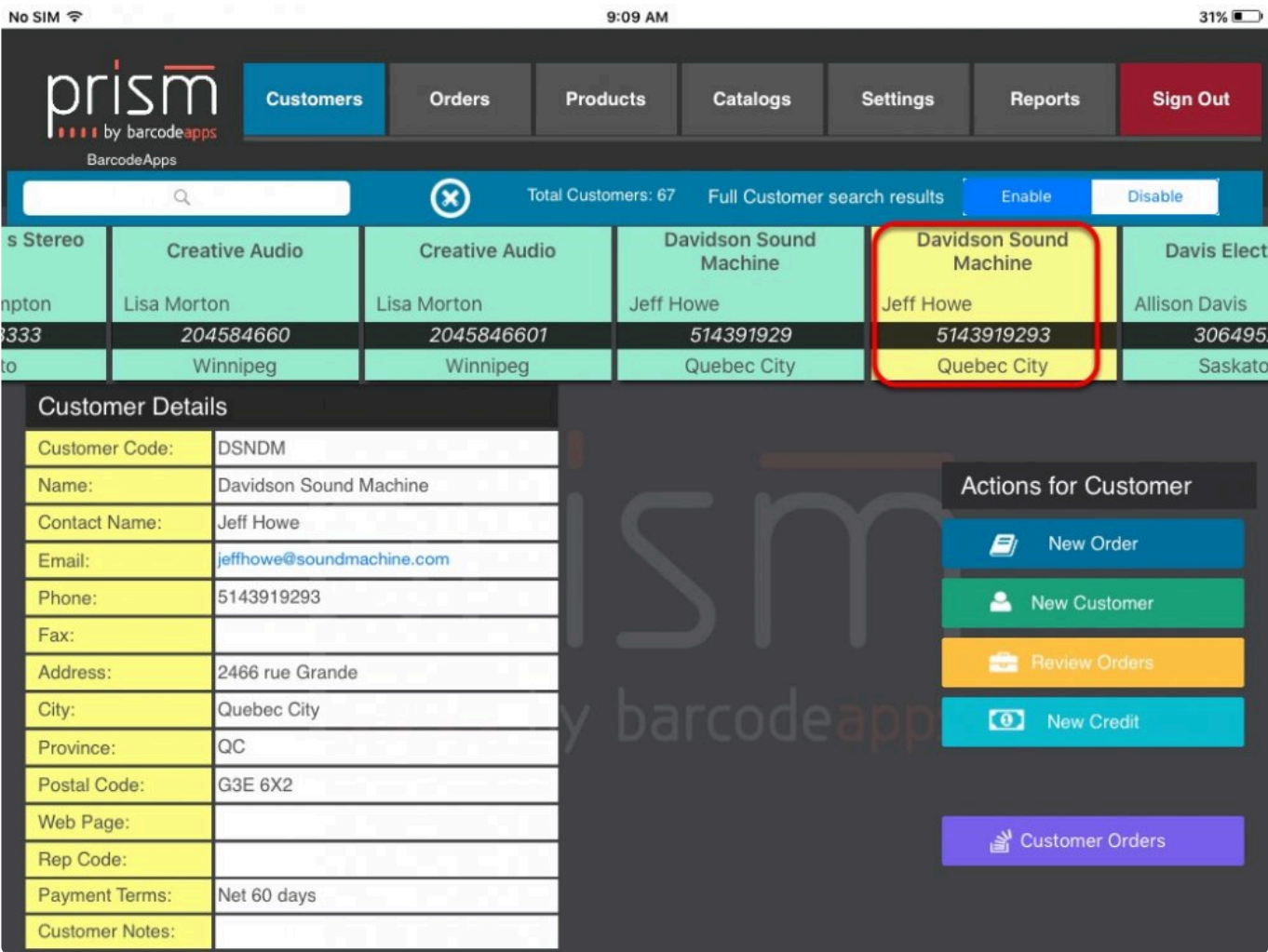
Search Criteria:Customer Name,Customer Code, Contact Name, Email Address, Address, City, Phone number, Fax Number, Postal Code.

2.4.3.3. iii. Adding An Item From Products

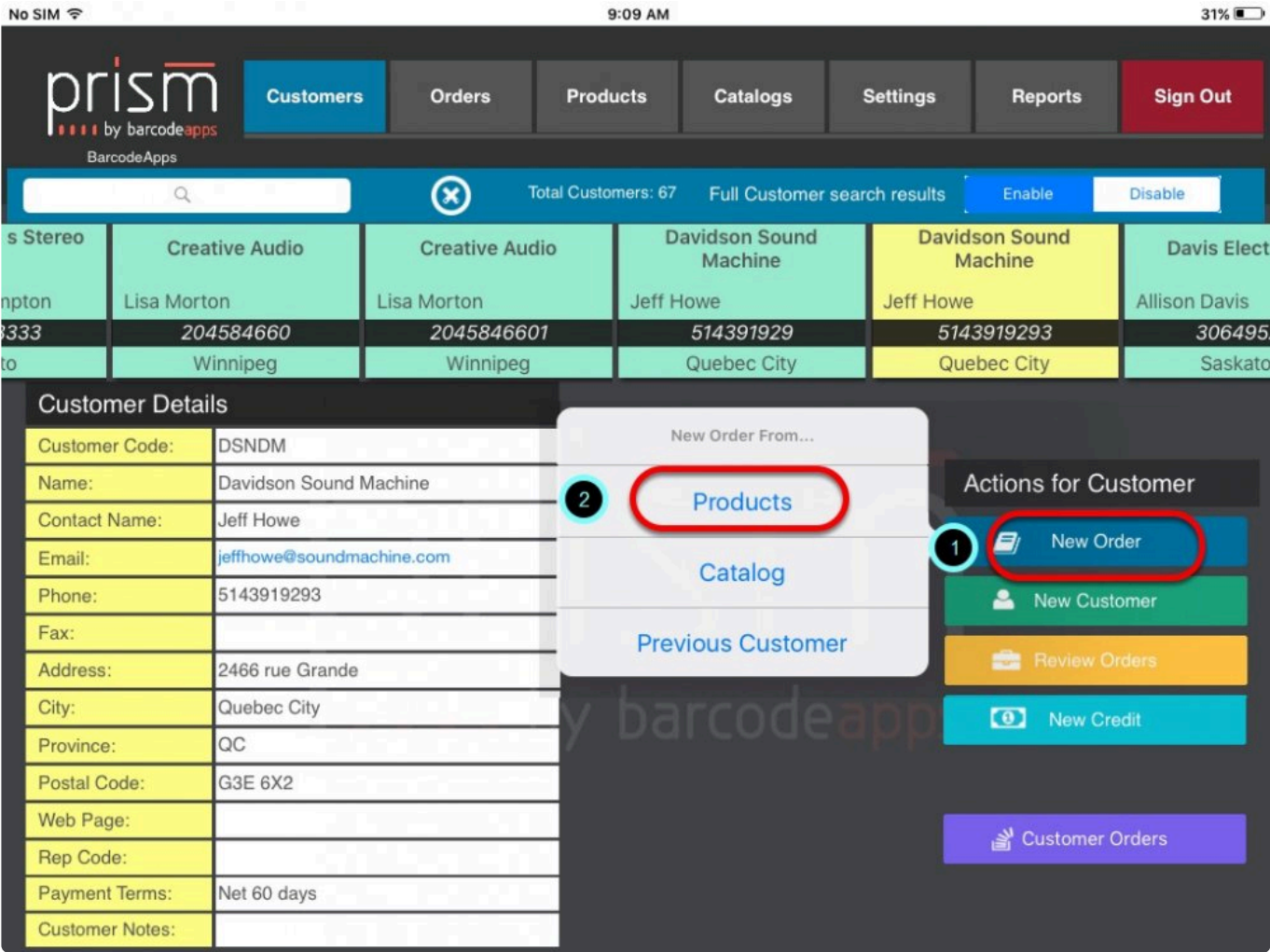
This knowledge base article will guide users on how to add an item from Products tab on their PRISM App iOS.

I. ADDING AN ITEM FROM PRODUCTS

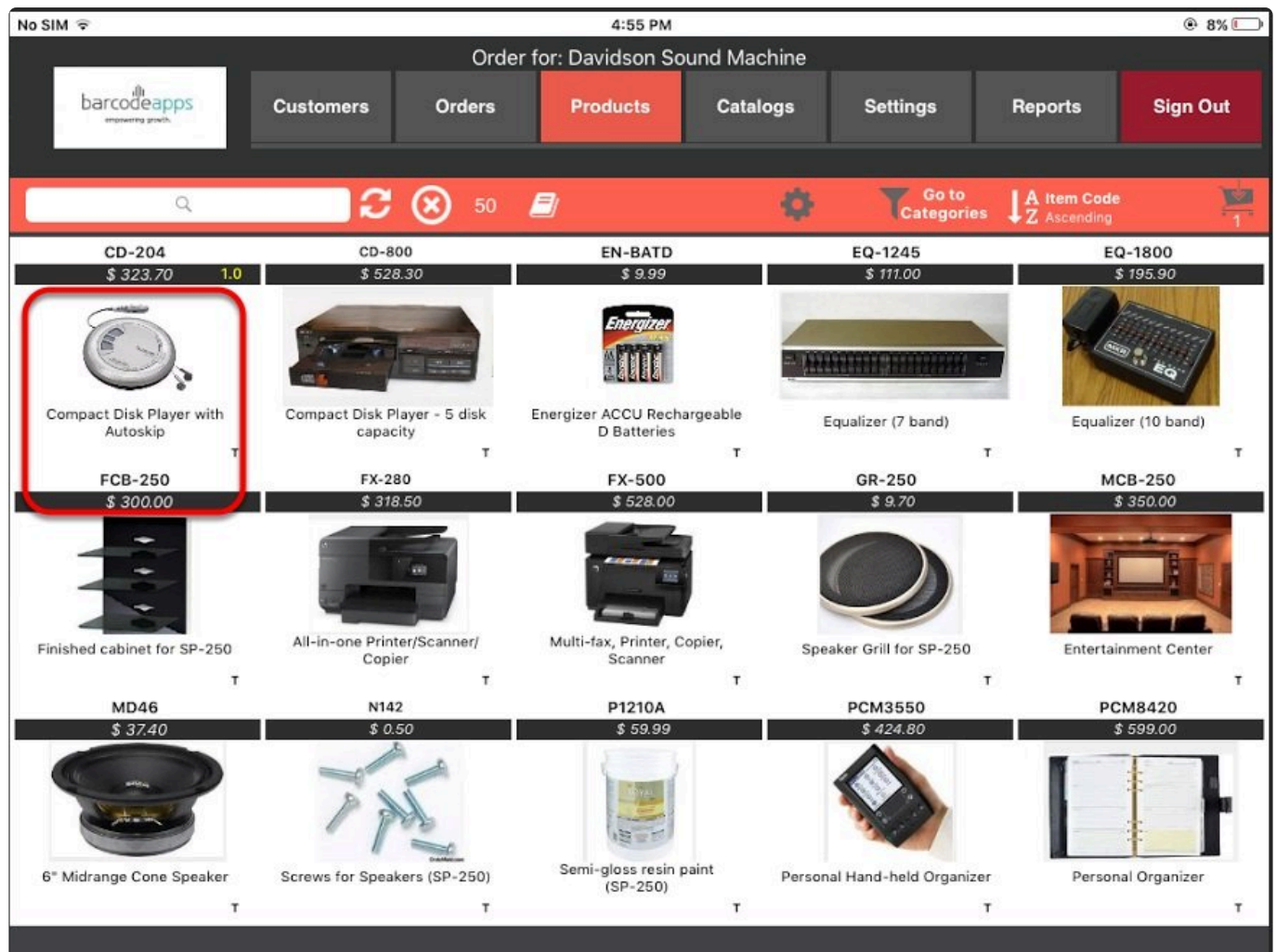
To add an item from Products tab, first select a customer or add a new customer.



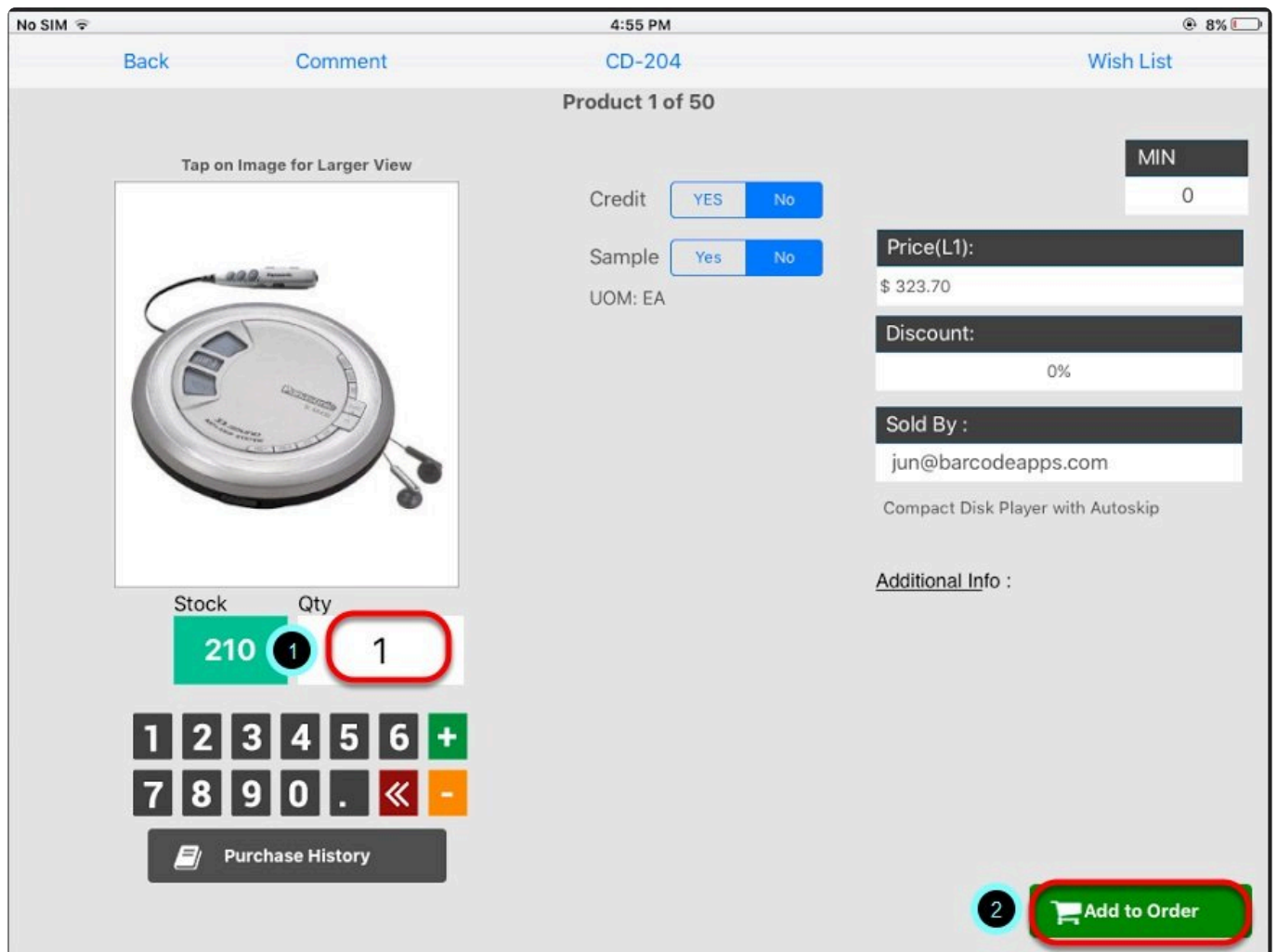
After selecting a customer, hit New Order and select Products.



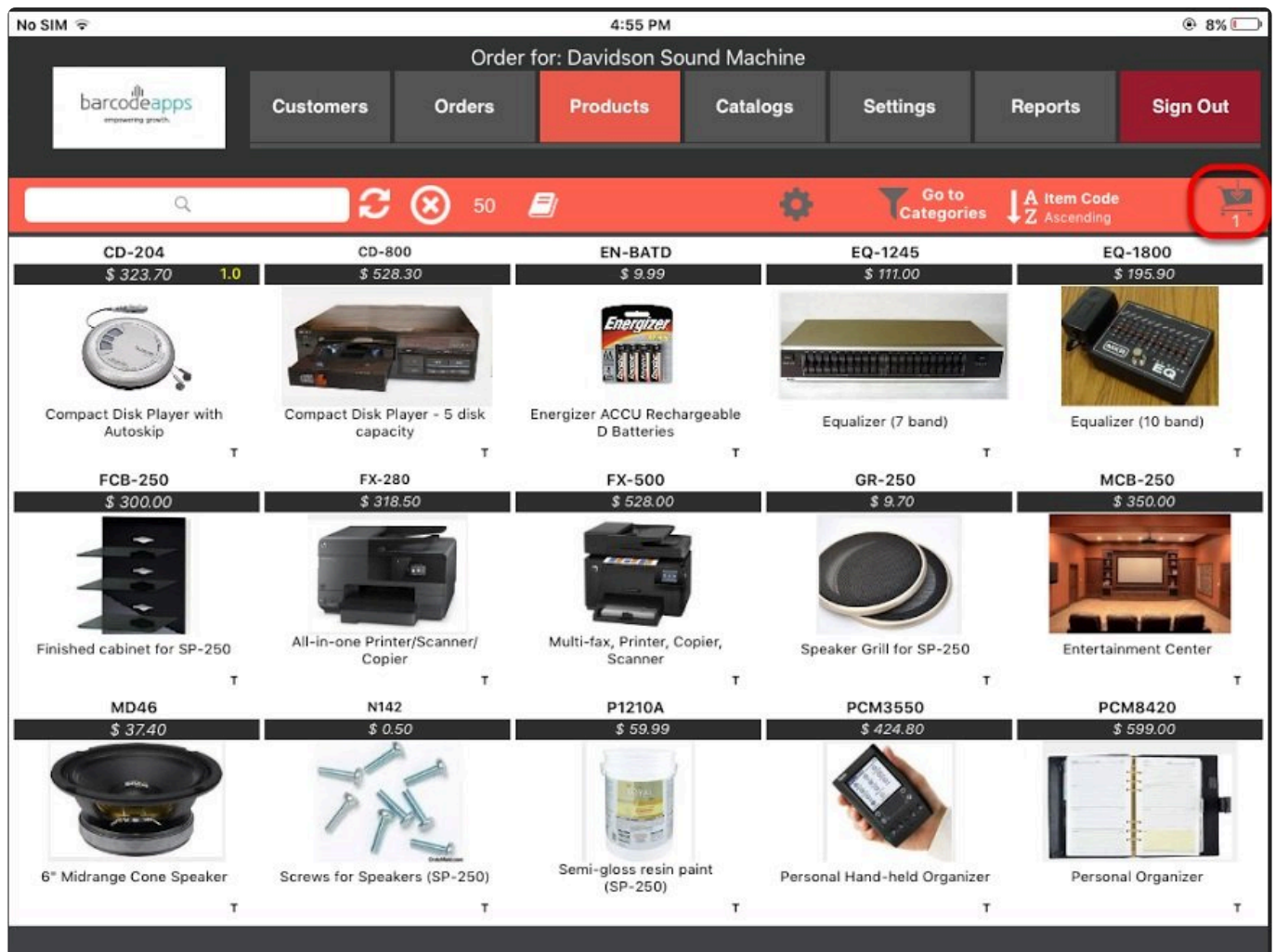
Tap on the item or product that you'd like to add on your order.



Specify a quantity then tap Add to Order.



Once the item or product has been added you should see it added on your shopping cart (located on the upper right hand corner of your app).



II. ADDING AN ITEM FROM PRODUCTS via TAP-HOLD-DRAG

Items can be added by tapping and holding on the item image.

12:07 AM 18%

Order for: Davidson Sound Machine
















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BarcodeApps

Customers Orders **Products** Catalogs Settings Reports Sign Out

50

Go to Categories Item Code A Z Ascending

 <p>Compact Disk Player with Autoskip</p> <p>FCB-250</p> <p>\$ 300.00</p>	 <p>Compact Disk Player - 5 disk capacity</p> <p>FX-280</p> <p>\$ 318.50</p>	 <p>Energizer ACCU Rechargeable D Batteries</p> <p>FX-500</p> <p>\$ 528.00</p>	 <p>Equalizer (7 band)</p> <p>GR-250</p> <p>\$ 9.70</p>	 <p>Equalizer (10 band)</p> <p>MCB-250</p> <p>\$ 350.00</p>
 <p>Finished cabinet for SP-250</p> <p>MD46</p> <p>\$ 37.40</p>	 <p>All-in-one Printer/Scanner/Copier</p> <p>N142</p> <p>\$ 0.50</p>	 <p>Multi-fax, Printer, Copier, Scanner</p> <p>P1210A</p> <p>\$ 59.99</p>	 <p>Speaker Grill for SP-250</p> <p>PCM3550</p> <p>\$ 424.80</p>	 <p>Entertainment Center</p> <p>PCM8420</p> <p>\$ 599.00</p>
 <p>6" Midrange Cone Speaker</p> <p>PRCB-250</p> <p>\$ 129.00</p>	 <p>Screws for Speakers (SP-250)</p> <p>PS-2</p> <p>\$ 199.00</p>	 <p>Semi-gloss resin paint (SP-250)</p> <p>RC2400</p> <p>\$ 438.10</p>	 <p>Personal Hand-held Organizer</p> <p>RC4850</p> <p>\$ 651.10</p>	 <p>Personal Organizer</p> <p>RCA-R</p> <p>\$ 69.00</p>

As soon as the item image pops up.

12:06 AM 18%

Order for: Davidson Sound Machine
















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Customers Orders **Products** Catalogs Settings Reports Sign Out

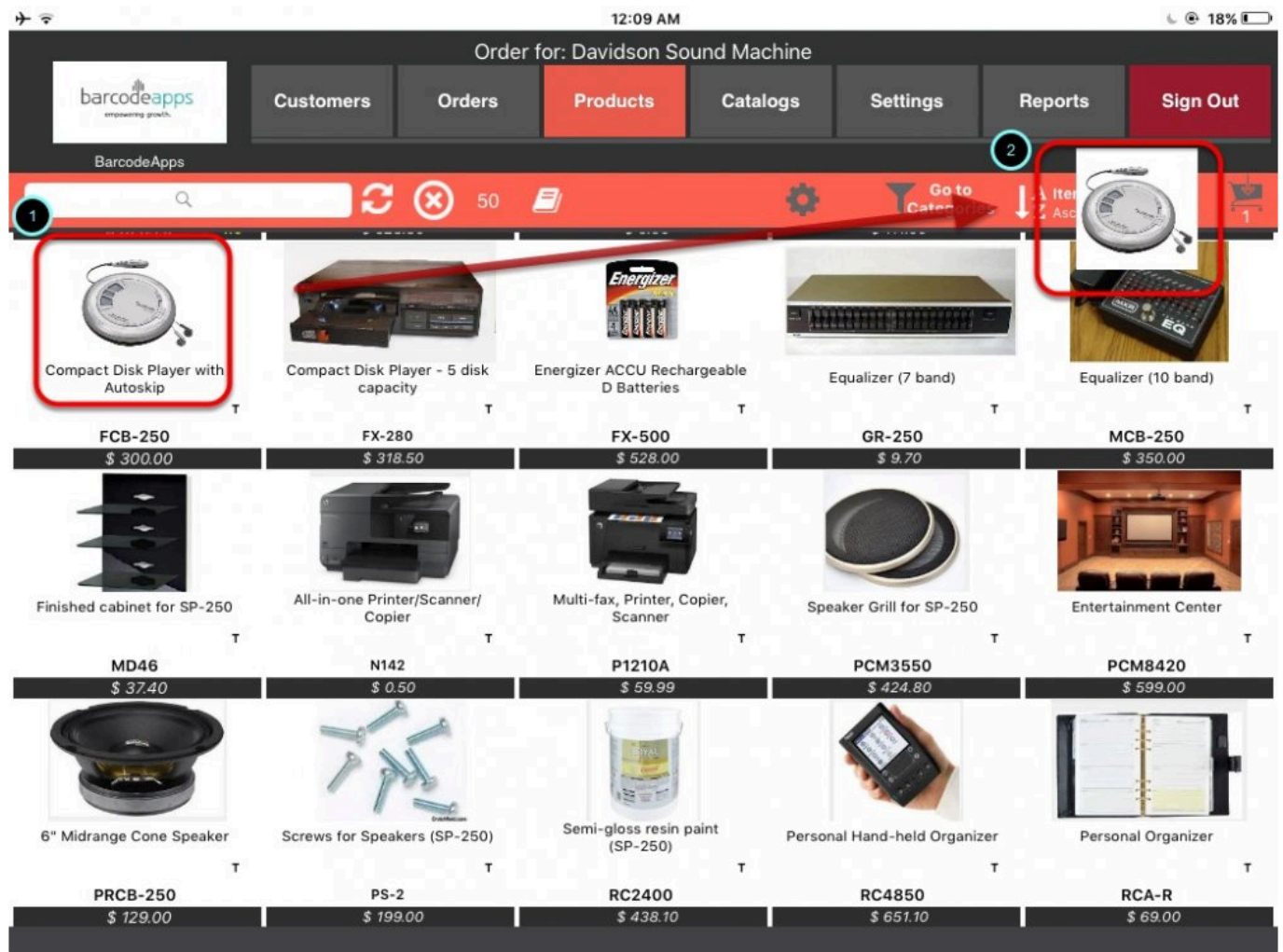
BarcodeApps

50

Go to Categories Item Code Ascending

CD-204 \$ 323.70	CD-800 \$ 528.30 1.0	EN-BATD \$ 9.99	EQ-1245 \$ 111.00	EQ-1800 \$ 195.90
 Compact Disc Player with Aut skip	 Compact Disk Player - 5 disk capacity	 Energizer ACCU Rechargeable D Batteries	 Equalizer (7 band)	 Equalizer (10 band)
FCB-250 \$ 300.00	FX-280 \$ 318.50	FX-500 \$ 528.00	GR-250 \$ 9.70	MCB-250 \$ 350.00
 Finished cabinet for SP-250	 All-in-one Printer/Scanner/ Copier	 Multi-fax, Printer, Copier, Scanner	 Speaker Grill for SP-250	 Entertainment Center
MD46 \$ 37.40	N142 \$ 0.50	P1210A \$ 59.99	PCM3550 \$ 424.80	PCM8420 \$ 599.00
 6" Midrange Cone Speaker	 Screws for Speakers (SP-250)	 Semi-gloss resin paint (SP-250)	 Personal Hand-held Organizer	 Personal Organizer

Drag the item going to the shopping cart.



A notification will show once the item has been added.

12:25 AM 19%

Order for: Davidson Sound Machine





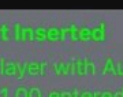










BarcodeApps Customers Orders **Products** Catalogs Settings Reports Sign Out

BarcodeApps

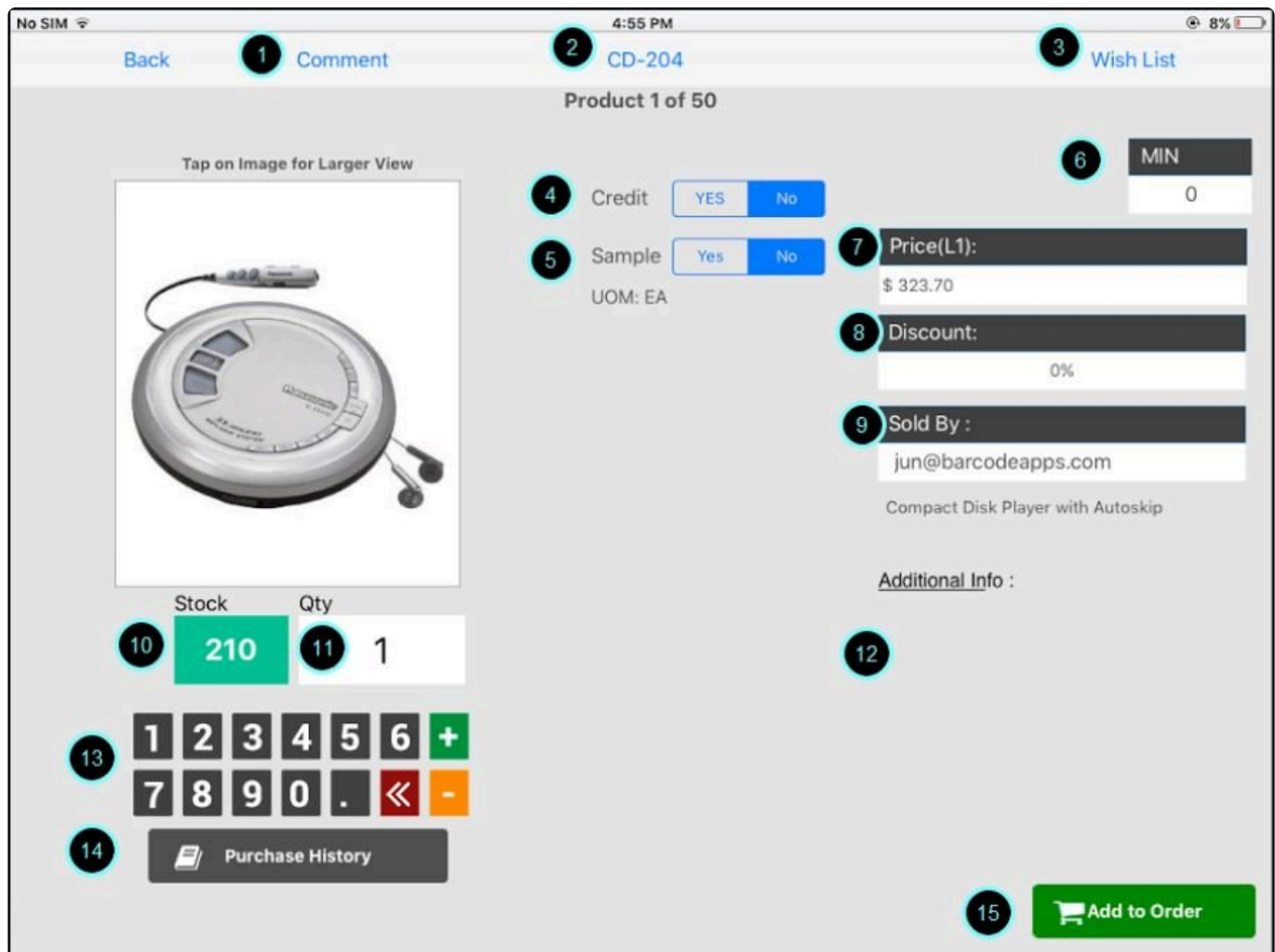
Go to Categories Item Code Add Items

Auto Add Notification Window

Product Inserted
Compact Disk Player with Autoskip
Quantity: 1.00 entered
Price(L1): \$ 323.70
Total Quantity on order so far: 1.00

CD-204 \$ 323.70 1.0  Compact Disk Player with Autoskip T	CD-800 \$ 528.30  Compact Disk Player - 5 disk capacity T	EN-BATD \$ 9.99  Energizer ACCU Rechargeable D Batteries T	EQ-1205 \$ 11.00  Equalizer T	EQ-1800 \$ 11.00  Equalizer T
FCB-250 \$ 300.00  Finished cabinet for SP-250 T	FX-280 \$ 318.50  All-in-one Printer/Scanner/Copier T	FX-500 \$ 528.00  Multi-fax, Printer, Copier, Scanner T	GR-250 \$ 9.70  Speaker Grill for SP-250 T	MCB-250 \$ 350.00  Entertainment Center T
MD46 \$ 37.40  6" Midrange Cone Speaker T	N142 \$ 0.50  Screws for Speakers (SP-250) T	P1210A \$ 59.99  Semi-gloss resin paint (SP-250) T	PCM3550 \$ 424.80  Personal Hand-held Organizer T	PCM8420 \$ 599.00  Personal Organizer T

The Order Screen



1. **Comments** – Taping on this option will open a small text box to add item specific item.
2. **Item Code** – This will show the item code.
3. **Wish List** – Allow a user to assign an item to be added to the order but as a wish only. Will need to review and confirm at the end of the order.
4. **Credit** – gives the option to send an order as a credit.
5. **Sample** – gives the option to send an order as a sample only.
6. **Min Quantity** – Displays the minimum quantity that can be ordered.
7. **Price** – Displays the price of an item
8. **Discounts** – displays the discount if applicable.
9. **Sold By** – Shows the person that is currently login.
10. **Stock** – Displays the stock on hand
11. **Qty** – shows the quantity to be ordered
12. **Additional Info** – Additional information about the product is listed here.
13. **Number Pad** – Use the number pad to specify quantity.
14. **Purchase History** – Tapping on this option will open a window displaying all historical purchases of this item for the selected customer.
15. **Add to Order** – This option will place the order on the shopping cart.

2.4.3.4. iv. Adding An Item From Categories

This knowledge base article will guide users on how to add an item from categories on their PRISM App.

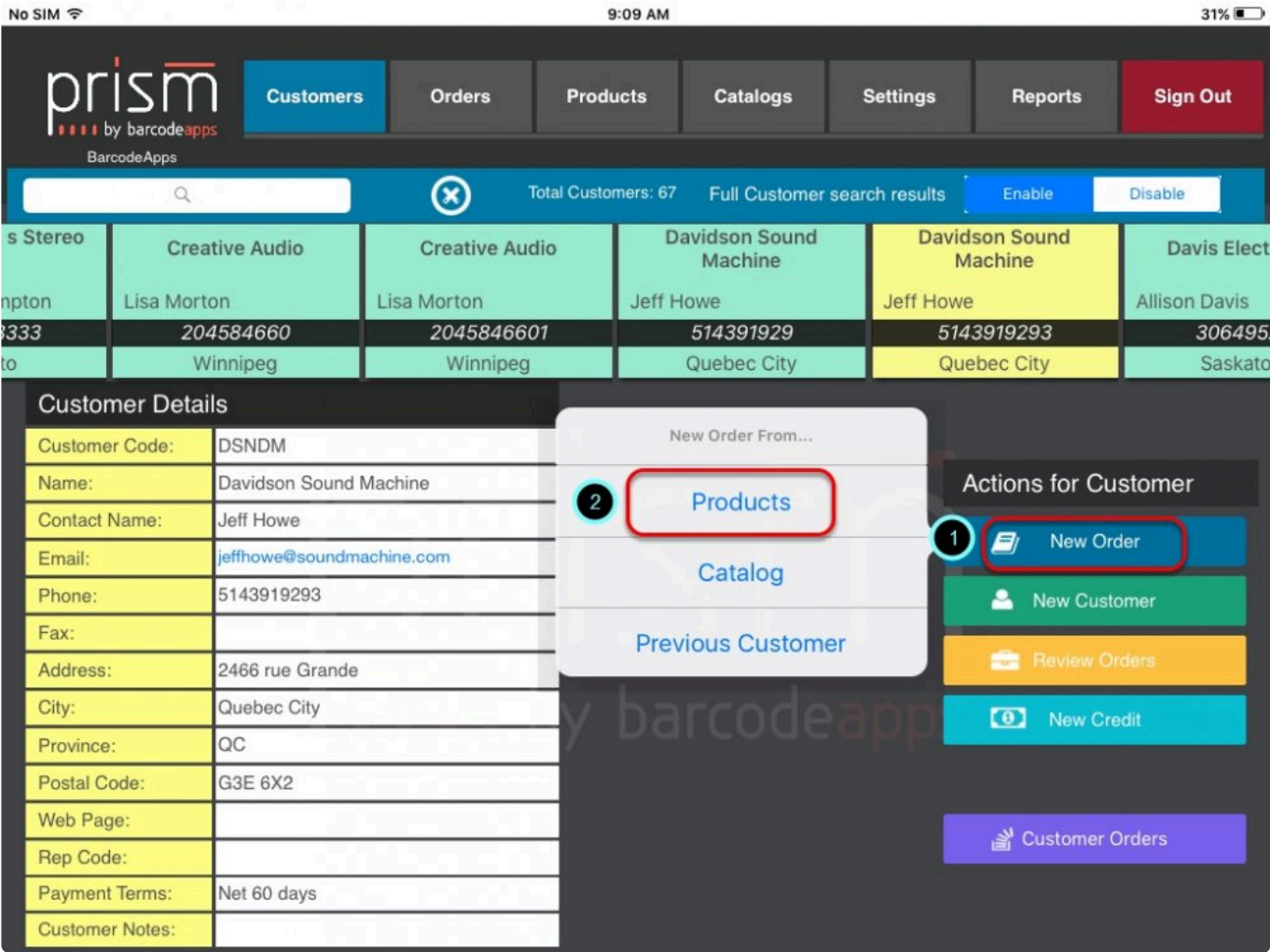
I. ADDING AN ITEM FROM CATEGORIES

To add an item from categories, first select a customer or add a new customer.

The screenshot shows the PRISM app interface. At the top, there's a navigation bar with tabs: Customers, Orders, Products, Catalogs, Settings, Reports, and Sign Out. Below this is a search bar and a status bar showing 'Total Customers: 67' and 'Full Customer search results'. A table of customers is displayed, with one row highlighted in yellow and a red box around it. The highlighted row is for 'Davidson Sound Machine' with contact 'Jeff Howe' and phone '5143919293'. Below the table, the 'Customer Details' section is visible, showing fields for Customer Code, Name, Contact Name, Email, Phone, Fax, Address, City, Province, Postal Code, Web Page, Rep Code, Payment Terms, and Customer Notes. To the right of the details is an 'Actions for Customer' panel with buttons for New Order, New Customer, Review Orders, New Credit, and Customer Orders.

Customer Code	Name	Contact Name	Email	Phone	Fax	Address	City	Province	Postal Code	Web Page	Rep Code	Payment Terms	Customer Notes
DSNDM	Davidson Sound Machine	Jeff Howe	jeffhowe@soundmachine.com	5143919293		2466 rue Grande	Quebec City	QC	G3E 6X2			Net 60 days	

Tap on New Order and then select Products.



In the Products screen tap Go to categories.







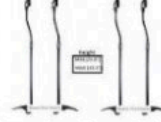








No SIM 9:09 AM 31%

Order for: Davidson Sound Machine

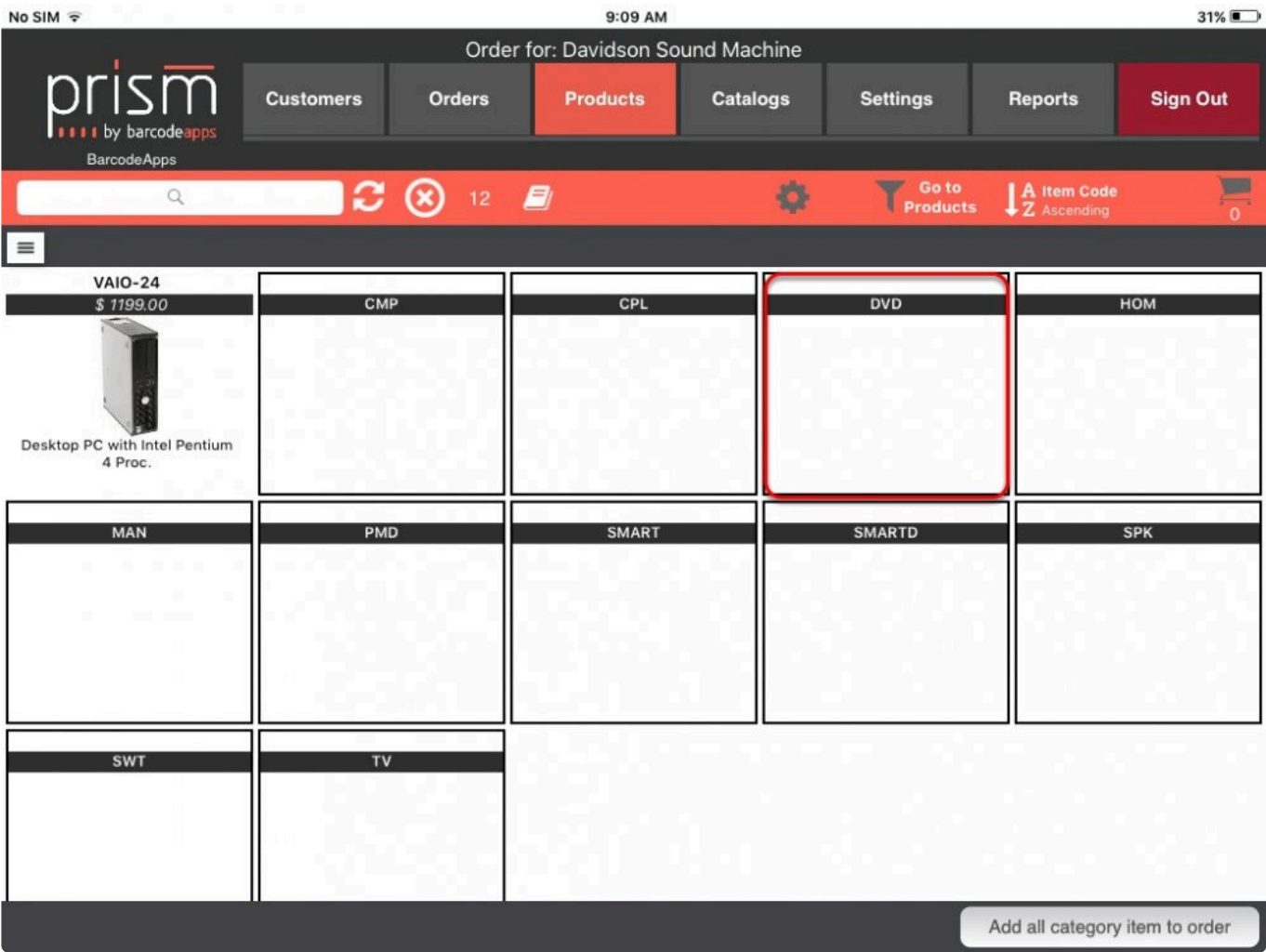
prism by barcodeapps
BarcodeApps

Customers Orders **Products** Catalogs Settings Reports Sign Out

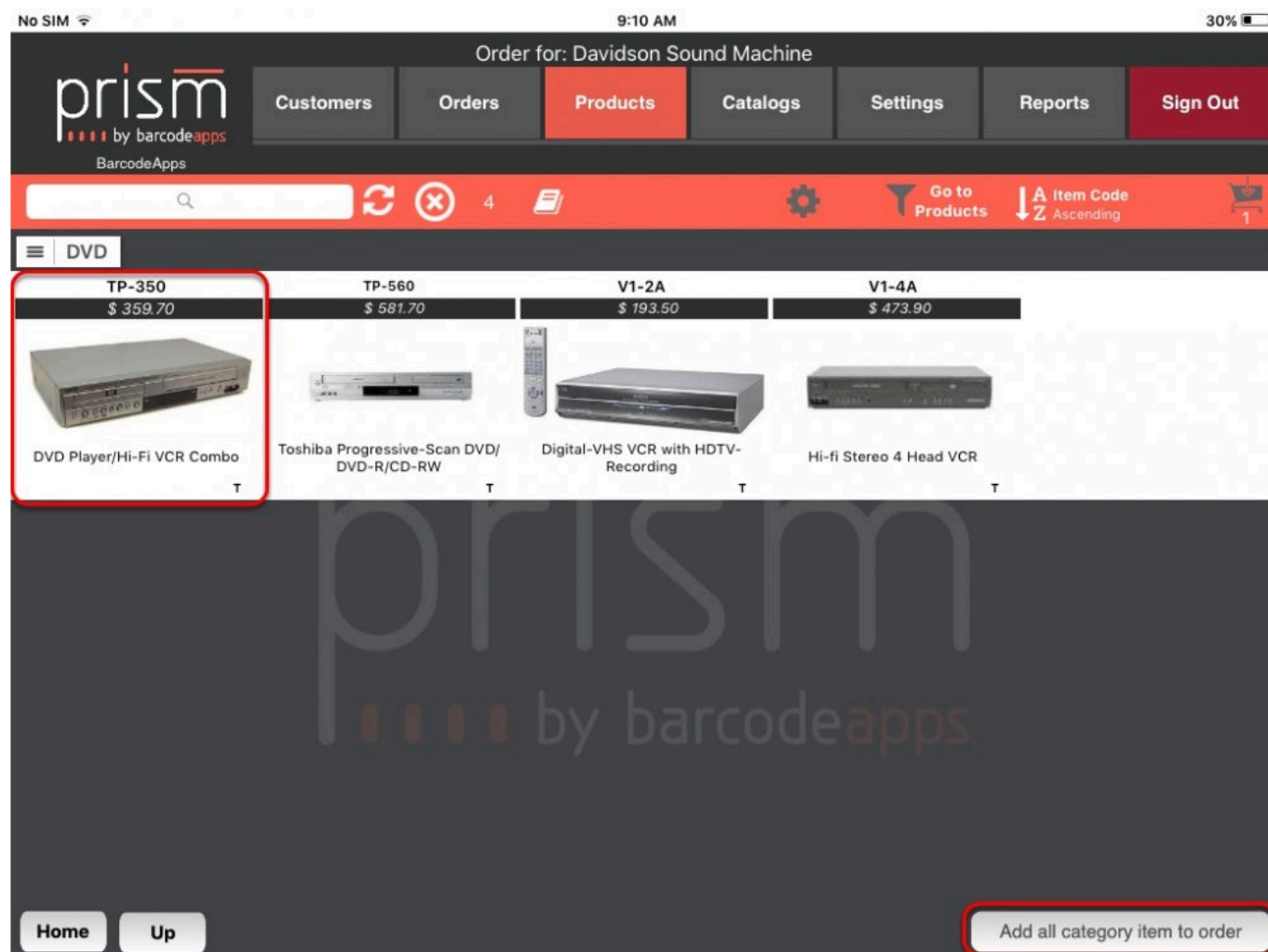
Search [] [Refresh] [Close] 19 [Settings] **Go to Categories** [Item Code A-Z Ascending] [Cart 0]

SP-500 \$ 765.40  Speakers - Home Theatre Package T	SPW-12G \$ 3.70  12-Gauge Micro Flat Speaker Wire T	SPW-14G \$ 2.30  14 Gauge Speaker Wire T	ST-10 \$ 199.00  Stand - for mini speakers T	ST-25 \$ 53.60  Stand - 24" Speaker T
ST-30 \$ 63.60  Stand - 30" Speaker T	ST-40 \$ 65.80  Stand - Universal Cube Speaker T	STS-01 \$ 2194.50  Home Sound System with MP3 Decoder T	STS-01MAN \$ 29.95  Instruction Manual STS-01 Sound System T	STS-02 \$ 2805.00  Surround Sound Home Theater System T
SY-MINI \$ 199.00  Sony MiniDisc Walkman Player/Recorder T	TP-350 \$ 359.70  DVD Player/Hi-Fi VCR Combo T	TP-560 \$ 581.70  Toshiba Progressive-Scan DVD/DVD-R/CD-RW T	TV-2100 \$ 336.70  20" TV with Flat Picture Tube T	TV-3600 \$ 468.10  36" DBX Stereo Color Television T

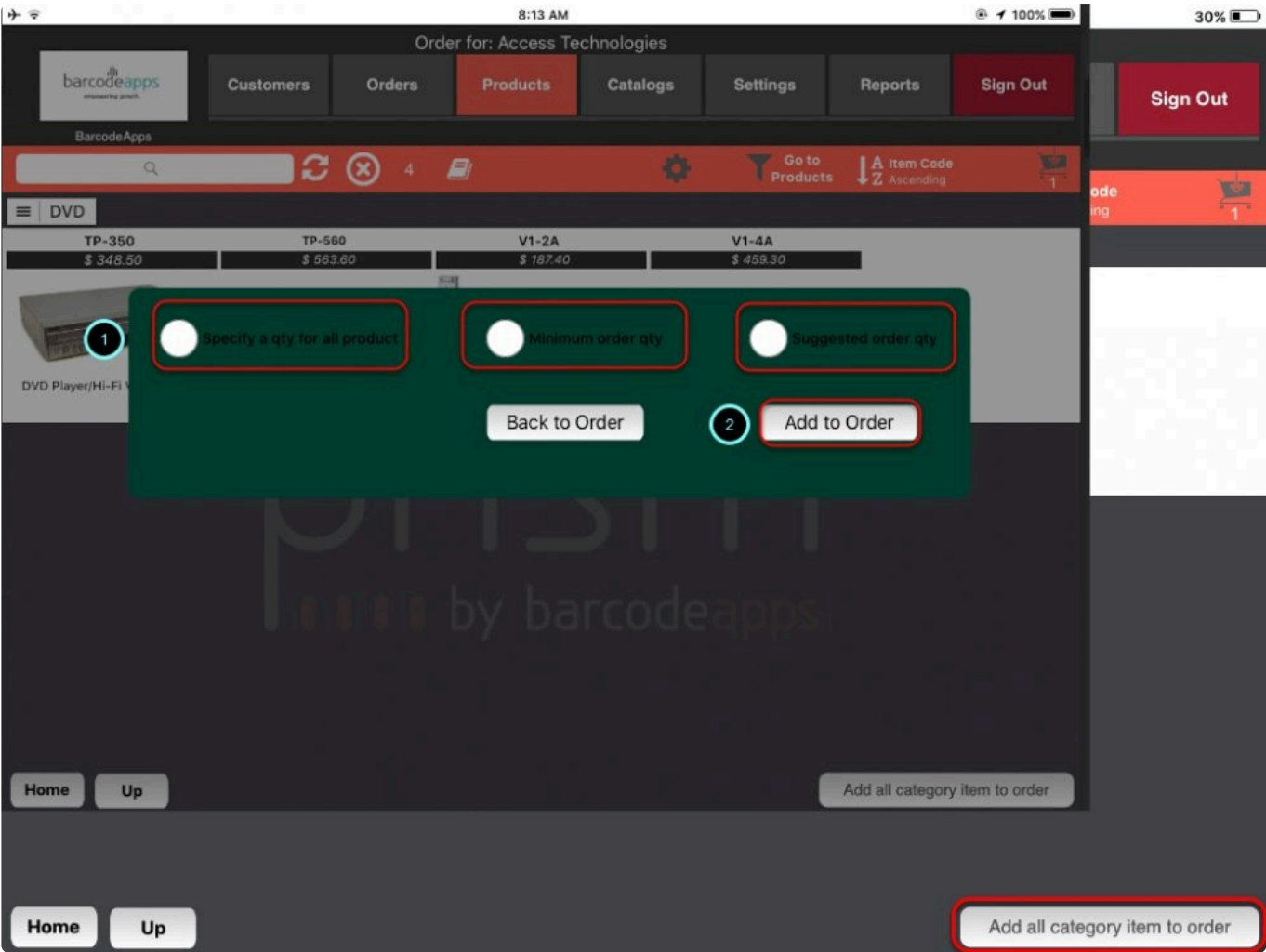
Select your category.



Tap on any item or product image to add to your order. Alternatively, you can Add all category item to order.



Selecting Specify a qty for all products allows you to enter your preferred quantity. Selecting Minimum order qty and Suggested order qty adds one quantity for each product. Once done tap Add to Order.

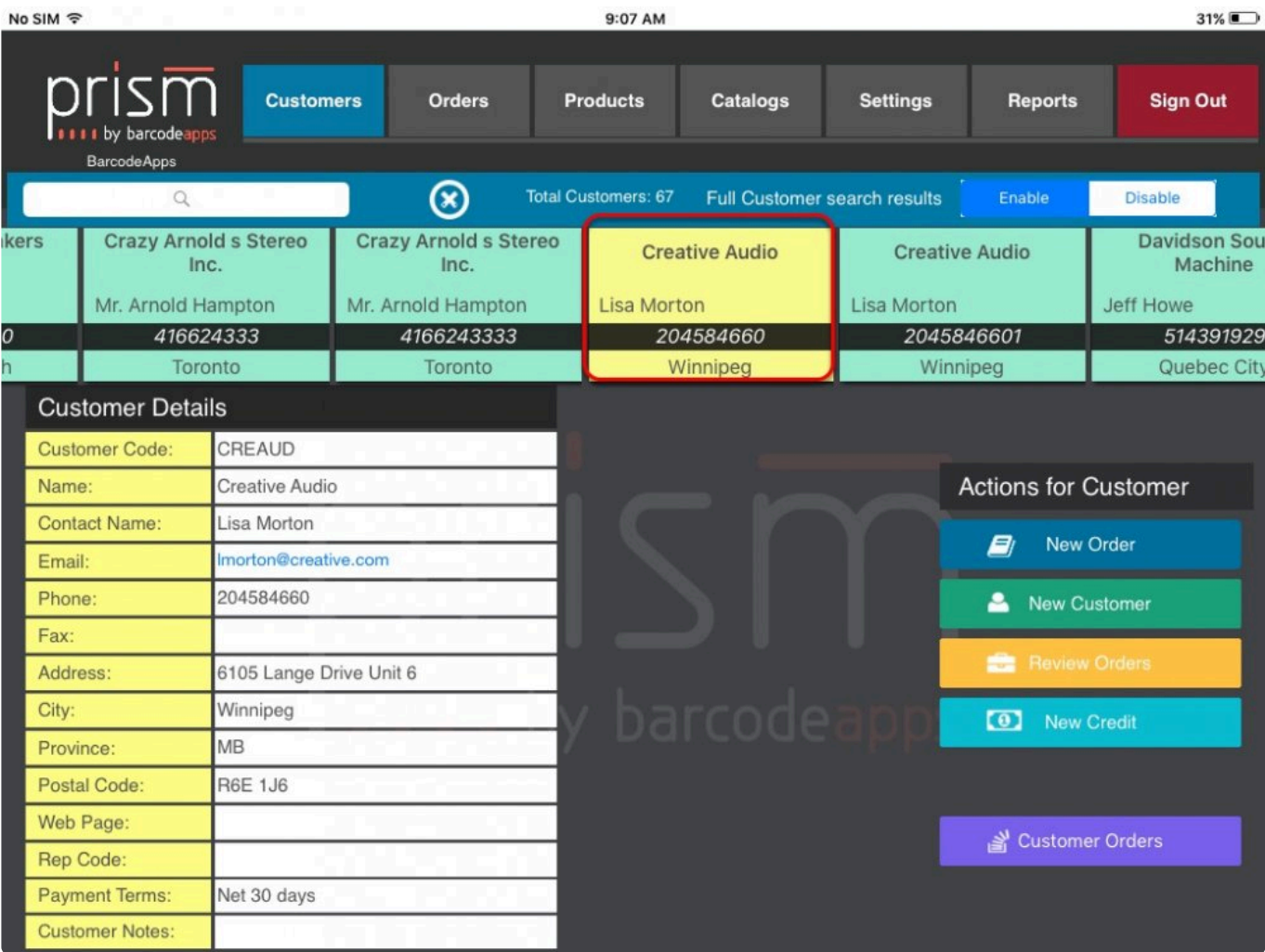


2.4.3.5. v. Adding An Item From Catalogs

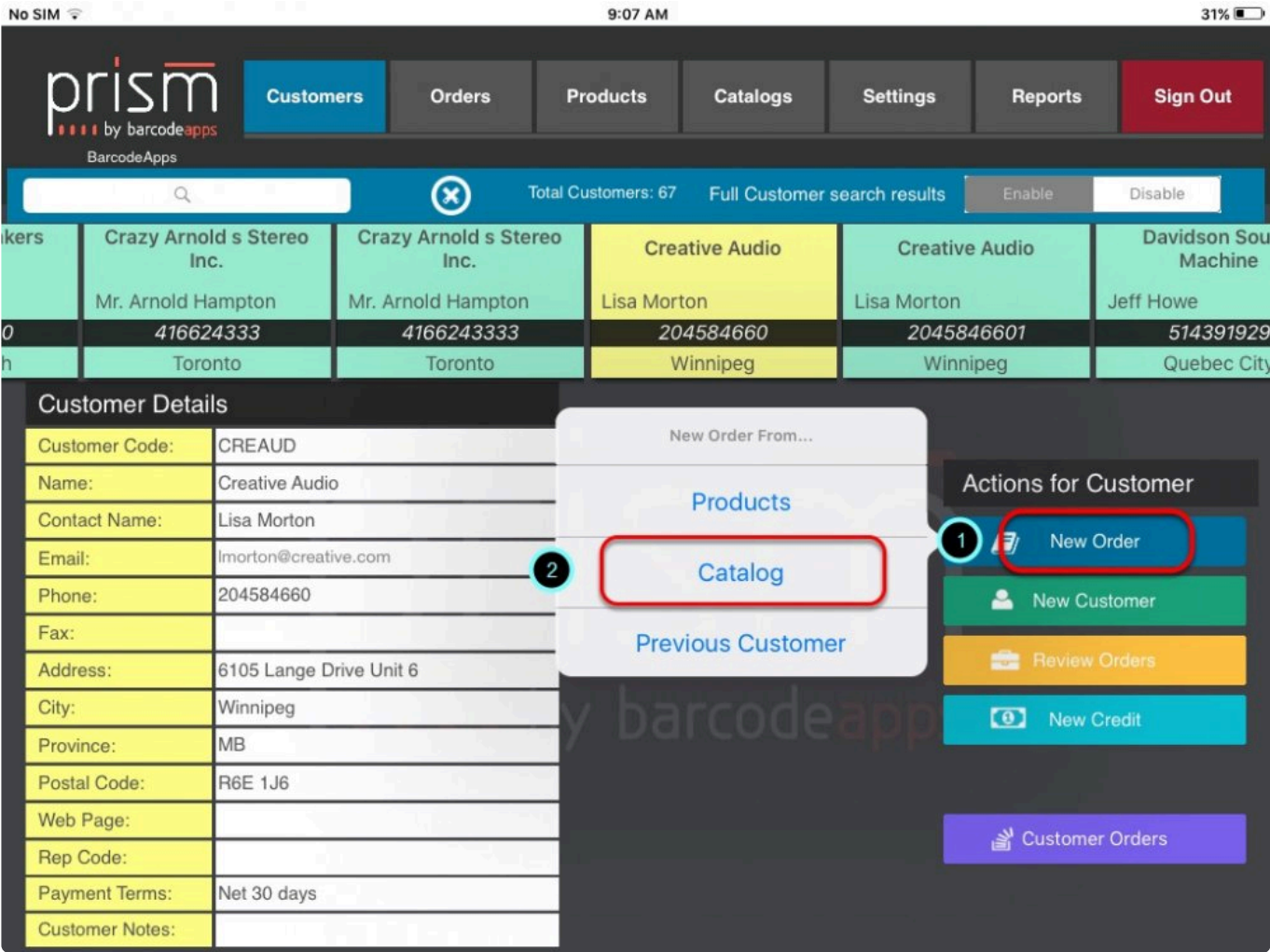
This knowledge base article will guide users on how to add an item from the catalogs screen.

I. ADDING AN ITEM FROM CATALOGS

To add an item from catalogs, first select a customer or add a new customer.



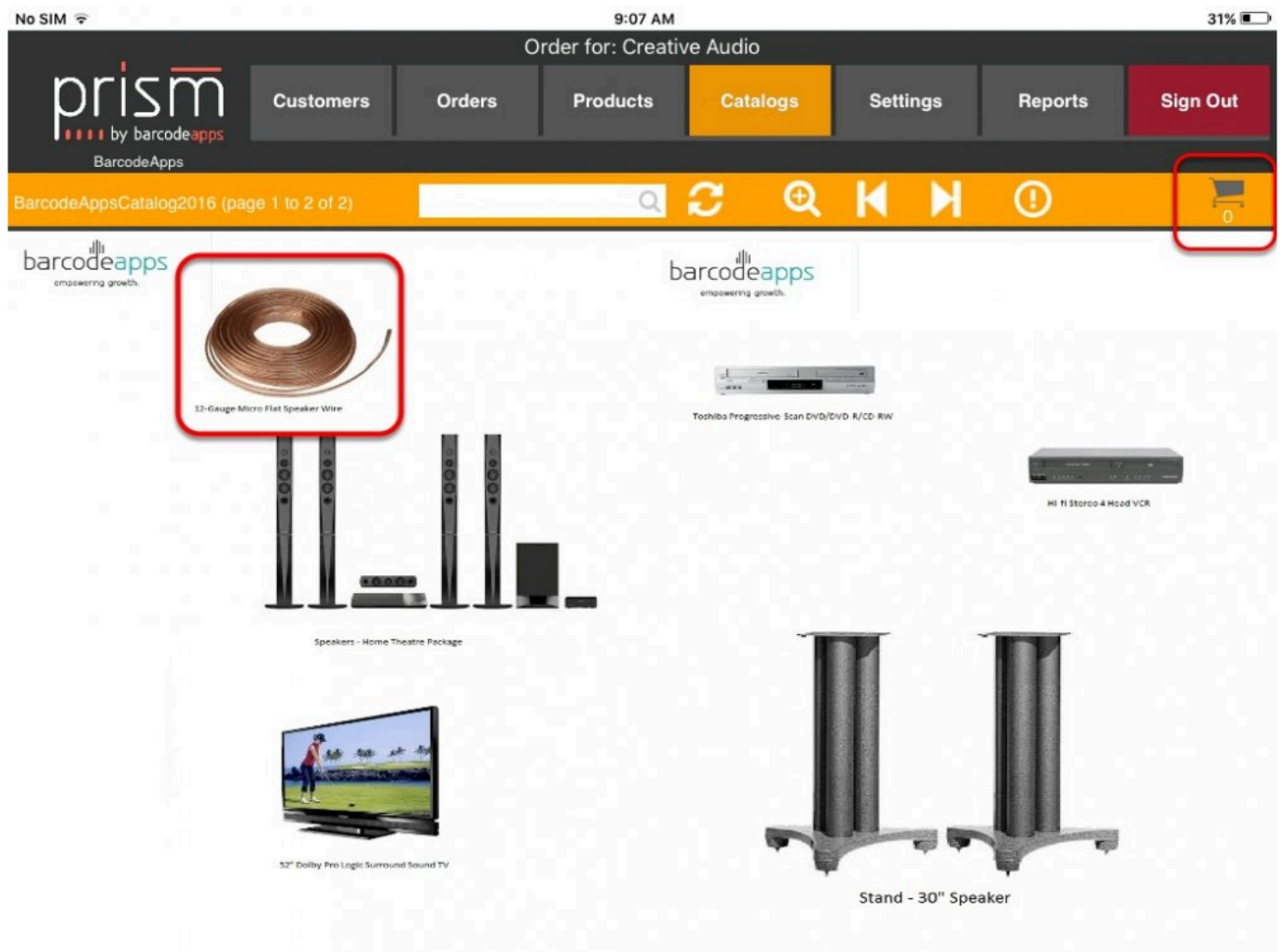
Tap on New Order and select Catalog.



Select your catalog.



Tap on any item or product image to add to your order




Specify a quantity and tap Add to Order.

7:18 AM100%

BackCommentSPW-12GWish List

Product 1 of 1

Tap on Image for Larger View



Stock141

Qty1

123456+

7890.<->

Purchase History

CreditYESNo

SampleYesNo

UOM: EA

MIN0

Price(L2):\$ 3.60

Discount:0%

Sold By :jun@barcodeapps.com

12-Gauge Micro Flat Speaker Wire

Additional Info :

2

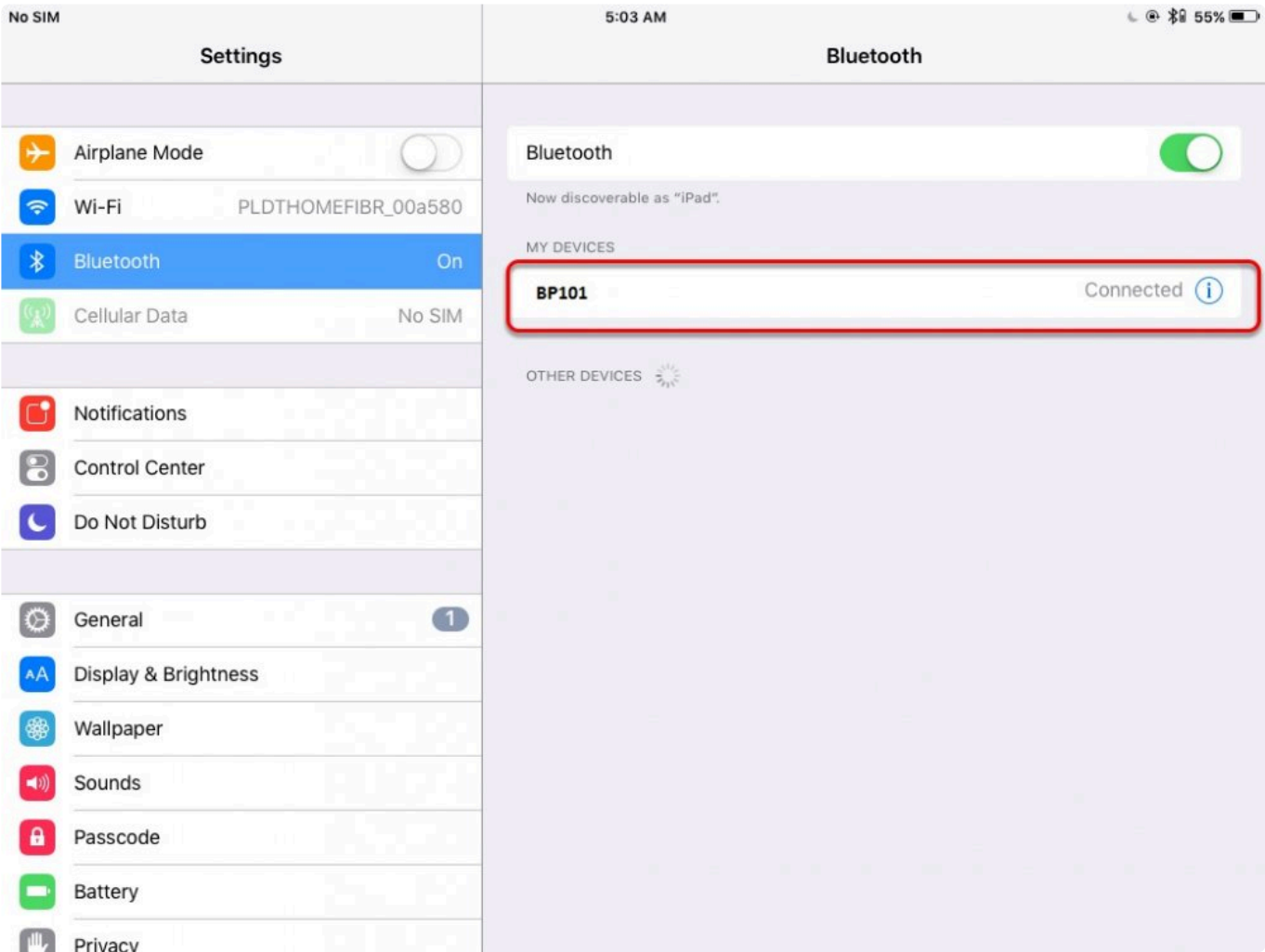
Add to Order

2.4.3.6. vi. Adding Items With A Bluetooth Scanner

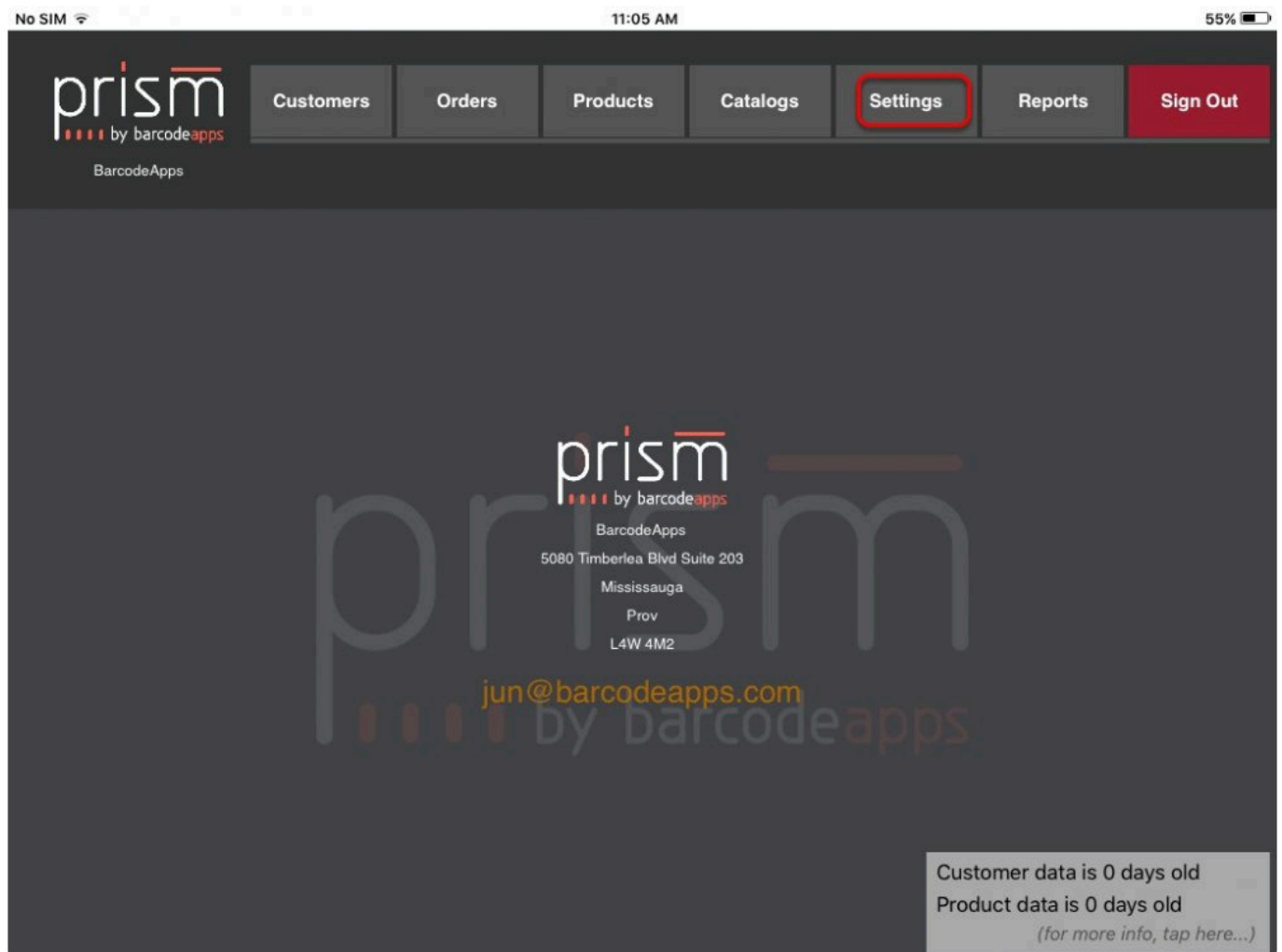
This knowledge base will guide users on how they can add an item using a Bluetooth scanner using the PRISM App iPad.

CONFIGURATION

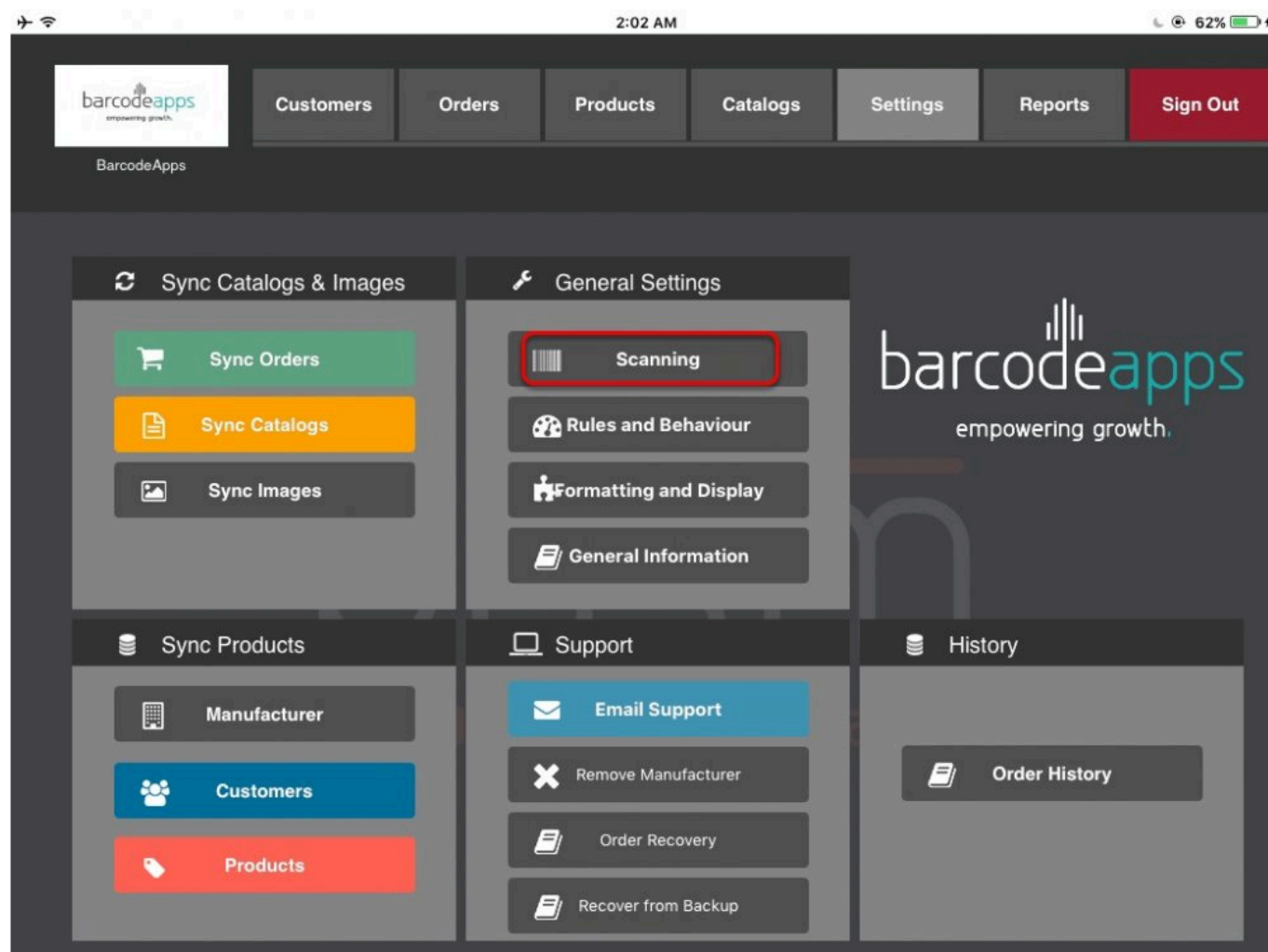
Before getting started, we have to make sure that the ipad is paired with the scanner.



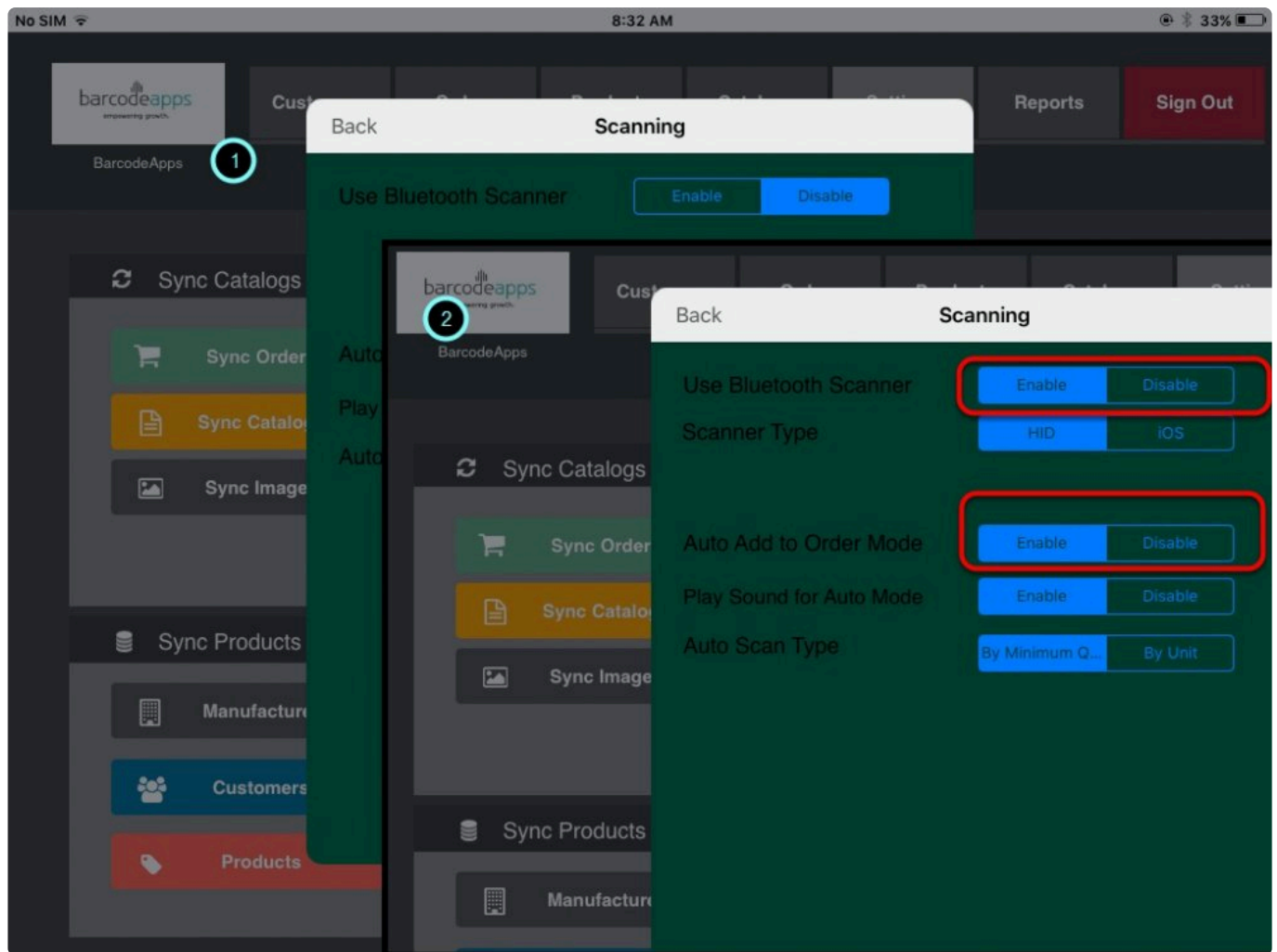
On the ipad tap on settings.



Tap on scanning.



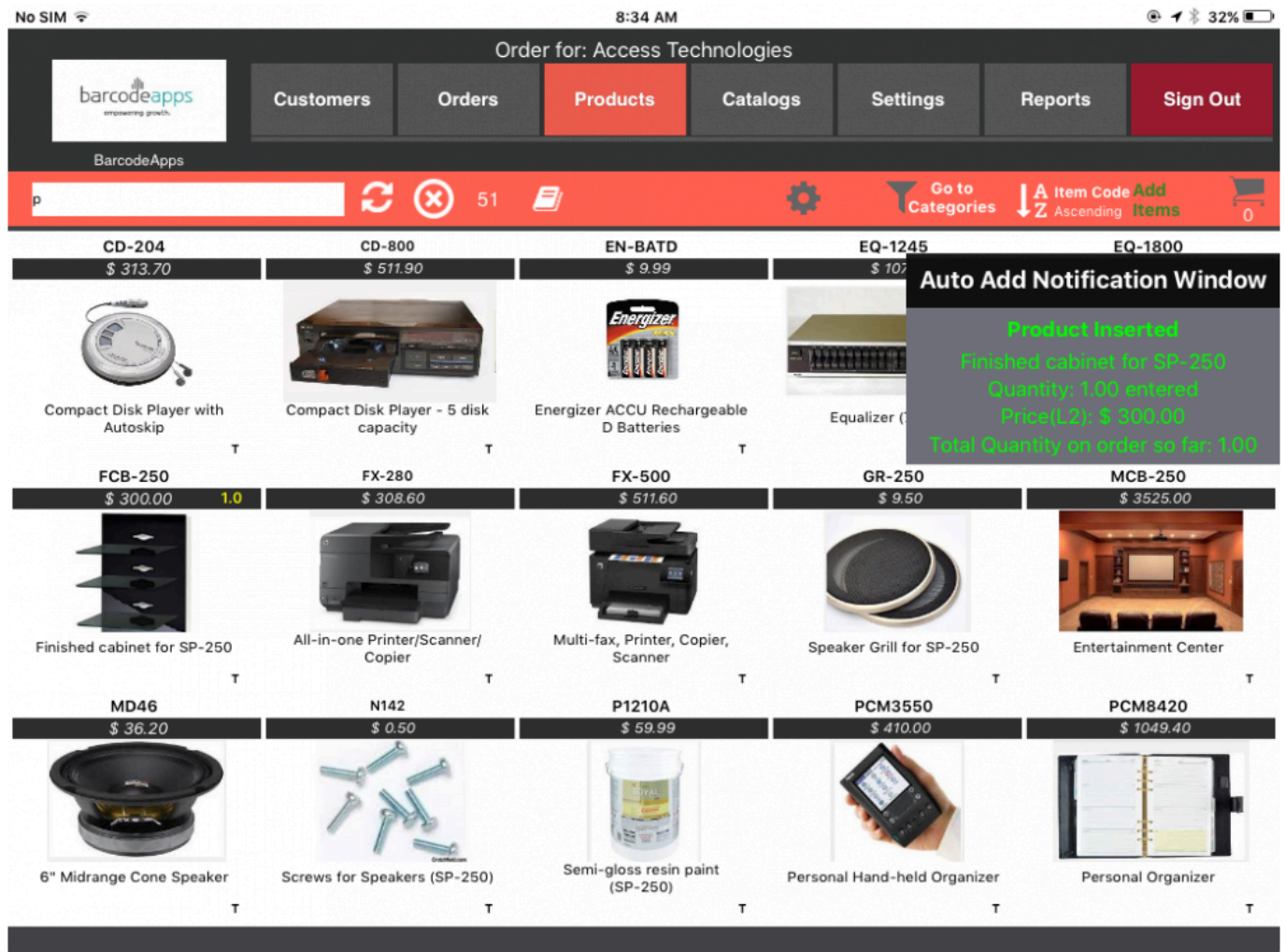
Enable Use Bluetooth scanner , enable Auto Add to Order if you wish to do it on fast mode, disable otherwise.



ADDING ITEM with Auto Add to Order Mode enabled.(Fast Mode)

Adding an item with Auto add to Order mode enabled will make the iPad add an order just by scanning the item by minimum quantity.

To add an item, tap on the search box and then scan the bar code of the item. A confirmation should show that the item has been added and at the same time the iPad will also produce a distinctive success sound.



- If the item is already on the order
 The app will add the minimum quantity to the previous one allowing you to update the order. A yellow notification will pop with the update information along with a distinctive sound for an item update after scanning.



- If the item is not found

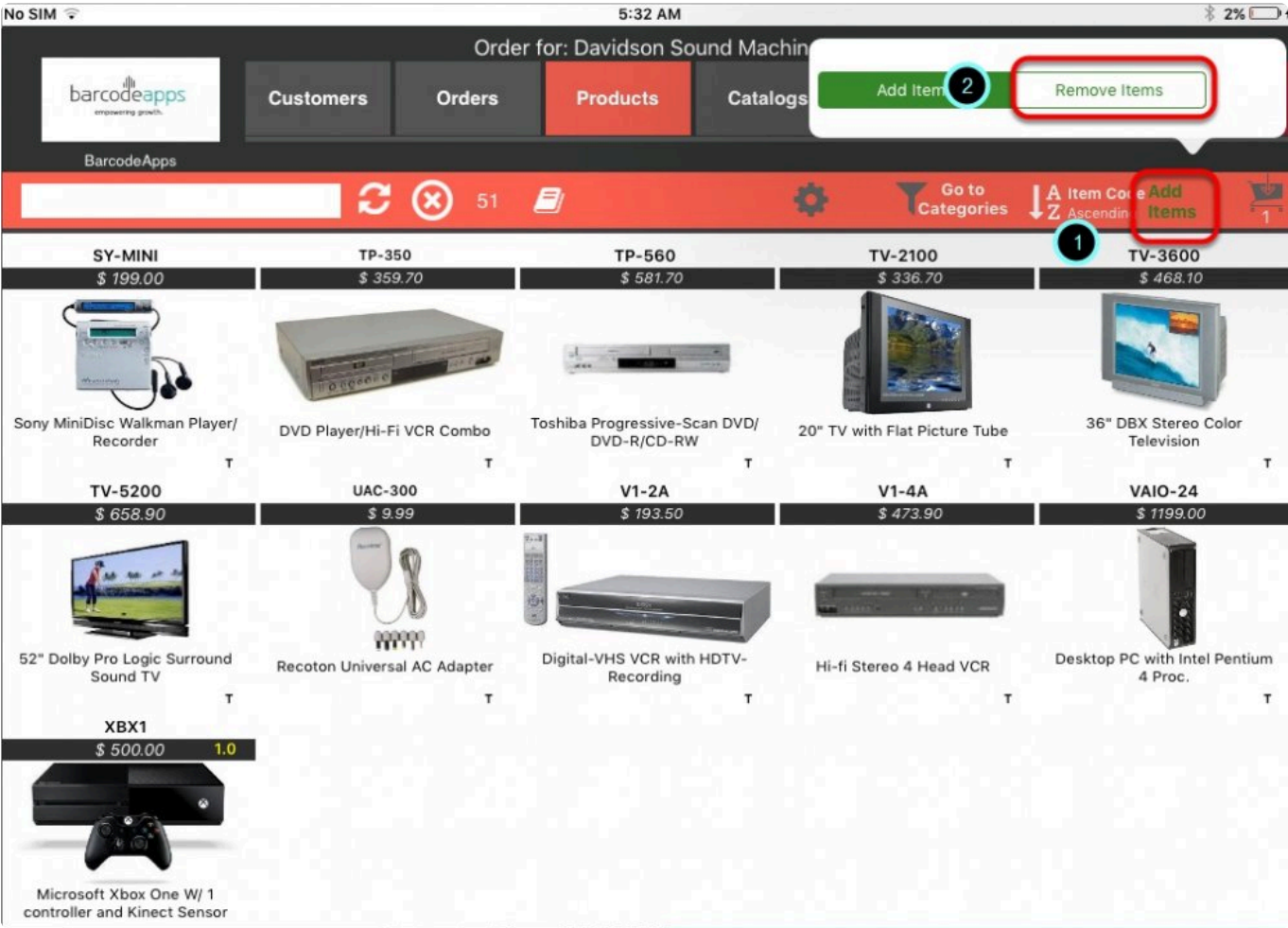
A red notification box will show up along with a distinctive failure sound after scanning the item.



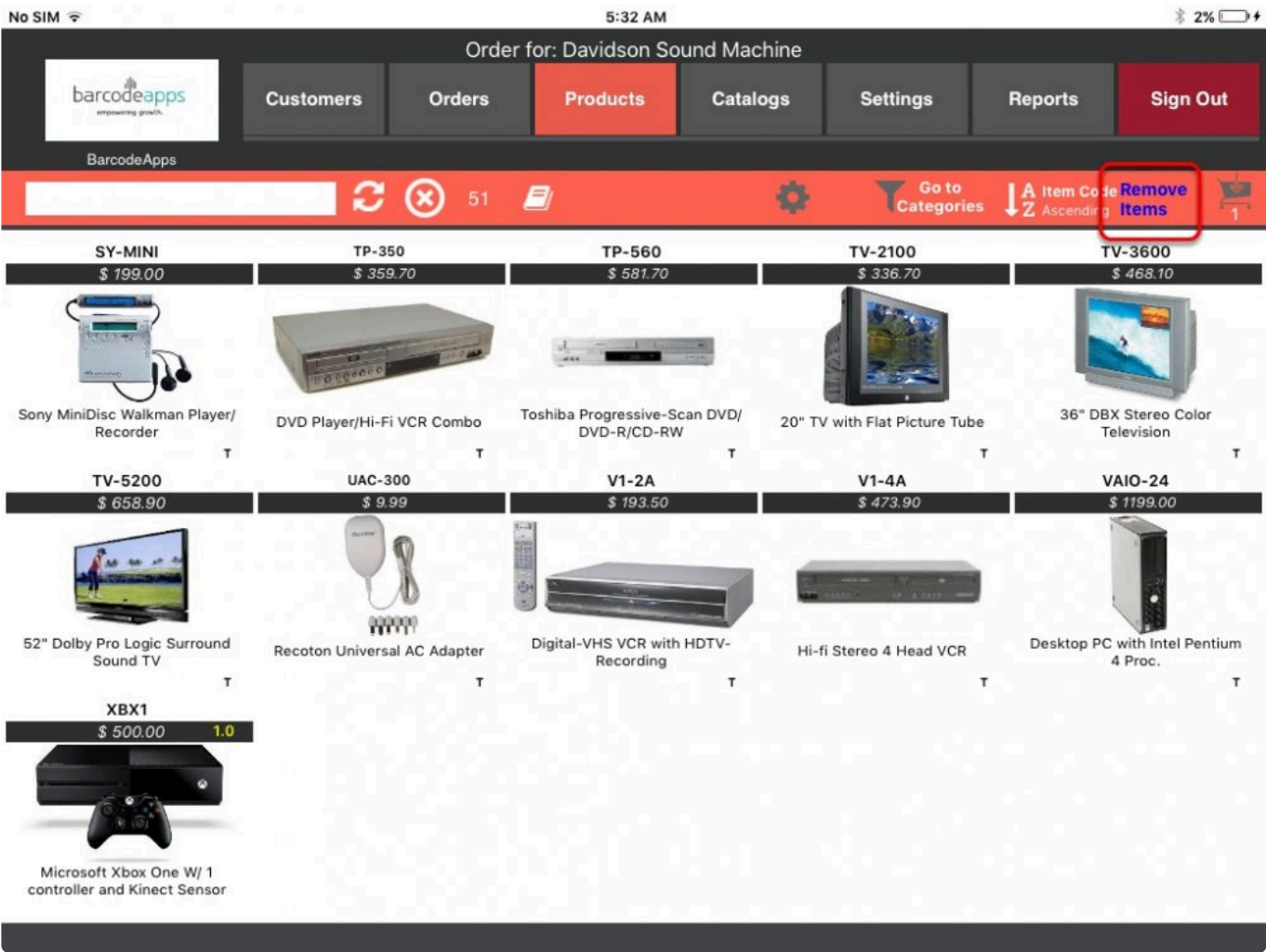
✿ With a bit of practice you can be fully guided by the sounds.

REMOVING AN ITEM

To remove an item, tap on the scan option on the top right corner and then select remove item.



Make sure that status shows “ Remove items”.



Scan the item that needs to be removed, and a confirmation will show that the item has been deleted successfully.

Order for: Davidson Sound Machine

BarcodeApps

Customers Orders **Products** Catalogs Settings Reports Sign Out

BarcodeApps 51

Go to Categories Item Code Remove Items
















Auto Add Notification Window

XBX1 deleted

Microsoft Xbox One W/ 1 controller and Kinect Sensor

Quantity: 2.00 deleted

Total Price: \$ 1000.00

CD-204 \$ 323.70  Compact Disk Player with Autoskip T	CD-800 \$ 528.30  Compact Disk Player - 5 disk capacity T	EN-BATD \$ 9.99  Energizer ACCU Rechargeable D Batteries T	EQ-1245 \$ 115.00  Equalizer (EQ-1800 \$ 115.00  Equalizer (
FCB-250 \$ 300.00  Finished cabinet for SP-250 T	FX-280 \$ 318.50  All-in-one Printer/Scanner/Copier T	FX-500 \$ 528.00  Multi-fax, Printer, Copier, Scanner T	GR-250 \$ 9.70  Speaker Grill for SP-250 T	MCB-250 \$ 3525.00  Entertainment Center T
MD46 \$ 37.40  6" Midrange Cone Speaker T	N142 \$ 0.50  Screws for Speakers (SP-250) T	P1210A \$ 59.99  Semi-gloss resin paint (SP-250) T	PCM3550 \$ 424.80  Personal Hand-held Organizer T	PCM8420 \$ 599.00  Personal Organizer T


ADDING ITEM without Auto Add to Order Mode

Adding an item with Auto add to order mode disabled will make the iPad process an order just like the ordinary way of processing an order. After scanning an item, the Order screen will open, after finishing adding the information on the order just tap on Add to Order.

[Back](#)[Comment](#)[TV-3600](#)[Wish List](#)

Product 15 of 19

Tap on Image for Larger View



Credit

Sample

UOM: EA

MIN

0

Price(L1):

\$ 468.10

Sold By :

jun@barcodeapps.com

36" DBX Stereo Color Television

Additional Info :

Stock

Qty

69

1

1

2

3

4

5

6

+

7

8


9


0

.

<<

-

 Purchase History

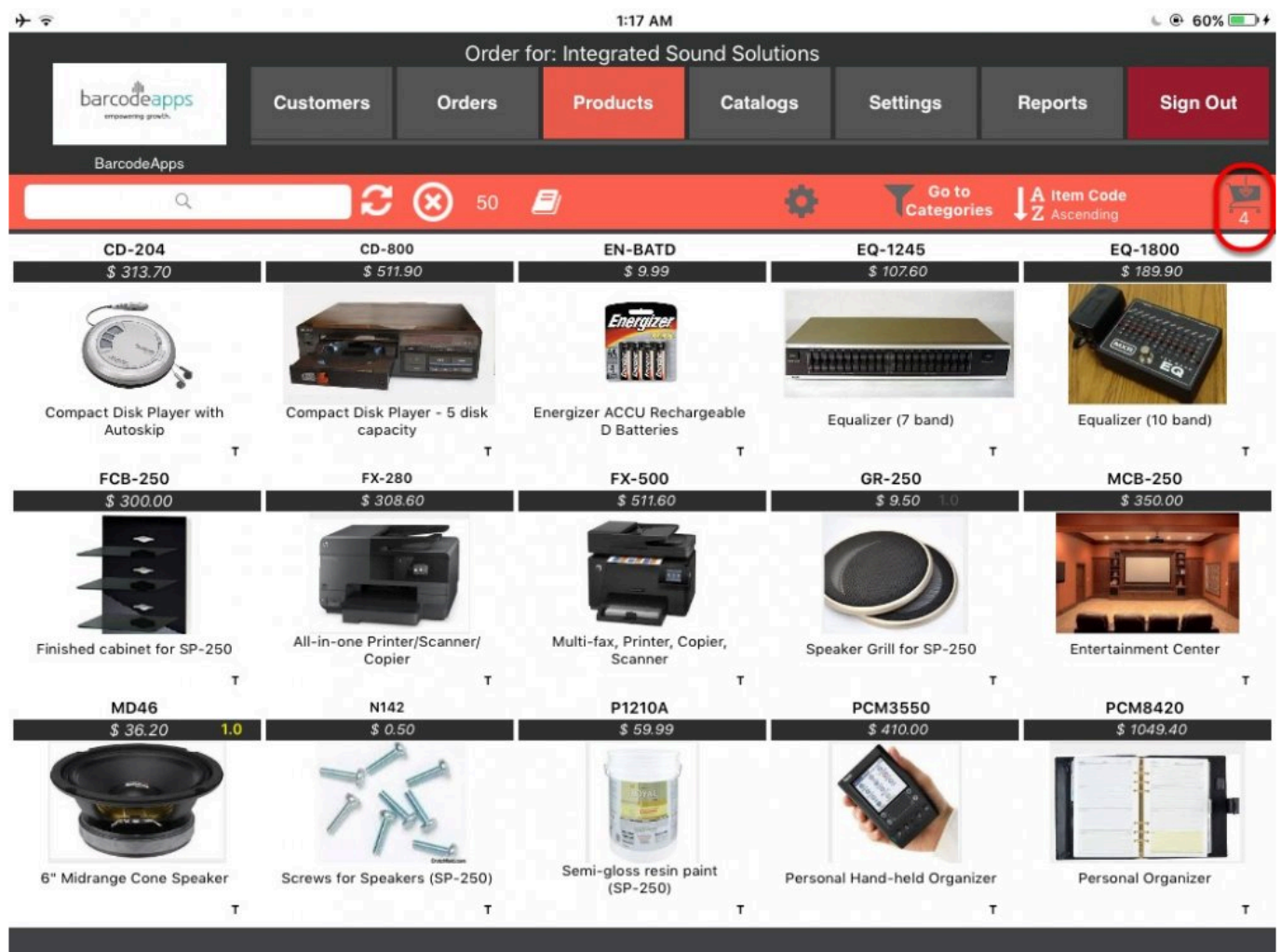
 Add to Order

2.4.3.7. vii. Editing An Order

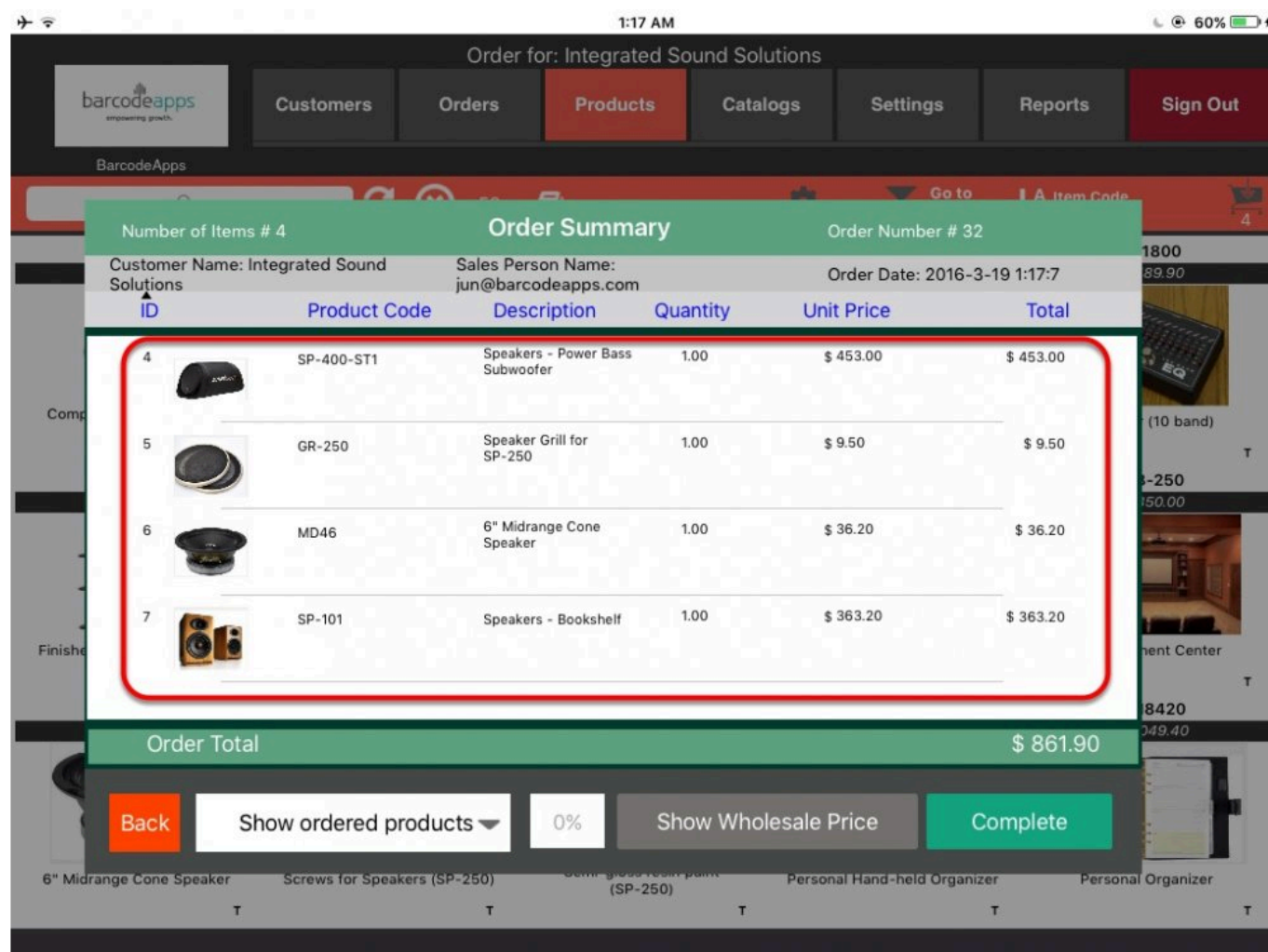
This knowledge base article will guide users on how to update or make changes to an order.

EDITING AN ORDER

Tap on the shopping cart icon.

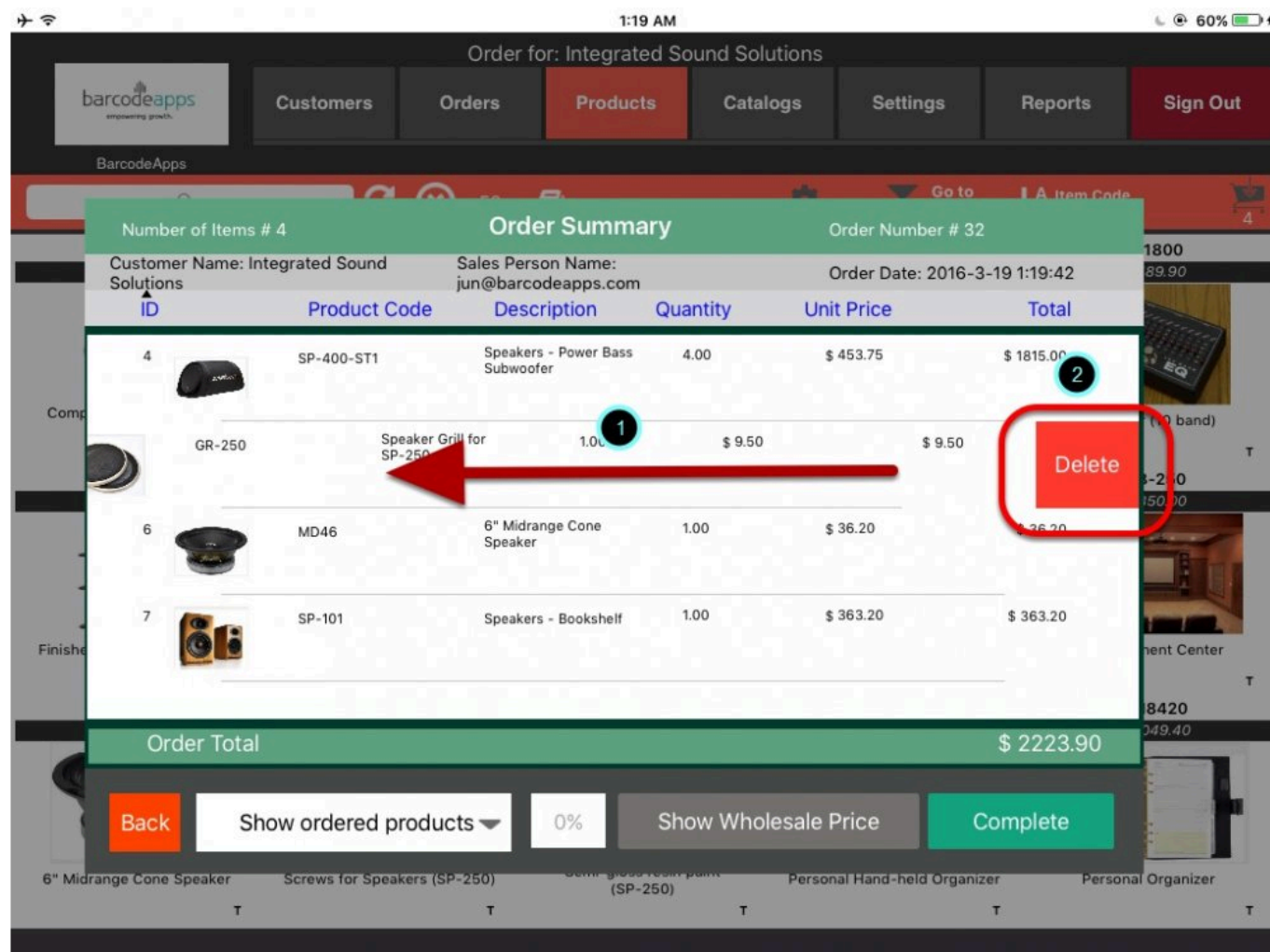


The Order Summary screen should pop up showing you the items added to your shopping cart.



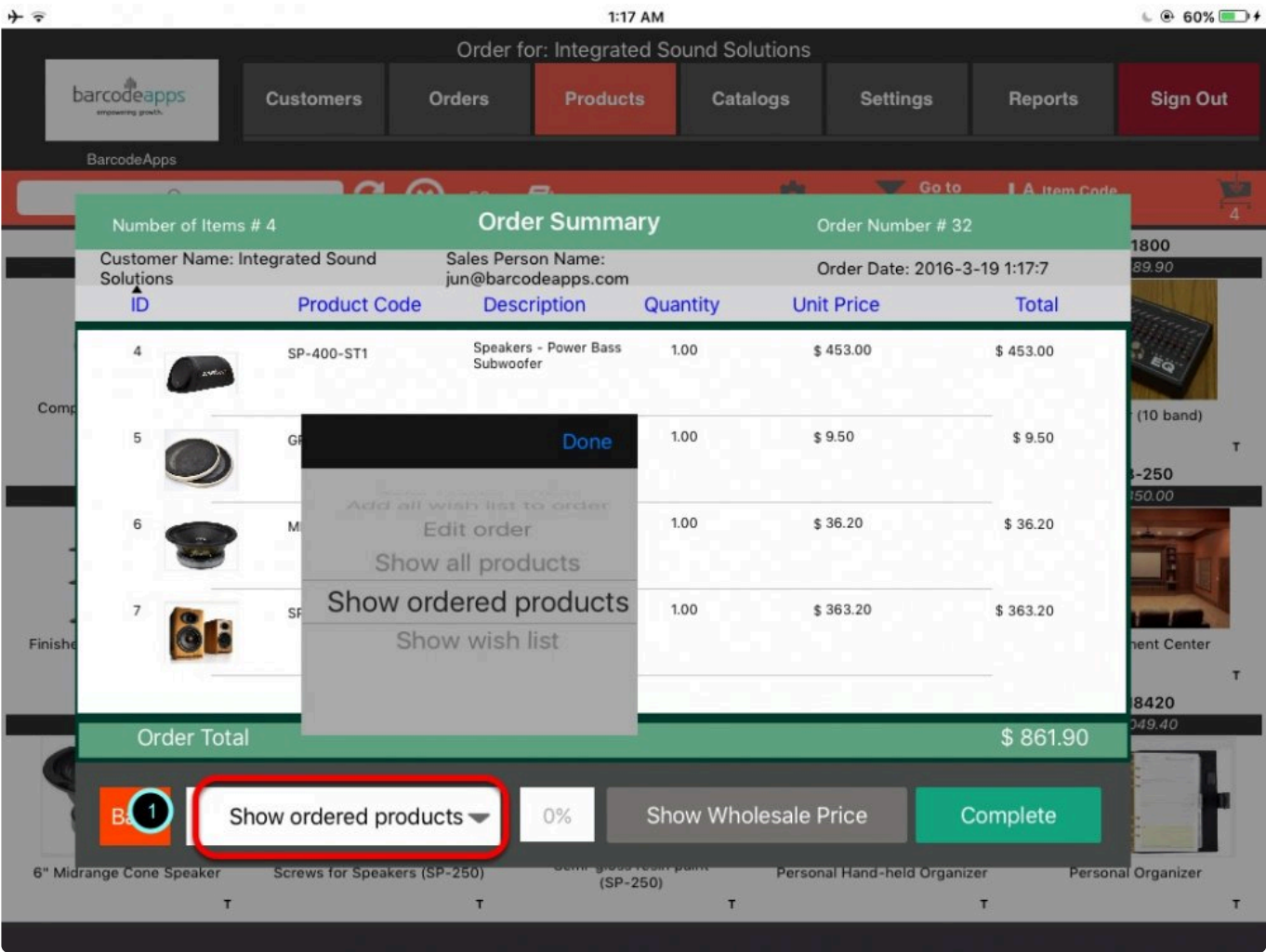
DELETING AN ITEM FROM AN ORDER

To delete an item from your order tap on your item and swipe to the left. The Delete button will appear. Tap on the Delete button to remove your item.

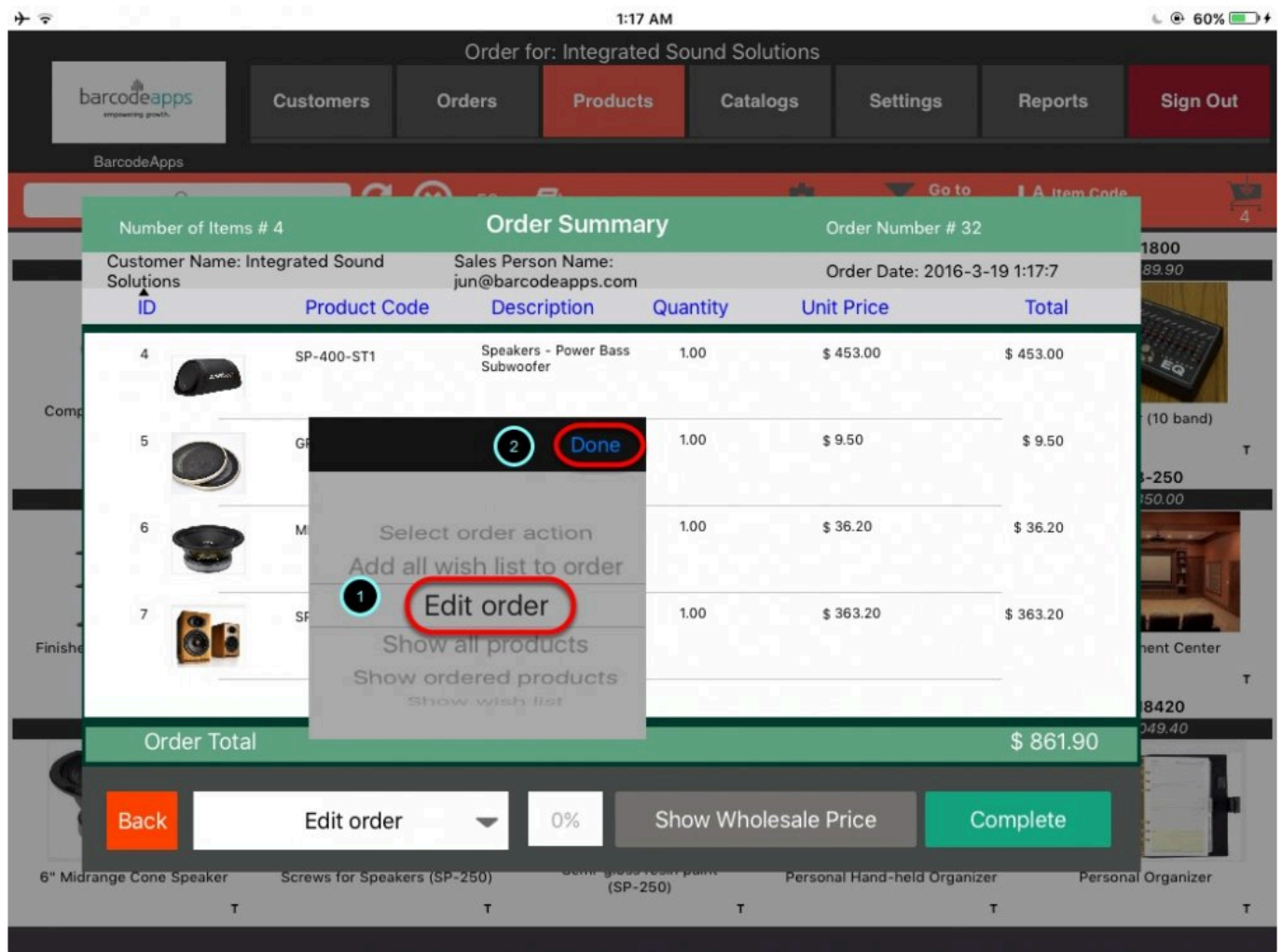


EDITING THE QUANTITY OF AN ITEM

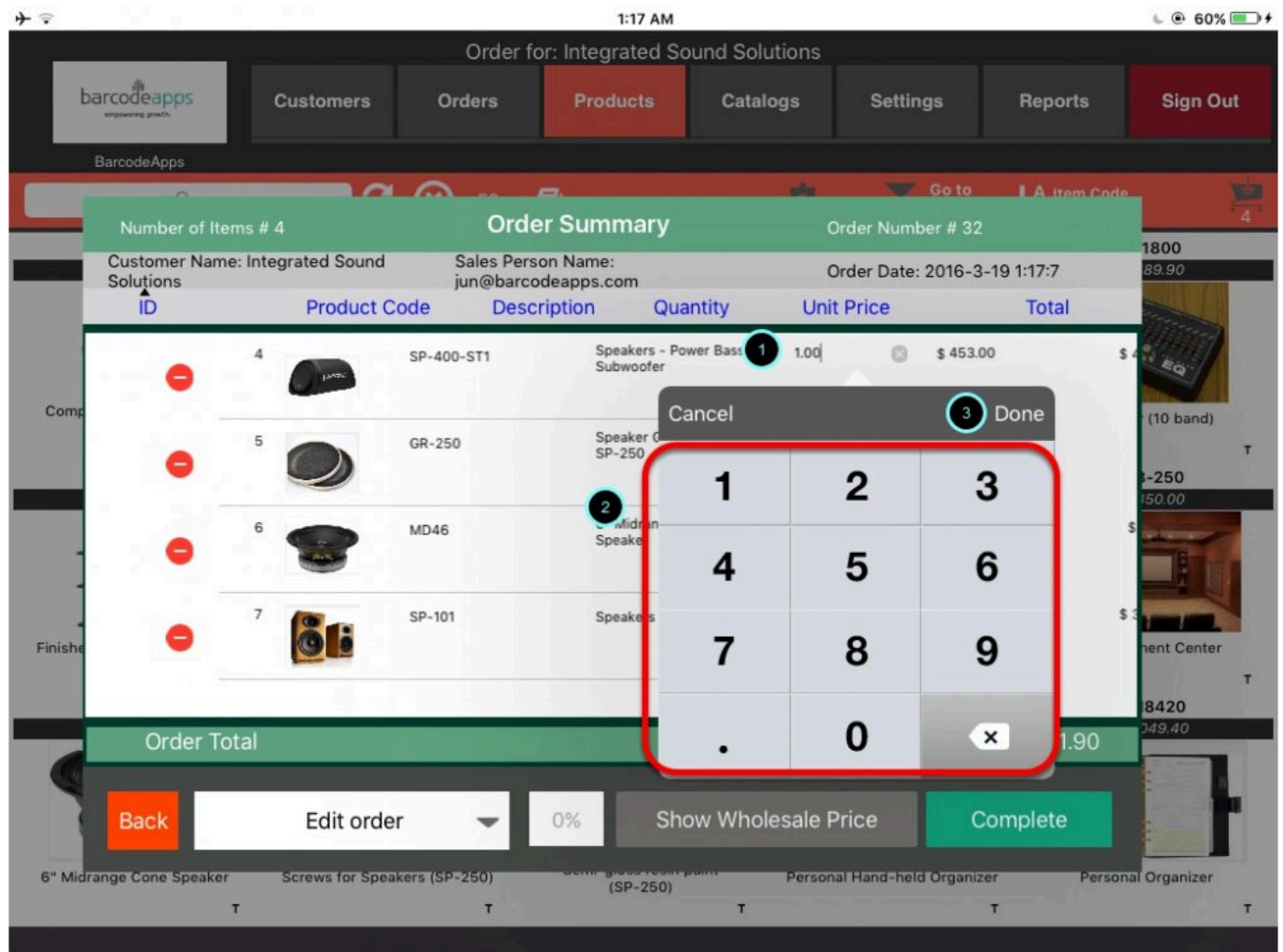
To edit the quantity of an item, tap on the drop down menu on the bottom left corner.



Select Edit Order and then tap on Done.

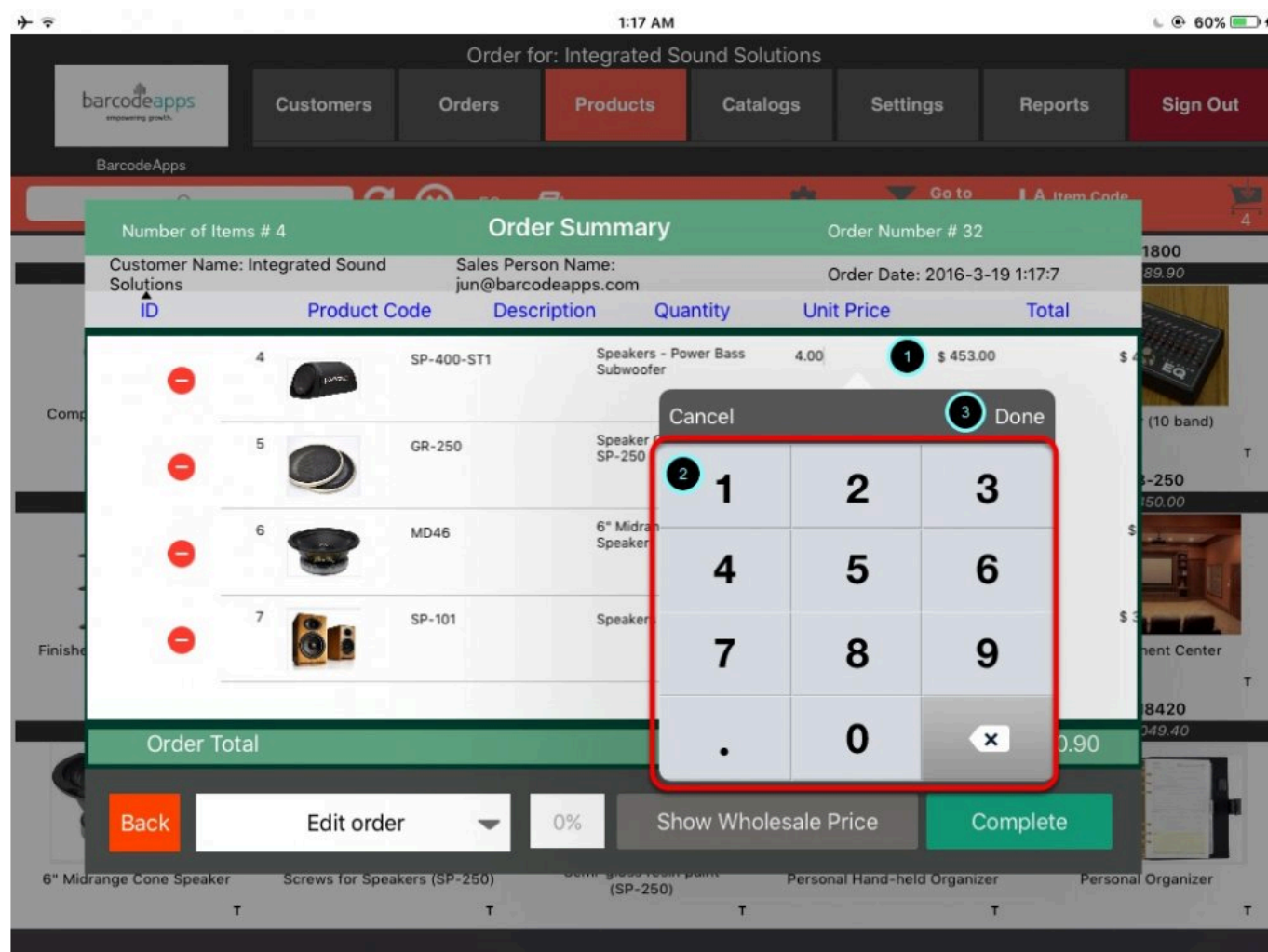


tap on the quantity value of the item and specify your desired quantity. Then hit Done.



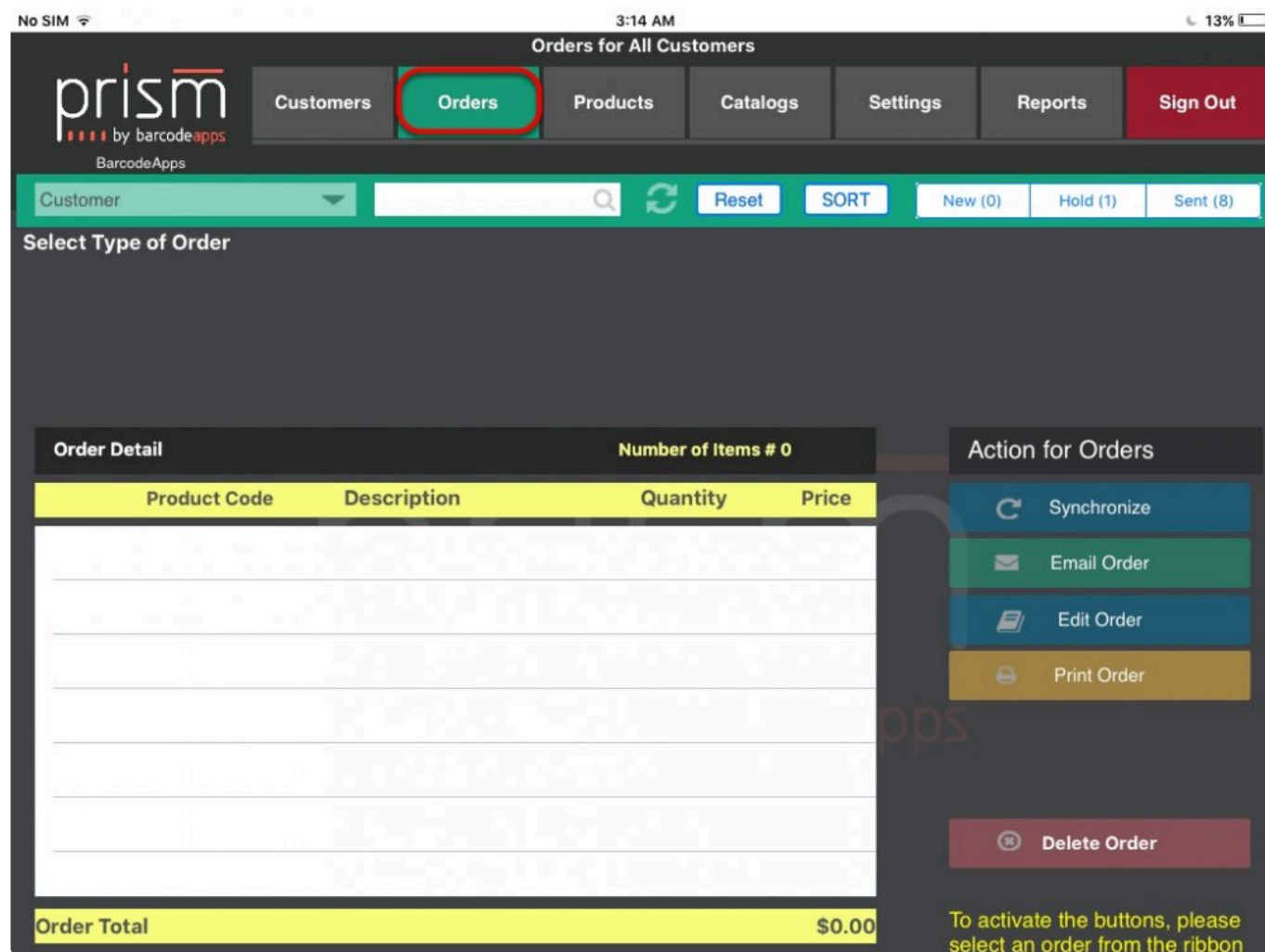
EDITING THE UNIT PRICE OF AN ITEM

To edit the unit price of an item, tap on the drop down menu on the bottom left corner and select Edit order, tap on the price value of the item and specify your desired pricing. Then hit Done.



EDITING AN ORDER FROM THE ORDER SCREEN

An order can be also be edited from the orders window. Tap on Order menu.



Select the order status (New, Hold, Sent) , tap on the order that needs to be edited and then tap on edit order.

prism by barcodeapps
BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

Customer [Search] [Reset] [SORT] [New (0)] [Hold (1)] [Sent (8)]

Orders on Hold 1

Crazy Arnold s Stereo Inc. Order # 10
Mar 08, 2016 03:22
Order Total \$ 771.55

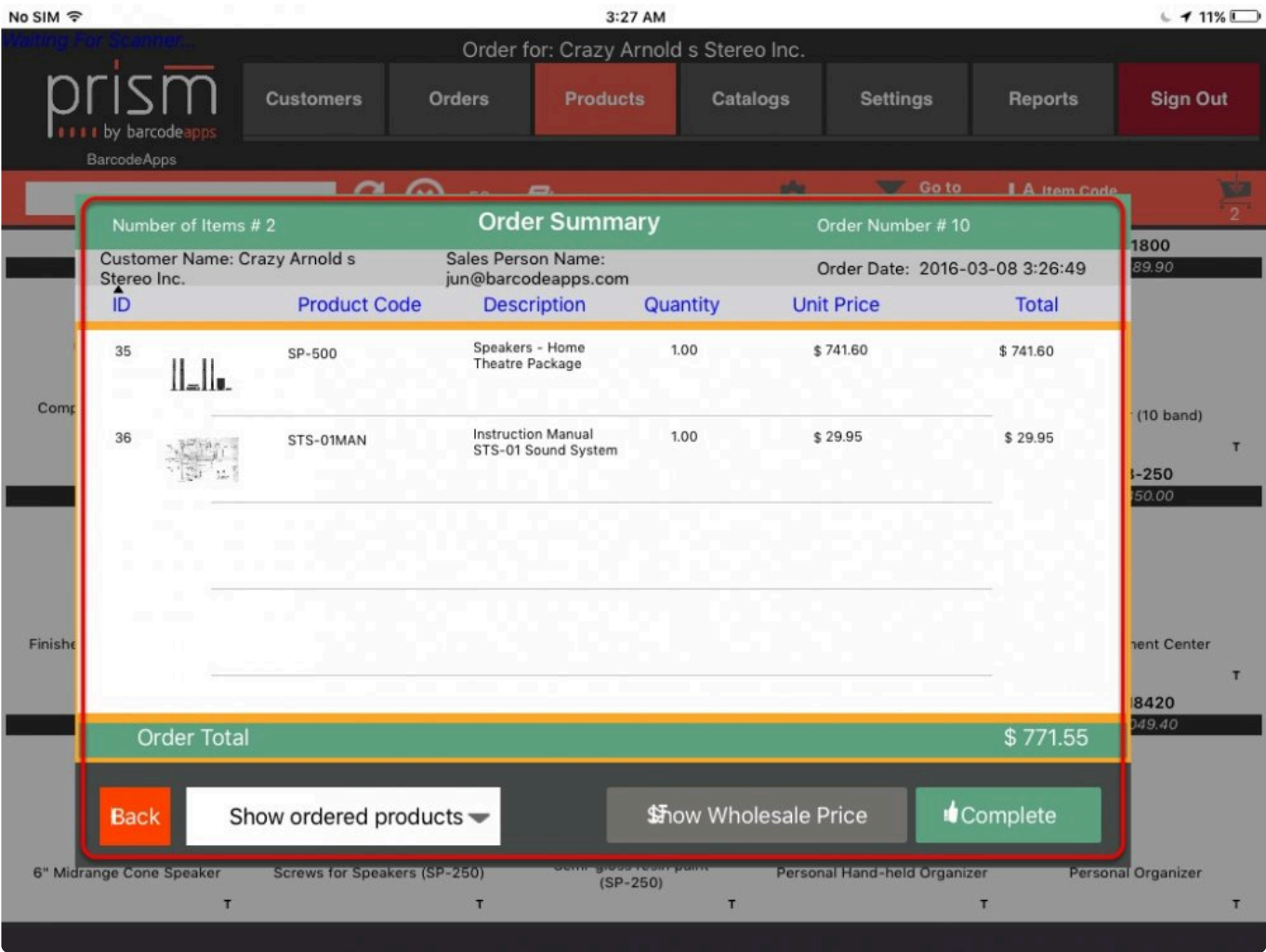
Order Detail for Crazy Arnold s Stereo Inc. Number of Items # 2 More

Product Code	Description	Quantity	Price
SP-500	Speakers - Home Theatre Package	1.00	\$ 741.60
STS-01MAN	Instruction Manual STS-01 Sound System	1.00	\$ 29.95
Order Total \$ 771.55			

Action for Orders

- Synchronize
- Email Order
- Edit Order**
- Print Order
- Remove Hold
- Delete Order

The order summary should show and you can repeat the same procedure to edit an item (quantity, delete)

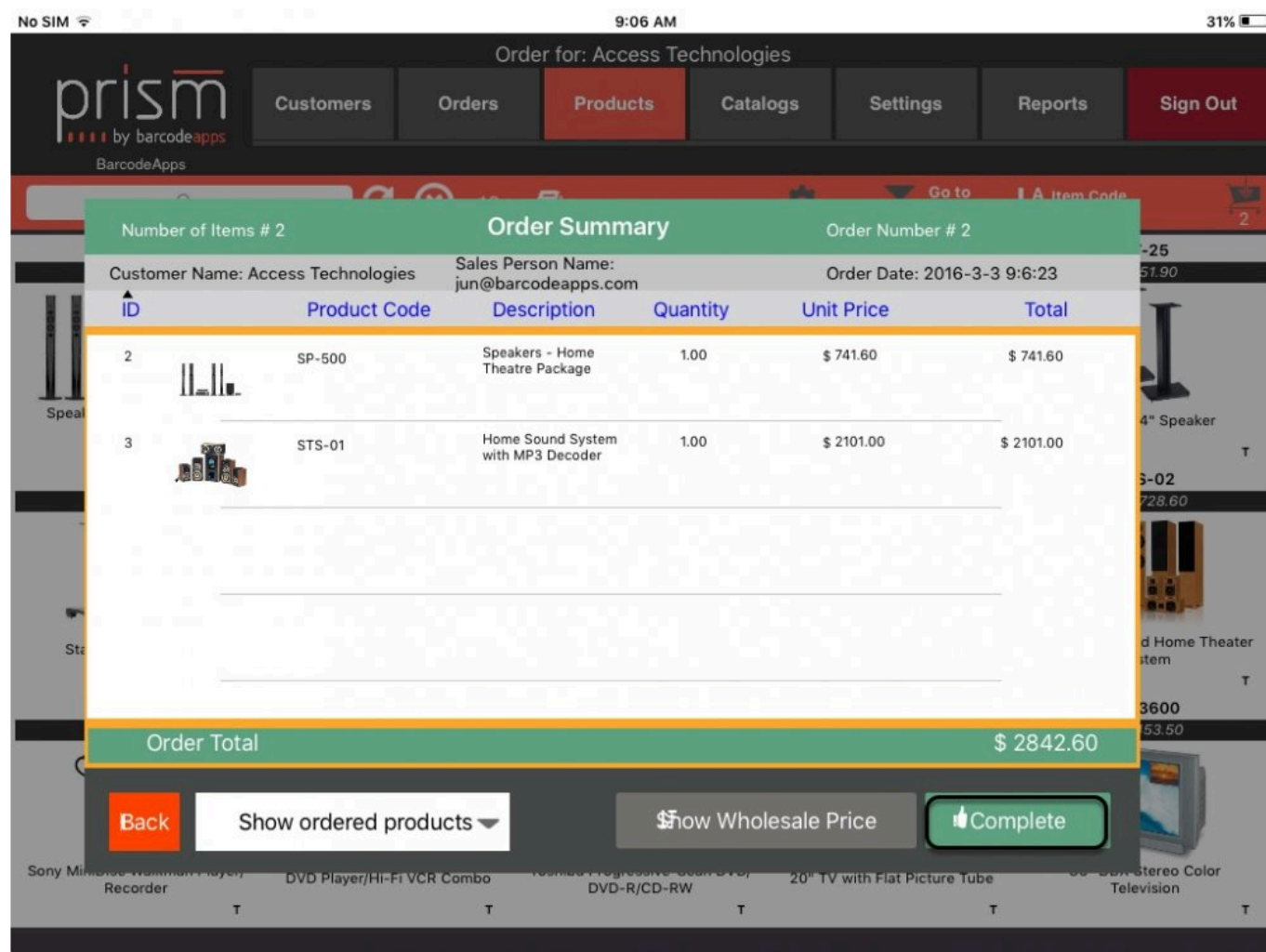


2.4.3.8. ix. Completing An Order

This knowledge base will guide user to complete an order using the PRISM App.

Completing an Order

On the Order Summary window tap on Complete.



The Order Confirmation box will show up. Just fill out the information needed and then Tap on Confirm Order.

No SIM 9:06 AM 31%

Order for: Access Technologies

prism by barcodeapps BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

19

Go to Categories A Item Code Z Ascending

2

SP-500 \$ 741 SPW-12G SPW-14G ST-10 ST-25

Number of Items # 2 Order Confirmation Order Number # 2

Customer Name: Access Technologies Sales Person Name: jun@barcodeapps.com Order Date: 2016-3-3 9:6:27

Ship Date Hold On YES NO

Cancel Date written By

Net 30 days Notes

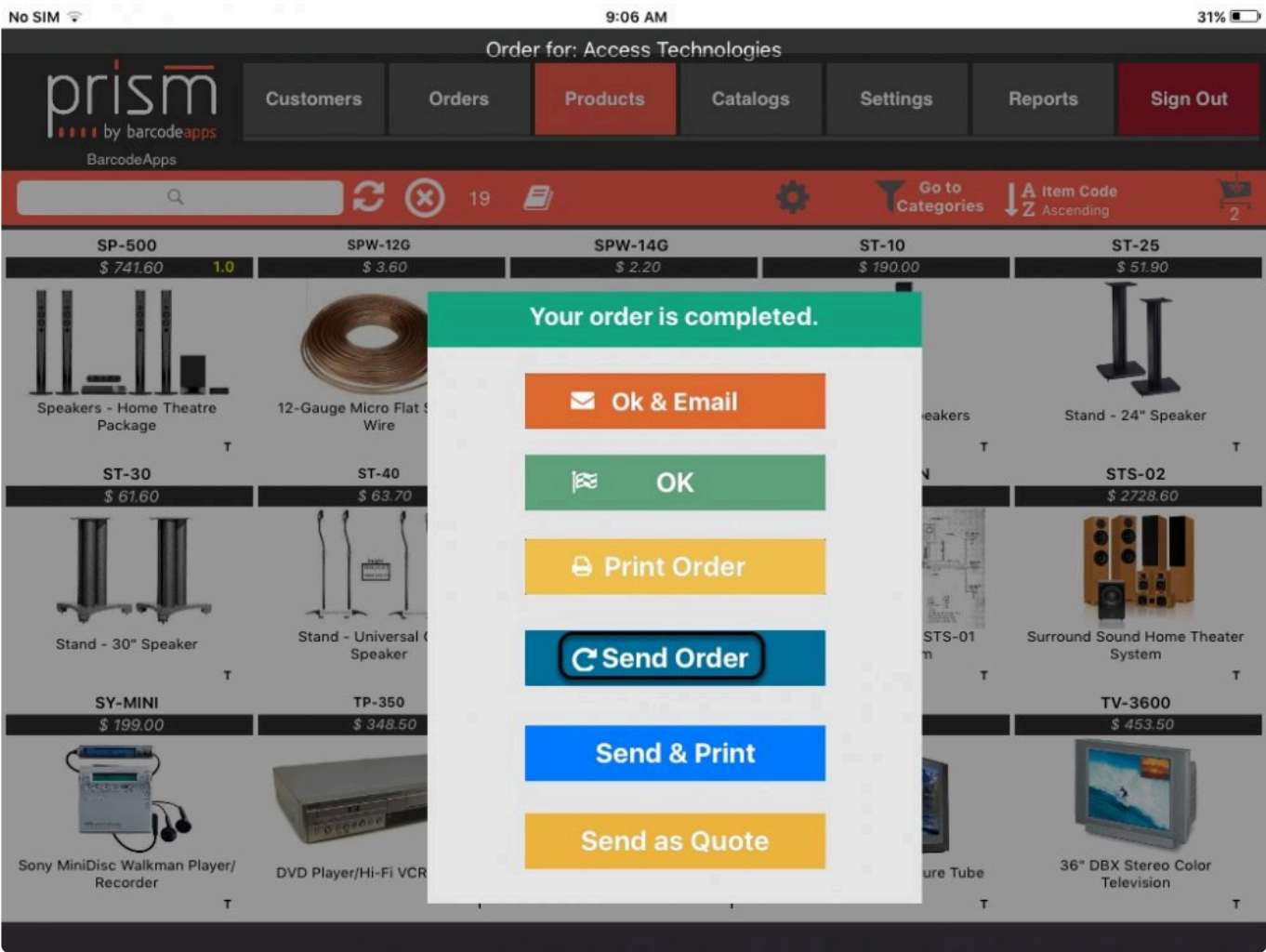
Cust Po

Signature Order Additional Info

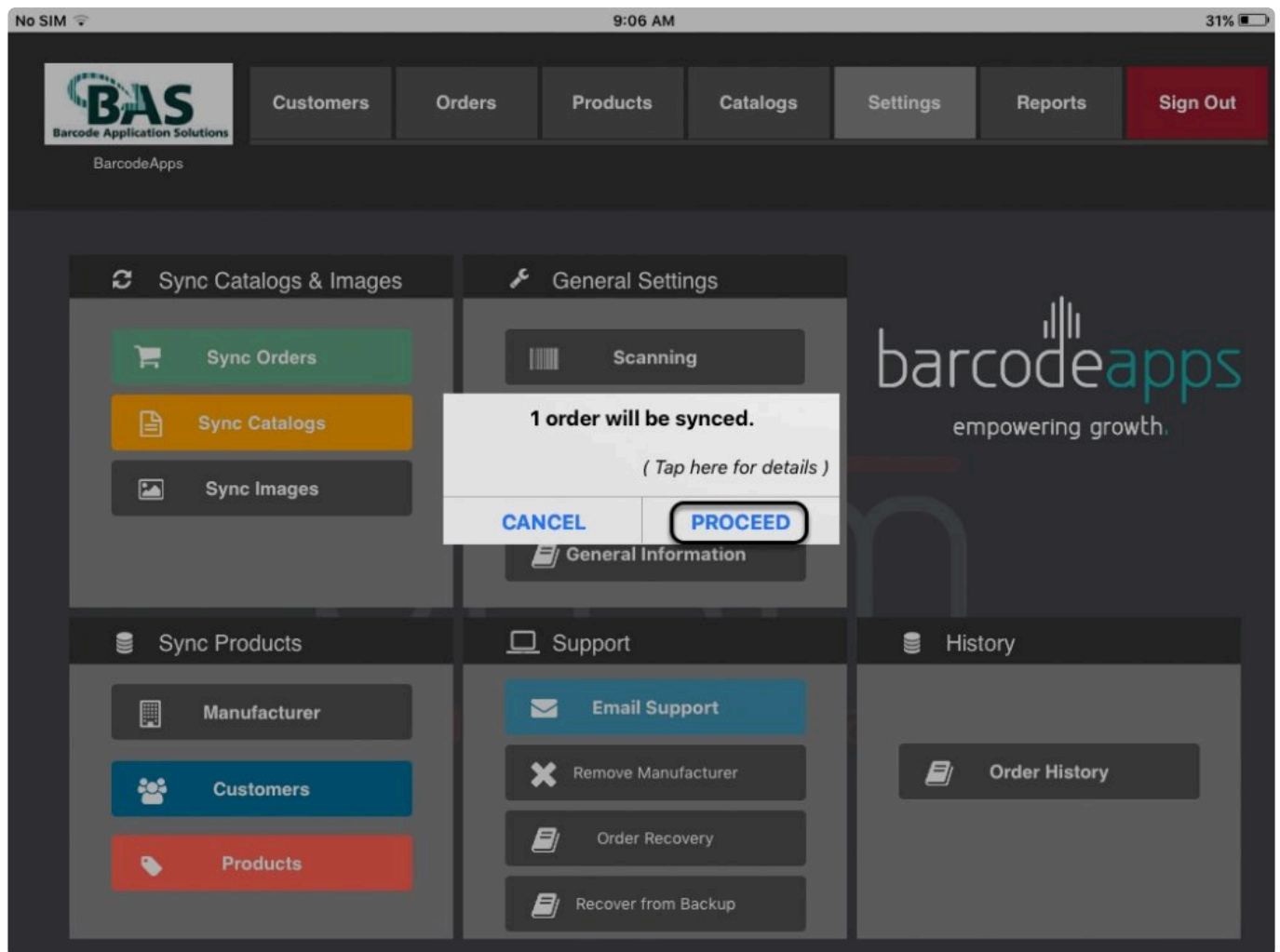
Back to Order Picture Confirm Order

Sony MiniDisc Walkman Player/Recorder DVD Player/Hi-Fi VCR Combo Toshiba Progressive Scan DVD/DVD-R/CD-RW 20" TV with Flat Picture Tube 60" Sony Stereo Color Television

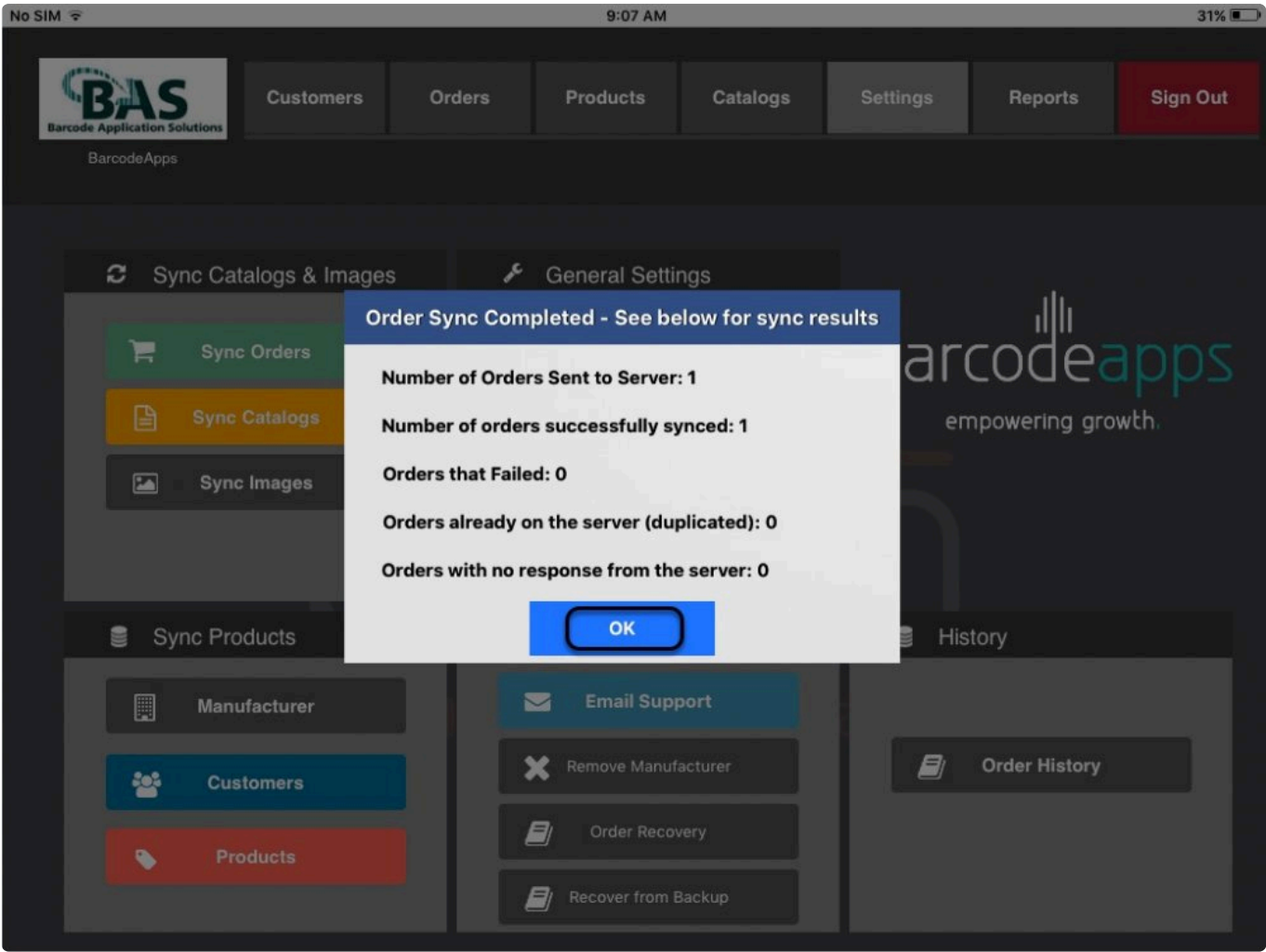
Tap on Send Order to complete



Tap on Proceed on the sync notification box



Review sync results and then Tap on Ok when finish.



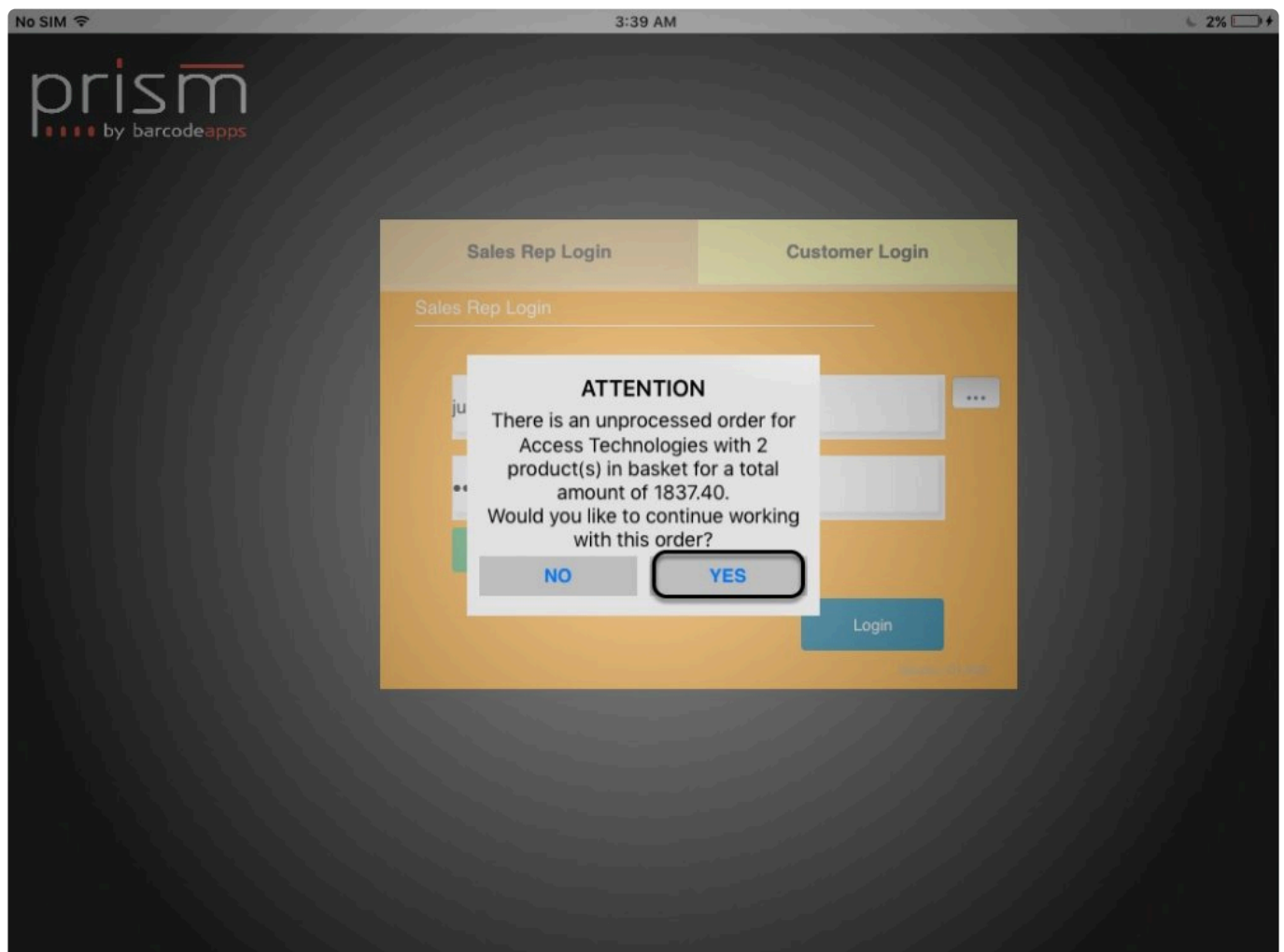
2.4.3.9. x. Recovering An Order

This knowledge base will show users on how they can recover their orders from the PRISM APP iPad

I. Auto Recover Feature

PRISM app has an auto recover function, this will help users to recover unprocessed orders that was interrupted in any instances of a system issue (app crashed, ipad crashed, shutdown)

In a scenario that the app closed. All you need to do is reopen PRISM app. PRISM will give you a notification of any unprocessed order. Just tap on YES to recover the order.

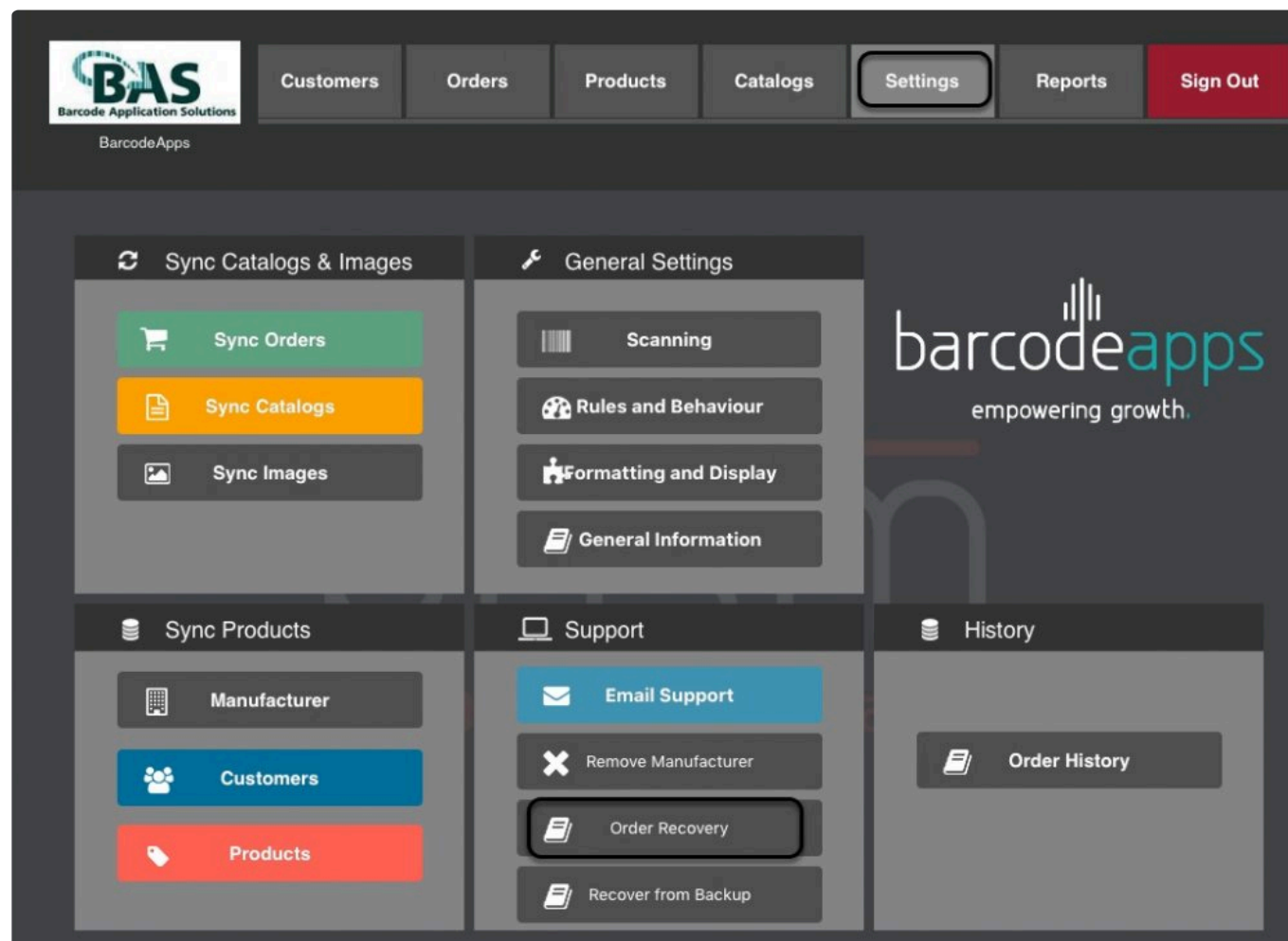


II. ORDER RECOVERY FUNCTION

In any case that you cannot find a previous order on the Order Summary for review. You can use the Order Recovery function under settings.

This option will show you a repository of all orders that the IPAD saved LOCALLY.

To access this feature. Tap on Settings and then Order recovery.



A list of all processed orders will show. Find the order to be recovered and then select on show items to review the order.

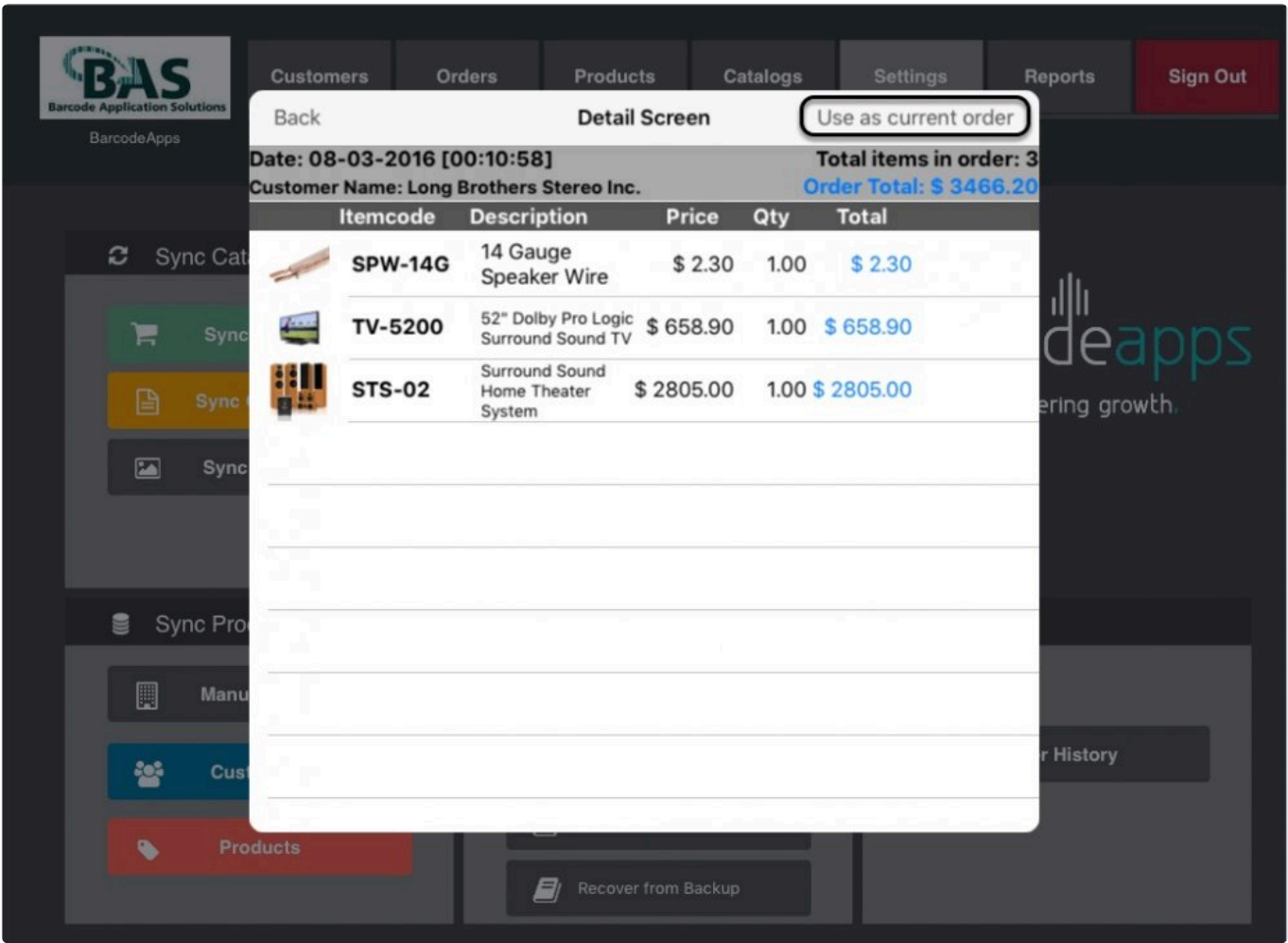
Order Recovery

NO.	Order Date	Customer Code	Total Items	Order Total	Show Items
20	09-03-2016 [03:40:13]	ACTECH	2	\$ 1837.40	Show Items
19	08-03-2016 [04:30:06]	ACTECH	2	\$ 1837.40	Show Items
18	08-03-2016 [04:04:26]	ACTECH	2	\$ 3182.10	Show Items
17	08-03-2016 [03:59:00]	ACTECH	2	\$ 3182.10	Show Items
16	08-03-2016 [03:35:20]	CZYARN	2	\$ 771.55	Show Items
15	08-03-2016 [03:22:22]	CZYARN	2	\$ 771.55	Show Items
14	08-03-2016 [03:15:33]	LBSTER	2	\$ 661.20	Show Items
13	08-03-2016 [02:56:32]	LBSTER	2	\$ 661.20	Show Items
12	08-03-2016 [02:55:20]	LBSTER	2	\$ 661.20	Show Items
11	08-03-2016 [02:34:01]	MASTER	1	\$ 719.40	Show Items
10	08-03-2016 [01:40:13]	ACTECH	1	\$ 741.60	Show Items
9	08-03-2016 [00:10:58]	LBSTER	3	\$ 3466.20	Show Items
8	08-03-2016 [00:09:59]	LBSTER	1	\$ 29.95	Show Items
7	08-03-2016 [00:08:53]	LBSTER	3	\$ 3466.20	Show Items
6	08-03-2016 [00:03:59]	MASTER	1	\$ 4676.10	Show Items
5	04-03-2016 [01:19:14]	DSNDM	3	\$ 1463.70	Show Items
4	04-03-2016 [01:12:15]	DSNDM	5	\$ 4006.80	Show Items
3	04-03-2016 [01:08:31]	CREAUD	2	\$ 1424.30	Show Items
2	04-03-2016 [01:06:38]	ACTECH	2	\$ 2842.60	Show Items
1	04-03-2016 [01:04:47]	CZYARN	1	\$ 741.60	Show Items

Total Recover Orders: 20

Recover from Backup

Once done reviewing the order and verified that it's correct. Just tap on Use as current order



Now you can start to work on the order recovered.

Waiting For Scanner...

Order for: Long Brothers Stereo Inc.

prism by barcodeapps BarcodeApps

Customers Orders **Products** Catalogs Settings Reports Sign Out

Number of Items # 3 Order Summary Order Number # 14

Customer Name: Long Brothers Stereo Inc. Sales Person Name: jun@barcodeapps.com Order Date: 2016-3-9 3:41:32

ID	Product Code	Description	Quantity	Unit Price	Total
45	SPW-14G	14 Gauge Speaker Wire	1.00	\$ 2.30	\$ 2.30
46	TV-5200	52" Dolby Pro Logic Surround Sound TV	1.00	\$ 658.90	\$ 658.90
47	STS-02	Surround Sound Home Theater System	1.00	\$ 2805.00	\$ 2805.00
Order Total					\$ 3466.20

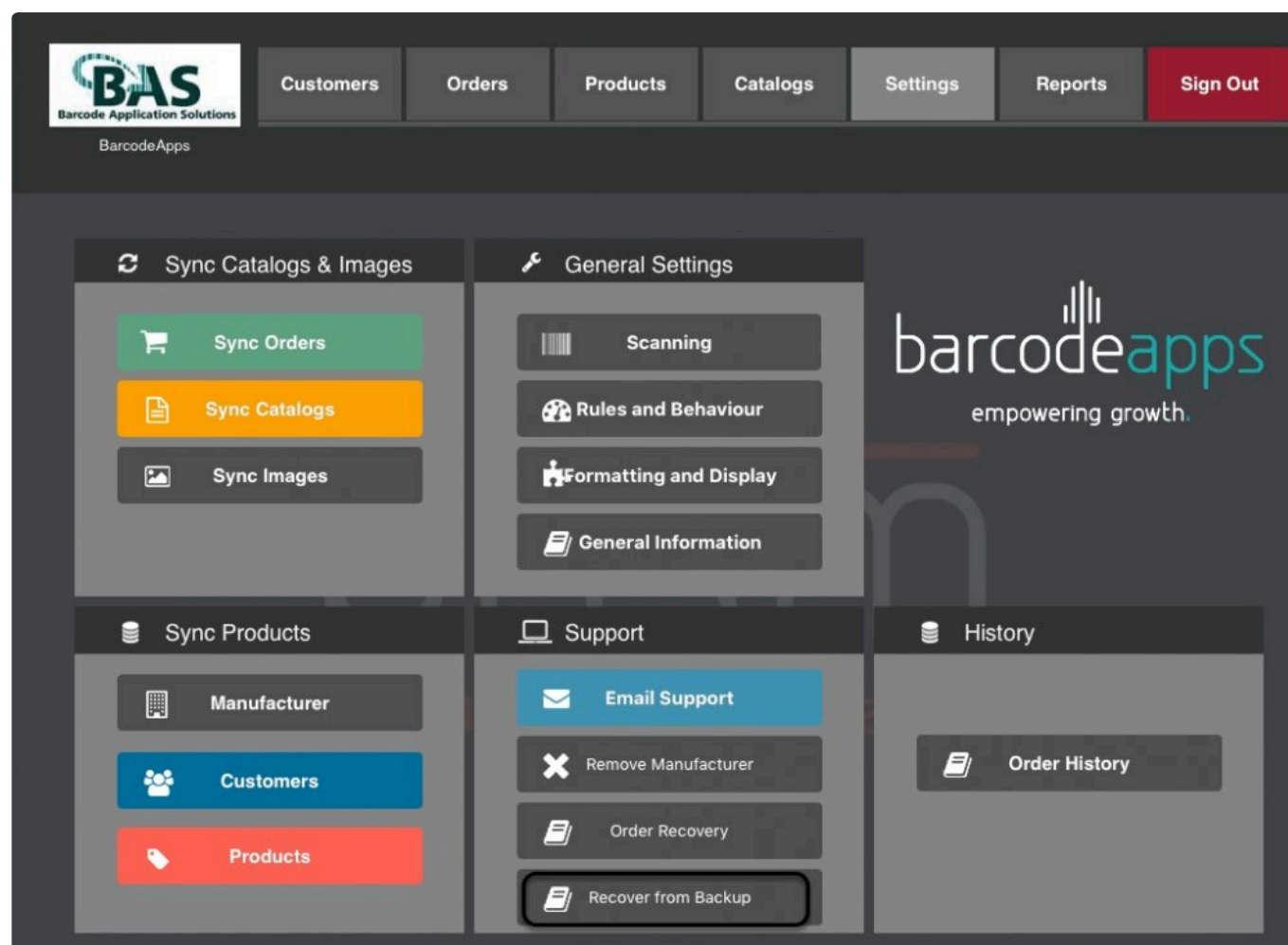
Back Show ordered products Show Wholesale Price Complete

6" Midrange Cone Speaker Screws for Speakers (SP-250) Semi-gloss resin paint (SP-250) Personal Hand-held Organizer Personal Organizer

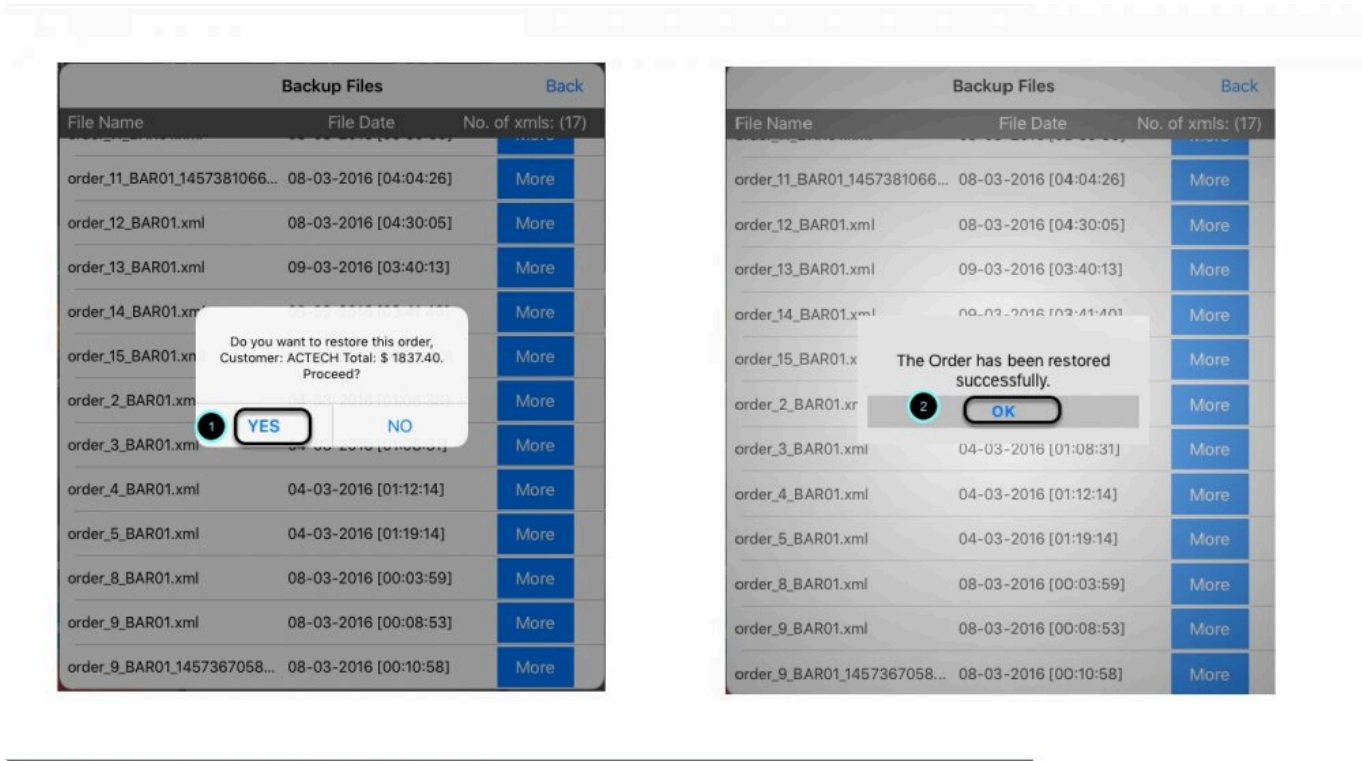
III. RECOVERY FROM BACK UP FUNCTION

Another way to recover an order is via the Recovery from Back up feature. This feature can recover an order from the back up XML that is stored LOCALLY on the IPAD.

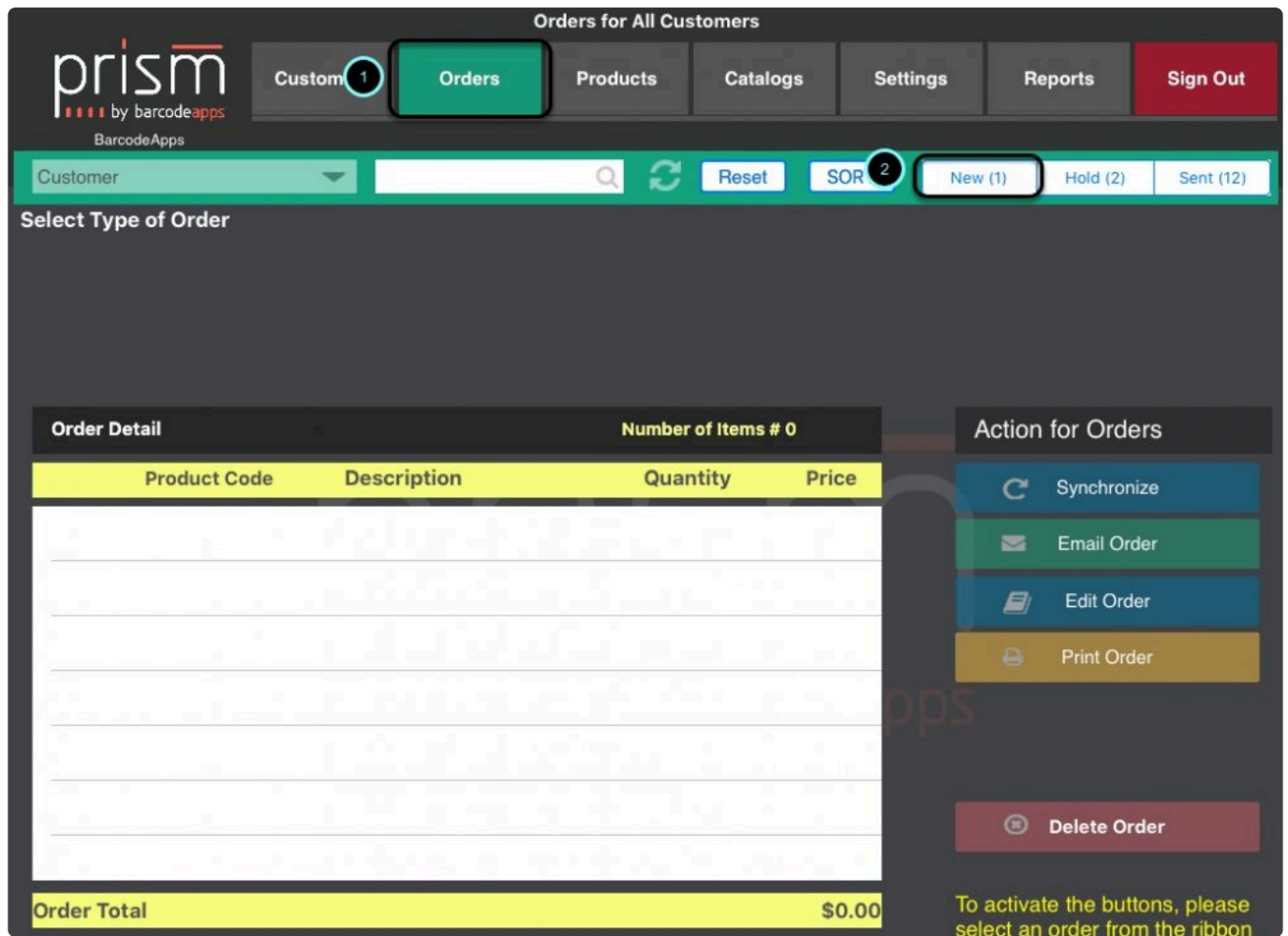
To recover an order from back up, Go to Settings and Tap on Recovery from Backup



A list of backup will show up, just tap on the Order that you wish to recover , select YES to confirm order, and then Ok to proceed.



To check on the Order, Just go to the Orders window and you will see that the Order recovered is on the New order bucket.



Just tap on New and then tap on the customer to show the order details. Now you can start working on the recovered order.

The screenshot displays the PRISM application interface for managing orders. At the top, there's a navigation bar with tabs for Customers, Orders (highlighted), Products, Catalogs, Settings, Reports, and Sign Out. Below this is a search bar with a dropdown for 'Customer', a search icon, a refresh icon, and buttons for 'Reset', 'SORT' (with a '1' badge), 'New (1)', 'Hold (2)', and 'Sent (12)'. A 'New Orders' section shows a card for 'Access Technologies' with 'Order # 16', 'WH: 00', 'Mar 08, 2016 04:30', and 'Order Total \$ 1837.40'. The main section is titled 'Order Detail for Access Technologies' and shows a table with 2 items. To the right of the table is an 'Action for Orders' panel with buttons for Synchronize, Email Order, Edit Order, Print Order, and Delete Order. At the bottom, a yellow bar shows the 'Order Total' as '\$ 1837.40'.

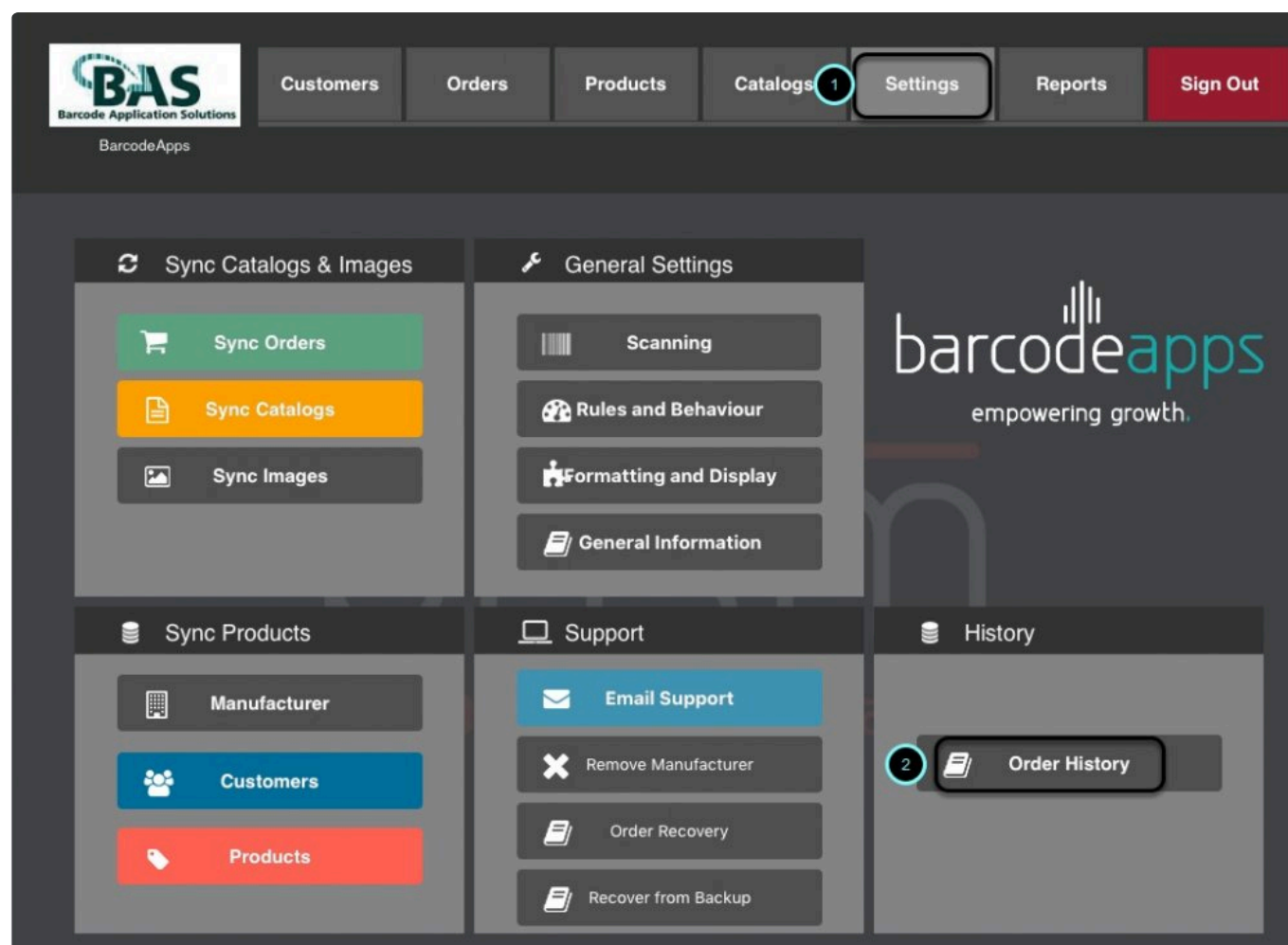
Product Code	Description	Quantity	Price
TV-5200	52" Dolby Pro Logic Surround Sound TV	1.00	\$ 638.40
VAIO-24	Desktop PC with Intel Pentium 4 Proc.	1.00	\$ 1199.00

Order Total \$ 1837.40

IV. RECOVER FROM ORDER HISTORY

There will be a case that PRISM has to be reinstalled and with that, all DATA (including the ORDER ENTRIES) that are saved LOCALLY on the IPAD will be cleared out and if those DATA are gone; All three features (Auto recovery, Order recovery and Recovery from back up) will not work . What we can use in this type of scenario is the RECOVER FROM ORDER HISTORY feature.

To RECOVER FROM ORDER HISTORY, go to settings and then tap on Order History



Select the order that needs to be recovered (Multiple selection can be done) and then tap on Generate Zip. (If your order is not on the list, we will be more than happy to help. [Please contact us](#))

Barcode Application Solutions
BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

Back Orders History Load Orders

Orders History (20)

✓ Generate Zip ✕ Clear Selection

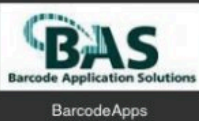
Search 🔍 ✕

☐ Check All

⏪ ⏩ 1 2 ⏪ ⏩

<input checked="" type="checkbox"/> 21	Order Date: 2016-03-08 16:15	RepCode: BAR01-002	Customer Code: ACTECH	Customer Name: Access Technologies	Total: \$6,384.00
<input type="checkbox"/> 20	Order Date: 2016-03-07 15:30	RepCode: BAR01-002	Customer Code: ACTECH	Customer Name: Access Technologies	Total: \$1,837.40
<input type="checkbox"/> 19	Order Date: 2016-03-03 14:45	RepCode: BAR01-002	Customer Code: ACTECH	Customer Name: Access Technologies	Total: \$2,842.60

Wait for the message (ZIP GENERATED) and then tap on Load Orders.



BarcodeApps

Customers

Orders

Products

Catalogs

Settings

Reports

Sign Out

Back

Orders History

2 Load Orders

Orders History (20)

Generate Zip

1 Message
Zip Generated

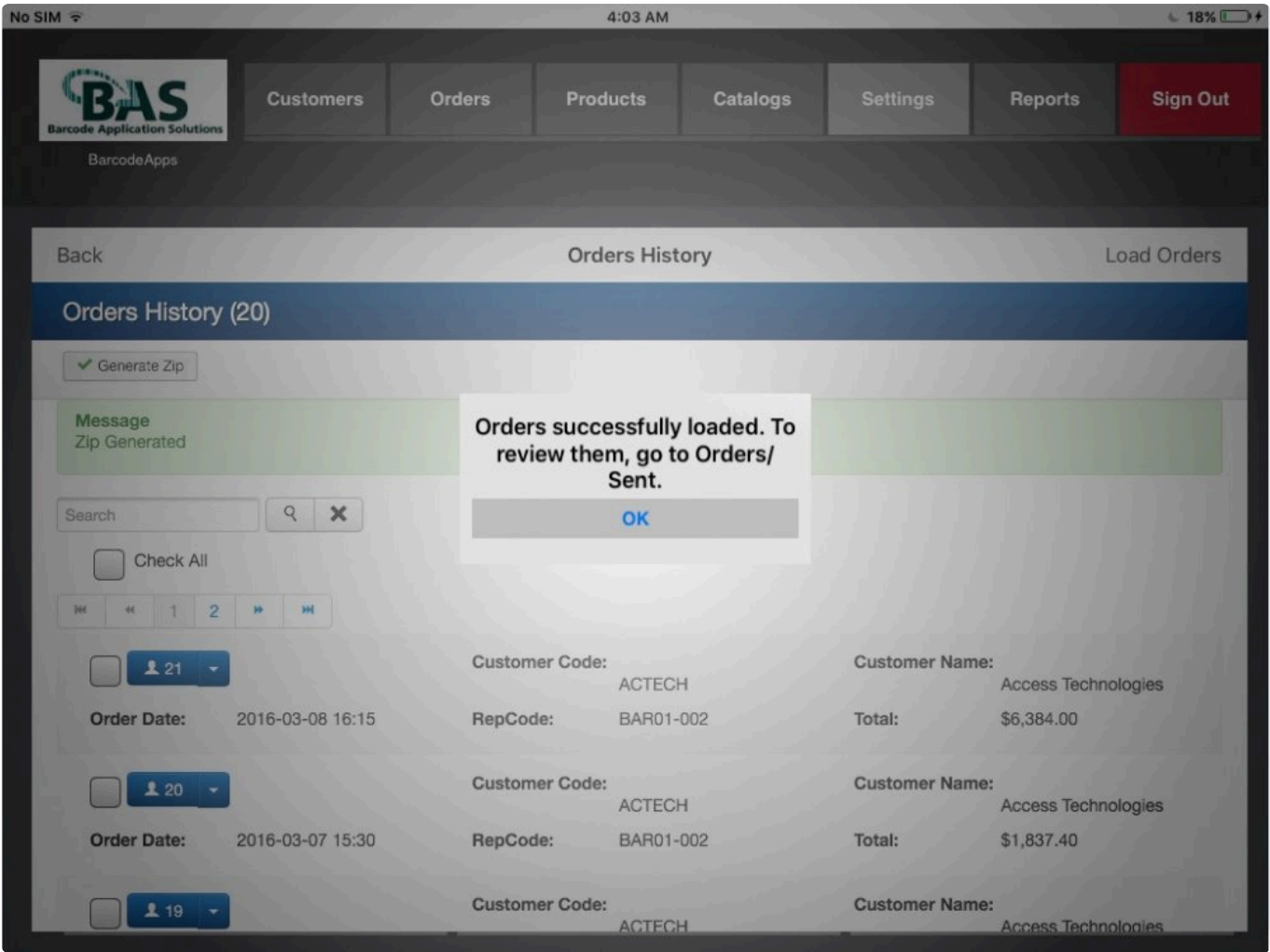
Search

Check All

1 2

<input type="checkbox"/>	21	Customer Code:	ACTECH	Customer Name:	Access Technologies
Order Date:	2016-03-08 16:15	RepCode:	BAR01-002	Total:	\$6,384.00
<input type="checkbox"/>	20	Customer Code:	ACTECH	Customer Name:	Access Technologies
Order Date:	2016-03-07 15:30	RepCode:	BAR01-002	Total:	\$1,837.40
<input type="checkbox"/>	19	Customer Code:	ACTECH	Customer Name:	Access Technologies

Click on Ok.



Now go to Orders and the recovered order will show on the sent orders. Just tap on sent.

prism

by barcodeapps

BarcodeApps

Customers

Orders

Products

Catalogs

Settings

Reports

Sign Out

Customer

Reset

SORT

New (0)

Hold (0)

Sent (1)

Select Type of Order

Order Detail

Number of Items # 0

Product Code	Description	Quantity	Price

Order Total

\$0.00

Action for Orders

Synchronize

Email Order

Edit Order

Print Order

Delete Order

To activate the buttons, please select an order from the ribbon

Tap on the customer to show the details.

Now you can start on working on the recovered order.

[illegible]

2.4.3.10. xi. Reviewing New And Current Order

This knowledge base article will guide users on how they can review their orders using the PRISM APP iPad.

Reviewing Orders

To review orders just tap on Review orders or just tap on the Orders Tab.

The screenshot displays the BarcodeApps PRISM app interface. At the top, there is a navigation bar with tabs: 'Custo 2', 'Orders', 'Products', 'Catalogs', 'Settings', 'Reports', and 'Sign Out'. Below this is a search bar and a status bar indicating 'Total Customers: 33' and 'Full Customer search results'. A table lists five customers: Access Technologies, Ace Electronics, Acme Electronics Corp., British Columbia Audio, and Canadian Speakers Limited. The 'Access Technologies' customer is selected, and their details are shown in a form on the left. On the right, there is a section titled 'Actions for Customer' with buttons for 'New Order', 'New Customer', 'Review Orders' (highlighted with a circled '1'), 'New Credit', and 'Customer Orders'.

Access Technologies	Ace Electronics	Acme Electronics Corp.	British Columbia Audio	Canadian Speakers Limited
Linda Adams	Allen Durk	Ms. Angel Miller	Mr. Doug Harris	Mrs. Lisa Oulette
5143648080	4164982381	9055953343	6046851212	4166563300
Montreal	Toronto	King City	Vancouver	Scarborough

Customer Details	
Customer Code:	ACTECH
Name:	Access Technologies
Contact Name:	Linda Adams
Email:	adams@access.com
Phone:	5143648080
Fax:	
Address:	380 St. Catherines St. Unit 15
City:	Montreal
Province:	QC
Postal Code:	H2R 4V3
Web Page:	
Rep Code:	
Payment Terms:	Net 30 days
Customer Notes:	

Actions for Customer	
	New Order
	New Customer
	Review Orders
	New Credit
	Customer Orders

On the Orders window you have three options (NEW,HOLD and SENT) to tap on.

barcodeapps
empowering growth

CustomersOrdersProductsCatalogsSettingsReportsSign Out

Customer

Reset

SORT

New (1)

Hold (3)

Sent (5)

Select Type of Order

Order Detail

Number of Items # 0

Product Code	Description	Quantity	Price

Order Total\$0.00

Action for Orders

Synchronize

Email Order

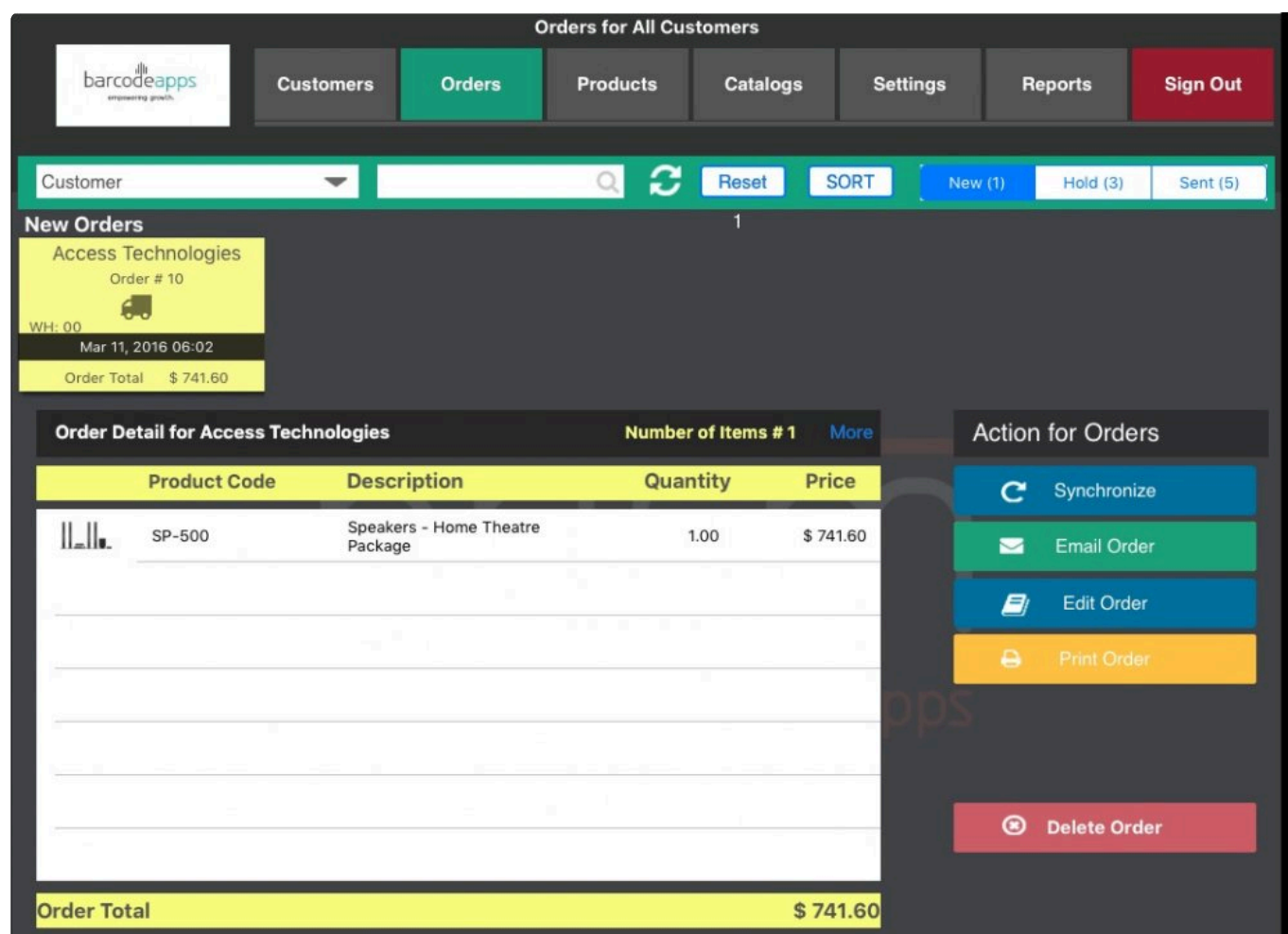
Edit Order

Print Order

Delete Order

To activate the buttons, please select an order from the ribbon

By tapping on New. The App will show you new orders that are still unprocessed



By tapping on Hold. The App will show you orders that are on hold.

[illegible]

and lastly the Sent option. Where you can review all processed orders.

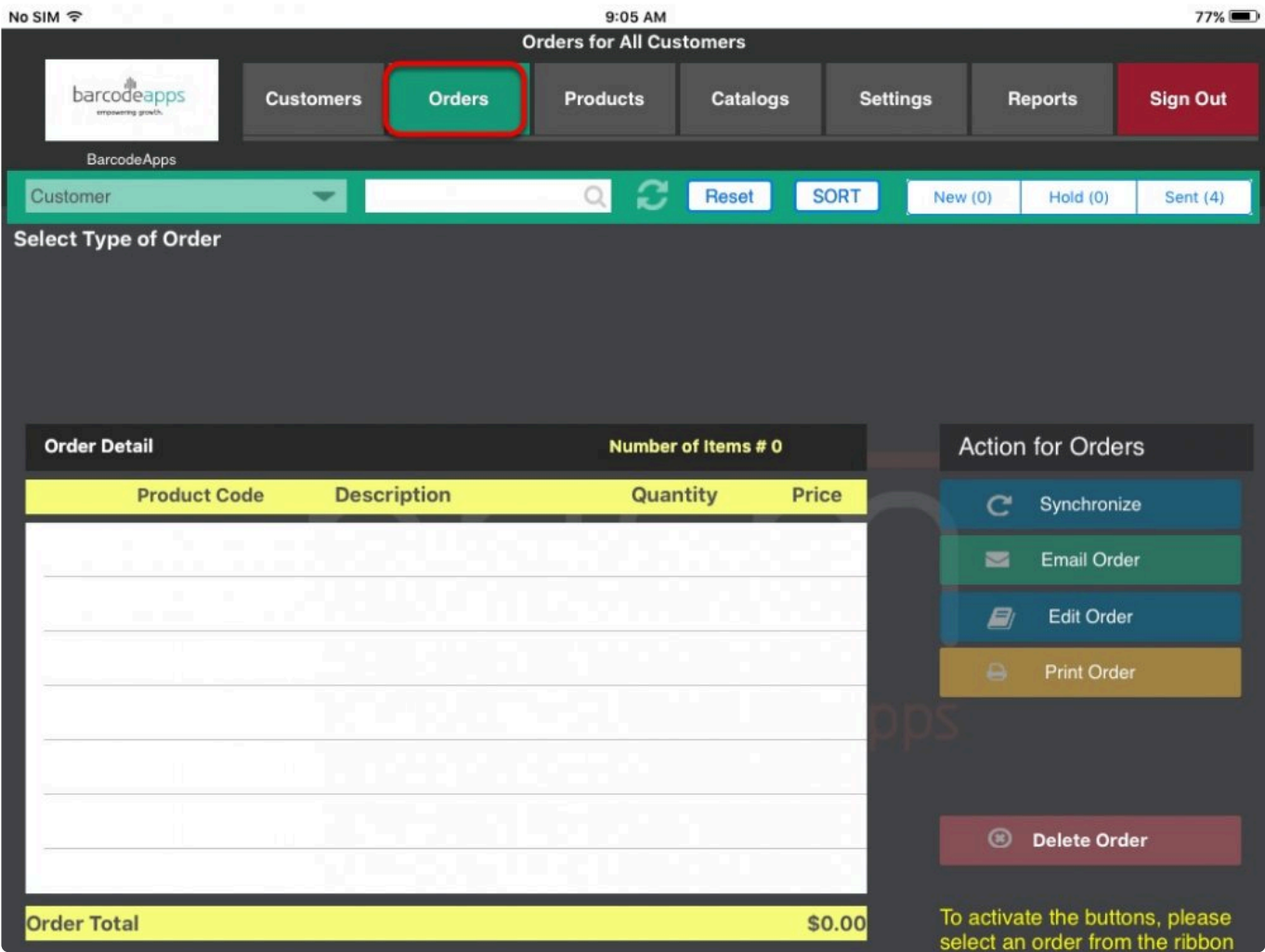
BarcodeApps © 2016

2.4.3.11. xii. Printing An Order

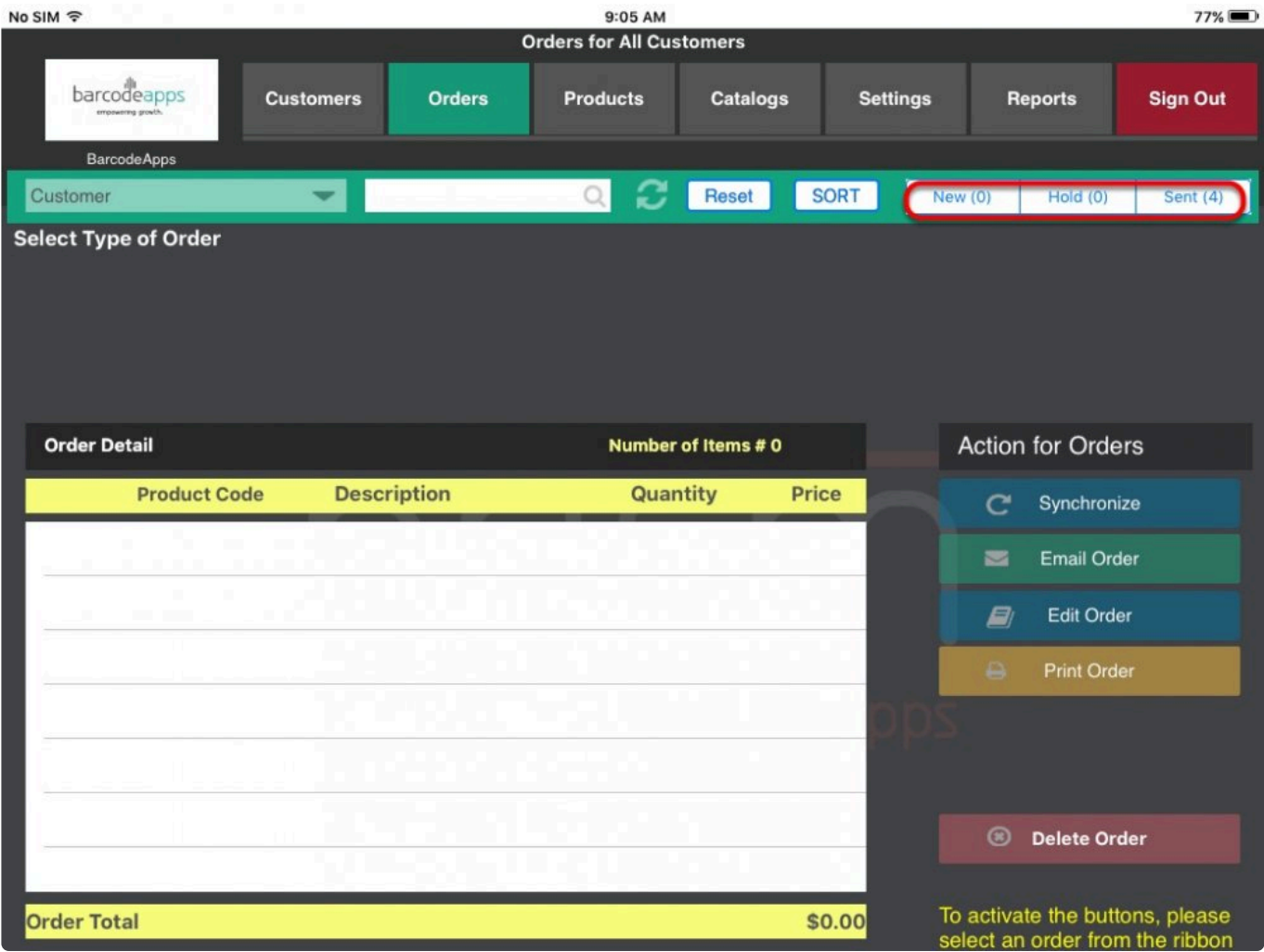
This knowledge base article will guide users on how they can print an order using the PRISM App iPad.

PRINTING ORDER

To begin printing an order. Tap on the Orders tab



Tap on the orders bin and tap on the status on where the order is located



Select the order and then tap on Print Order

No SIM 8:22 AM 80%

Orders for All Customers

BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

Customer [Search] [Reset] [SORT] New (0) Hold (0) Sent (4)

Sent Orders 4

Talbo Speakers
Order # 1
Ship Date: - Mar 21, 2016 16:51
Order Total \$ 538.29
OrderID 33 - Synced from Histo...

Talbo Speakers
Order # 2
Ship Date: - May 28, 2016 08:04
Order Total \$ 538.29
OrderID - 43 - 05/28/2016

Creative Audio
Order # 3
Ship Date: - May 28, 2016 08:12
Order Total \$ 6932.30
OrderID - 44 - 05/28/2016

Talbo Speakers
Order # 4
Ship Date: - May 28, 2016 08:15
Order Total \$ 13864.60
OrderID - 45 - 05/28/2016

Order Detail for Talbo Speakers Number of Items # 6 More

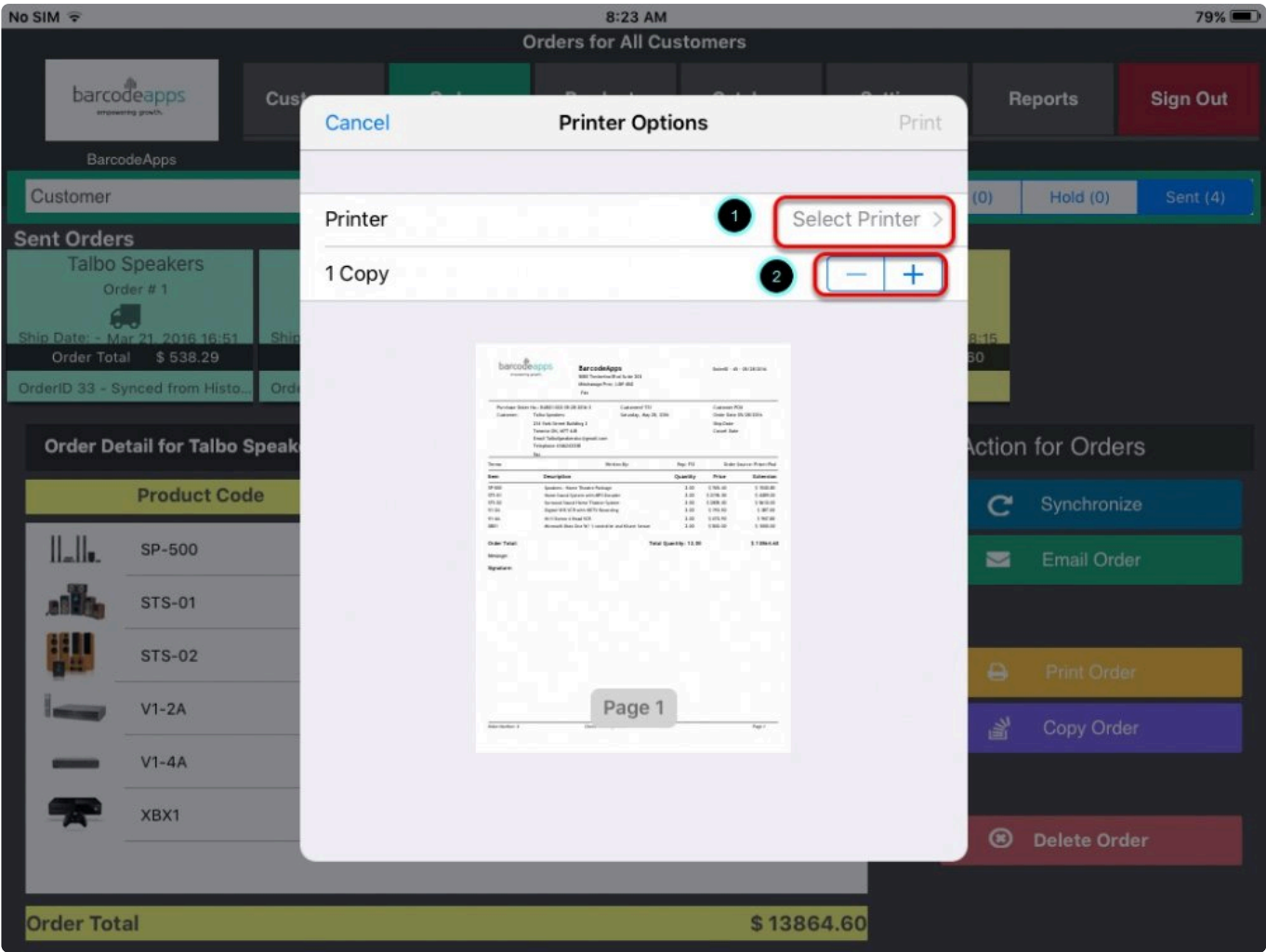
Product Code	Description	Quantity	Price
SP-500	Speakers - Home Theatre Package	2.00	\$ 765.40
STS-01	Home Sound System with MP3 Decoder	2.00	\$ 2194.50
STS-02	Surround Sound Home Theater System	2.00	\$ 2805.00
V1-2A	Digital-VHS VCR with HDTV-Recording	2.00	\$ 193.50
V1-4A	Hi-fi Stereo 4 Head VCR	2.00	\$ 473.90
XBX1	Microsoft Xbox One W/ 1 controller and Kinect Sensor	2.00	\$ 500.00

Order Total \$ 13864.60

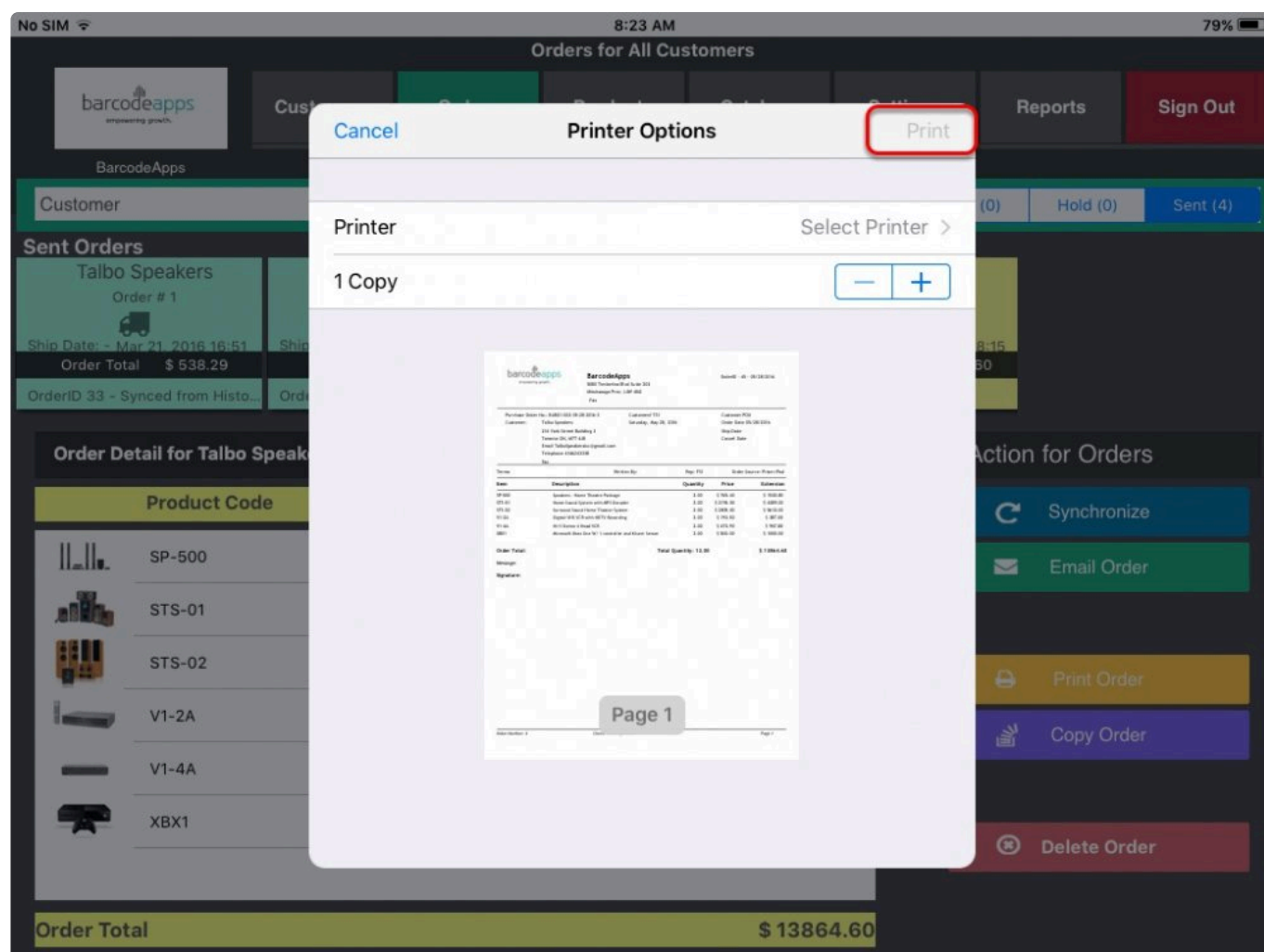
Action for Orders

- Synchronize
- Email Order
- Print Order
- Copy Order
- Delete Order

Tap on select printer to define a printer and then tap on the minus or plus sign to define the number of copies to be printed.



Once finish just tap on Print to complete the request.

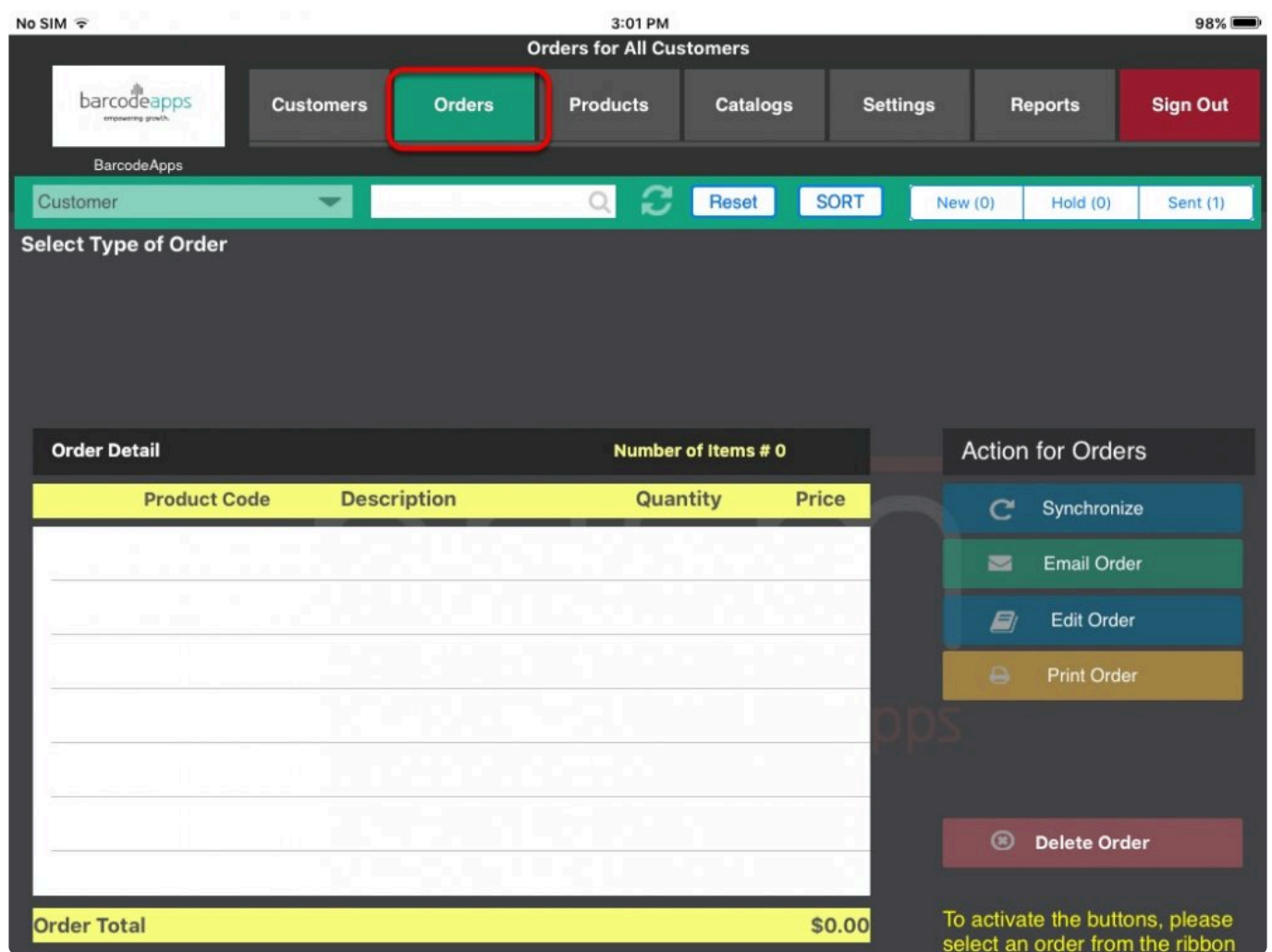


2.4.3.12. xiii. Copying An Order And Other Order Functions

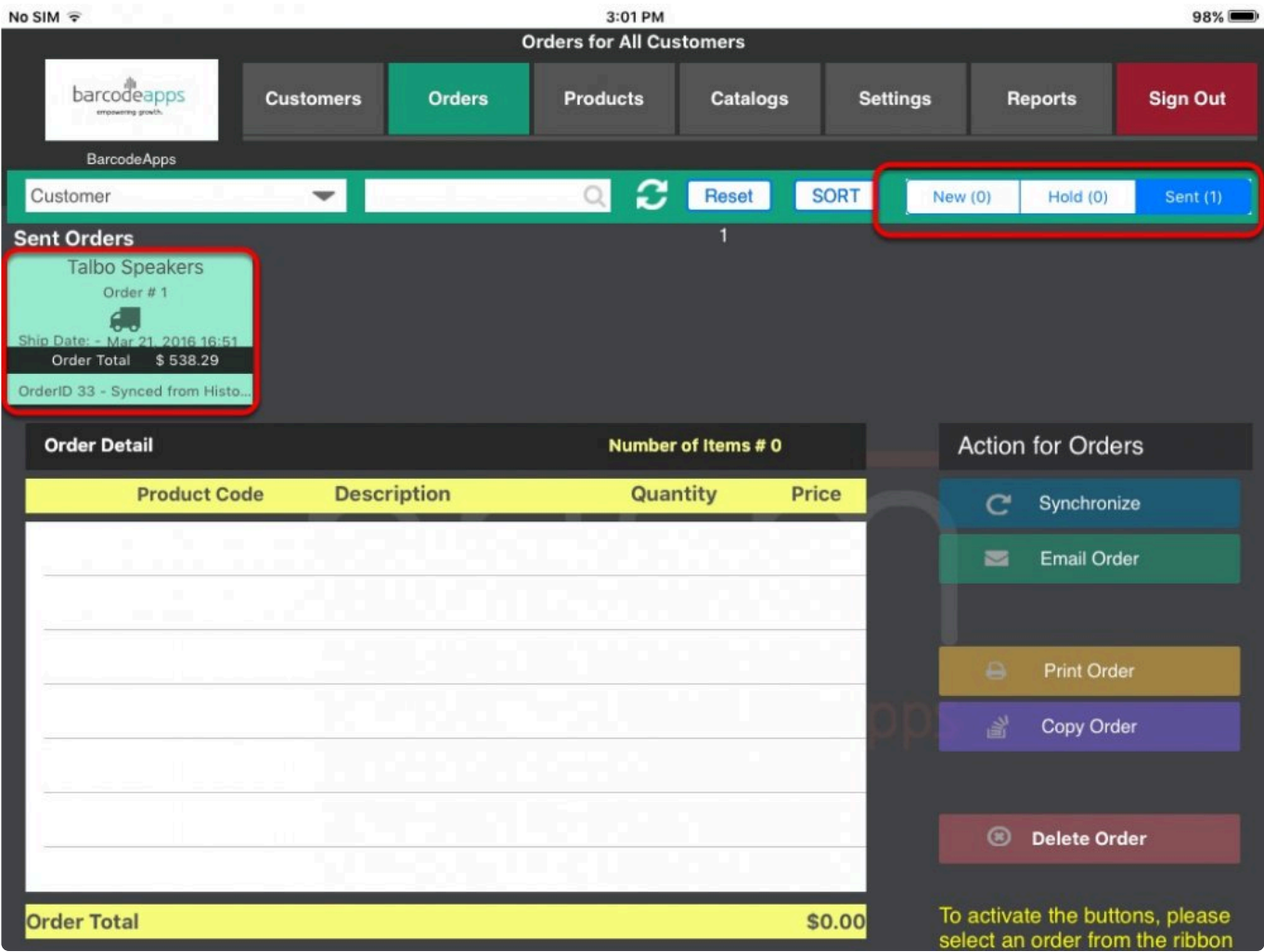
This knowledge base article will show users on how they can copy an order and other order functions inside the PRISM app.

COPY ORDER

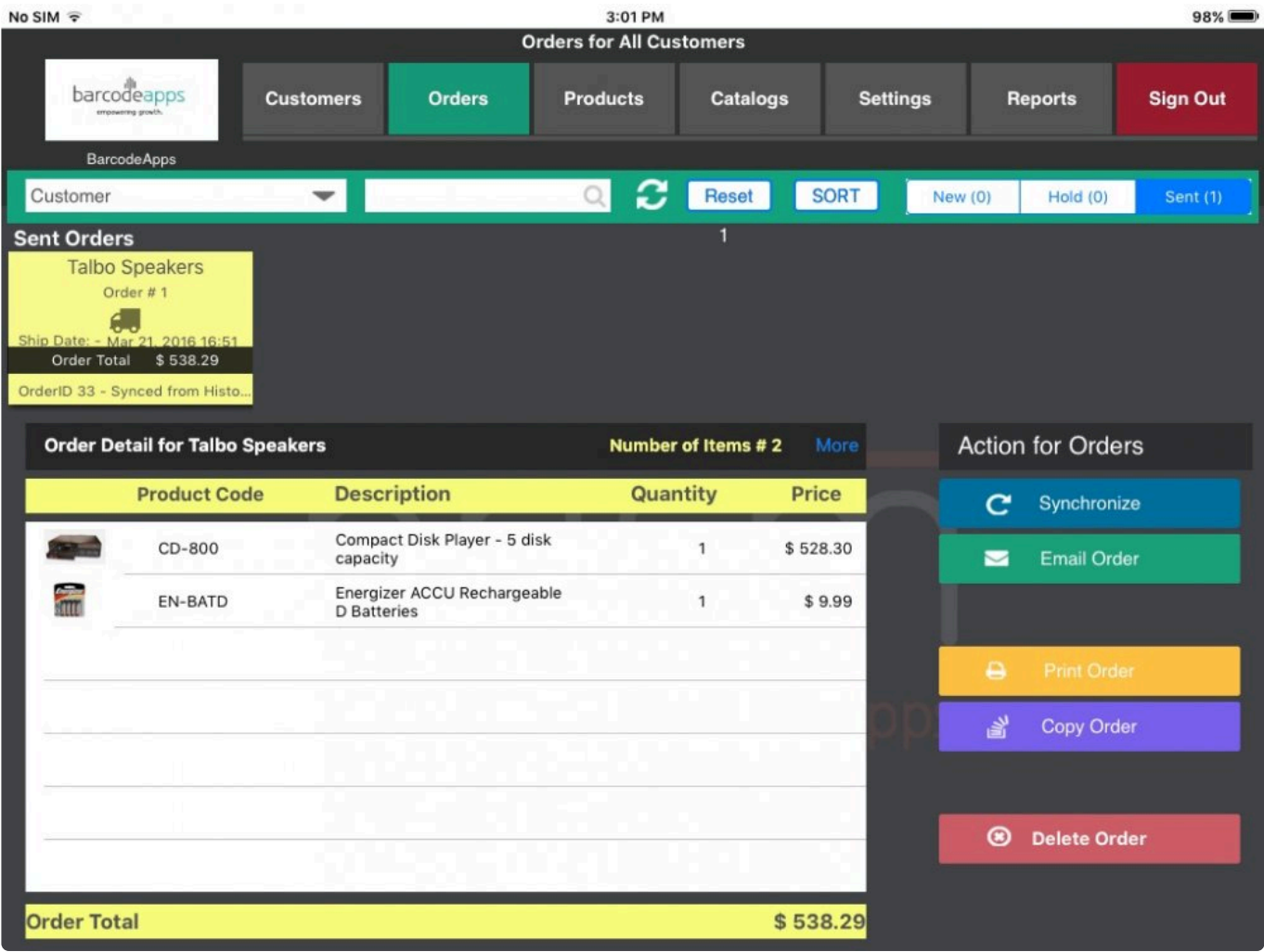
To copy an order. Tap on the Orders Tab.



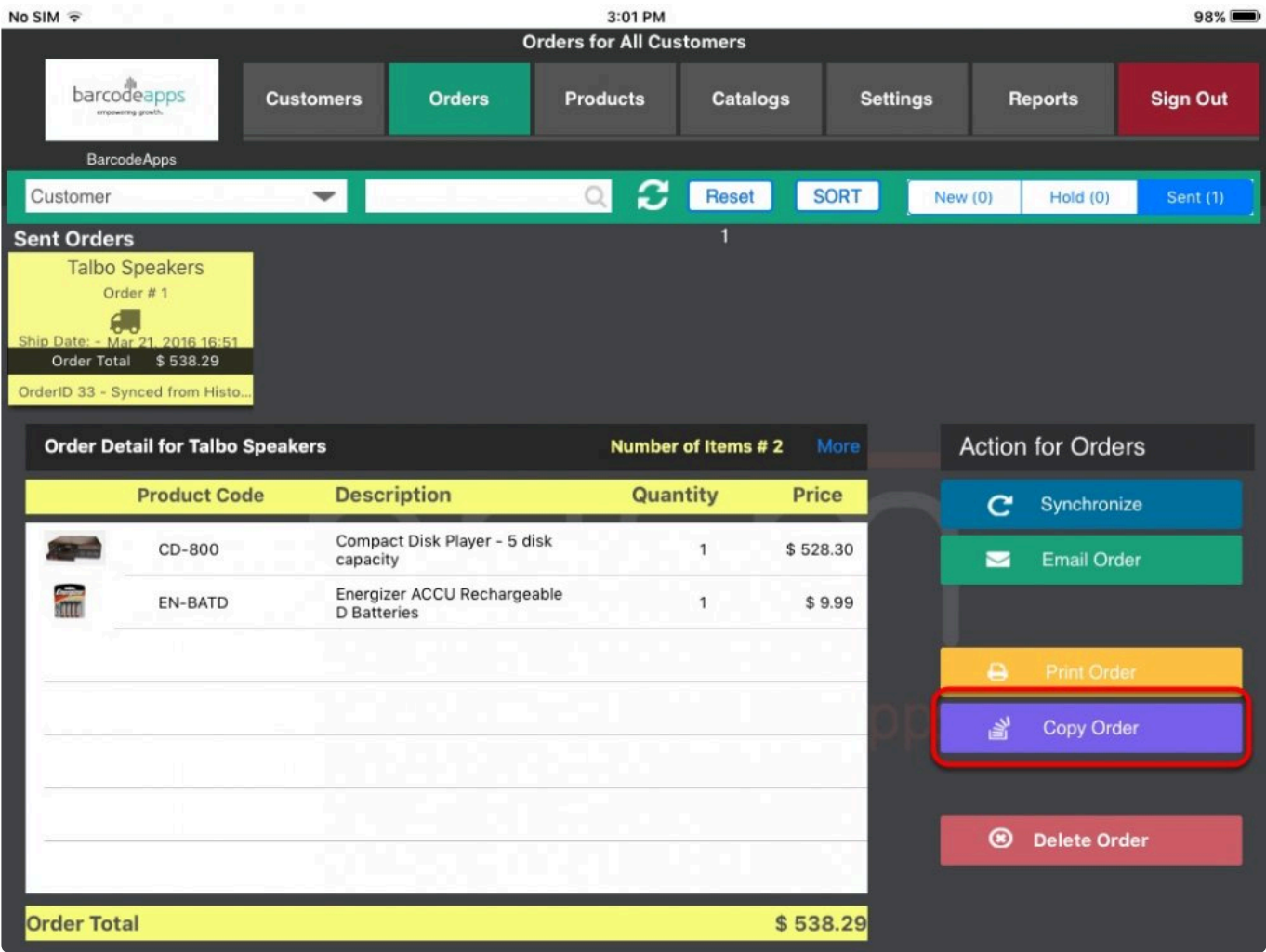
from the orders window, there are three order bins to choose(new,hold and sent)
select the bin on where you need to copy the order.



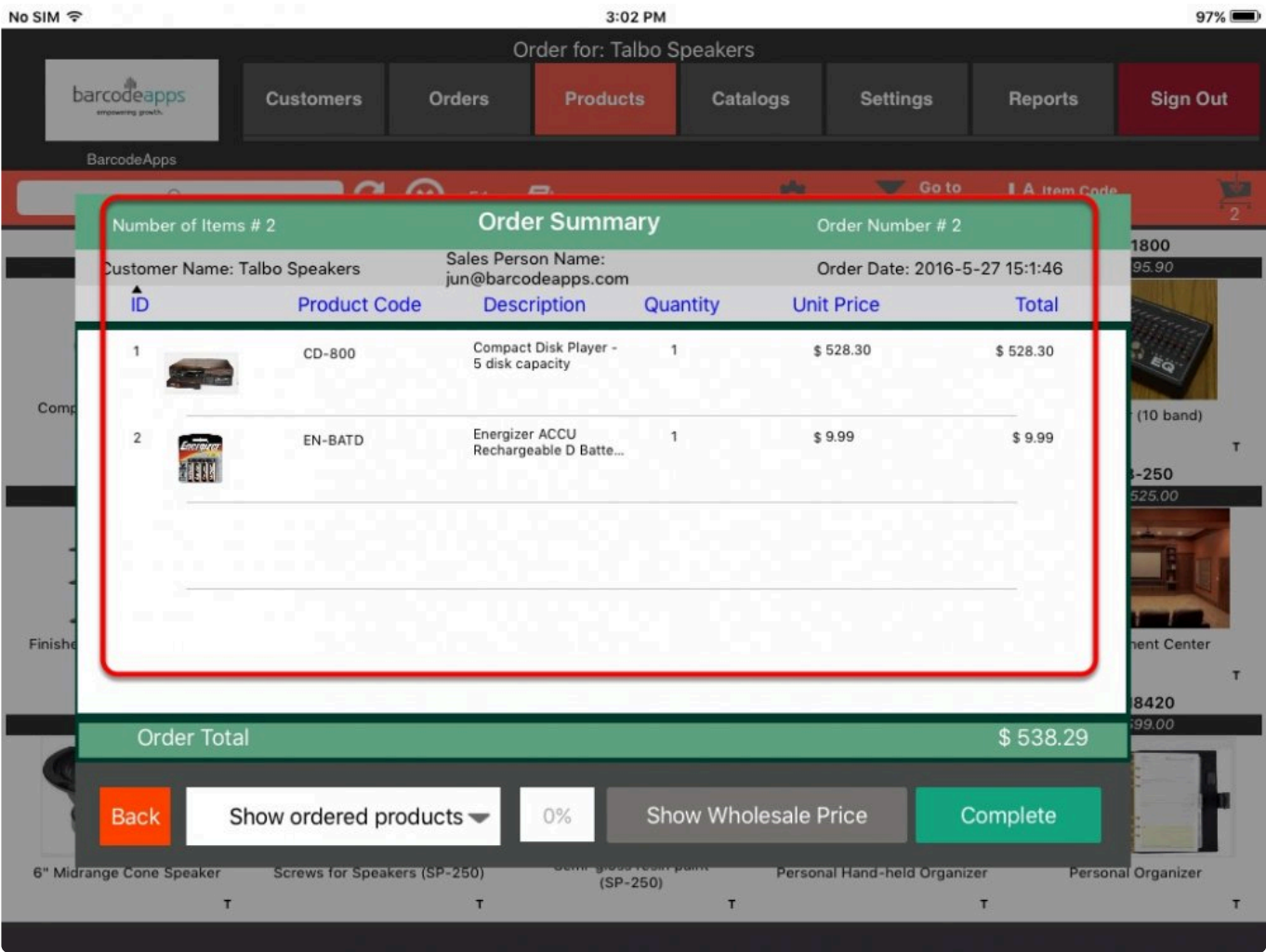
Once a bin is selected. it will display all the orders. just tap on the order that needs to copied and it will show the details of the order.



To copy the order just tap on copy order.



the order summary will open and from here you can proceed completing the order.



OTHER ORDER FUNCTIONS

BarcodeApps

Orders for All Customers



Customers Orders Products Catalogs Settings Reports Sign Out

Customer [Search] [Reset] [SORT] New (0) Hold (0) Sent (1)






Sent Orders 1

Talbo Speakers
Order # 1
Ship Date: - Mar 21, 2016 16:51
Order Total \$ 538.29
OrderID 33 - Synced from Histo...

Order Detail for Talbo Speakers Number of Items # 2 [More](#)

Product Code	Description	Quantity	Price
 CD-800	Compact Disk Player - 5 disk capacity	1	\$ 528.30
 EN-BATD	Energizer ACCU Rechargeable D Batteries	1	\$ 9.99
Order Total \$ 538.29			

Action for Orders

-  Synchronize
-  Email Order
-  Print Order
-  Copy Order
-  Delete Order

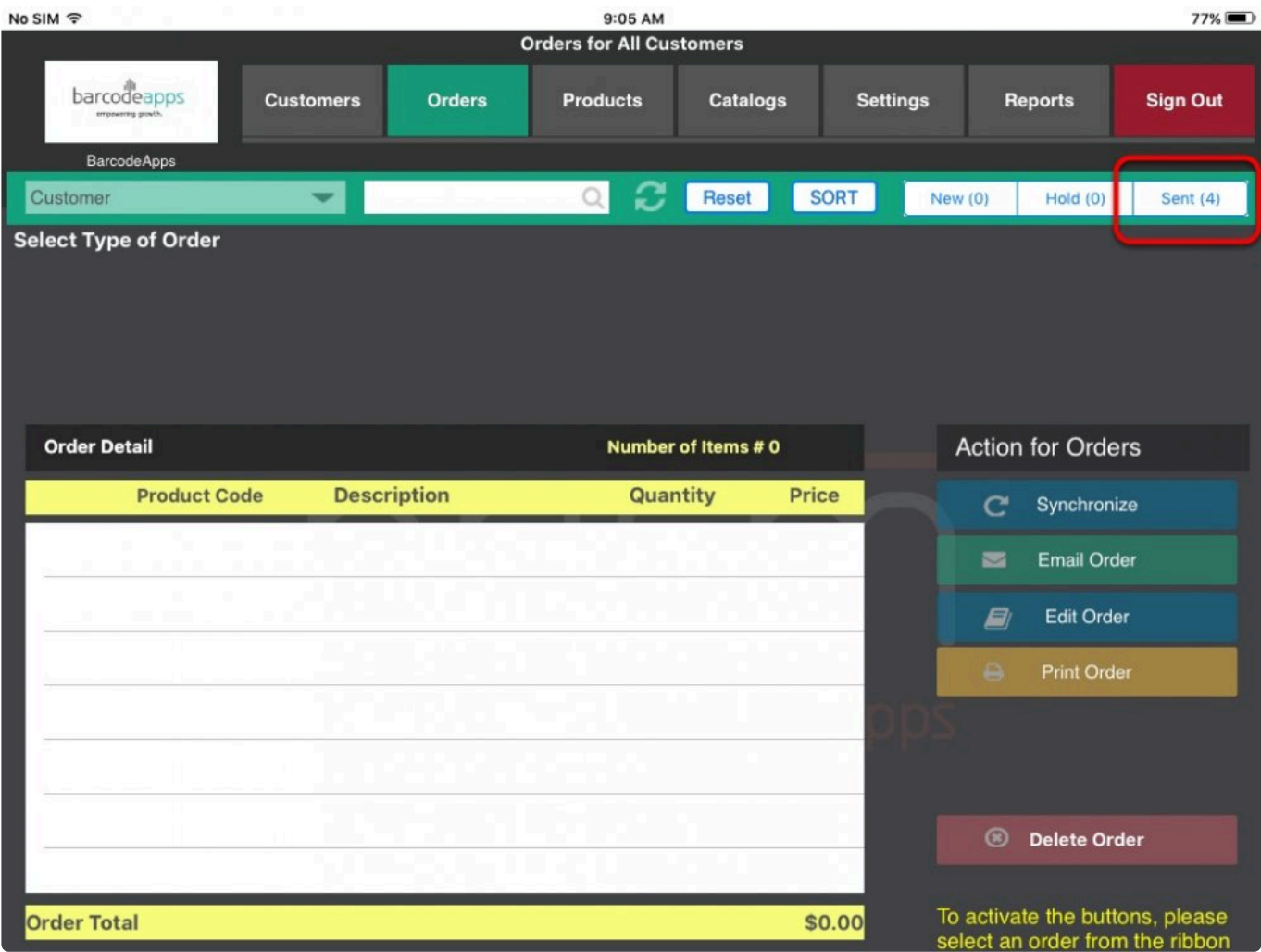
1. **Synchronize** – This function will send all pending orders to the cloud
2. **Email Order** – This function allows the user to send a copy of the order via email.
3. **Print Order** – This function allows the user to print a copy of an order.
4. **Delete Order** – This function will let the user delete an order.

2.4.3.13. xiv. Past Order Functions

This knowledge base article will show user the past order function of the PRISM iPad.

PAST ORDER FUNCTIONS

You can review your past orders from the orders tab by tapping on Sent



This will list all the orders that were done in the past. Just tap on the order and the details will show on the order detail table.

No SIM 8:20 AM 80%

Orders for All Customers

BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

Customer [Search] [Reset] [SORT] New (0) Hold (0) Sent (4)

Sent Orders 4

Talbo Speakers Order # 1	Talbo Speakers Order # 2	Creative Audio Order # 3	Talbo Speakers Order # 4
Ship Date: - Mar 21, 2016 16:51	Ship Date: - May 28, 2016 08:04	Ship Date: - May 28, 2016 08:12	Ship Date: - May 28, 2016 08:15
Order Total \$ 538.29	Order Total \$ 538.29	Order Total \$ 6932.30	Order Total \$ 13864.60
OrderID 33 - Synced from Histo...	OrderID - 43 - 05/28/2016	OrderID - 44 - 05/28/2016	OrderID - 45 - 05/28/2016

Order Detail for Talbo Speakers Number of Items # 6 More

Product Code	Description	Quantity	Price
SP-500	Speakers - Home Theatre Package	2.00	\$ 765.40
STS-01	Home Sound System with MP3 Decoder	2.00	\$ 2194.50
STS-02	Surround Sound Home Theater System	2.00	\$ 2805.00
V1-2A	Digital-VHS VCR with HDTV-Recording	2.00	\$ 193.50
V1-4A	Hi-fi Stereo 4 Head VCR	2.00	\$ 473.90
XBX1	Microsoft Xbox One W/ 1 controller and Kinect Sensor	2.00	\$ 500.00
Order Total			\$ 13864.60

Action for Orders

Synchronize

Email Order

Print Order

Copy Order

Delete Order

* An order search can also be done by tapping on the search box.(Allows searches using Customer or Date as a criteria)

No SIM 8:38 AM 79%

Orders for All Customers

BarcodeApps

Customers Orders Products Catalogs Settings Reports Sign Out

Customer [Search] [Refresh] [Reset] [SORT] [New (0)] [Hold (0)] [Sent (4)]

Sent Orders 4

Order #	Order Total	OrderID
Talbo Speakers Order # 1 Ship Date: - Mar 21, 2016 16:51 Order Total \$ 538.29 OrderID 33 - Synced from Histo...	Talbo Speakers Order # 2 Ship Date: - May 28, 2016 08:04 Order Total \$ 538.29 OrderID - 43 - 05/28/2016	Creative Audio Order # 3 Ship Date: - May 28, 2016 08:12 Order Total \$ 6932.30 OrderID - 44 - 05/28/2016

Order Detail for Talbo Speakers Number of Items # 6 More

Product Code	Description	Quantity	Price
SP-500	Speakers - Home Theatre Package	2.00	\$ 765.40
STS-01	Home Sound System with MP3 Decoder	2.00	\$ 2194.50
STS-02	Surround Sound Home Theater System	2.00	\$ 2805.00
V1-2A	Digital-VHS VCR with HDTV-Recording	2.00	\$ 193.50
V1-4A	Hi-fi Stereo 4 Head VCR	2.00	\$ 473.90
XBX1	Microsoft Xbox One W/ 1 controller and Kinect Sensor	2.00	\$ 500.00

Order Total \$ 13864.60

Action for Orders

- Synchronize
- Email Order
- Print Order
- Copy Order
- Delete Order

2.4.3.14. xv. Sending Quote Email

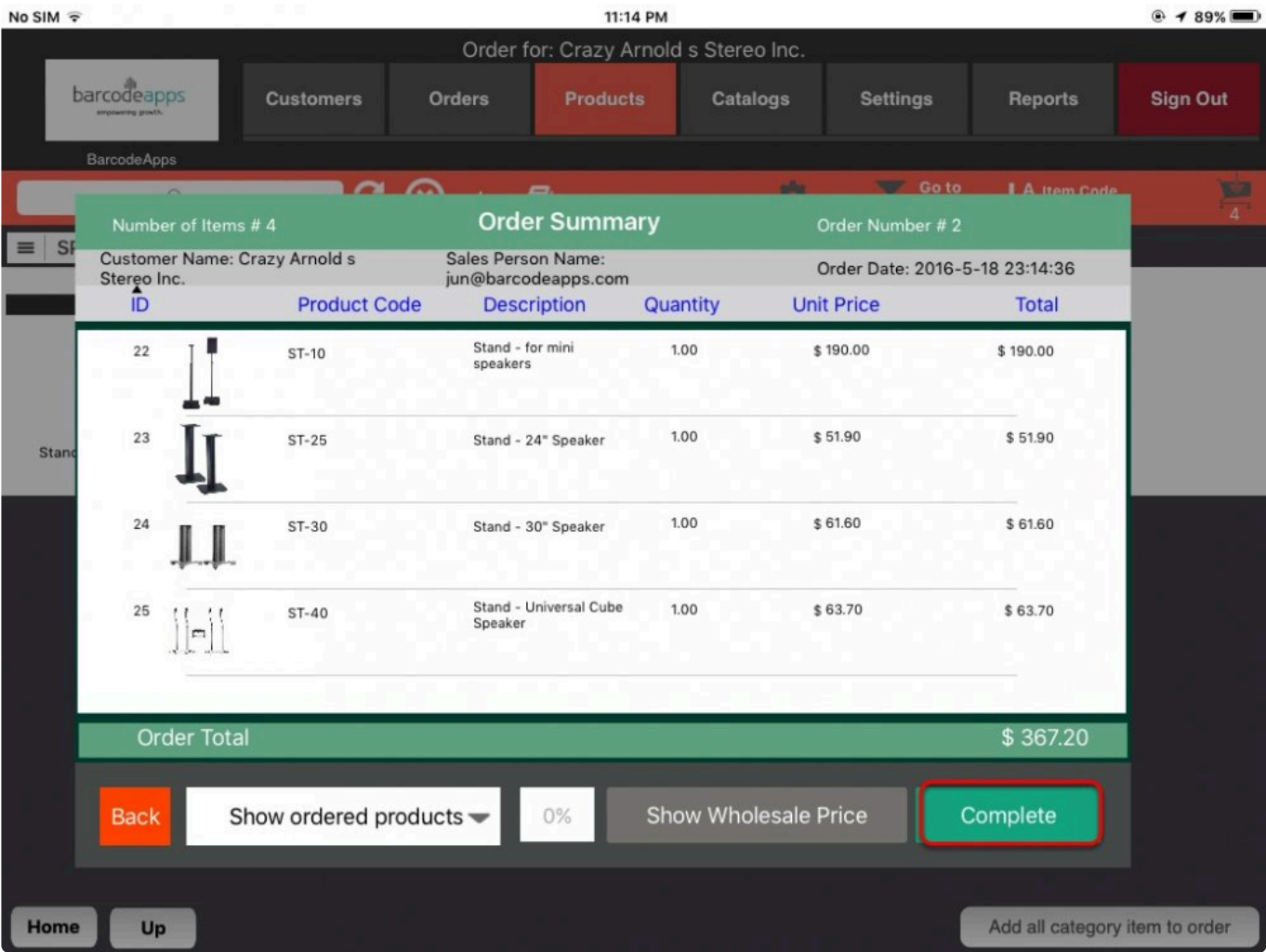
This knowledge base will guide user on how to send quote email using the PRISM App.

SENDING A QUOTE EMAIL

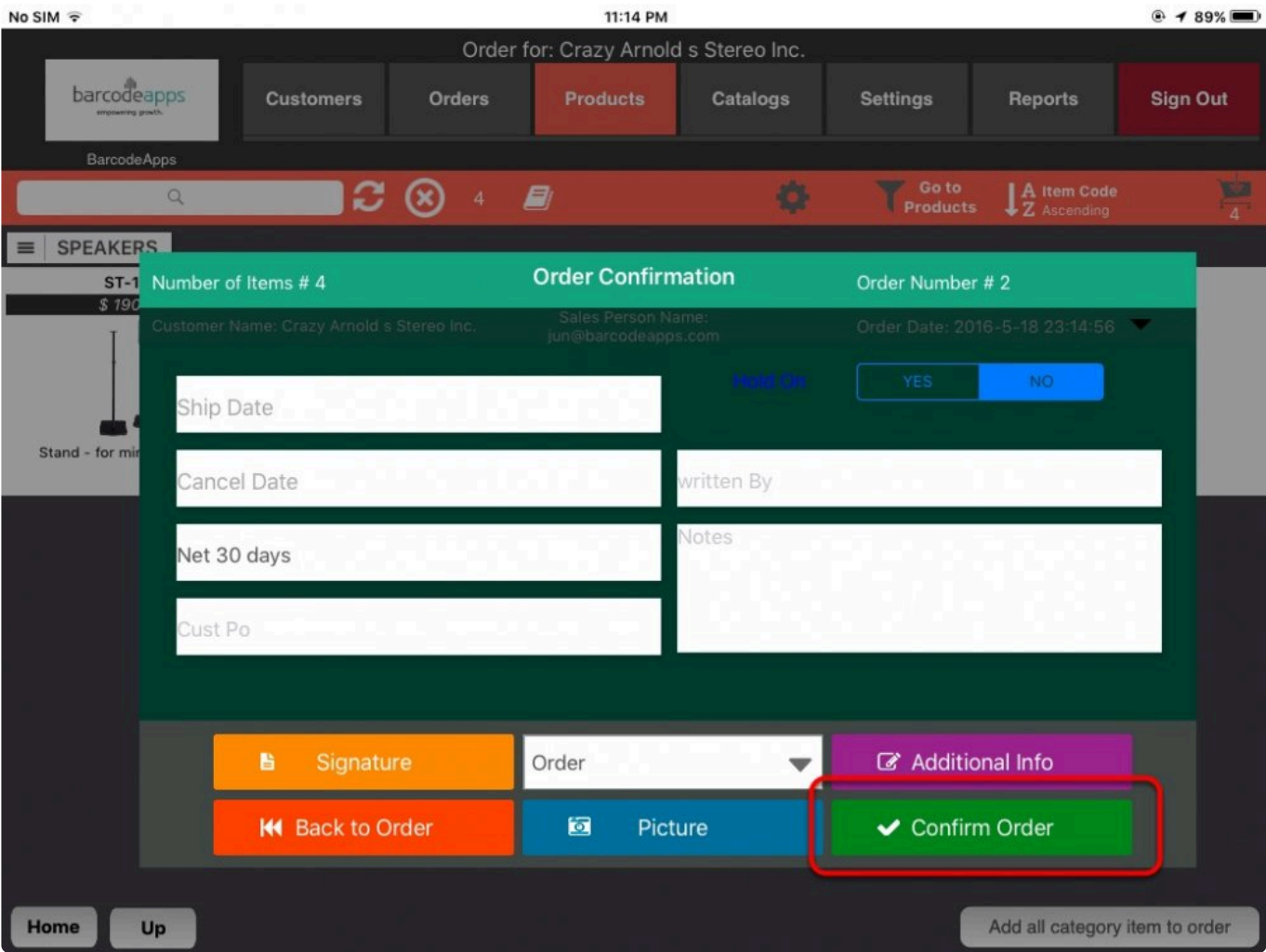
To send a quote email, select the item that needs to be ordered and then open the shopping cart.



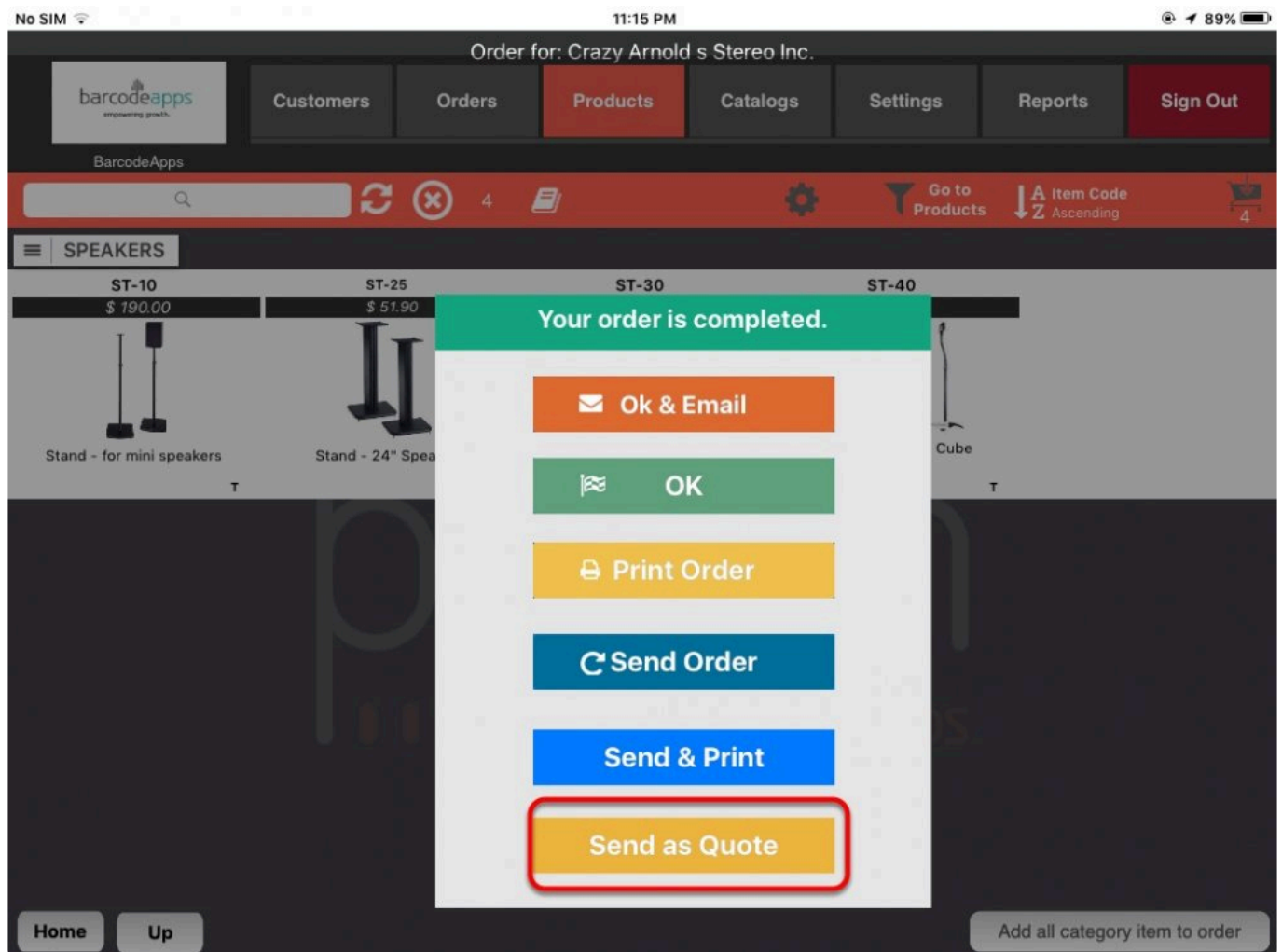
On the Order summary window, select complete.



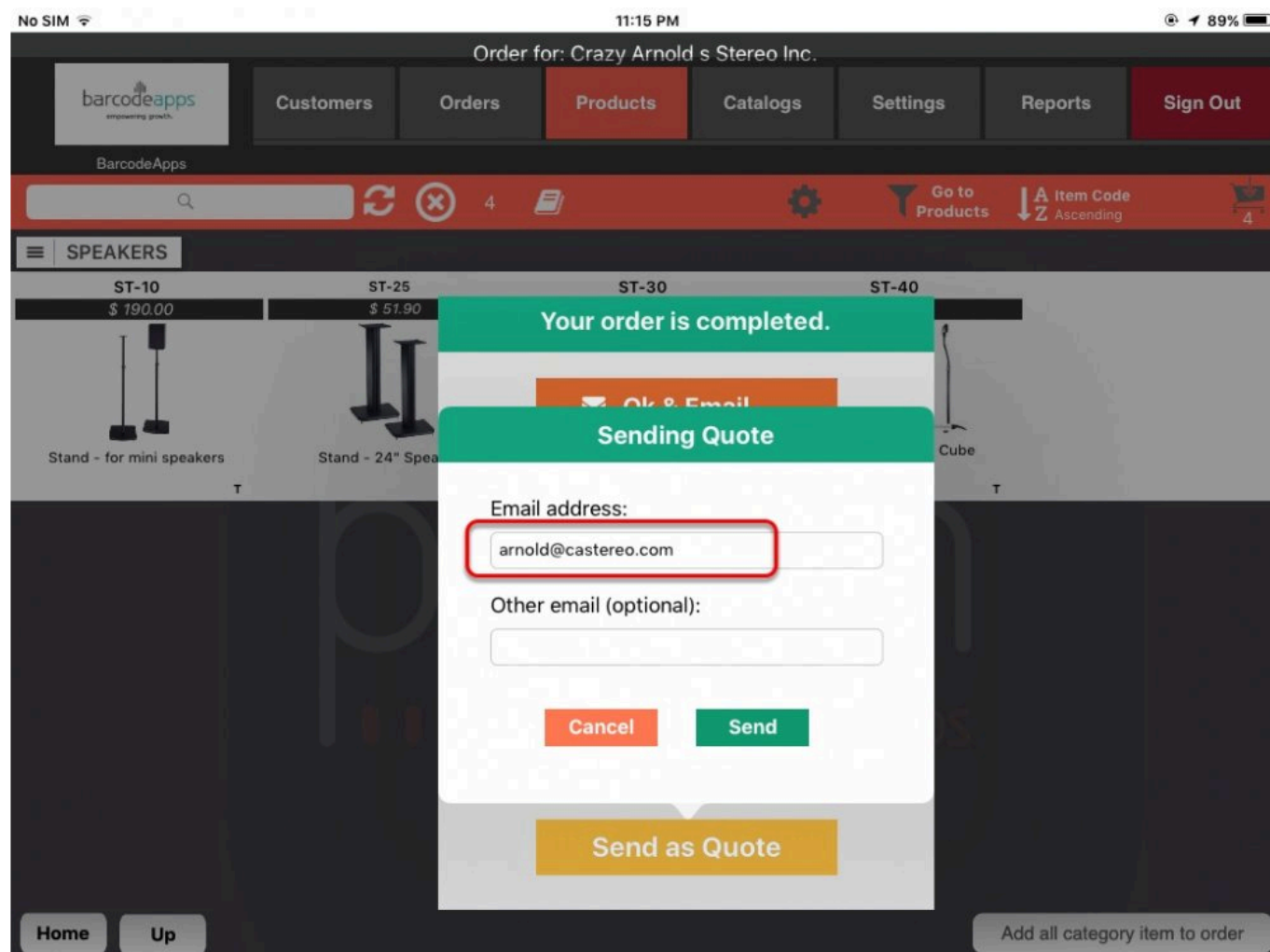
On the Order Confirmation. After completing the necessary details , tap on Confirm Order



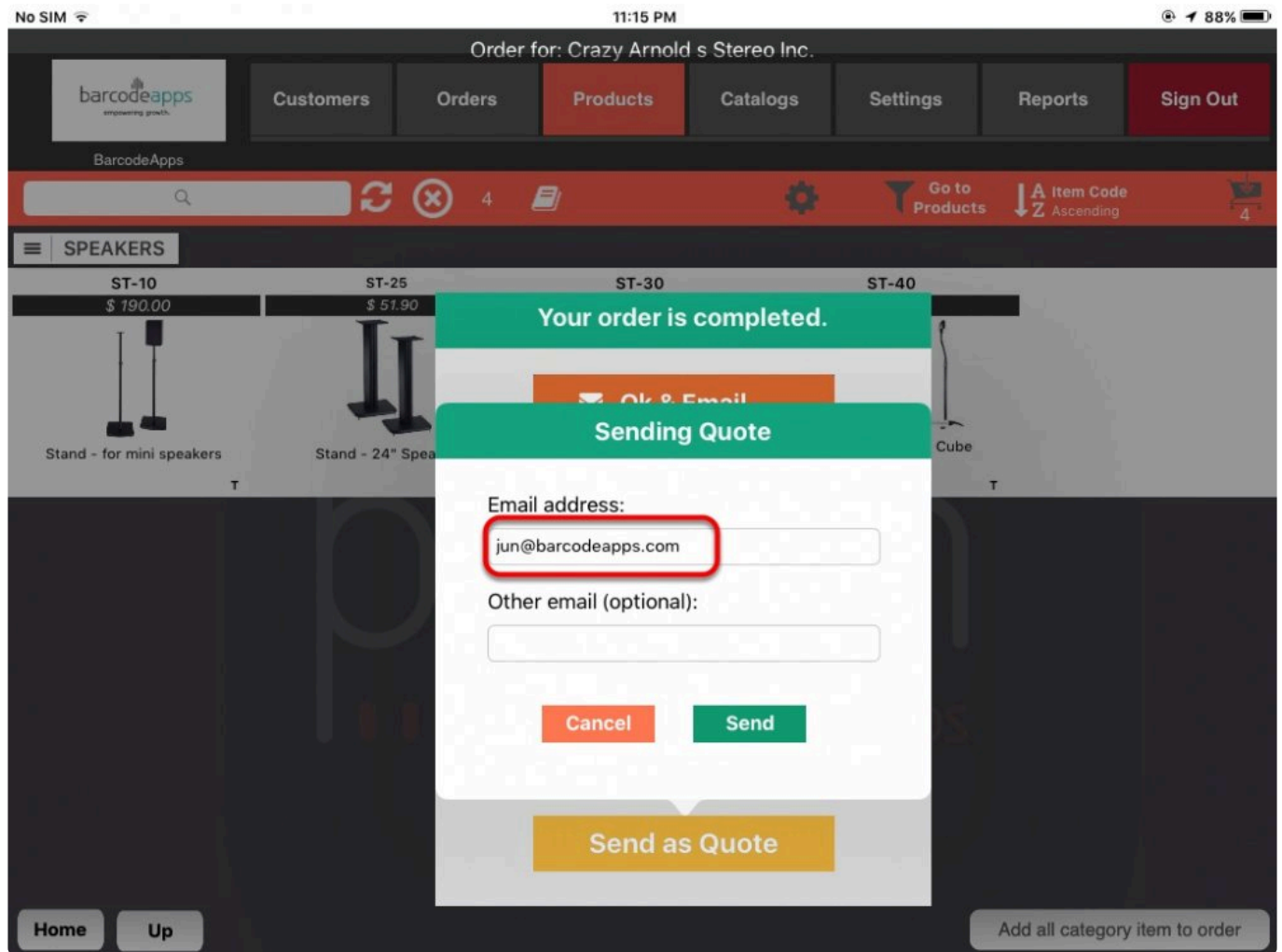
Tap on Send as Quote



By default the email address of the customer on the email address field.



You can change the email address by tapping on the field and typing in the recipients email address you can also add another recipient by using the other email field. Once finish just tap on Send.





Quote Email Review


The quote email is divided into three sections

1. Customer Logo section – This will display the customers logo as the header of the mail.
2. Customer Details – This section will show the customer details including the reference number for the order.
3. Items Section – This section will show the item details.

Quote-Reference No. BAR01-002-05-18-2016-2 from 'BarcodeApps'


Inbox x



 Sales Team <prism@barcodeapps.com>
to me

11:16 PM (20 minutes ago) ☆ ↶ ▾

1


empowering growth.

2

Reference: BAR01-002-05-18-2016-2
Customer: Crazy Arnold s Stereo Inc.
623 York Street Building 3
Toronto ON, M7T 4J8
Email arnold@castereo.com
Telephone [4166243333](tel:4166243333)
Fax



Customer # CZYARN
Wednesday, May 18 2016

Rep: HOUSE


Source: Prism iPad

3

Thumbnails




Item	Description
ST-10	Stand - for mini speakers
ST-25	Stand - 24" Speaker

 Note: Each Thumbnails can be expanded to give a much better view of the item. This can be done just by clicking on the thumbnail

623 York Street Building 3
Toronto ON, M7T 4J8
Email arnold@castereo.com
Telephone [4166243333](tel:4166243333)
Fax

Thumbnail



Item

ST-10



2.4.4. D. Settings

2.4.4.1. i. General Setting

2.4.4.1.1. a. Scanning

SCANNING SETTINGS REVIEW

Back		Scanning	
Use Bluetooth Scanner	Enable	Disable	
Auto Add to Order Mode	Enable	Disable	
Play Sound for Auto Mode	Enable	Disable	
Auto Scan Type	By Minimum Q...	By Unit	

SCANNING SETTINGS DEFINITION

1. **Use Bluetooth Scanner** – Enable if working with a Bluetooth scanner, disable otherwise
2. **Auto Add to order module** – Use to automatically add items by scanning them repetitively.
3. **Play Sound for Auto Mode** – If enabled the iPad will chirp a distinctive sound based on the success or failure of the scan.
4. **Auto Scan Type** – by minimum quantity will add the pre-set minimum to each scan i.e. is Min is the first scan add 6, second makes it 12 etc... By unit will add 1 more item to each scan.

2.4.4.1.2. b. Rules And Behaviour

RULES AND BEHAVIOR SETTINGS REVIEW

1:59 AM

Rules and Behaviour

Import all customers	Enable	Disable
Sell by cases only	Enable	Disable
Prompt to Print Order	Enable	Disable
Prompt to Sync Order	Enable	Disable
Send Order Email	Enable	Disable
Enable Hotspot pop ups	Enable	Disable
Calculate Taxes	Enable	Disable
Full Product search results	Enable	Disable
Full Customer search results	Enable	Disable
Navigation by Warehouse	Enable	Disable
Filter the items by price level	Enable	Disable
Live Quantity on Hand	Enable	Disable
Default Products View	Products	Categories
Customer specific category	Enable	Disable
Product Special Pricing	Enable	Disable
Advanced XML Functionality	Enable	Disable
Advanced Category	Enable	Disable
Case Pack Pricing	Enable	Disable
Price Checker Mode	Enable	Disable

RULES AND BEHAVIOR OPTIONS DEFINITION

1. **Import all customers** – If enabled by the head office will import all available customer otherwise will allow only to import the rep's customer.
2. **Sell by cases only** – is controlled by the server. This setting will upward any quantity to the nearest case. If this 2 features are not allowed by the server, the settings will be locked.
3. **Prompt to print an order** – Adds a prompt when printing.
4. **Prompt to sync order** – Adds a prompt at the end of the orders to prompt accordingly.
5. **Send order email** – Sends an email confirmation to customers after each order.
6. **Enable Hotpot pop ups** – Enables or disables the ability to see a red box on the hotspots in the catalogues.
7. **Calculate taxes** – If set up the taxes will be added to the order if this setting is enabled
8. **Full product search results** – If enabled will search using the criteria anywhere within the description or code. Otherwise will search only by the first characters.
9. **Full Customer search results** – If enabled will search using the criteria anywhere within the description or code. Otherwise will search only by the first characters.
10. **Navigation by warehouse** – Allows the user to segregate the products by warehouse. Once enabled the app will restart and when logging in, the user
11. **Filter the items by price level** – if selected, this option will only display items for which a price exists in the price level assigned to the customer. for example if a customer is assigned price level 4 when selecting this customer the only items to display will be the ones to have a non-zero price on price level 4
12. **Live Quantity on Hand** – if selected the iPad will make a call to the server before adding items to the order to confirm the on hand availability. (If on the internet). When the order is sent to the server on hand quantities will be updated on the server for the iPad to get updated.
13. **Default product views** – when selecting the products tab, if this settings is set to categories then categories will display. If set to products then products will display.
14. **Customer specific category**
15. **Product special pricing**
16. **Advance XML Functionality**
17. **Advance Category** – this enables the advance category view
18. **Case Pack Pricing** – enables the case pack pricing of a product
19. **Price Checker Mode** -

2.4.4.1.3. c. Formatting And Display

Formatting And Display Settings Review

Back Formatting and Display

Display Printout Header Enable Disable

Spacing - + 7

Document Title: Purchase Order

Product thumbnails in order email and print Enable Disable

Show On hand Quantity Enable Disable

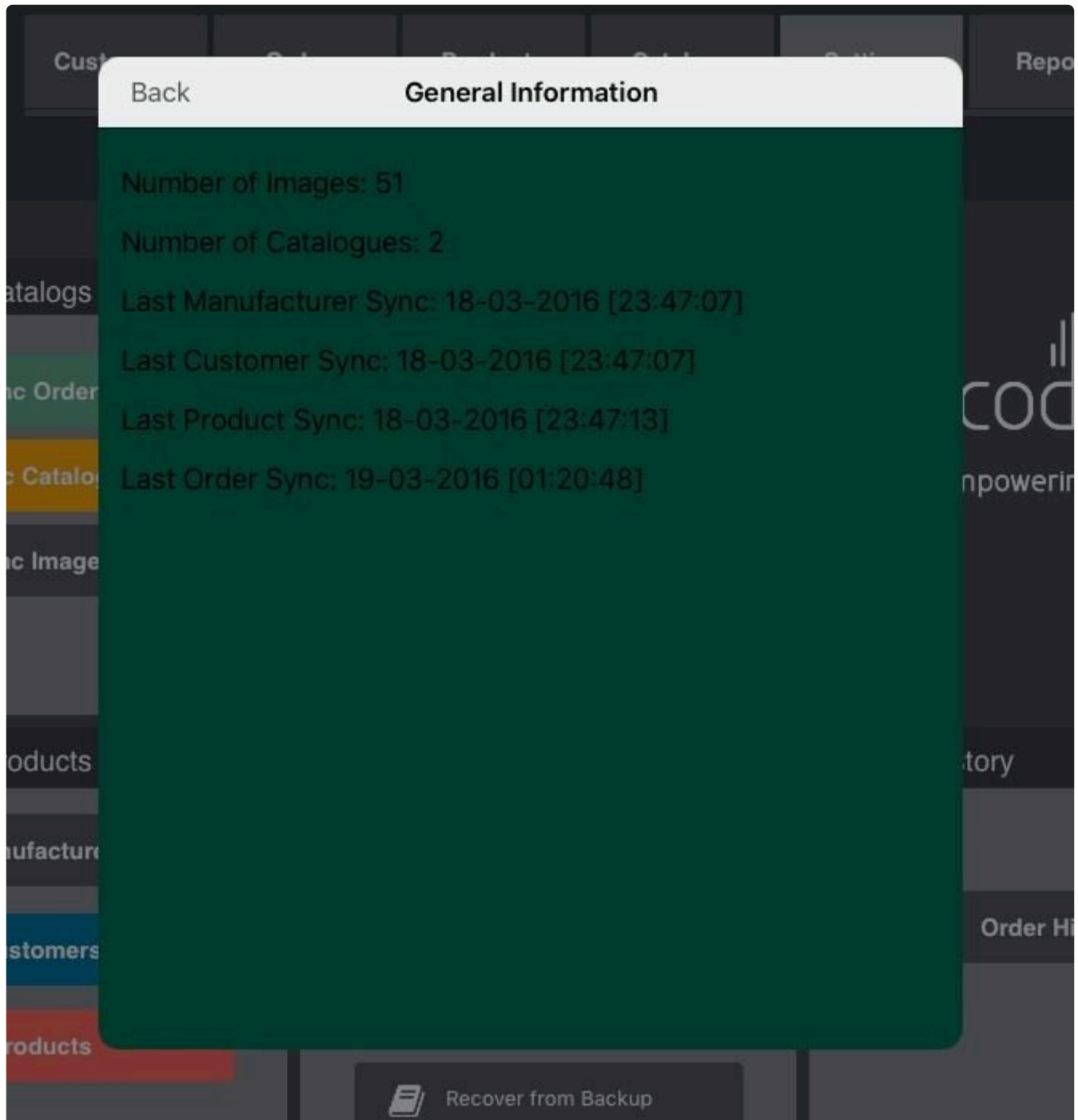
Show Product Price Enable Disable

Show Products Enable Disable

1. **Display Print Out Header** – This setting is to allow printing on pre-printed forms.
2. **Spacing** – if using pre- printed forms then this settings allows to control the space allocated at the top of the form as not to overwrite the pre-printed information.
3. **Document Title** – Allows to control the name of the document displayed at the top of the order confirmation. (Invoice, Purchase Order, Quote)
4. **Product thumbnails in email order and print** – enable to add thumbnails of products to reports and emails
5. **Show on Hand Quantity** – if selected will display the on hand quantity on the order screen.
6. **Show Product Price** – if not selected prices will only show when the item is selected.
7. **Show Products** -if not selected will show products until a search criteria is inserted in the product page.

2.4.4.1.4. d. General Information

General Information Review



1. Number of Images – displays the total number of images
2. Number of Catalogues – display the total number of catalogues
3. Last manufacturer sync- shows the last record (date and time) of a manufacturer sync committed

on the iPad.

4. Last Customer Sync – shows the last record (date and time) of a [customer sync](#) committed on the iPad.
5. Last Product Sync – shows the last record (date and time) of a [product sync](#) committed on the iPad.
6. Last Order Sync- shows the last record (date and time) of an [order sync](#) committed on the iPad.

BarcodeApps © 2016

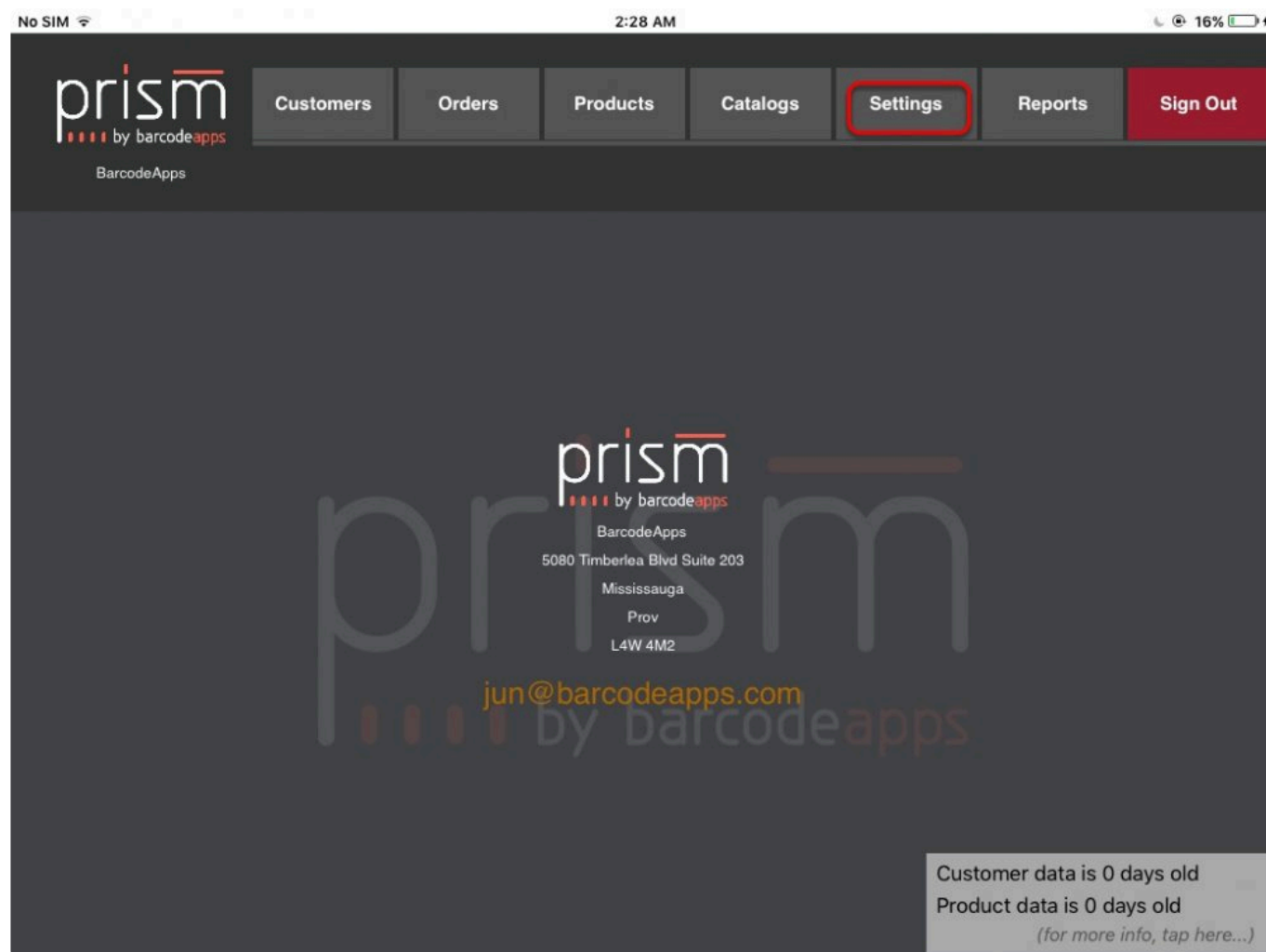
2.4.4.2. ii. Sync Catalogs And Images

2.4.4.2.1. a. Sync Orders

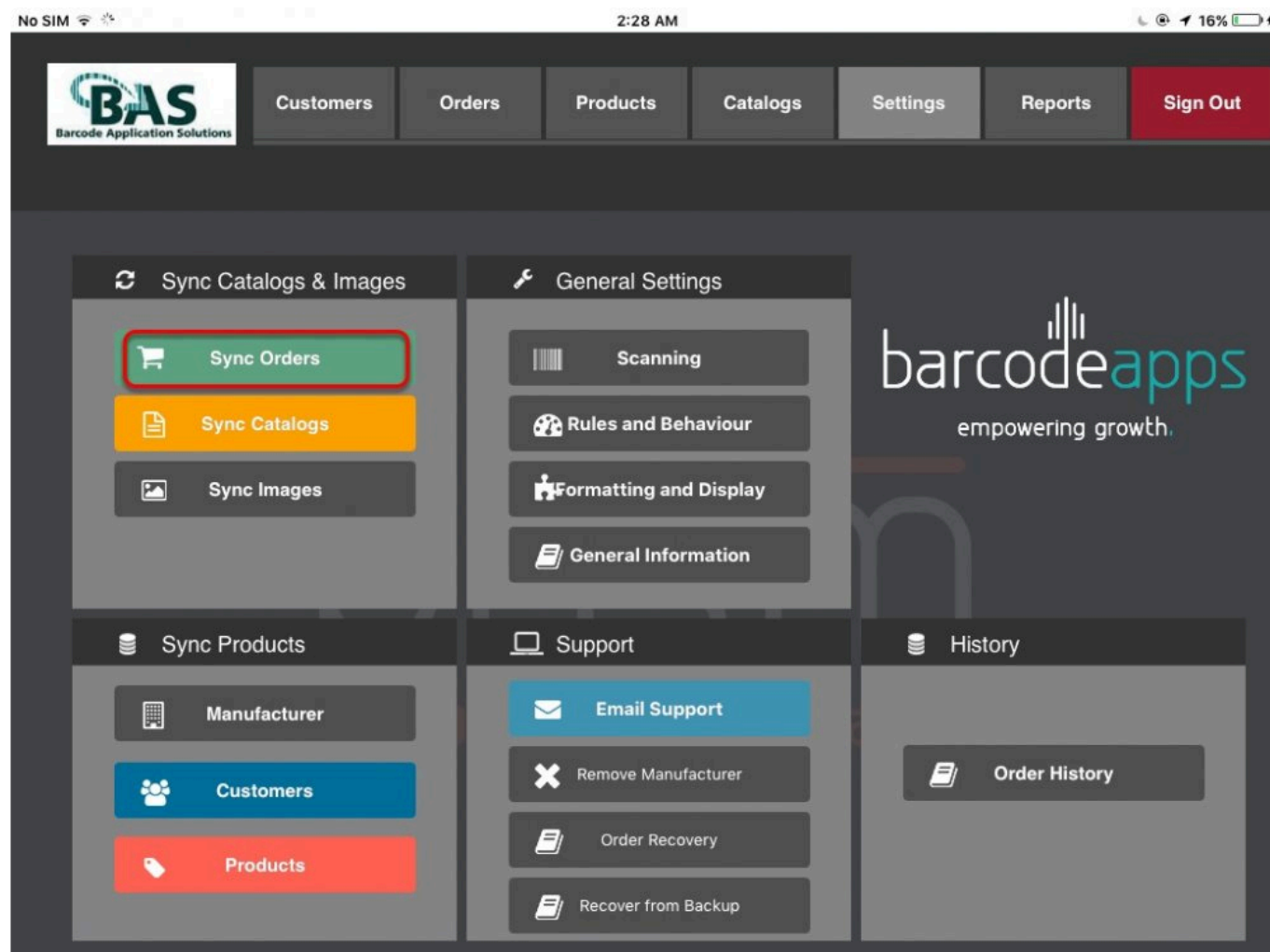
SYNCING ORDERS

Using the Sync Order function will make PRISM app send all pending orders to the cloud.

To sync your orders using the prism app, tap on settings on the prism main window.



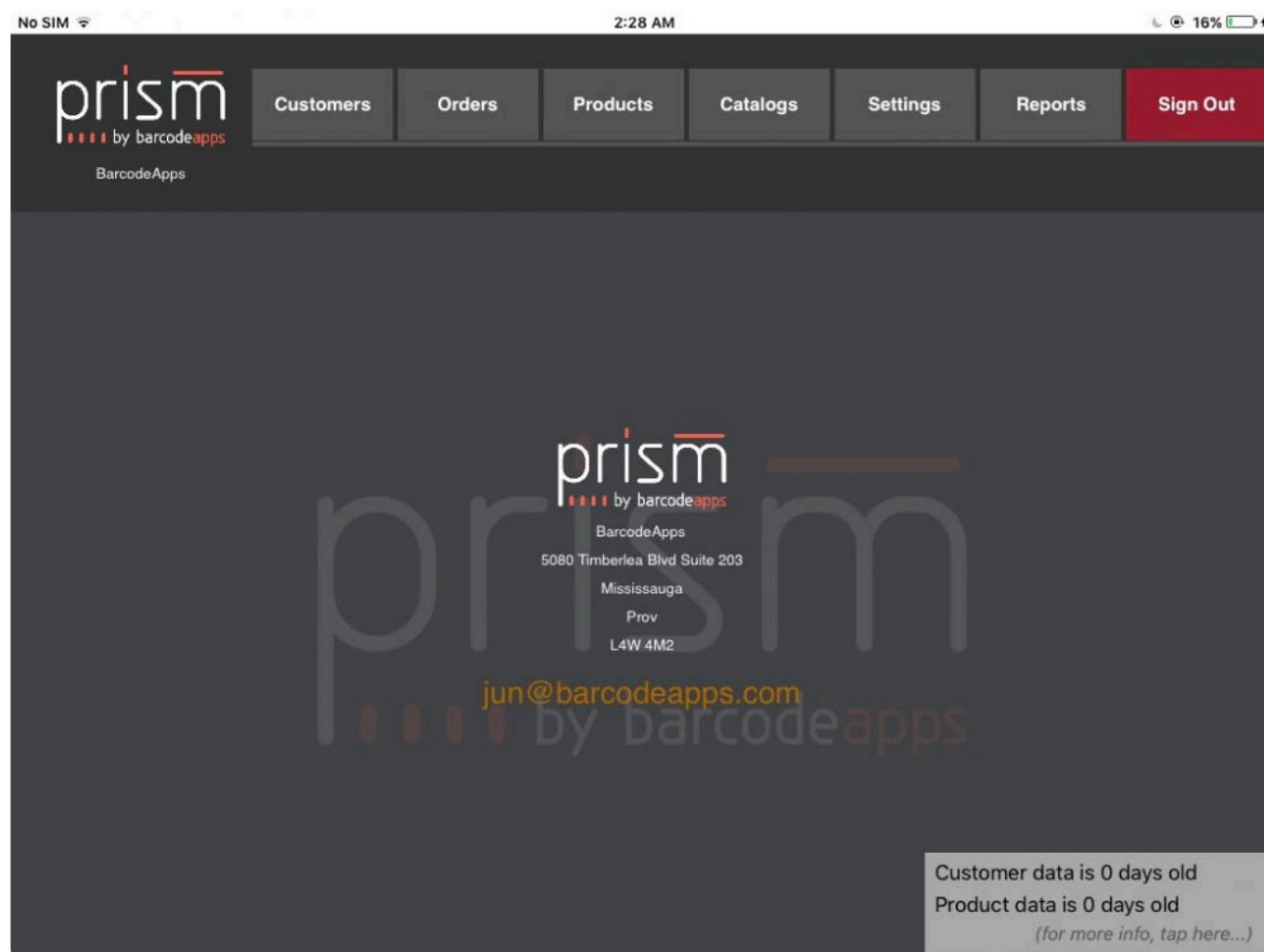
Tap on Sync Orders under sync catalogs and images.



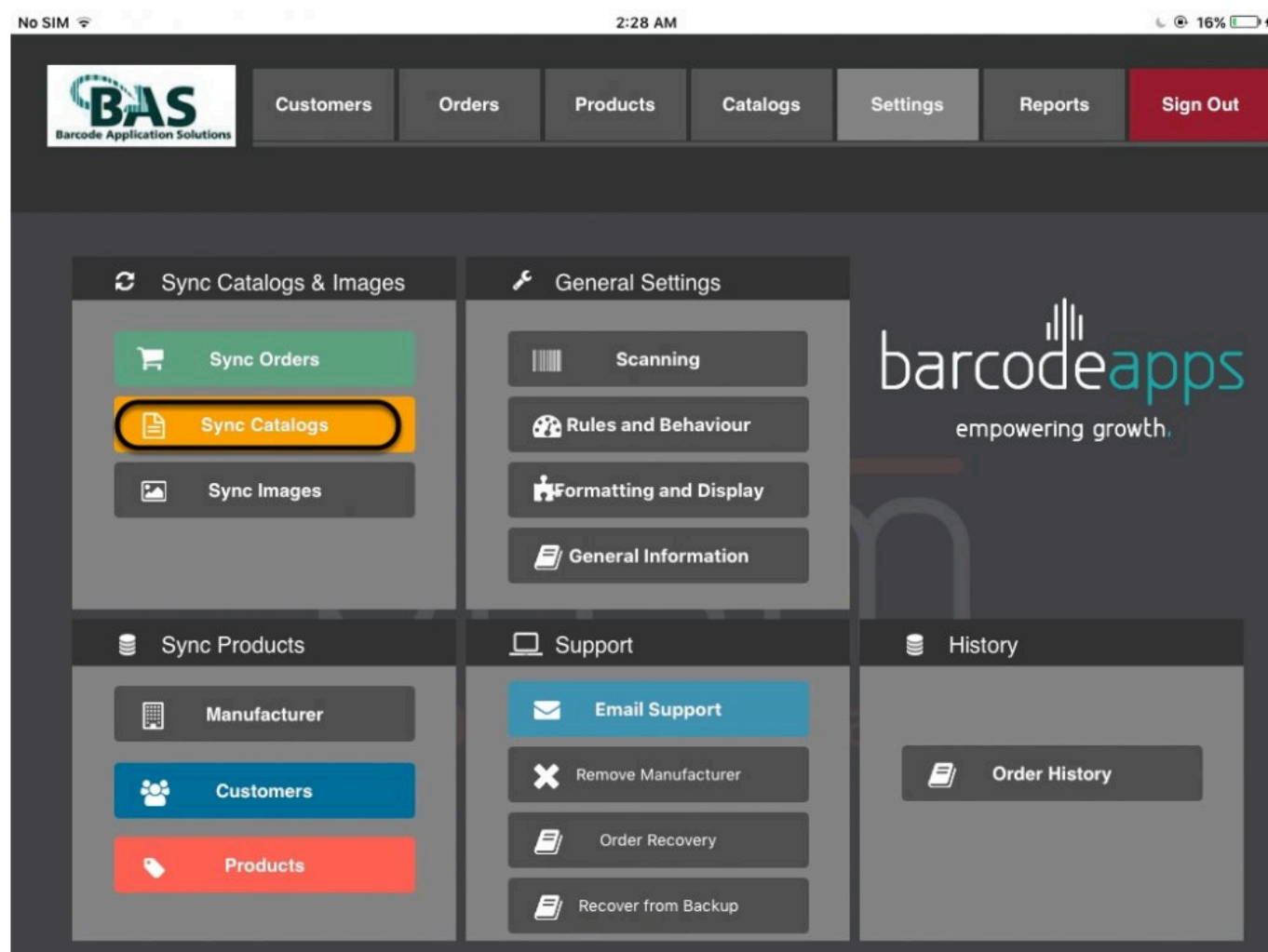
2.4.4.2.2. b. Sync Catalogs

SYNCING CATALOG

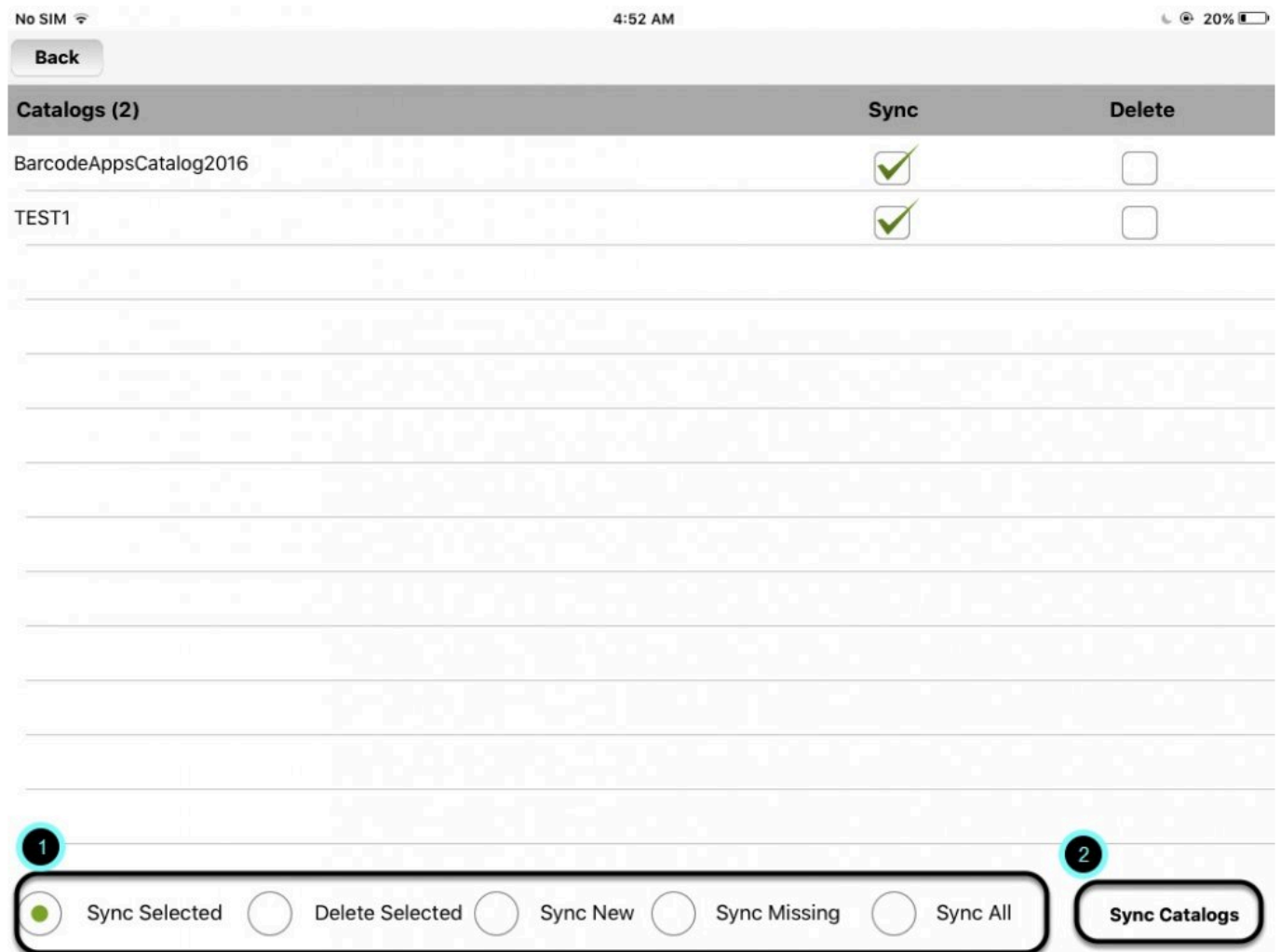
To sync your catalogs using the PRISM App iOS, tap on settings on the main screen.



Tap on Sync Catalogs under Sync Catalogs & Images.



On the Sync catalogs window, just tap on the sync option(see sync options), and then tap on Sync Catalogs.



SYNC OPTIONS

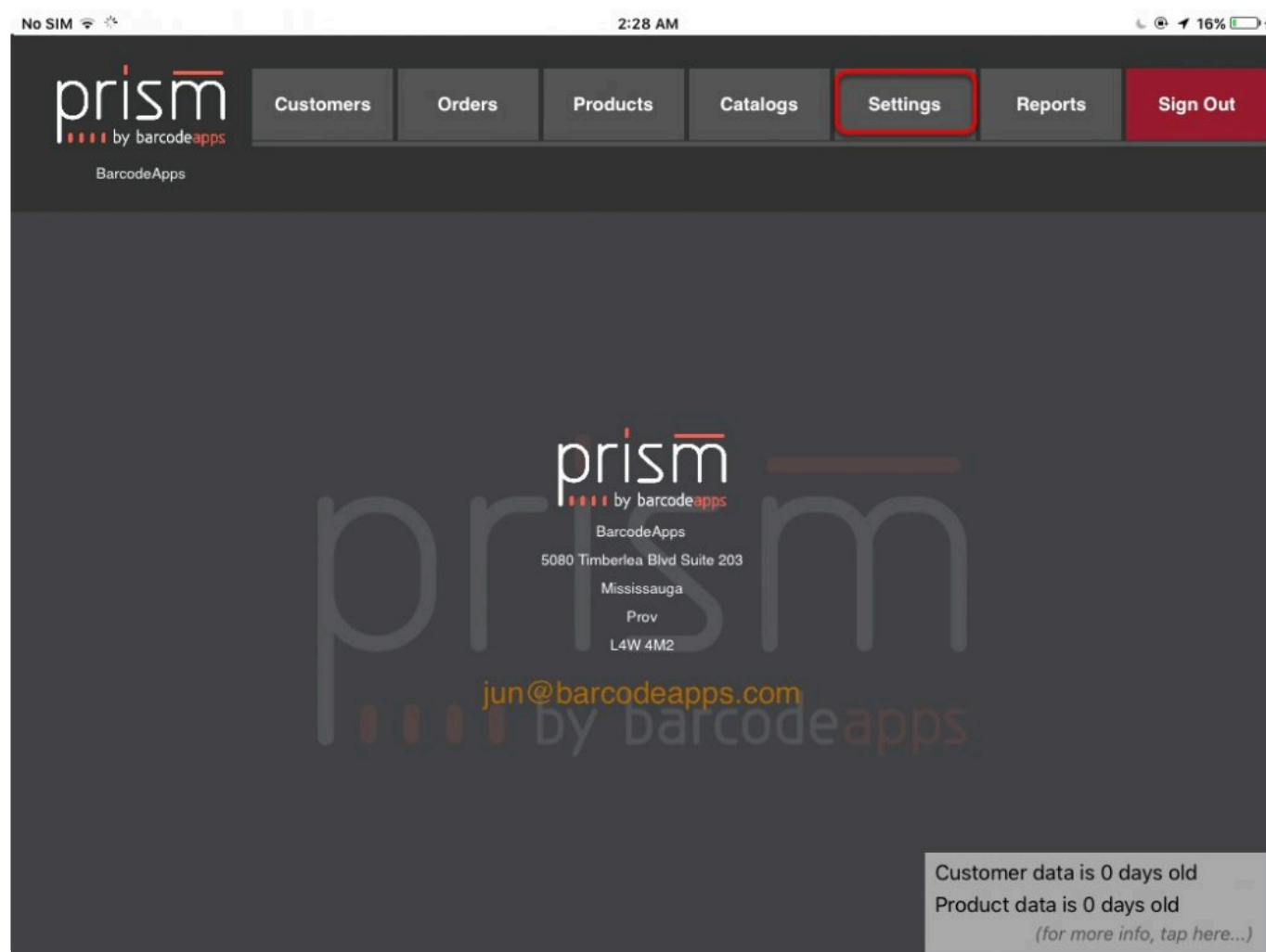
1. **Sync Selected** – this option will let you choose the catalog that needs to be sync.
2. **Delete Selected** – This option will delete the selected catalog.
3. **Sync New** – this option will let you download a catalog that is not on the Catalog List.
4. **Sync missing** – this option will sync missing catalog
5. **Sync All** – this option will sync all the catalogs that is on the list and at the same time, it will download new and missing catalogs.

[illegible]

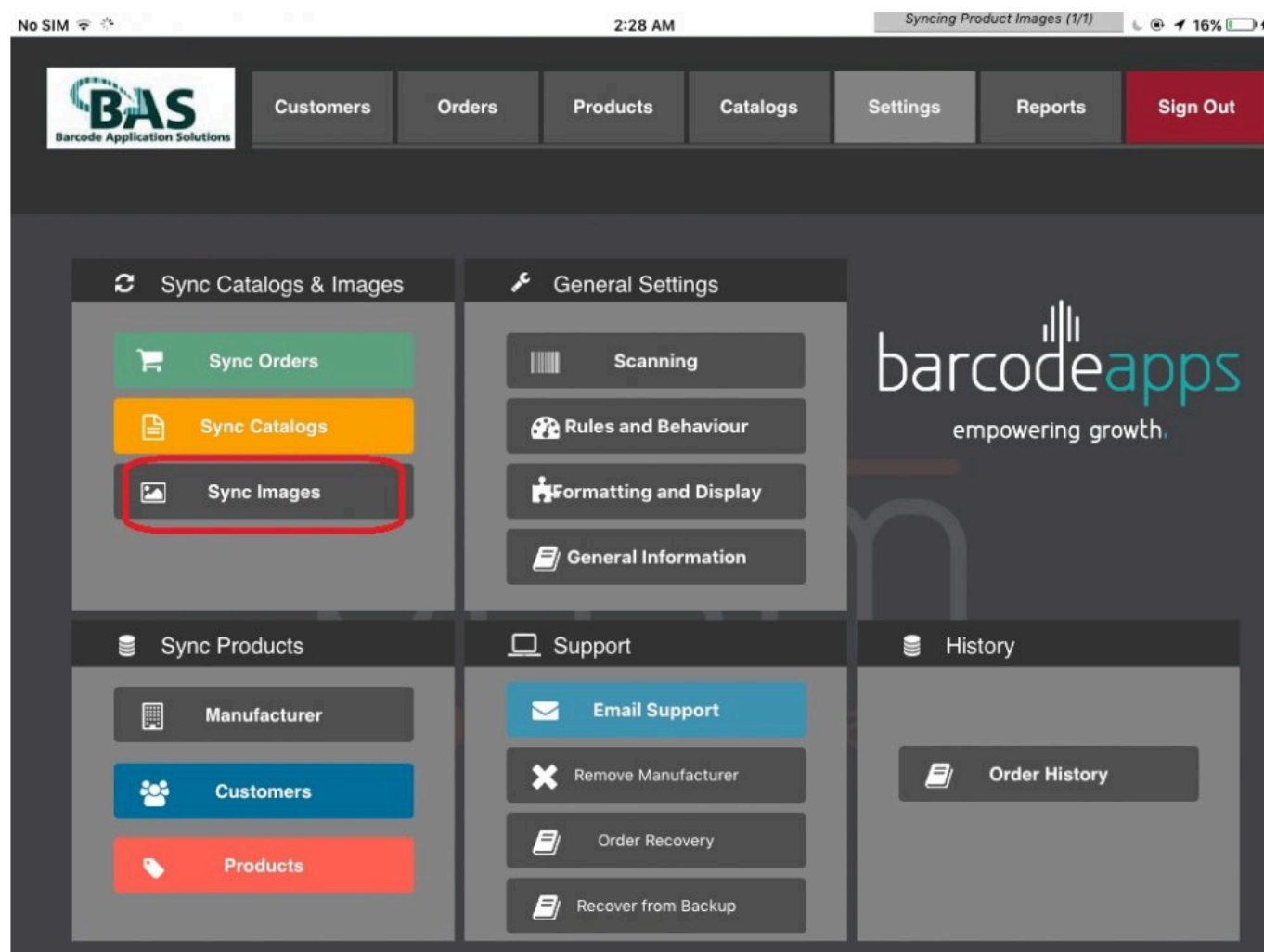
2.4.4.2.3. c. Sync Images

SYNCING IMAGES

To sync your images using the PRISM App, go to settings



tap on Sync Images.



This function is applicable if:

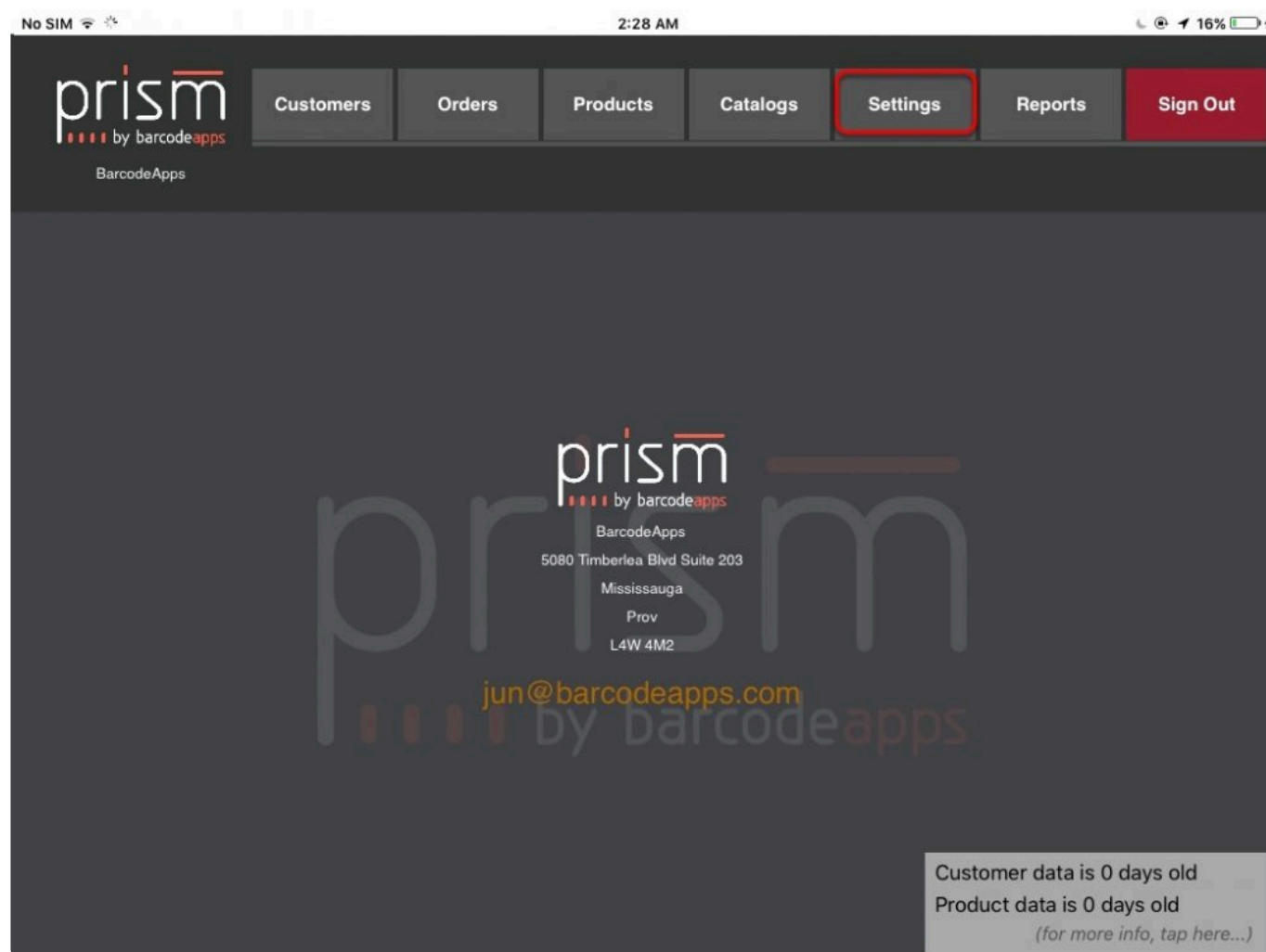
- An Image is missing.
- After a product image update.
- Syncing new product images.

2.4.4.3. iii Sync Products

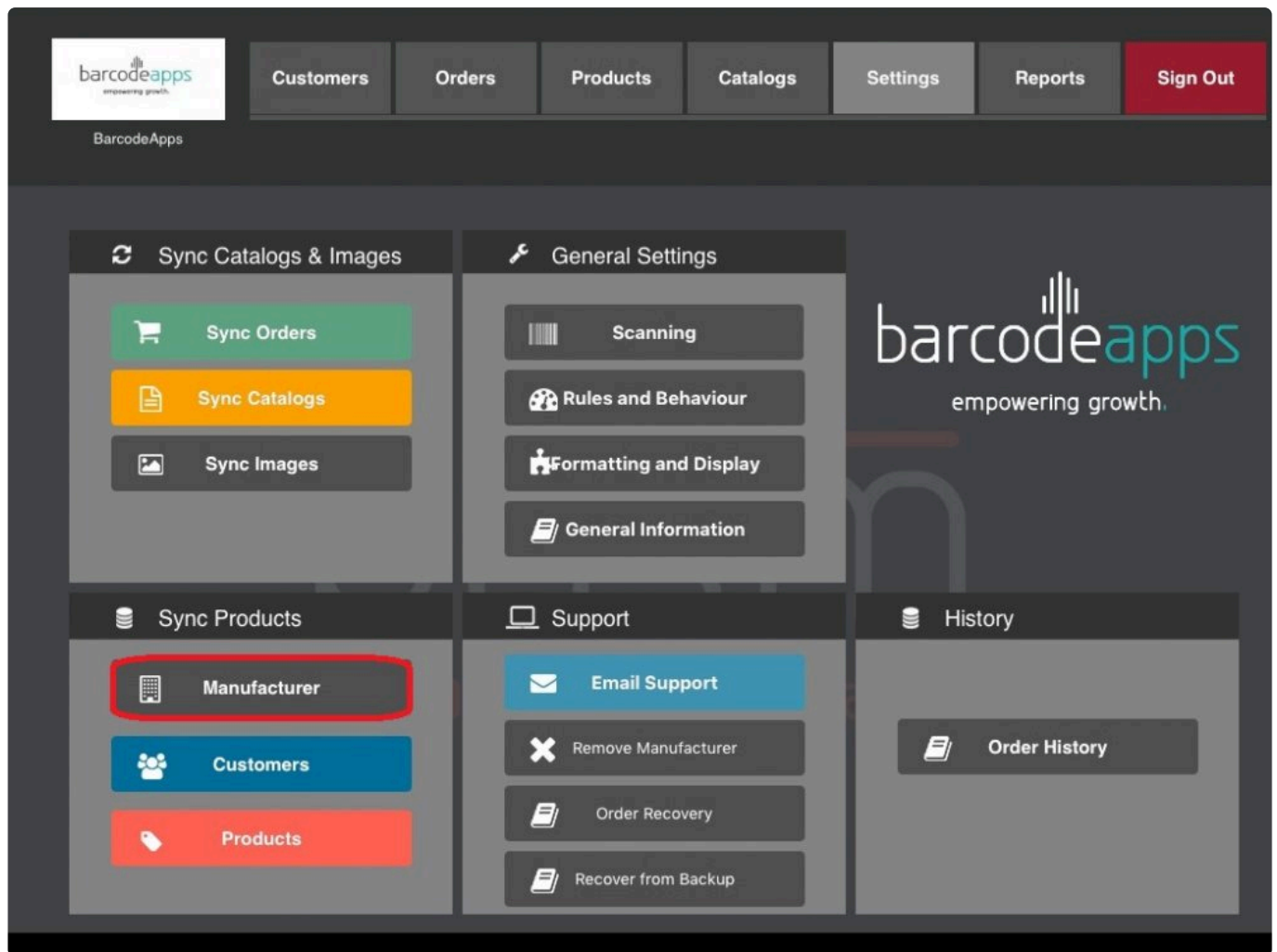
2.4.4.3.1. a. Manufacturer

MANUFACTURER SYNC

To sync your manufacturer settings using the PRISM App. On the Main screen tap on settings



Under sync products, tap on Manufacturer.



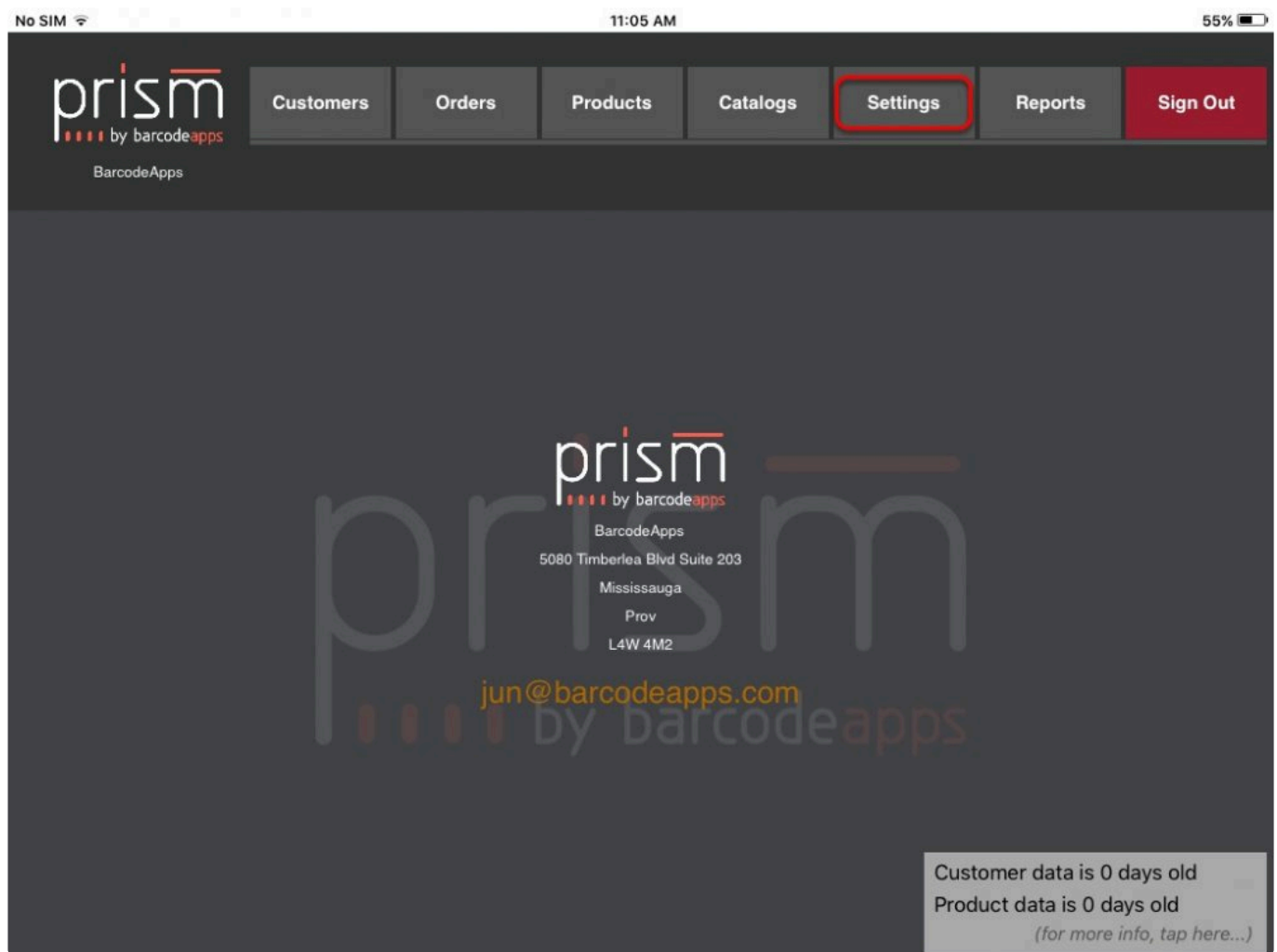
This function is applicable if:

- Global settings are not working
- Update new global settings

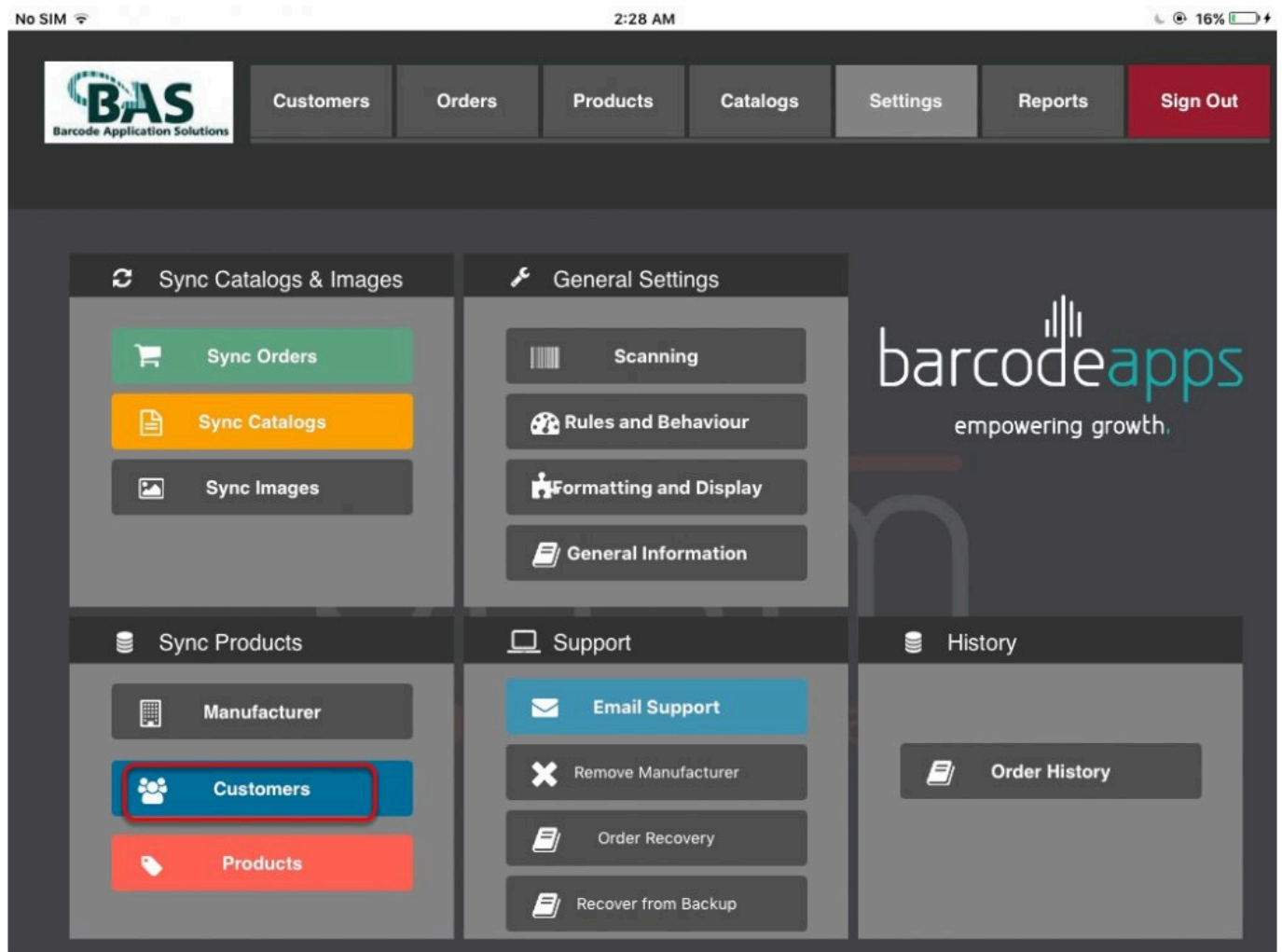
2.4.4.3.2. b. Customers

SYNCING CUSTOMERS

To sync your customers using the PRISM App. On the Main screen tap on settings.



Under sync products, tap on Customers.



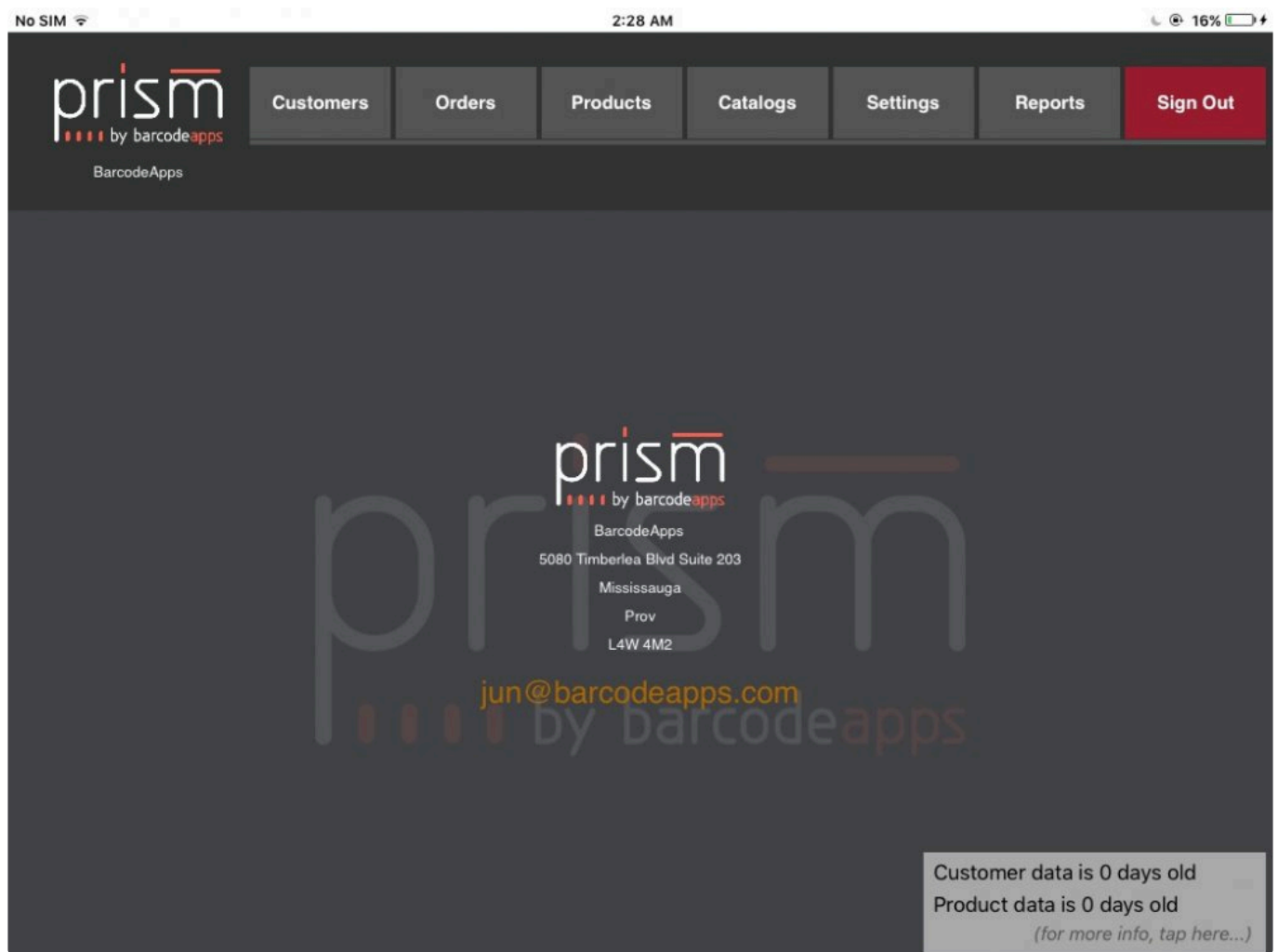
This function is applicable if:

- A customer is missing.
- A customer information has to be updated.
- New customer sync.

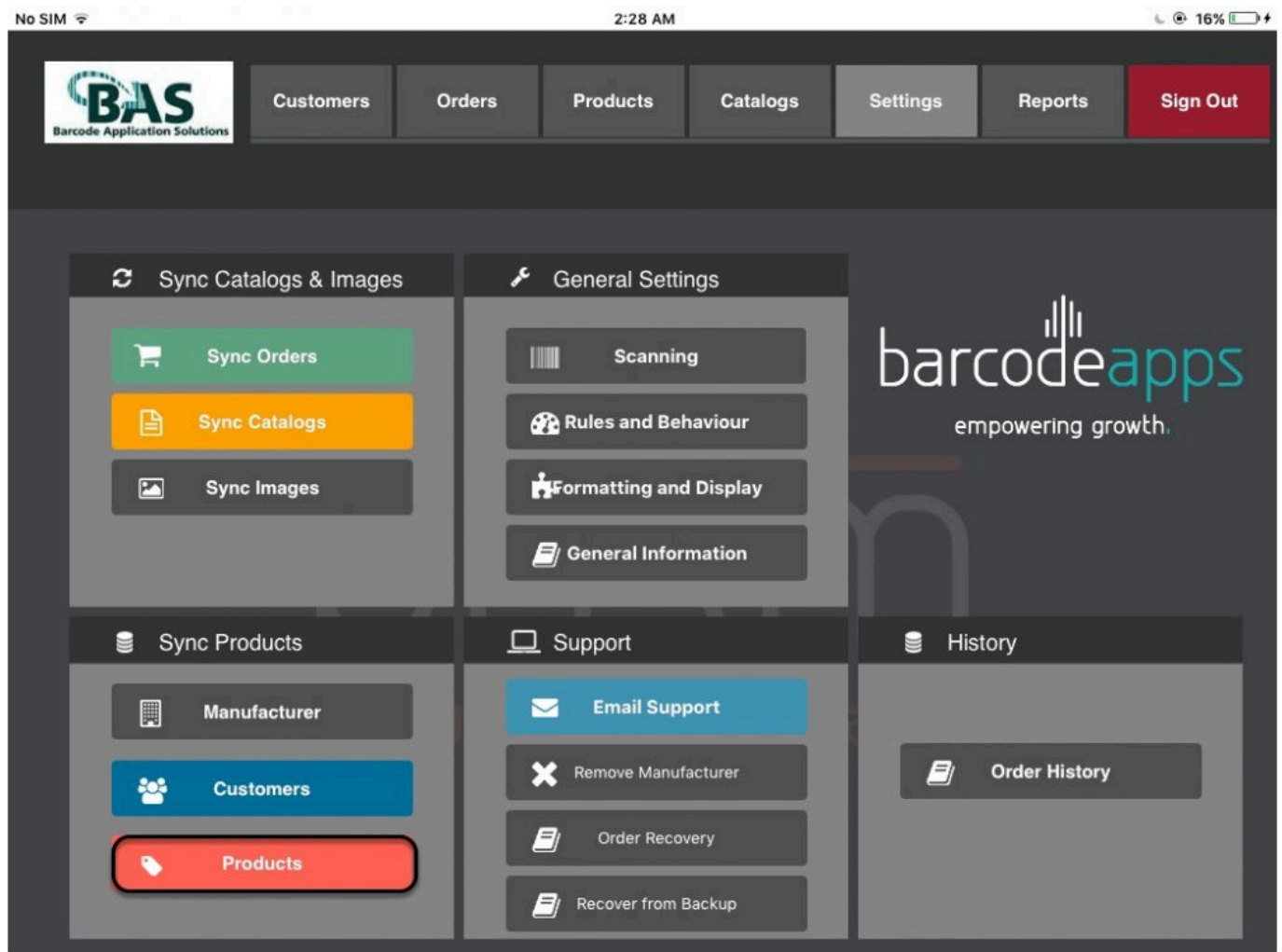
2.4.4.3.3. c. Products

SYNCING PRODUCTS

To sync your products using the PRISM App. On the main screen tap on settings.



Under Sync Products tap on products.



This function will be applicable if:

- A product is missing.
- Product item information has to updated.
- New Product sync

2.4.4.4. iv. Support

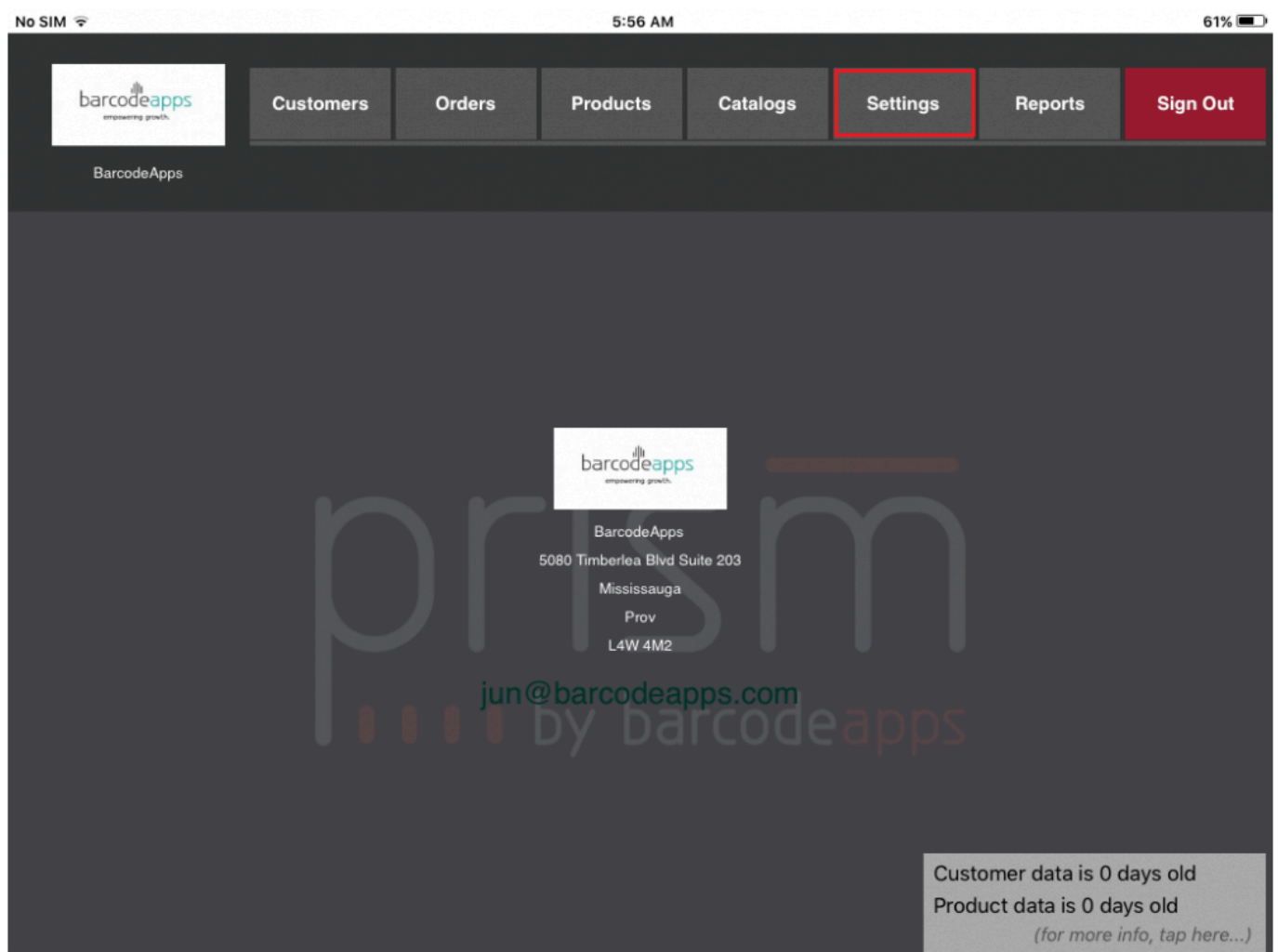
2.4.4.4.1. a. Email Support

This knowledge base article will review the email support function on the PRISM iPad.

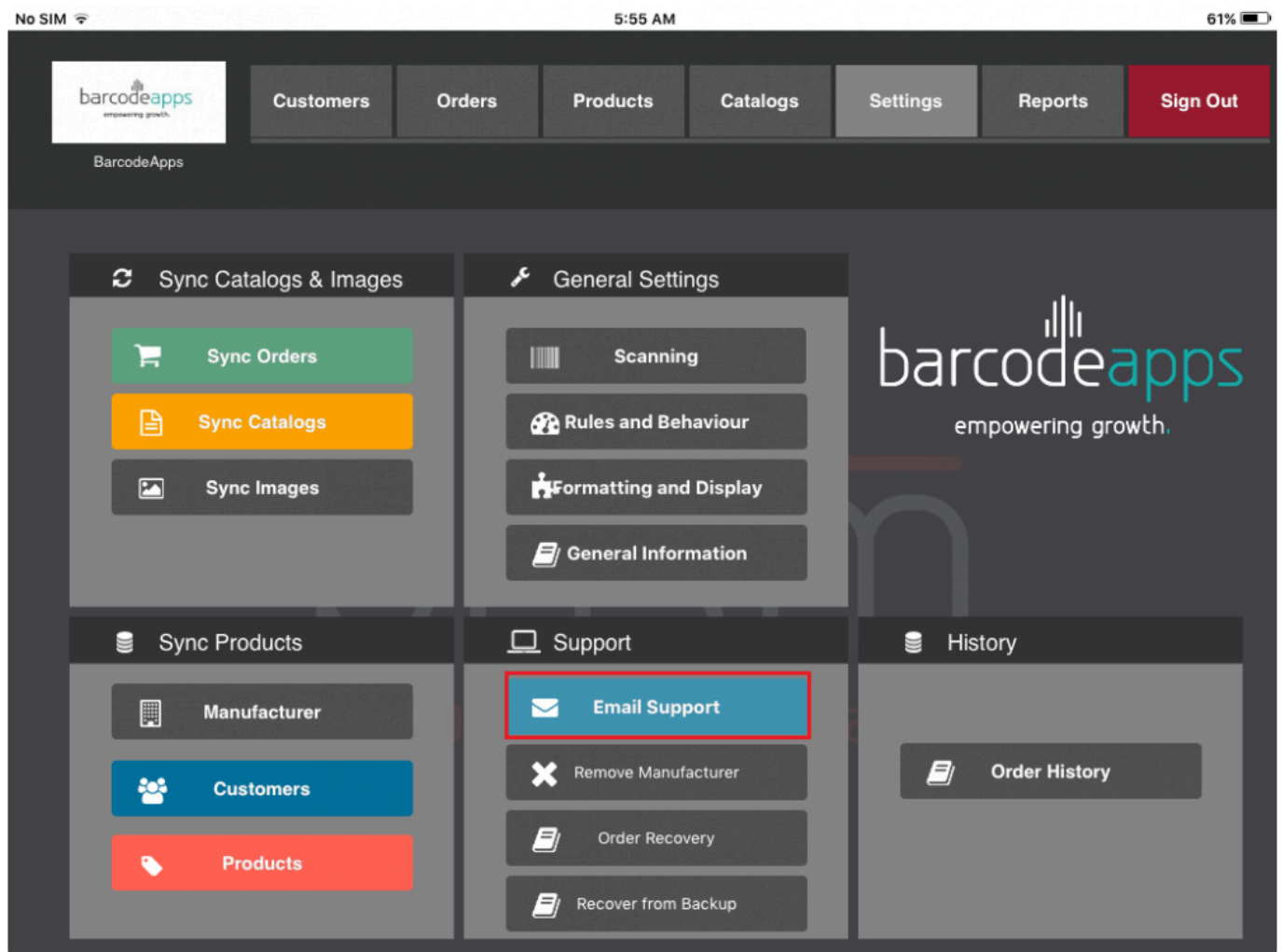
EMAIL SUPPORT

The iPad has a support feature that lets our support group review and diagnose the issue that the App might be having.

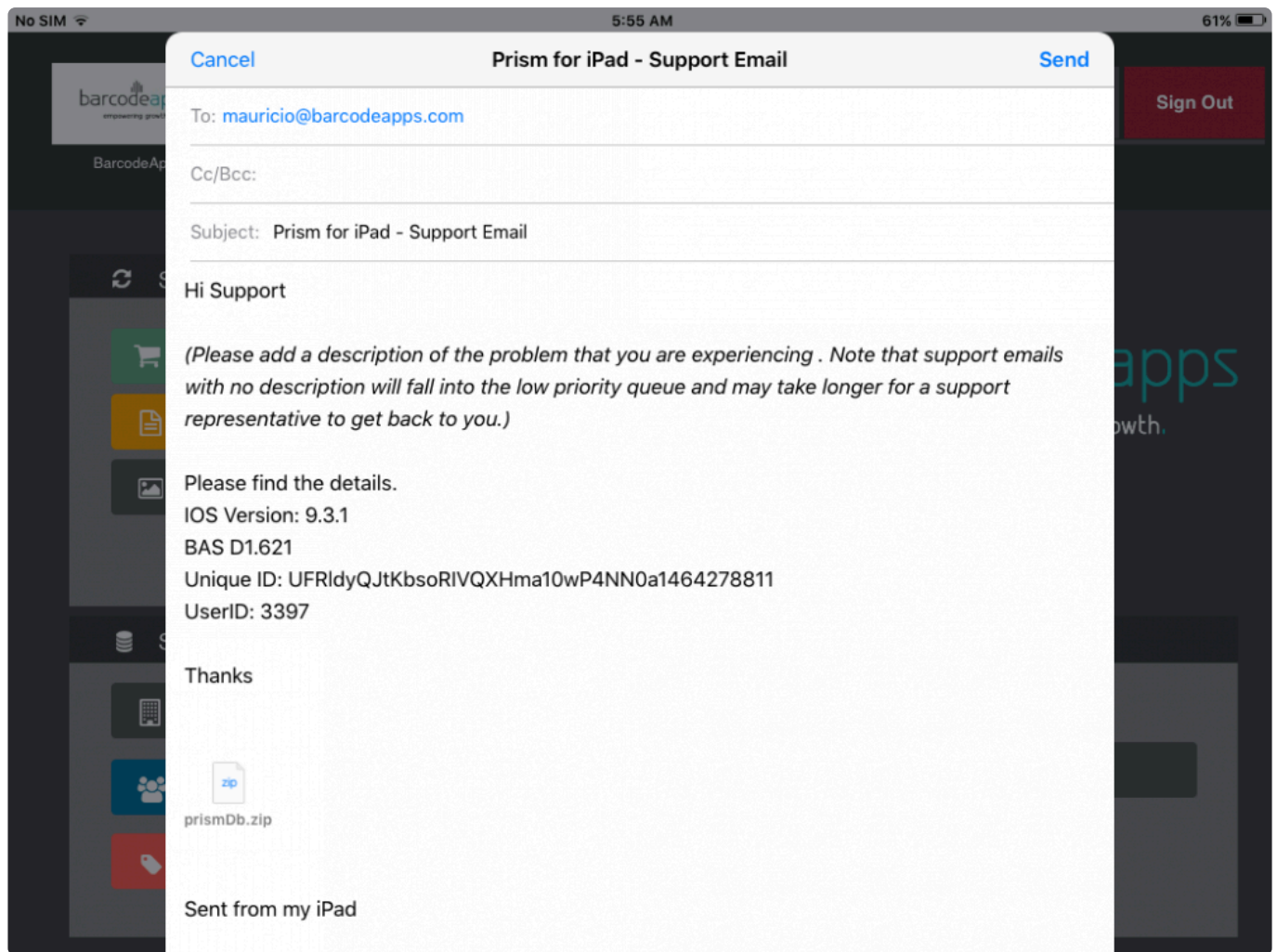
To access this feature. Tap on settings on the Main Window.



Tap on Email Support



On the Email Support Page. You can now add a description of the issue that you are having.



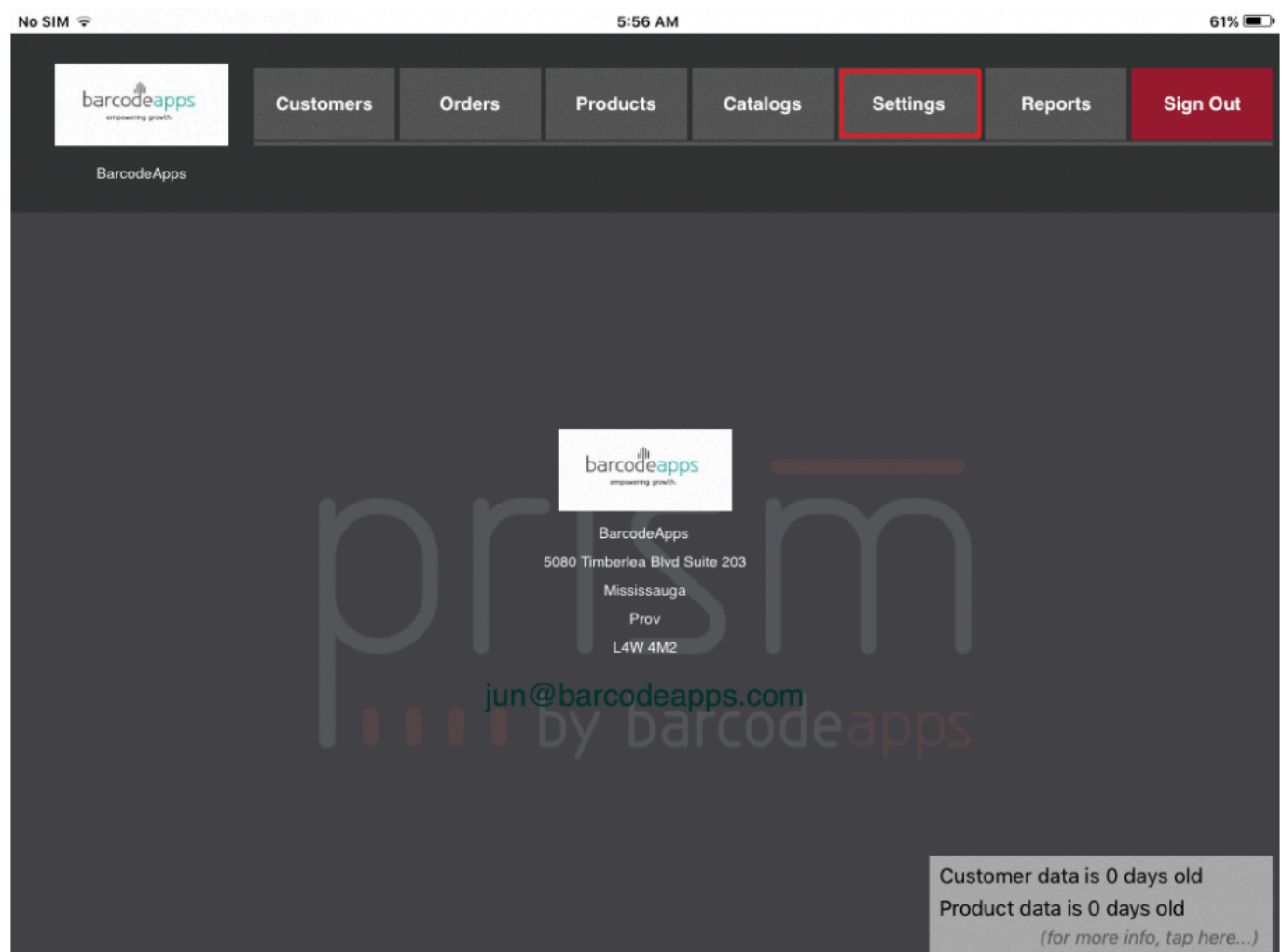
* Note that support emails that has no description will fall into the low priority queue and may take longer for a support representative to get back to you.

2.4.4.4.2. b. Remove Manufacturer

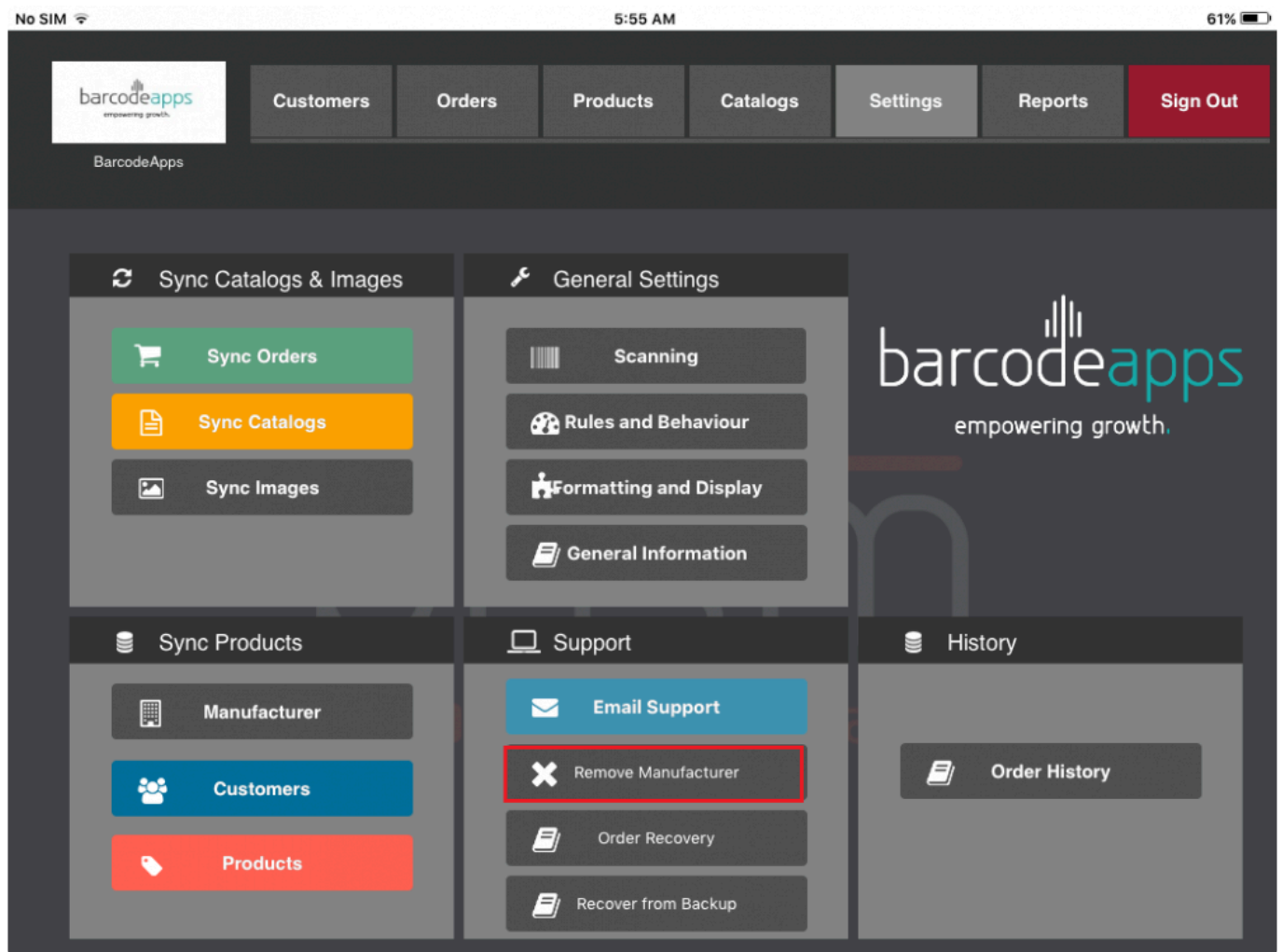
Remove manufacturer is a feature of the PRISM App to manually remove a manufacturer from the database without reinstalling the App.

REMOVE MANUFACTURER

To remove a manufacturer manually, Tap on settings on the main window


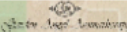



Tap on Remove Manufacturer under the support section



tap on Remove to remove a manufacturer on the list.

No SIM 5:57 AM 60%

Remove Manufacturer				
Current user is logged in under 'BarcodeApps'				
	BarcodeApps BAR01 Mississauga, 5080 Timberlea Blvd Suite 203, L4W 4M2	Total Customers: 37 Total Products: 51 Total Orders: 5	Total Catalogs: 3 Total Product Images: 52	Remove
	Garden Angel GA-123 Mississauga, 6411 Edwards Blvd,	Total Customers: 34 Total Products: 91 Total Orders: 0	Total Catalogs: 5 Total Product Images: 77	Remove
	MITS Air Conditionning MIT01 Mississauga, 1608 Bonhill Road , L5T 1C7	Total Customers: 8 Total Products: 12138 Total Orders: 0	Total Catalogs: 4 Total Product Images: 230	Remove

From here you can login back to the App using the same old credentials to establish a” FIRST SYNC”:#ios

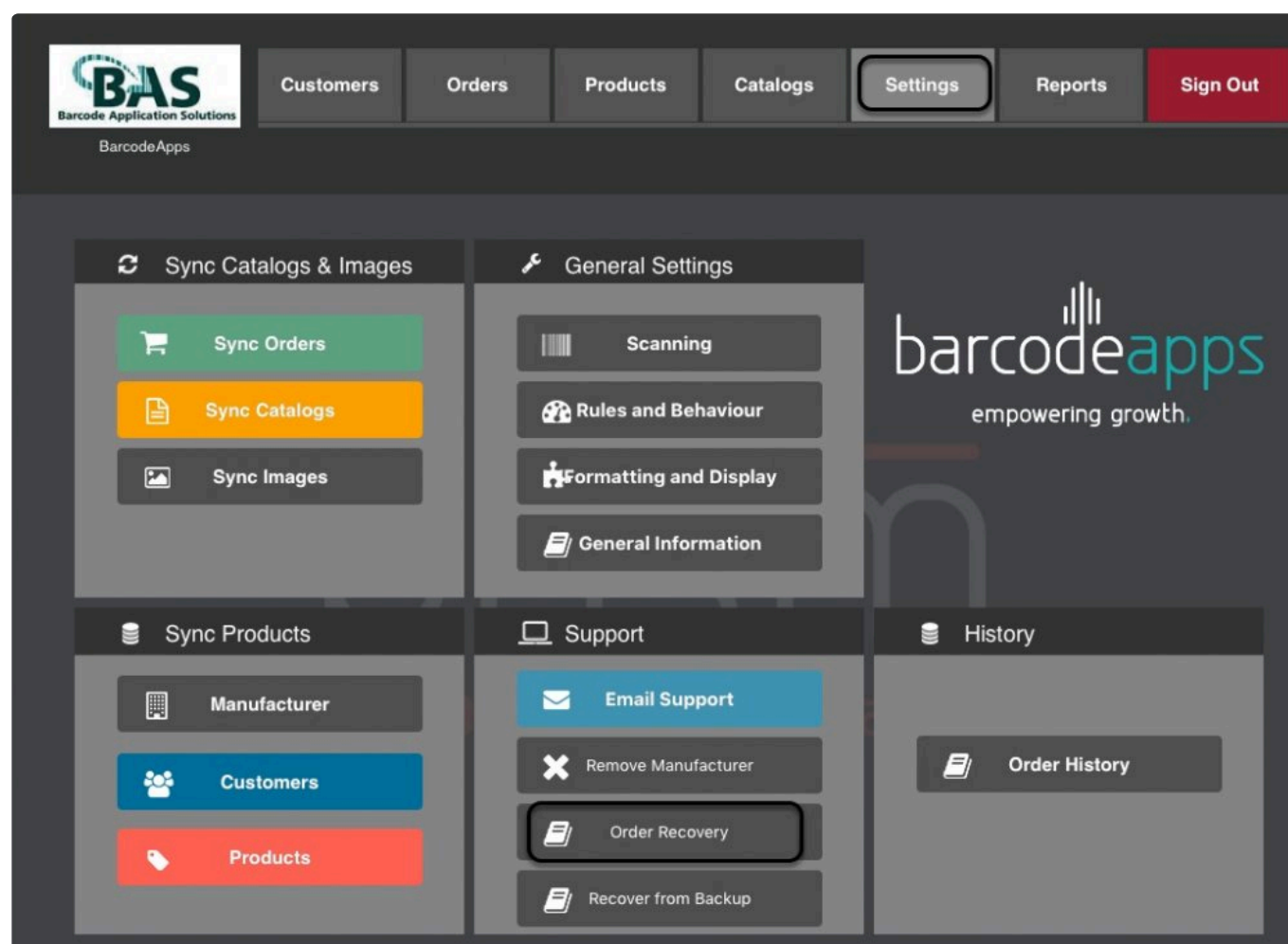
2.4.4.4.3. c. Order Recovery

ORDER RECOVERY FUNCTION

In any case that you cannot find a previous order on the Order Summary for review. You can use the Order Recovery function under settings.

This option will show you a repository of all orders that the IPAD saved LOCALLY.

To access this feature. Tap on Settings and then Order recovery.



A list of all processed orders will show. Find the order to be recovered and then select on show items to review the order.

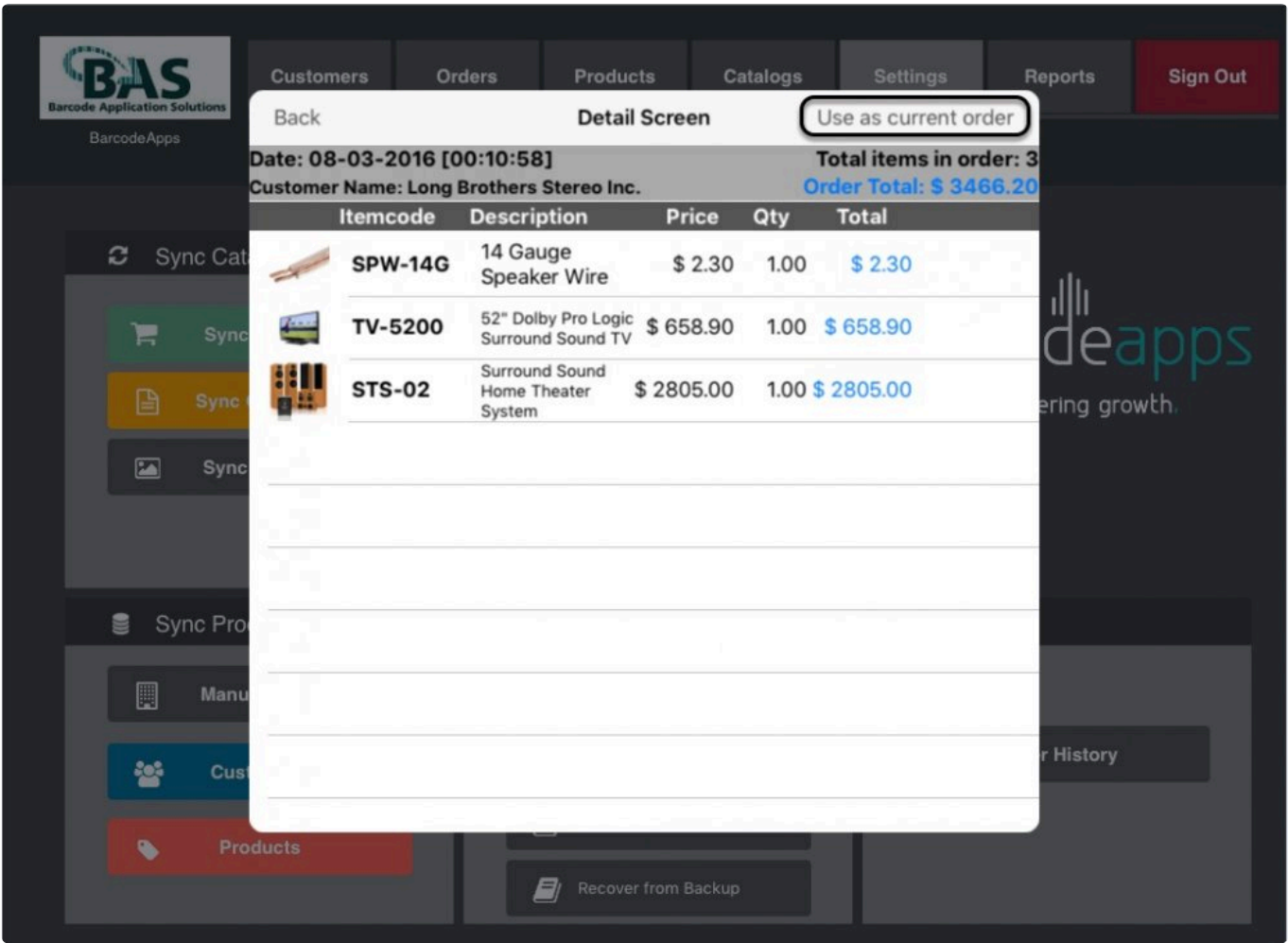
Order Recovery

NO.	Order Date	Customer Code	Total Items	Order Total	Show Items
20	09-03-2016 [03:40:13]	ACTECH	2	\$ 1837.40	Show Items
19	08-03-2016 [04:30:06]	ACTECH	2	\$ 1837.40	Show Items
18	08-03-2016 [04:04:26]	ACTECH	2	\$ 3182.10	Show Items
17	08-03-2016 [03:59:00]	ACTECH	2	\$ 3182.10	Show Items
16	08-03-2016 [03:35:20]	CZYARN	2	\$ 771.55	Show Items
15	08-03-2016 [03:22:22]	CZYARN	2	\$ 771.55	Show Items
14	08-03-2016 [03:15:33]	LBSTER	2	\$ 661.20	Show Items
13	08-03-2016 [02:56:32]	LBSTER	2	\$ 661.20	Show Items
12	08-03-2016 [02:55:20]	LBSTER	2	\$ 661.20	Show Items
11	08-03-2016 [02:34:01]	MASTER	1	\$ 719.40	Show Items
10	08-03-2016 [01:40:13]	ACTECH	1	\$ 741.60	Show Items
9	08-03-2016 [00:10:58]	LBSTER	3	\$ 3466.20	Show Items
8	08-03-2016 [00:09:59]	LBSTER	1	\$ 29.95	Show Items
7	08-03-2016 [00:08:53]	LBSTER	3	\$ 3466.20	Show Items
6	08-03-2016 [00:03:59]	MASTER	1	\$ 4676.10	Show Items
5	04-03-2016 [01:19:14]	DSNDM	3	\$ 1463.70	Show Items
4	04-03-2016 [01:12:15]	DSNDM	5	\$ 4006.80	Show Items
3	04-03-2016 [01:08:31]	CREAUD	2	\$ 1424.30	Show Items
2	04-03-2016 [01:06:38]	ACTECH	2	\$ 2842.60	Show Items
1	04-03-2016 [01:04:47]	CZYARN	1	\$ 741.60	Show Items

Total Recover Orders: 20

Recover from Backup

Once done reviewing the order and verified that it's correct. Just tap on Use as current order



Now you can start to work on the order recovered.

Waiting For Scanner...

Order for: Long Brothers Stereo Inc.

prism by barcodeapps BarcodeApps

Customers Orders **Products** Catalogs Settings Reports Sign Out

Go to A Item Code

Number of Items # 3 **Order Summary** Order Number # 14

Customer Name: Long Brothers Stereo Inc. Sales Person Name: jun@barcodeapps.com Order Date: 2016-3-9 3:41:32

ID	Product Code	Description	Quantity	Unit Price	Total
45	SPW-14G	14 Gauge Speaker Wire	1.00	\$ 2.30	\$ 2.30
46	TV-5200	52" Dolby Pro Logic Surround Sound TV	1.00	\$ 658.90	\$ 658.90
47	STS-02	Surround Sound Home Theater System	1.00	\$ 2805.00	\$ 2805.00
Order Total					\$ 3466.20

Back Show ordered products Show Wholesale Price Complete

6" Midrange Cone Speaker Screws for Speakers (SP-250) Semi-gloss Resin paint (SP-250) Personal Hand-held Organizer Personal Organizer

2.4.4.5. v. Reports

This knowledge base article will guide users to generate a report using the PRISM app iPad.

TYPES OF REPORT

Before getting started there are two types of report that the PRISM iPad App can generate and these are:

1. **Sales Report by Date** – this report will generate all sales transaction within a given time frame.

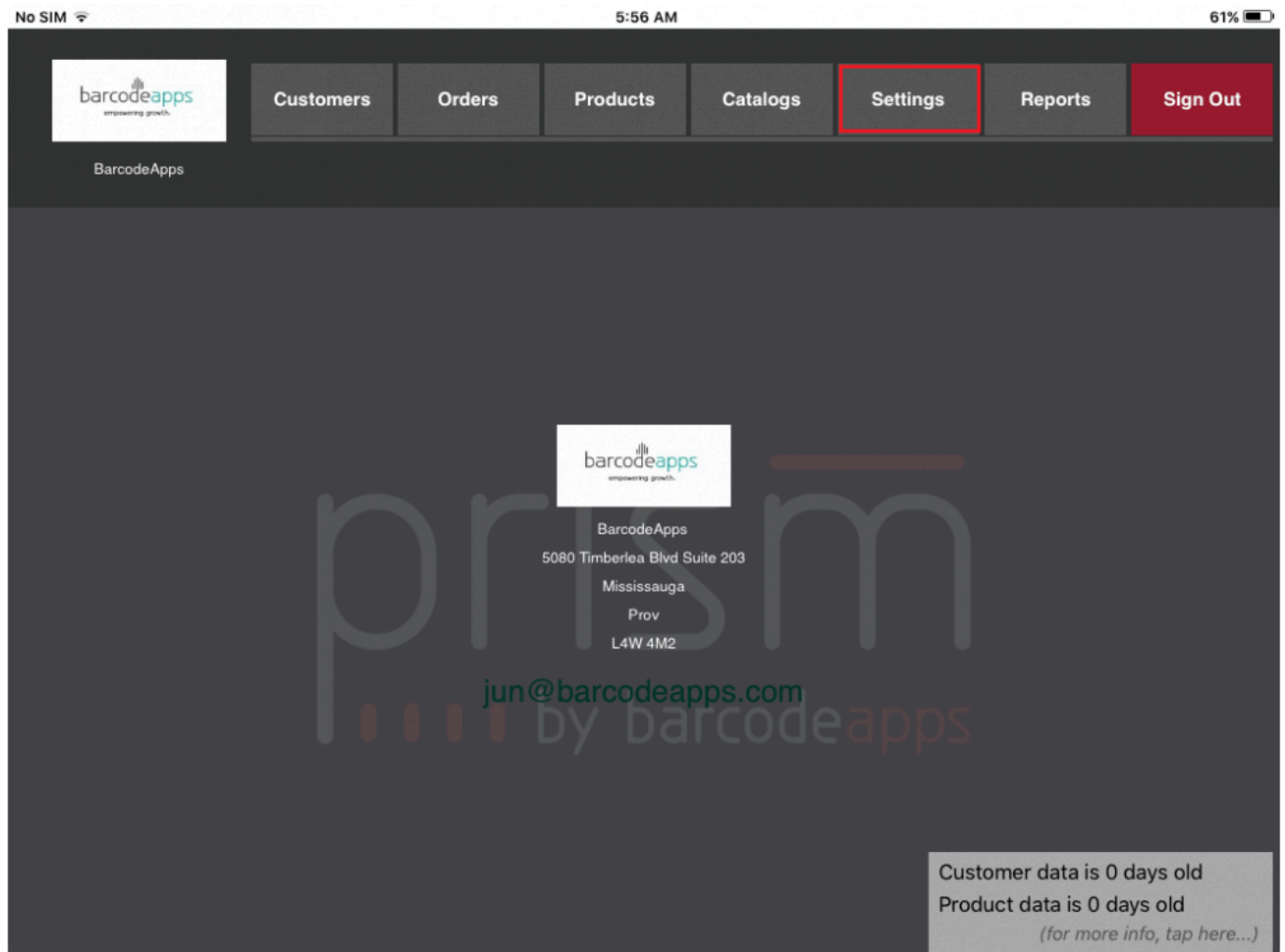
Sales Report by customer by date		
Customer	Name	Sales
Talbo Speakers	BarcodeApps	\$ 538.29
	Totalfor: Talbo Speakers	\$ 538.29
Creative Audio	BarcodeApps	\$ 6932.30
	Totalfor: Creative Audio	\$ 6932.30
Talbo Speakers	BarcodeApps	\$ 13864.60
	Totalfor: Talbo Speakers	\$ 13864.60
		Grand Total for the period: \$ 28267.49

2. **Product Rank on highest to Lowest** – this report will give the user an idea which product is marketable and which is not

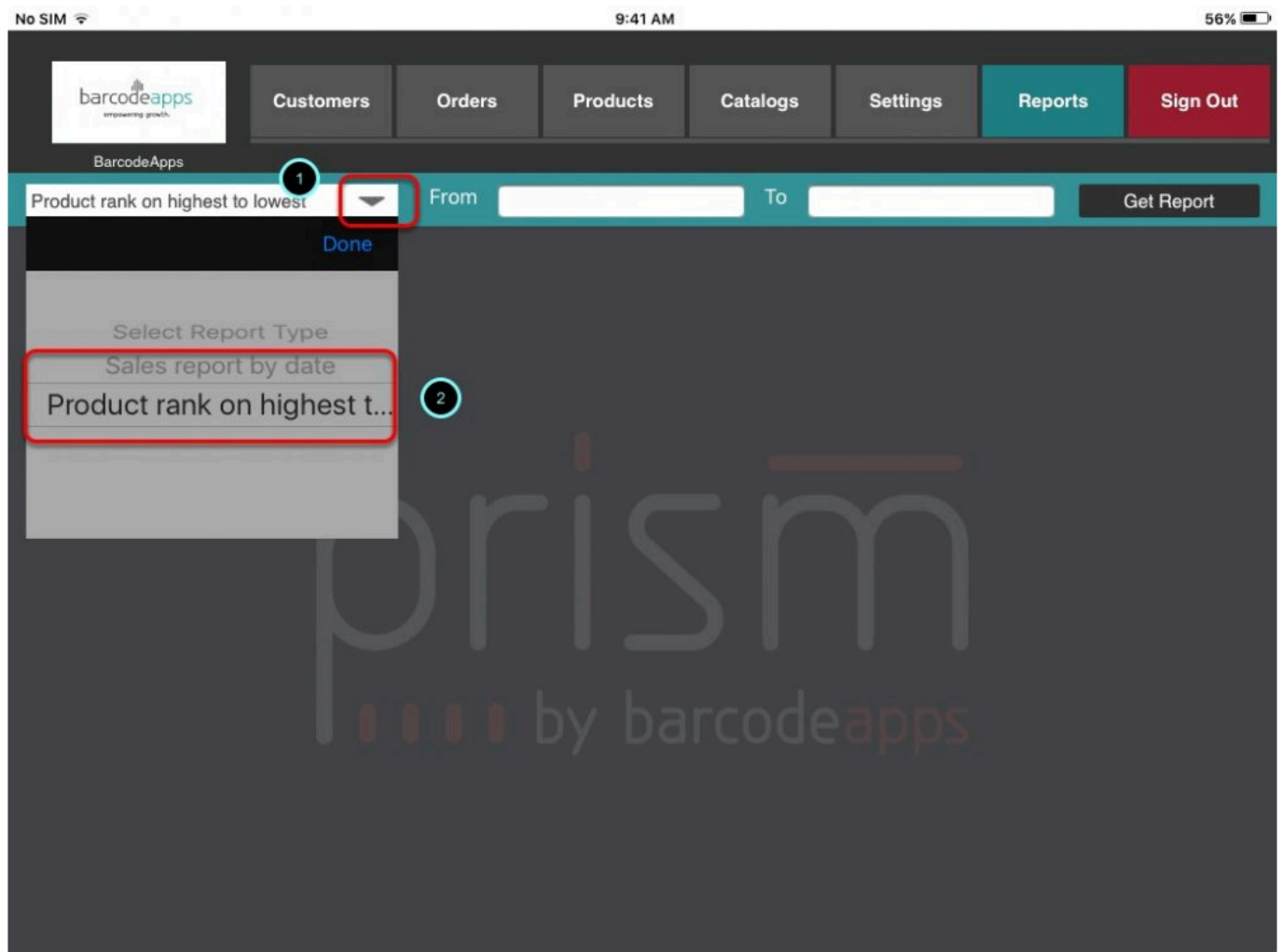
Sales Report by customer by date					
Item	Description	Sold	On Hand	Price	Extension
SP-500	Speakers - Home Theatr...	4.0		\$ 765.40	\$ 3061.60
STS-01	Home Sound System wit...	4.0		\$ 2194.50	\$ 8778.00
STS-02	Surround Sound Home T...	4.0		\$ 2805.00	\$ 11220.00
V1-2A	Digital-VHS VCR with HD...	4.0		\$ 193.50	\$ 774.00
V1-4A	Hi-fi Stereo 4 Head VCR	4.0		\$ 473.90	\$ 1895.60
XBX1	Microsoft Xbox One W/ 1...	4.0		\$ 500.00	\$ 2000.00
Grand Total for the period: \$ 28267.49					

GENERATING REPORT

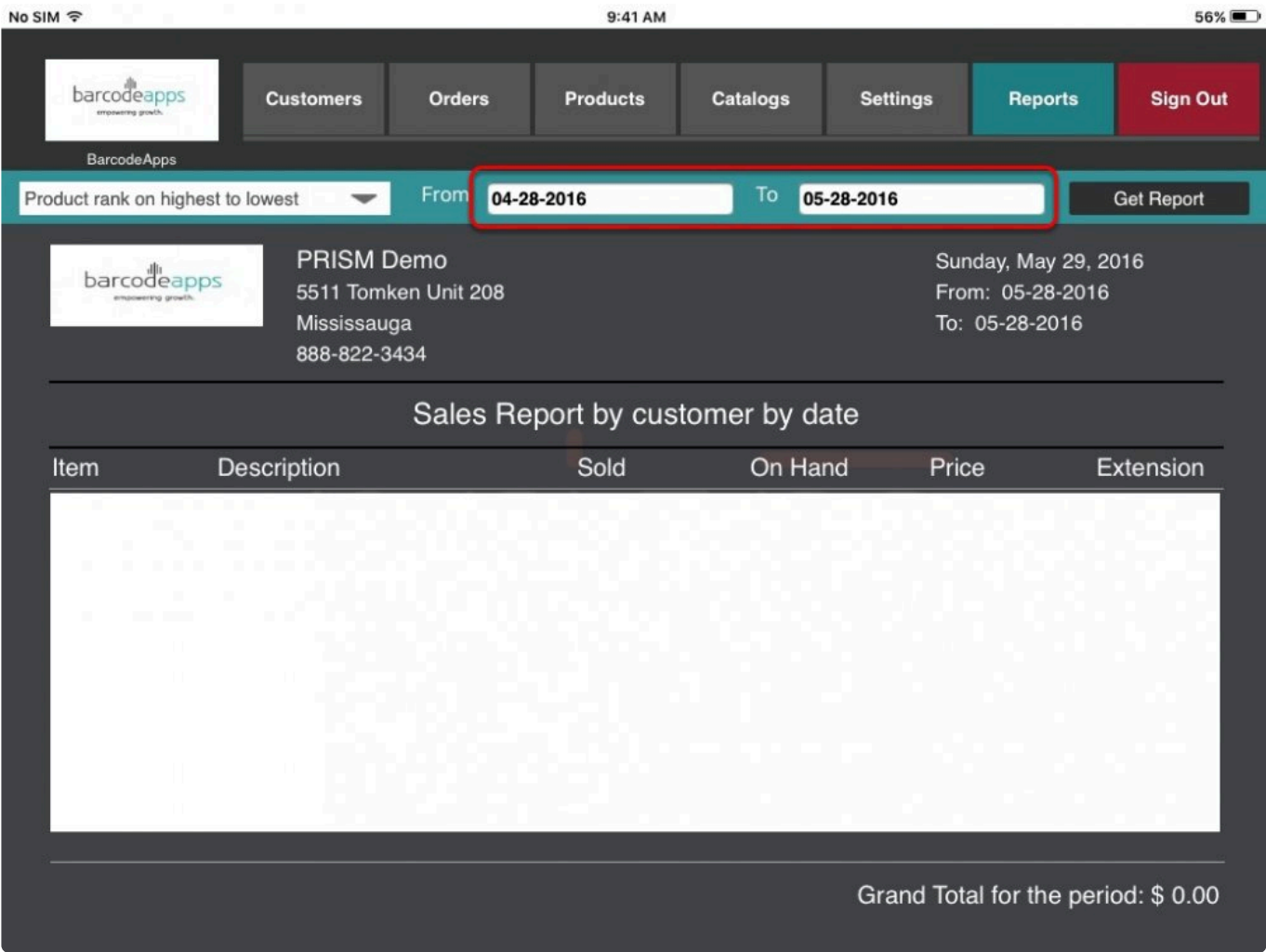
To generate a report, Tap on reports from the main window



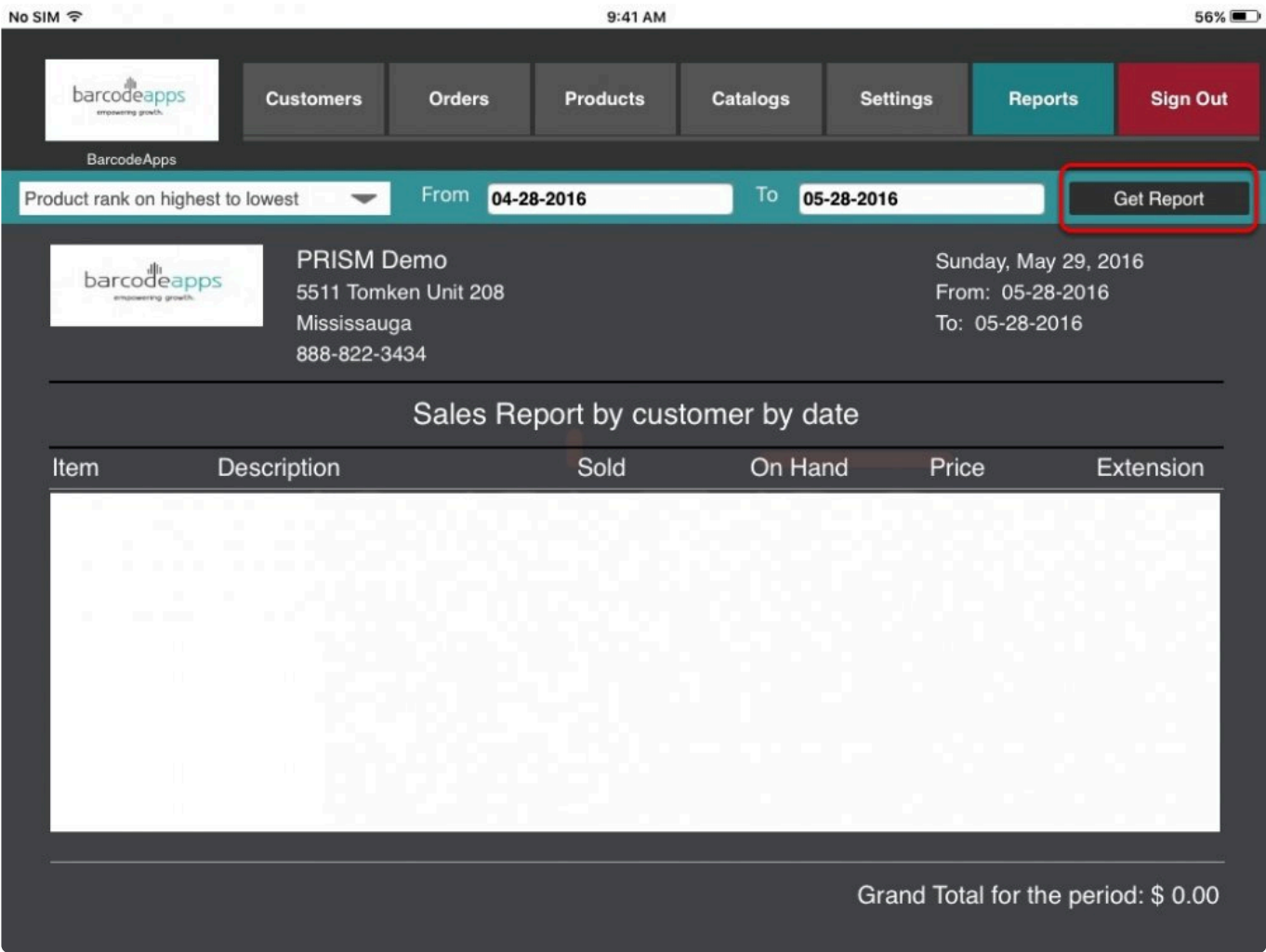
Select the report type



Select the date range



Tap on Get report



Report is now generated

No SIM 9:48 AM 55%

barcodeapps
empowering growth.

Customers Orders Products Catalogs Settings Reports Sign Out

BarcodeApps

Product rank on highest to lowest From 04-28-2016 To 05-28-2016 Get Report

barcodeapps
empowering growth.

PRISM Demo
5511 Tomken Unit 208
Mississauga
888-822-3434

Sunday, May 29, 2016
From: 04-28-2016
To: 05-28-2016

Sales Report by customer by date

Item	Description	Sold	On Hand	Price	Extension
SP-500	Speakers - Home Theatr...	4.0		\$ 765.40	\$ 3061.60
STS-01	Home Sound System wit...	4.0		\$ 2194.50	\$ 8778.00
STS-02	Surround Sound Home T...	4.0		\$ 2805.00	\$ 11220.00
V1-2A	Digital-VHS VCR with HD...	4.0		\$ 193.50	\$ 774.00
V1-4A	Hi-fi Stereo 4 Head VCR	4.0		\$ 473.90	\$ 1895.60
XBX1	Microsoft Xbox One W/ 1...	4.0		\$ 500.00	\$ 2000.00

Grand Total for the period: \$ 28267.49

2.5. V. PRISM JOOMLA WEBSITE

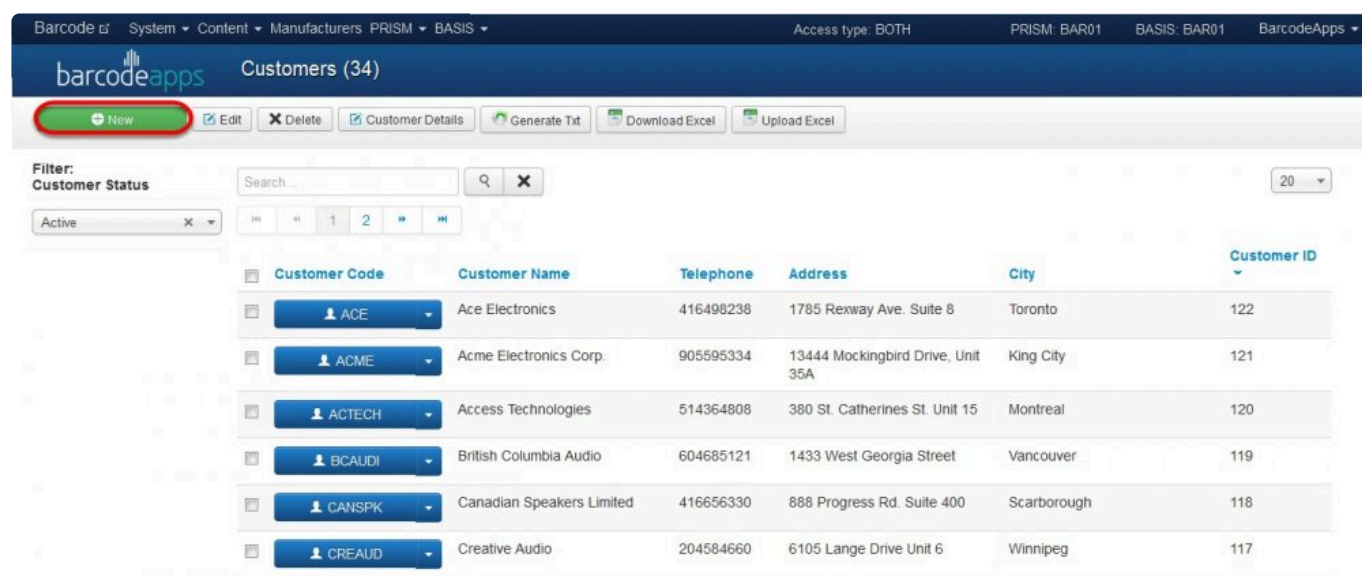
2.5.1. A. Customer Management

2.5.1.1. i. Adding A New Customer

This knowledge base article will guide users on how to add a new customer using the [PRISM Joomla Website](#).

ADDING NEW CUSTOMER

To add a customer manually, on the customer main window click on New.



The screenshot shows the BarcodeApps Customers (34) management interface. The 'New' button is highlighted with a red circle. The interface includes a search bar, a filter for Customer Status (Active), and a table of existing customers.

Customer Code	Customer Name	Telephone	Address	City	Customer ID
ACE	Ace Electronics	416498238	1785 Rexway Ave. Suite 8	Toronto	122
ACME	Acme Electronics Corp.	905595334	13444 Mockingbird Drive, Unit 35A	King City	121
ACTECH	Access Technologies	514364808	380 St. Catherines St. Unit 15	Montreal	120
BCAUDI	British Columbia Audio	604685121	1433 West Georgia Street	Vancouver	119
CANSPK	Canadian Speakers Limited	416656330	888 Progress Rd. Suite 400	Scarborough	118
CREAUD	Creative Audio	204584660	6105 Lange Drive Unit 6	Winnipeg	117

Fill out the basic information needed for the new customer (see field definitions) and then click on save and close once finish.

Nuevo

basmax1.dyndns.biz/basportal/administrator/index.php?option=com_ba_customers&view=customer&layout=edit

Search

Most Visited Graphics Card Hierarc... Getting Started eXtreme Power Supply... Graphics Cards - 2015 ... TPC | Technology Pow... Punongbayan and Ara... Barcode - Administrati... http

Barcode System Menus Content PRISM Extensions Help Access type: BOTH PRISM: BAR01 BASIS: BAR

barcodeapps Nuevo

Save & Close Cancel

Basic Information

Customer Code *

Customer Name *

Address

City

State

Zip Postal

Email

Web

Telephone *

Fax

Cell

Billtophone

Headofficename

Repcode

Contact1

Contact2

Notes

num1

Num2

BVWH

Password

Validated

Active

Other2

True

True

0

Customers Edición

Description

Customers / Edición

Basic Information Field Definitions

Basic Information Field Definitions

Telephone: Mandatory: Holds the customer main telephone number (Characters up to 40). This doesn't have to be unique, although it is recommended.

CustomerCode: Mandatory: Holds the customer code. (Characters up to 20). Each code must be unique.

CustomerName: Mandatory: Holds a customer name (usually the business name) Characters up to 100.

Address: Optional: Holds the customer address (Street number, name, type, unit number). Characters up to 70

City: Optional: Holds the customer city. Characters up to 100

StateProv: Optional: Holds the customer state (if US location) or province (if Canada location). Characters up to 4

PostalZip: Optional: Holds the customer zip code (if US location) or postal code (if Canada location). Characters up to 10

EMAIL: Optional: Holds the customer email address. Works in key with the field zzz to give the customer access to several Prism apps (Prism for iPad and Prism website) Characters up to 50

Password: Holds the customer password that works in key with the email for access to several Prism programs such as the customer login on the iPad app and the customer login on the online shopping website. Characters up to 9

WEB: Optional: Holds the customer website URL. Characters up to 50

Fax: Optional: Holds the customer fax number. Characters up to 12

Cell: Optional: Holds the customer cell number. Characters up to 12

BilltoPhone: Optional: This is actually the customer code of the BILL TO if the customer is part of a Bill To Ship to setting. For example if a company has a head office in Toronto and 3 ship to stores then PRISM will require 4 customers where the BILL TO is a customer and the ship to's are also customers but in their case the BILL TO code would be inserted in this field. Characters up to 20

HeadOfficeName: Optional: As per explanation above this is the name of the Head Office (Optional) Characters up to 50

+PaymentTerms +: Optional: Terms of payment assigned to this customer's Characters up to 20

RepCode: Optional: Holds the code of the rep (sales person) who represents the customer. Characters up to 30

Contact1: Optional: Holds the name of the main contact person for the customer. Characters up to 20

Contact2: Optional: Holds the name of the secondary contact person for the customer. Characters up to 20

Notes: Optional: Holds any customer comments that will be displayed on the Customer Details screen of all Prism products. Characters up to 50

Num1: Optional: Holds the tax rate that applies to the customer for the first tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

Num2: Optional: Holds the tax rate that applies to the customer for the second tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

BVWh: Optional: Warehouse attached to that customer in BV Characters up to 3

BarcodeApps © 2016

2.5.1.2. ii. Editing Customer Details

This knowledge base article will guide users on how they can edit the details of their customer.


EDITING CUSTOMER DETAILS


To edit customer details, click on the drop down arrow just after the customer code, and then select the option Edit Customer.

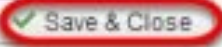

The screenshot shows the BarcodeApps interface for managing customers. The top navigation bar includes 'Barcode', 'System', 'Content', 'Manufacturers', 'PRISM', and 'BASIS'. The main header displays 'barcodeapps Customers (34)'. Below the header, there are buttons for 'New', 'Edit', 'Delete', 'Customer Details', 'Generate Txt', 'Download Excel', and 'Upload Excel'. A filter section on the left shows 'Filter: Customer Status' with a dropdown set to 'Active'. A search bar is located above the table. The table lists customers with columns: Customer Code, Customer Name, Telephone, Address, City, and Customer ID. The first row is 'ACE' (Ace Electronics) with Customer ID 122. A dropdown arrow next to the 'ACE' code is highlighted with a red circle, and a menu is open showing 'View Details' and 'Edit Customer' (the latter is highlighted with a red circle and a '2' in a green circle). Other customers listed include 'Acme Electronics Corp.', 'Access Technologies', 'British Columbia Audio', and 'Canadian Speakers Limited'.

Customer Code	Customer Name	Telephone	Address	City	Customer ID
ACE	Ace Electronics	416498238	1785 Rexway Ave. Suite 8	Toronto	122
Acme Electronics Corp.	Acme Electronics Corp.	905595334	13444 Mockingbird Drive, Unit 35A	King City	121
ACTECH	Access Technologies	514364808	380 St. Catherine's St. Unit 15	Montreal	120
BCAUDI	British Columbia Audio	604685121	1433 West Georgia Street	Vancouver	119
CANSPK	Canadian Speakers Limited	416656330	888 Progress Rd. Suite 400	Scarborough	118

We can now modify the information of the customer (see field definition) and after making the changes, just click on Save and Close.

Barcode  System Menus Content PRISM Extensions Help

 Edit

Basic Information

Customer Code *	ACE
Customer Name *	Ace Electronics
Address	1785 Rexway Ave. Suite 8
City	Toronto
State	ON
Zip Postal	M9A 2B2
Email	adurk@aceelectronics.com
Web	
Telephone *	416498238
Fax	
Cell	
Billto phone	
Headoffice name	ACE
Repcode	
Contact1	Allen Durk
Contact2	
Notes	
num1	13

Basic Information Field Definitions

Telephone: Mandatory: Holds the customer main telephone number (Characters up to 40). This doesn't have to be unique, although it is recommended.

CustomerCode: Mandatory: Holds the customer code. (Characters up to 20). Each code must be unique.

CustomerName: Mandatory: Holds a customer name (usually the business name) Characters up to 100.

Address: Optional: Holds the customer address (Street number, name, type, unit number). Characters up to 70

City: Optional: Holds the customer city. Characters up to 100

StateProv: Optional: Holds the customer state (if US location) or province (if Canada location). Characters up to 4

PostalZip: Optional: Holds the customer zip code (if US location) or postal code (if Canada location). Characters up to 10

EMAIL: Optional: Holds the customer email address. Works in key with the field zzz to give the customer access to several Prism apps (Prism for iPad and Prism website) Characters up to 50

Password: Holds the customer password that works in key with the email for access to several Prism programs such as the customer login on the iPad app and the customer login on the online shopping website. Characters up to 9

WEB: Optional: Holds the customer website URL. Characters up to 50

Fax: Optional: Holds the customer fax number. Characters up to 12

Cell: Optional: Holds the customer cell number. Characters up to 12

BilltoPhone: Optional: This is actually the customer code of the BILL TO if the customer is part of a Bill To Ship to setting. For example if a company has a head office in Toronto and 3 ship to stores then PRISM will require 4 customers where the BILL TO is a customer and the ship to's are also customers but in their case the BILL TO code would be inserted in this field. Characters up to 20

HeadOfficeName: Optional: As per explanation above this is the name of the Head Office (Optional) Characters up to 50

+PaymentTerms +: Optional: Terms of payment assigned to this customer's Characters up to 20

RepCode: Optional: Holds the code of the rep (sales person) who represents the customer. Characters up to 30

Contact1: Optional: Holds the name of the main contact person for the customer. Characters up to 20

Contact2: Optional: Holds the name of the secondary contact person for the customer. Characters up to 20

Notes: Optional: Holds any customer comments that will be displayed on the Customer Details screen of all Prism products. Characters up to 50

Num1: Optional: Holds the tax rate that applies to the customer for the first tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

Num2: Optional: Holds the tax rate that applies to the customer for the second tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

BVWh: Optional: Warehouse attached to that customer in BV Characters up to 3

2.5.1.3. iii. Deleting A Customer

This knowledge base article will guide users to delete a customer from the [PRISM Joomla Website](#).

DELETING A CUSTOMER

To delete a customer, make a selection of the customers that needs to be deleted by putting a check mark on the box, and then click on Delete.

The screenshot shows the BarcodeApps Customers management interface. At the top, there's a header bar with the BarcodeApps logo and the text 'Customers (34)'. Below the header, there's a toolbar with buttons: 'New', 'Edit', 'Delete' (highlighted with a red circle), 'Customer Details', 'Generate Txt', 'Download Excel', and 'Upload Excel'. A filter dropdown is set to 'Active'. A search bar is present. Below the search bar, there's a table of customers. The table has columns: 'Customer Code', 'Customer Name', 'Telephone', 'Address', 'City', and 'Customer ID'. The first row is 'ACE' with ID 122. The second row is 'ACME' with ID 121. The third row is 'ACTECH' with ID 120. The fourth row is 'BCAUDI' with ID 119. The fifth row is 'CANSPK' with ID 118. The sixth row is 'CREAUD' with ID 117. The seventh row is 'CZYARN' with ID 116. The eighth row is 'DAVID' with ID 115. The 'Delete' button in the toolbar is highlighted with a red circle. A red circle with the number '1' is also around the 'Delete' button in the toolbar.

Customer Code	Customer Name	Telephone	Address	City	Customer ID
ACE	Ace Electronics	416498238	1785 Rexway Ave. Suite 8	Toronto	122
ACME	Acme Electronics Corp.	905595334	13444 Mockingbird Drive, Unit 35A	King City	121
ACTECH	Access Technologies	514364808	380 St. Catherine's St. Unit 15	Montreal	120
BCAUDI	British Columbia Audio	604685121	1433 West Georgia Street	Vancouver	119
CANSPK	Canadian Speakers Limited	416656330	888 Progress Rd. Suite 400	Scarborough	118
CREAUD	Creative Audio	204584660	6105 Lange Drive Unit 6	Winnipeg	117
CZYARN	Crazy Arnold's Stereo Inc.	416624333	623 York Street Building 3	Toronto	116
DAVID	David Electronics	306405271	231 Briston Way Unit 8	Saskatoon	115

Click on Ok to confirm.

The screenshot shows the BarcodeApps 'Customers (34)' interface. At the top, there's a header bar with the BarcodeApps logo and the title 'Customers (34)'. Below the header, there's a toolbar with buttons: 'New', 'Edit', 'Delete', 'Customer Details', 'Generate Txt', 'Download Excel', and 'Upload Excel'. A filter section on the left shows 'Filter: Customer Status' with a dropdown set to 'Active'. A search bar is also present. The main area displays a table of customer records. A modal dialog box is open in the center, asking 'Desea eliminar este registro' (Do you want to delete this record?) with 'OK' and 'Cancel' buttons. The table has columns: 'Customer Code', 'Customer', 'Address', 'City', and 'Customer ID'. The first row is highlighted.

Customer Code	Customer	Address	City	Customer ID
ACE	Ace Electro	1785 Rexway Ave. Suite 8	Toronto	122
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A	King City	121
ACTECH	Access Technologies	380 St. Catherines St. Unit 15	Montreal	120
BCAUDI	British Columbia Audio	1433 West Georgia Street	Vancouver	119
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400	Scarborough	118
CREAUD	Creative Audio	6105 Lange Drive Unit 6	Winnipeg	117
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3	Toronto	116
DAVIDE	Davis Electronics	231 Rivton Way Unit 8	Saskatoon	115

To sync the changes with the PRISM App (iOS/Android), click on Generate TXT.

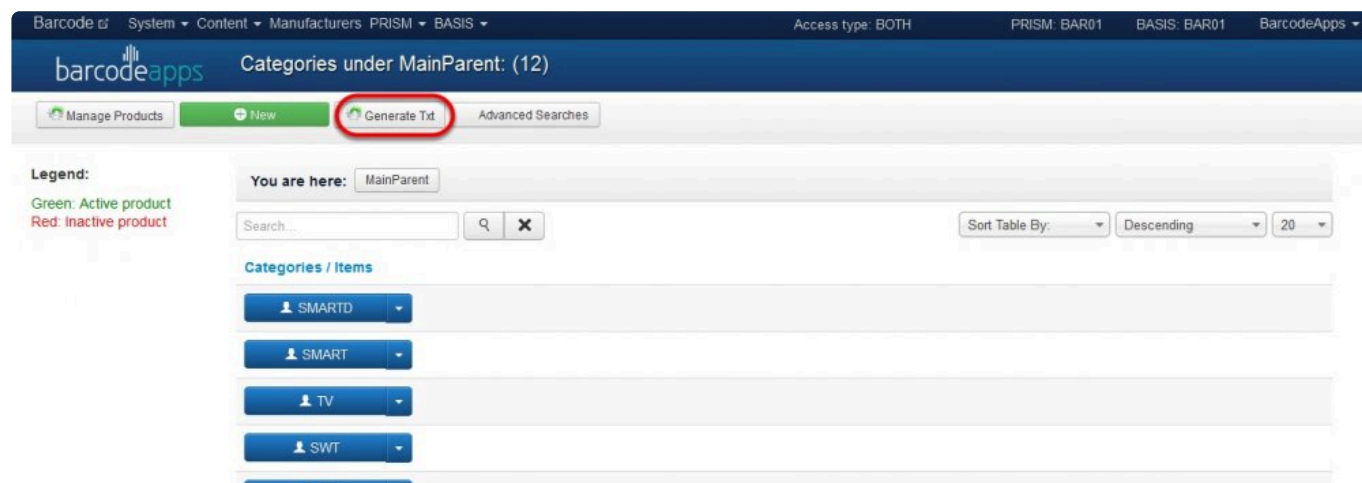
This screenshot shows the same BarcodeApps 'Customers (34)' interface, but with the 'Generate Txt' button in the toolbar highlighted with a red rectangle. The table of customer records is visible, showing columns: 'Customer Code', 'Customer Name', 'Telephone', 'Address', 'City', and 'Customer ID'. The first row is highlighted.

Customer Code	Customer Name	Telephone	Address	City	Customer ID
ACME	Acme Electronics Corp.	905595334	13444 Mockingbird Drive, Unit 35A	King City	121
CANSPK	Canadian Speakers Limited	416656330	888 Progress Rd. Suite 400	Scarborough	118
CREAUD	Creative Audio	204584660	6105 Lange Drive Unit 6	Winnipeg	117
CZYARN	Crazy Arnold's Stereo Inc.	416624333	623 York Street Building 3	Toronto	116
DAVIDE	Davis Electronics	306405271	231 Rivton Way Unit 8	Saskatoon	115

2.5.1.4. iv. Generate Text

GENERATE TEXT (SYNC DATA)

The Generate txt button syncs all data (Product items, Categories, , Images) from the PRISM Joomla Portal going to the Mobile devices(IOS/ ANDROID) and the PRISM Web Store.



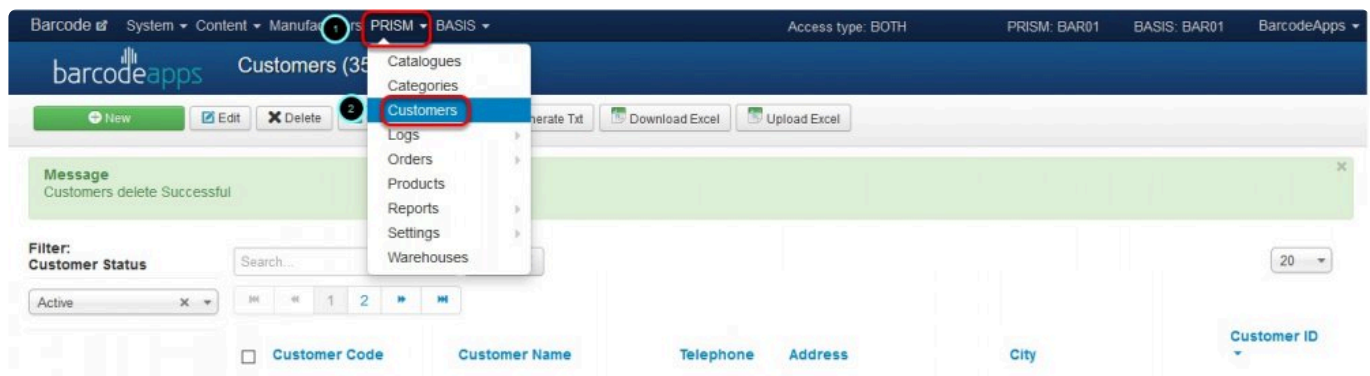
It's a best practice to use this option whenever you make changes inside the joomla portal

2.5.1.5. v. Download Excel

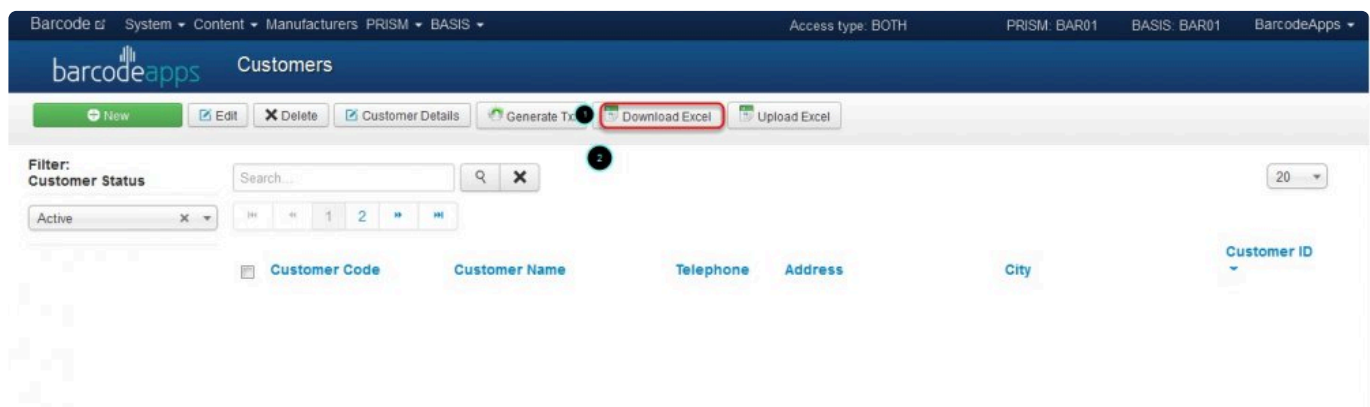
This knowledge base article will guide users to download and manage the customer form from the [PRISM Joomla Website](#).

DOWNLOADING EXCEL (CUSTOMERS FORM)

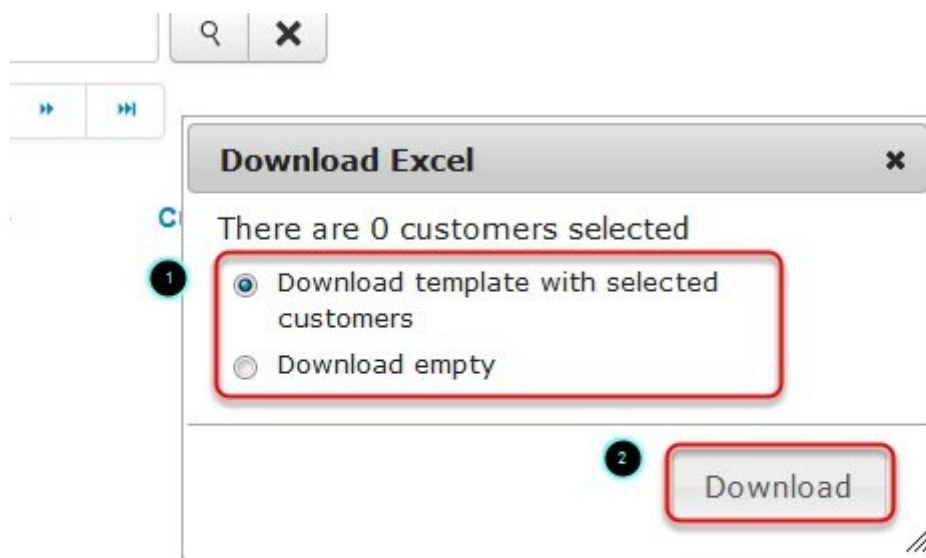
To download the customer form. Login to PRISM Joomla Portal and then go to PRISM and then Customers.



Click on Download Excel.



On the pop up window, select the download option and then click on Download.

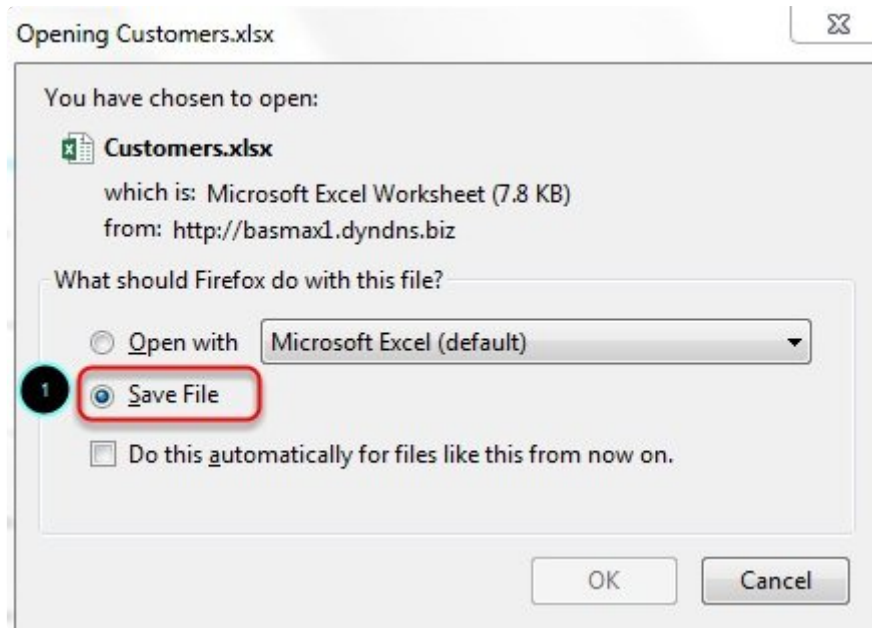


Download Options

1. Download Template with selected customers – This will download the customer form with preselected customers

Download Excel – 2 BarcodeA pps © 2016
from the PRISM Joomla Website.

2. Download Empty – This will download a blank customer form. Typically used by new customers to upload their clients on the PRISM Joomla Website.



Save the form on your computer. Now you can start to fill out the form and once done you can start uploading it.

(See Uploading Excel Form)

	A	B	C	D	E	F	G	H
1	Telephone	CustomerCode	CustomerName	Address	City	StateProv	PostalZip	EMAIL
2	416-822-3434	BAR01001	Trisha Dotullo	5080 Timberlea f	Mississauga	ON	L4W 4M2	trisha@barcodeapps.com
3	4165908333	WINSTN	Winston s Computer Consultant	9000 Front St. V	Toronto	ON	M4G 2B2	gwinston@winstoncomputer.com
4	2049275540	WHDIST	West Heights Distributors Inc.	5550 Independer	Winnipeg	MB	R3J 1P9	julesb@westheights.com
5	6046224900	WESTEC	Western Electronics	1265 Madison S	Vancouver	BC	V1S 3L3	kwong@westernelectronics.com
6	4166655400	TORRAD	Toronto Radio Limited	2316 Avenue Ro	Toronto	ON	M5A 1X5	rtucker@torontoradio.com
7	4162222323	TERSEA	Terrace Sound Effects	78 Christopher A	Toronto	ON	M8V 8R2	hsmyth@home.com
8	4168835656	SNDMCH	Sound Machine	1137 West Park	Mississauga	ON	L4W 5N3	wendy@soundmachine.com
9	7052726339	SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street	Brockville	ON	L92 3K7	croberts@smithevanshifi.com
10	9052547699	RADLND	Radio Land	103 MacArthur C	Willowdale	ON	L8T 2T2	dmacarthur@radioland.com
11	4165556262	ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore	Toronto	ON	M6G 1J5	kevinh@ose.com
12	4165394575	NYAUDI	North York Audio Specialists	823 Griffin Way	North York	ON	M3P 2D5	ghinnings@northyorkaudio.ca
13	5197223654	MASTER	Masters Computer Systems	104 Griffin Road	Windsor	ON	N1R 5G8	dmasters@masterscs.com
14	9024249787	LBSTER	Long Brothers Stereo Inc.	8041 Newman A	Yarmouth	NS	B4K 2LW	scrocker@longbrothersstereo.ca
15	9056589445	JACSN	Jackson Electronics	600 Niagara Wa	Niagara Falls	ON	NOF 7R9	jjackson@jacksonelectronics.com
16	2048224901	INTSYS	Integrated Sound Solutions	1402 West Stree	Lethbridge	AB	T5H 2L4	djackson@integratedsound.com
17	9055551438	HARNEW	Harris Newland Inc.	1197 Bartley Bul	Brampton	ON	L6W 7J8	lnewland@harrisnewland.com
18	6045554321	HARMON	Harmons Home Theatre System	283 Jane Street	Calgary	AB	T7E 1K3	wharmon@hhts.com
19	9055559696	HARDIN	Harding TV Repairs	252 Gladstone E	Willowdale	ON	L2J 4S3	sharding@hardingtv.com
20	9055559700	HARCOM	Hardy Computer Associates	1200 Lester Pea	Malton	ON	L9V 1M2	whardy@hardyca.com
21	7052521616	GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley	Huntsville	ON	N2J 5T5	ibarnett@georgianhifi.com
22								
23								
24								
25								

Customers Form Field Definitions

Telephone: Mandatory: Holds the customer main telephone number (Characters up to 40). This doesn't have to be unique, although it is recommended.

CustomerCode: Mandatory: Holds the customer code. (Characters up to 20). Each code must be unique.

CustomerName: Mandatory: Holds a customer name (usually the business name) Characters up to 100.

Address: Optional: Holds the customer address (Street number, name, type, unit number). Characters up to 70

City: Optional: Holds the customer city. Characters up to 100

StateProv: Optional: Holds the customer state (if US location) or province (if Canada location). Characters up to 4

PostalZip: Optional: Holds the customer zip code (if US location) or postal code (if Canada location). Characters up to 10

EMAIL: Optional: Holds the customer email address. Works in key with the field zzz to give the customer access to several Prism apps (Prism for iPad and Prism website) Characters up to 50

WEB: Optional: Holds the customer website URL. Characters up to 50

Fax: Optional: Holds the customer fax number. Characters up to 12

Cell: Optional: Holds the customer cell number. Characters up to 12

BilltoPhone: Optional: This is actually the customer code of the BILL TO if the customer is part of a Bill To Ship to setting. For example if a company has a head office in Toronto and 3 ship to stores then PRISM will require 4 customers where the BILL TO is a customer and the ship to's are also customers but in their case the BILL TO code would be inserted in this field. Characters up to 20

HeadOfficeName: Optional: As per explanation above this is the name of the Head Office (Optional) Characters up to 50

+PaymentTerms +: Optional: Terms of payment assigned to this customers Characters up to 20

RepCode: Optional: Holds the code of the rep (sales person) who represents the customer. Characters up to 30

Contact1: Optional: Holds the name of the main contact person for the customer. Characters up to 20

Contact2: Optional: Holds the name of the secondary contact person for the customer. Characters up to 20

Notes: Optional: Holds any customer comments that will be displayed on the Customer Details screen of all Prism products. Characters up to 50

Num1: Optional: Holds the tax rate that applies to the customer for the first tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

Num2: Optional: Holds the tax rate that applies to the customer for the second tax type (e.g. 15, 10, etc.). Integer numbers NO decimals

BVWh: Optional: Warehouse attached to that customer in BV Characters up to 3

zzz: Holds the customer password that works in key with the email for access to several Prism programs such as the customer login on the iPad app and the customer login on the online shopping website.
Characters up to 9

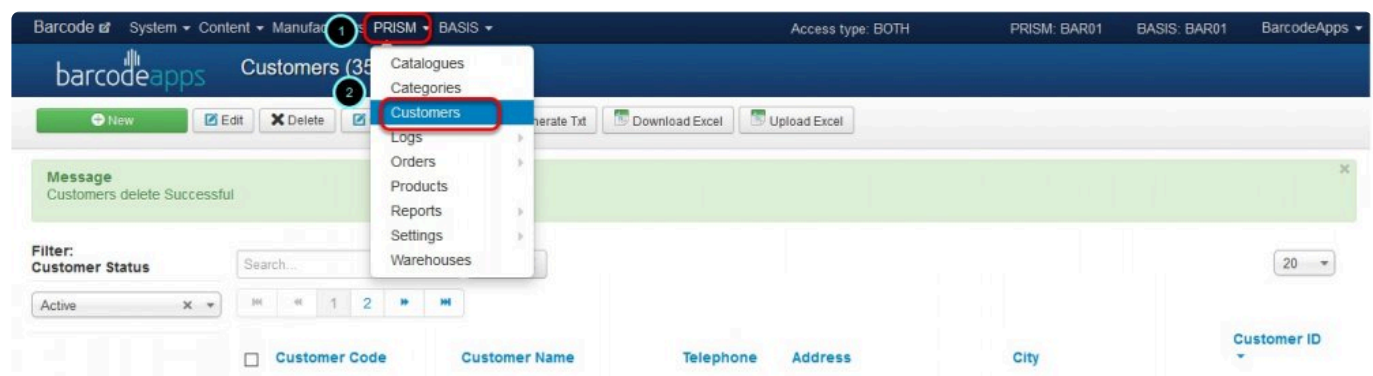
BarcodeApps © 2016

2.5.1.6. vi. Upload Excel

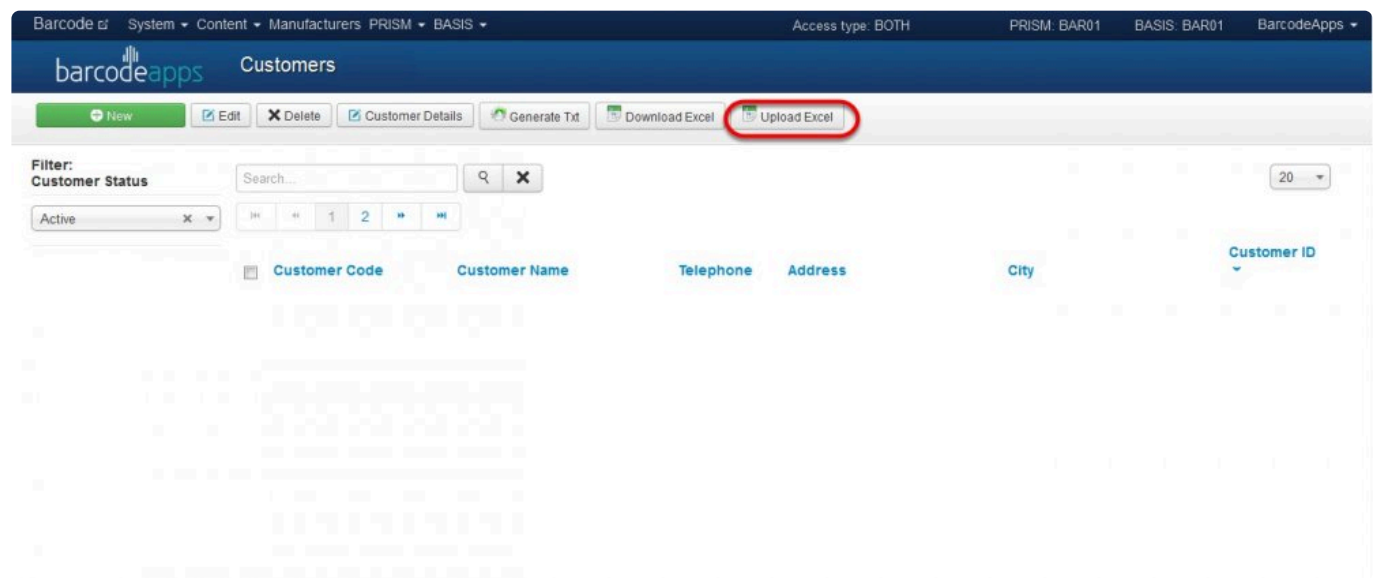
This knowledge base article will guide users on how to upload their clients information using the customers form.

UPLOADING EXCEL (CUSTOMERS FORM)

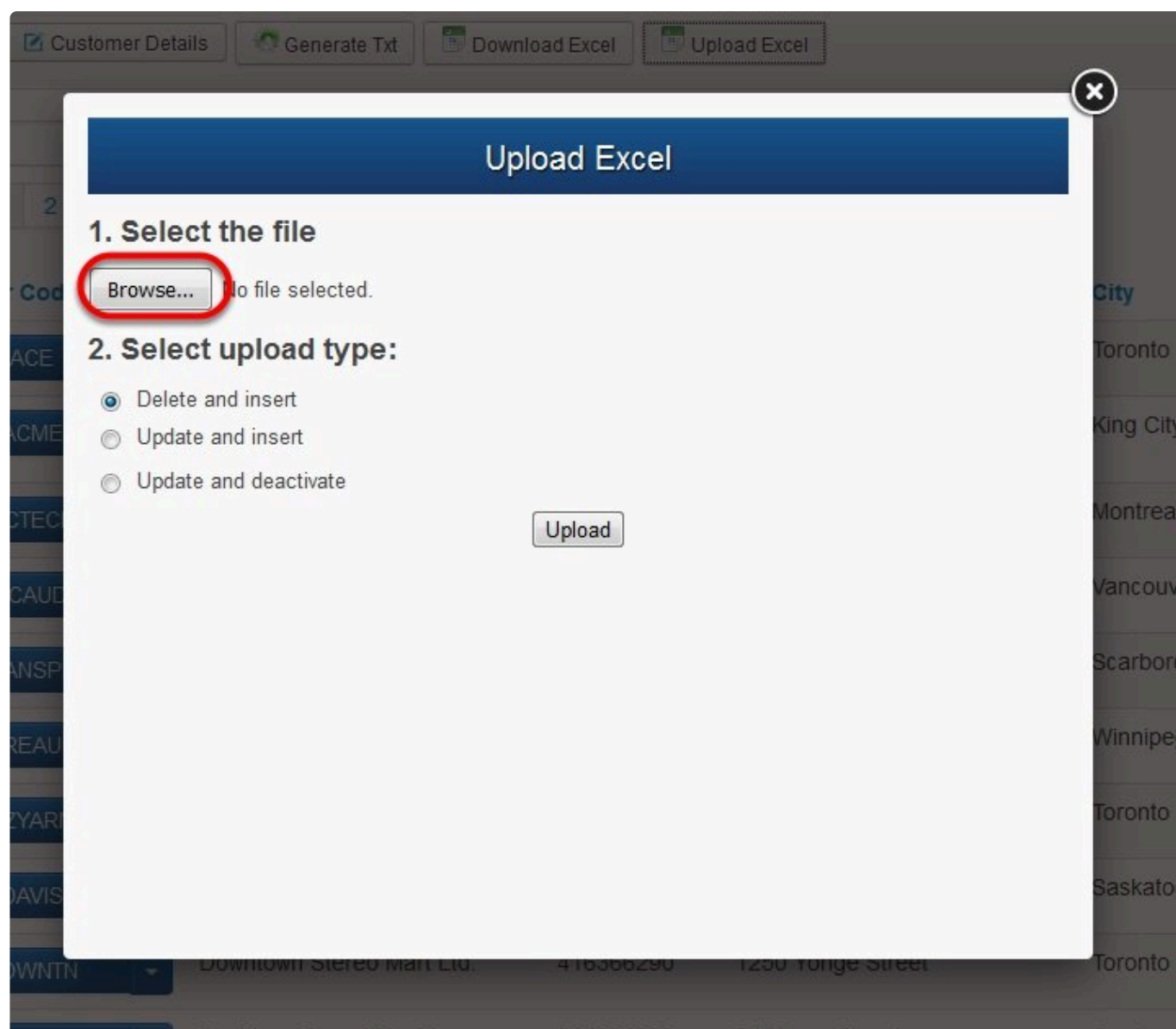
To upload the customer form. Login to PRISM Joomla Portal and then go to PRISM and then Customers.



Click on Upload Excel.



On the pop up window. click on Browse



The screenshot shows a web application interface with a top navigation bar containing buttons for 'Customer Details', 'Generate Txt', 'Download Excel', and 'Upload Excel'. The 'Upload Excel' button is highlighted with a dashed border. A modal dialog box titled 'Upload Excel' is open in the center. The dialog has a blue header bar with the title. Below the header, there are two sections: '1. Select the file' and '2. Select upload type:'. In the first section, there is a 'Browse...' button circled in red, followed by the text 'No file selected.'. In the second section, there are three radio button options: 'Delete and insert' (which is selected), 'Update and insert', and 'Update and deactivate'. At the bottom of the dialog, there is an 'Upload' button. The background of the application shows a list of customer records with columns for name, address, and city.

Customer Details Generate Txt Download Excel Upload Excel

Upload Excel

1. Select the file

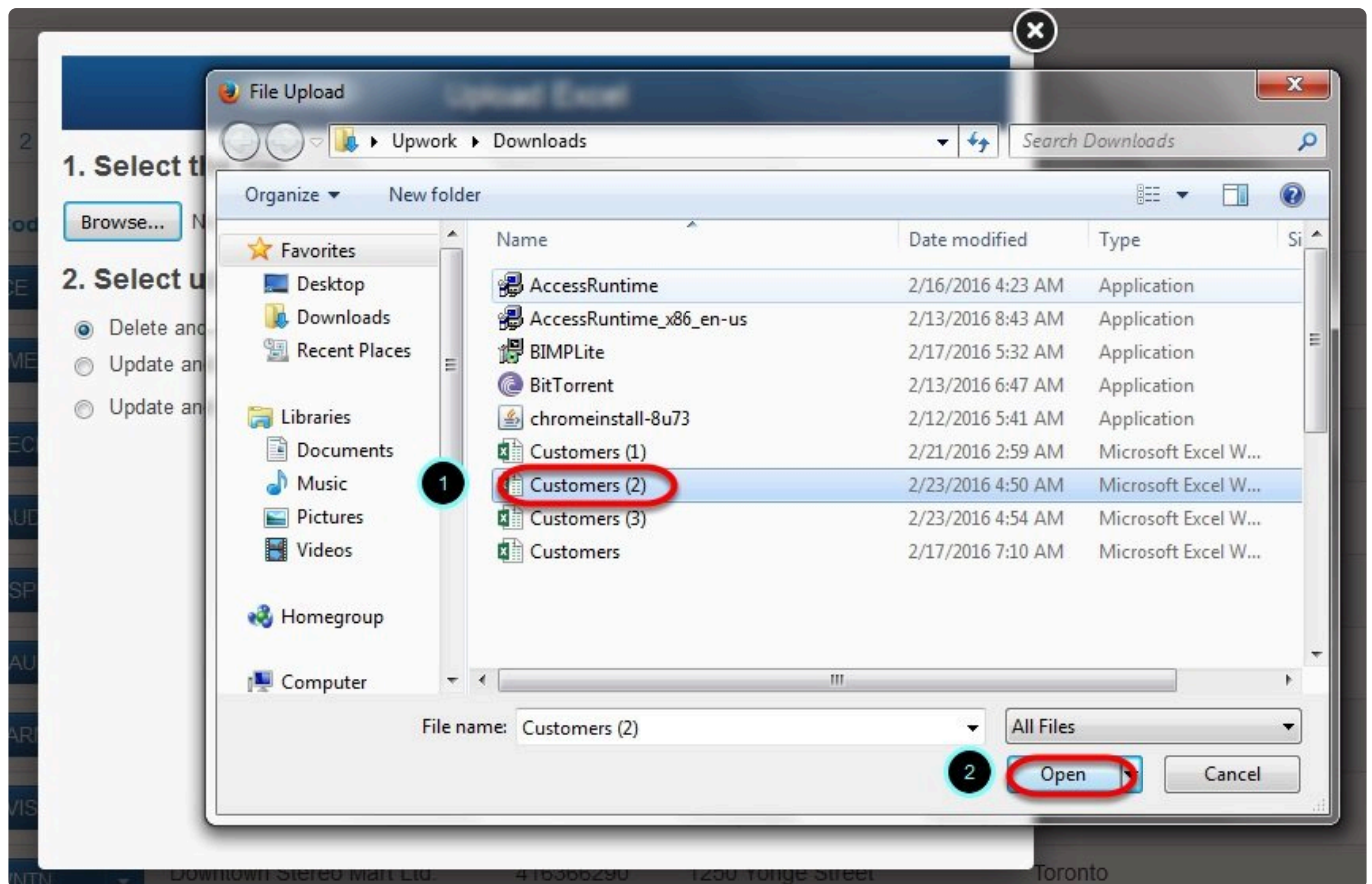
Browse... No file selected.

2. Select upload type:

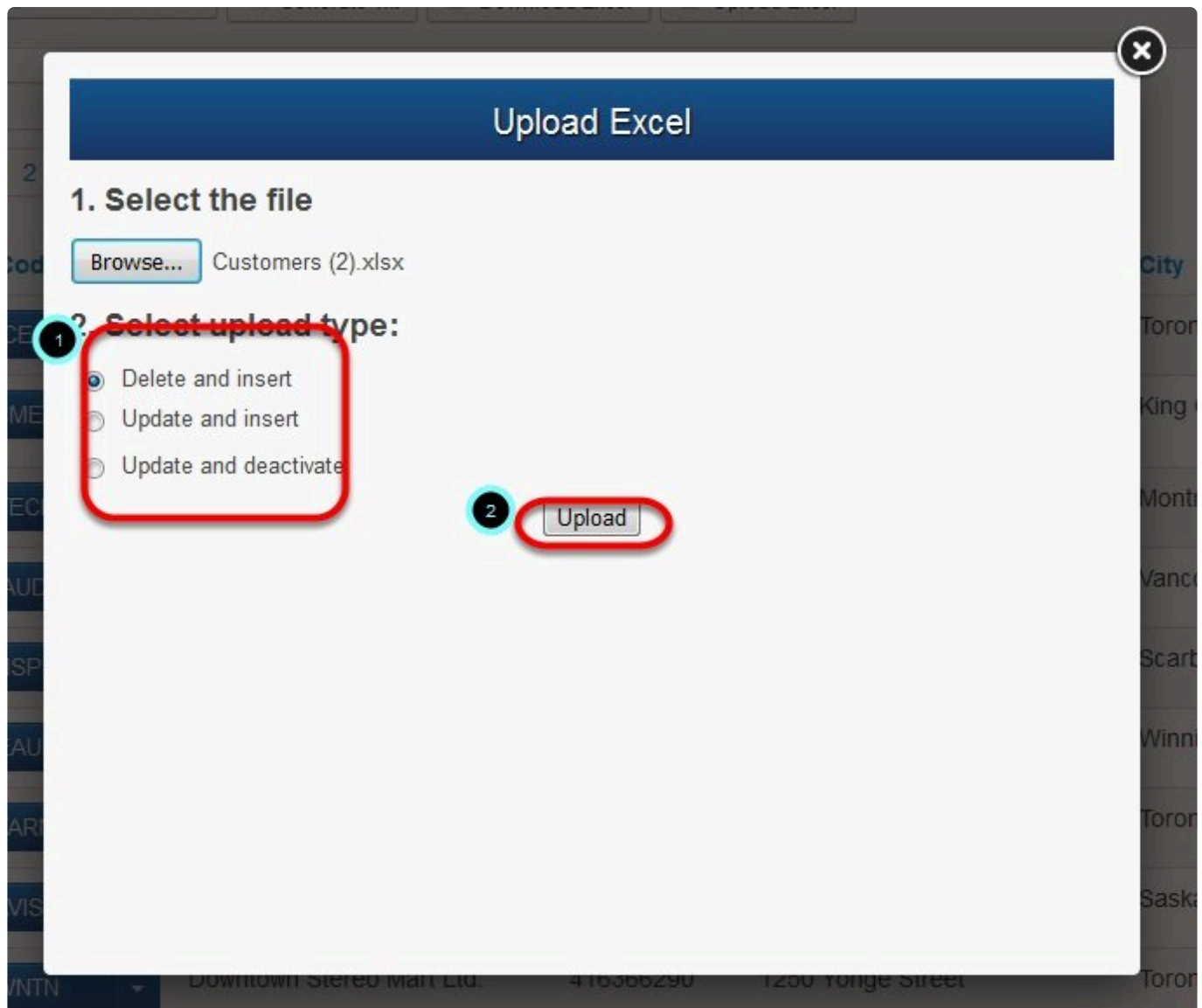
- ☒ Delete and insert
- ☐ Update and insert
- ☐ Update and deactivate

Upload

Locate the Customers form and then click on Open.



select the upload type and then select Upload.



Upload Type

1. Delete and Insert – this option will delete all entries and insert new customers.
2. Update and Insert – this option will update your customer list.
3. Update and Deactivate -

Customers are now uploaded on the website.

BarcodeApps System Content Manufacturers PRISM BASIS Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

barcodeapps Customers (34)

New Edit Delete Customer Details Generate Txt Download Excel Upload Excel

Filter: Customer Status Search... 20

Active

Customer Code	Customer Name	Telephone	Address	City	Customer ID
ACE	Ace Electronics	416498238	1785 Rexway Ave. Suite 8	Toronto	122
ACME	Acme Electronics Corp.	905595334	13444 Mockingbird Drive, Unit 35A	King City	121
ACTECH	Access Technologies	514364808	380 St. Catherines St. Unit 15	Montreal	120
BCAUDI	British Columbia Audio	604685121	1433 West Georgia Street	Vancouver	119
CANSPK	Canadian Speakers Limited	416656330	888 Progress Rd. Suite 400	Scarborough	118
CREAUD	Creative Audio	204584660	6105 Lange Drive Unit 6	Winnipeg	117

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2.5.2. B. Product Management

2.5.2.1. i. How To Add A New Item

This knowledge base article will guide users to add a new item from to their product inventory on the [PRISM Joomla Website](#).

ADDING NEW PRODUCT

To add a new item on your products, click on New.

The screenshot shows the BarcodeApps interface for managing products. The top navigation bar includes links for System, Content, Manufacturers, PRISM, and BASIS. The main header displays 'barcodeapps Products (20)'. Below the header is a toolbar with buttons: New (highlighted in a red circle), Edit, Delete, Details Products, Generate Barcode, Assign Categories, Clear Selection, Generate bit, Download Excel, and Upload Excel. On the left, there is a filter section for 'Product Status' (set to 'Active') and a search section with checkboxes for 'ItemCode', 'Barcode', and 'Description'. The main area contains a table of products with columns: ItemCode, Barcode, Description, MinOrderQty, UnitPrice, Comment, and ItemID. The table lists 11 items, including GE Ultra HD 55" smart TV, Speakers - Home Theatre Package, 12-Gauge Micro Flat Speaker Wire, 14 Gauge Speaker Wire, Stand - for mini speakers, Stand - 24" Speaker, Stand - 30" Speaker, Stand - Universal Cube Speaker, Home Sound System with MP3 Decoder, Instruction Manual STS-01 Sound System, and Surround Sound Home Theater System.


ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	ItemID
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV	111
SP-500		Speakers - Home Theatre Package	0	765.4		110
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		109
SPW-14G		14 Gauge Speaker Wire	0	2.3		108
ST-10		Stand - for mini speakers	0	199		107
ST-25		Stand - 24" Speaker	0	53.6		106
ST-30		Stand - 30" Speaker	0	63.6		105
ST-40		Stand - Universal Cube Speaker	0	65.8		104
STS-01		Home Sound System with MP3 Decoder	0	2194.5		103
STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		102
STS-02		Surround Sound Home Theater System	0	2805		101

Fill out the information (see field definitions) needed on each tabs (Basic information, Numeric information and Other information)

The screenshot displays the 'BarcodeApps' application interface for creating a new item. The form is divided into three main sections, each with a tabbed header: 'Basic Information' (selected), 'Numeric Information', and 'Other Information'. The 'Basic Information' tab includes fields for 'ItemCode *', 'Barcode', 'Description', 'MinOrderQty', 'Comment', 'Casepack', and 'Catalog'. The 'Numeric Information' tab includes fields for 'UnitPrice', 'PR2', 'PR3', 'PR4', 'PR5', 'PR6', 'PR7', and 'PR8'. The 'Other Information' tab includes fields for 'Style', 'StyleColor', 'SuggestedOrder', 'isParent' (a dropdown menu), 'ParentCategory', and 'isProduct' (a dropdown menu). The form has a top navigation bar with 'BarcodeApps' and 'New' buttons, and a bottom bar with 'Save & Close' and 'Close' buttons. The 'Basic Information' tab is highlighted with a red circle and a '1' in a black circle. The 'Numeric Information' tab is highlighted with a red circle and a '2' in a black circle. The 'Other Information' tab is highlighted with a red circle and a '3' in a black circle.

ADDING IMAGE

An Image can be added to a product. This can be done by clicking on the Add image button under the basic Information tab. To add an image, click on the add image button.

Barcode  System Menus Content PRISM Extensions Help

Access type: BOTH

barcodeapps

New

Save & Close

Close

Basic Information

Numeric Information

Other Information

ItemCode *

XBX1

Barcode
COM_BA_PRODUCTS_HEAD_BARCODE_DESC

Barcode

Description

XBOX one

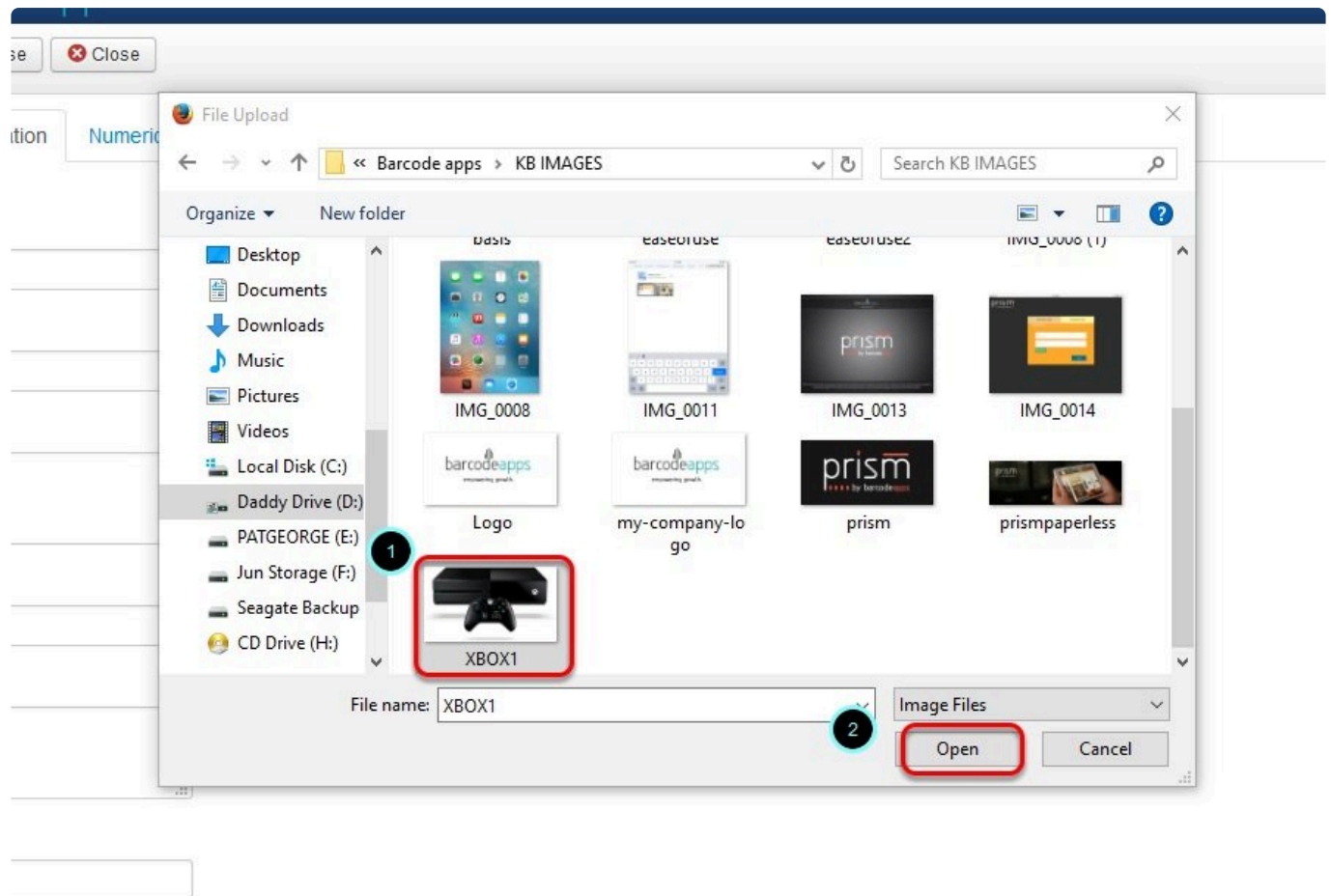
MinOrderQty

1

Product Image

Add

Locate the image of the item and then click on Open.



Click on Save and Close to finish adding the item.

Basic Information Tab Field Definitions

ItemCode: Mandatory: Holds the item code. (Characters up to 50). Each code must be unique.

Barcode: Optional: Holds the secondary code (or UPC) of the product. Although not required, it is recommended

that each barcode is unique. The majority of our apps, when searching or scanning will first look for the Item Code then for the Barcode. Characters up to 50

+Description +: Mandatory: Holds the description of the product. Characters up to 80

MinOrderQty: Optional. Holds the minimum quantity a product is sold. If no minimum quantity is specified, most

apps in the Prism suite will default the minimum order qty to 1. Numeric, decimals allowed

Comment: Optional: Additional information concerning the product: Characters up to 50

CasePack: Optional: Specifies the case quantity a product is sold for (e.g. case of 10). Numeric, decimals allowed

Catalog: Optional: Specifies the Main Category the product belongs to (e.g. Kitchen, Summer, etc.). Characters up to 50

DueDate: Optional: Expected date if not in stock. Characters up to 20

Exp1: Optional: Specifies if the product is taxable for tax type 1 (1 for True and 0 for False)

Exp2: Optional: Specifies if the product is taxable for tax type 2 (1 for True and 0 for False)

WHSE: Optional: Specifies the warehouse the product belongs to. Characters up to 6

+TempOnHand +: Optional: Specifies the quantity available of the product in stock. Numeric, decimals

allowed

UOM: Optional: Holds the unit of measure (primary) for the product. Characters up to 50

Numeric Information Field Definitions

UnitPrice: Mandatory: Holds the price (unit price/price level 1) for the product. Numeric, decimals allowed

PR2: Optional: Holds the price (price level 2) for the product. Numeric, decimals allowed

PR3: Optional: Holds the price (price level 3) for the product. Numeric, decimals allowed

+PR4: +Optional: Holds the price (price level 4) for the product. Numeric, decimals allowed

PR5: Optional: Holds the price (price level 5) for the product. Numeric, decimals allowed

PR6: Optional: Holds the price (price level 6) for the product. Numeric, decimals allowed

PR7: Optional: Holds the price (price level 7) for the product. Numeric, decimals allowed

PR8: Optional: Holds the price (price level 8) for the product. Numeric, decimals allowed

PR9: Optional: Holds the price (price level 9) for the product. Numeric, decimals allowed

PR10: Optional: Holds the price (price level 10) for the product. Numeric, decimals allowed

PR11: Optional: Holds the price (price level 11) for the product. Numeric, decimals allowed

PR12: Optional: Holds the price (price level 12) for the product. Numeric, decimals allowed

PR13: Optional: Holds the price (price level 13) for the product. Numeric, decimals allowed

PR14: Optional: Holds the price (price level 14) for the product. Numeric, decimals allowed

PR15: Optional: Holds the price (price level 15) for the product. Numeric, decimals allowed

PR16: Optional: Holds the price (price level 16) for the product. Numeric, decimals allowed

PR17: Optional: Holds the price (price level 17) for the product. Numeric, decimals allowed

PR18: Optional: Holds the price (price level 18) for the product. Numeric, decimals allowed

PR19: Optional: Holds the price (price level 19) for the product. Numeric, decimals allowed

PR20: Optional: Holds the price (price level 20) for the product. Numeric, decimals allowed

Other Information Field Definition

Style: Optional. Holds the value of a style a product can belong to (one dimensional or two dimensional matrix's). Characters up to 20

SuggestedOrder: Optional: Holds the quantity that the manufacturer can specify as suggested ordering quantity.

Integer numbers NO decimals

StyleColor: Optional: Specifies an alternate image name for the product in case the ItemCode has some characters that Windows does not allow as file names (e.g. 100.001). Characters up to 50

isParent: Optional: Specifies if a product is a parent of a subset of products for the Parent/Child logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

ParentCategory: Optional: Specifies the subcategory a product can belong to. Used for the auto category creation

logic in Prism desktop. Characters up to 100

isProduct: Mandatory: Specifies if a product is an actual product (True) or if it part of the Size/Frame

functionality(False or Null) logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

BarcodeApps © 2016

2.5.2.2. ii. How To Edit An Item

This knowledge base article will guide users to edit their product information in the [PRISM Joomla Website](#).

HOW TO EDIT AN ITEM


To edit a product, select a product by ticking on the box just before the item code and then click on Edit.

The screenshot shows the BarcodeApps interface for managing products. The top navigation bar includes links for Barcode, System, Content, Manufacturers, PRISM, and BASIS. The main header displays 'Products (20)'. Below the header, there is a toolbar with buttons for New, Edit, Delete, Details Products, Generate Barcode, Assign Categories, Clear Selection, Generate bt, Download Excel, and Upload Excel. The 'Edit' button is highlighted with a red circle. On the left, there is a filter section for Product Status (Active) and search criteria (ItemCode, Barcode, Description). The main table lists products with columns for ItemCode, Barcode, Description, MinOrderQty, UnitPrice, Comment, and ItemID. The first row, 'GE Ultra HD 55" smart TV', has its selection checkbox highlighted with a red circle.

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	ItemID
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV	111
SP-500		Speakers - Home Theatre Package	0	765.4		110
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		109
SPW-14G		14 Gauge Speaker Wire	0	2.3		108
ST-10		Stand - for mini speakers	0	199		107
ST-25		Stand - 24" Speaker	0	53.6		106
ST-30		Stand - 30" Speaker	0	63.6		105
ST-40		Stand - Universal Cube Speaker	0	65.8		104
STS-01		Home Sound System with MP3 Decoder	0	2194.5		103
STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		102
STS-02		Surround Sound Home Theater System	0	2805		101

After making the changes click on Save and Close.

[Barcode](#) [System](#) [Menus](#) [Content](#) [PRISM](#) [Extensions](#) [Help](#)

 **New**

Basic Information

Numeric Information

Other Information

ItemCode *

Barcode

Description

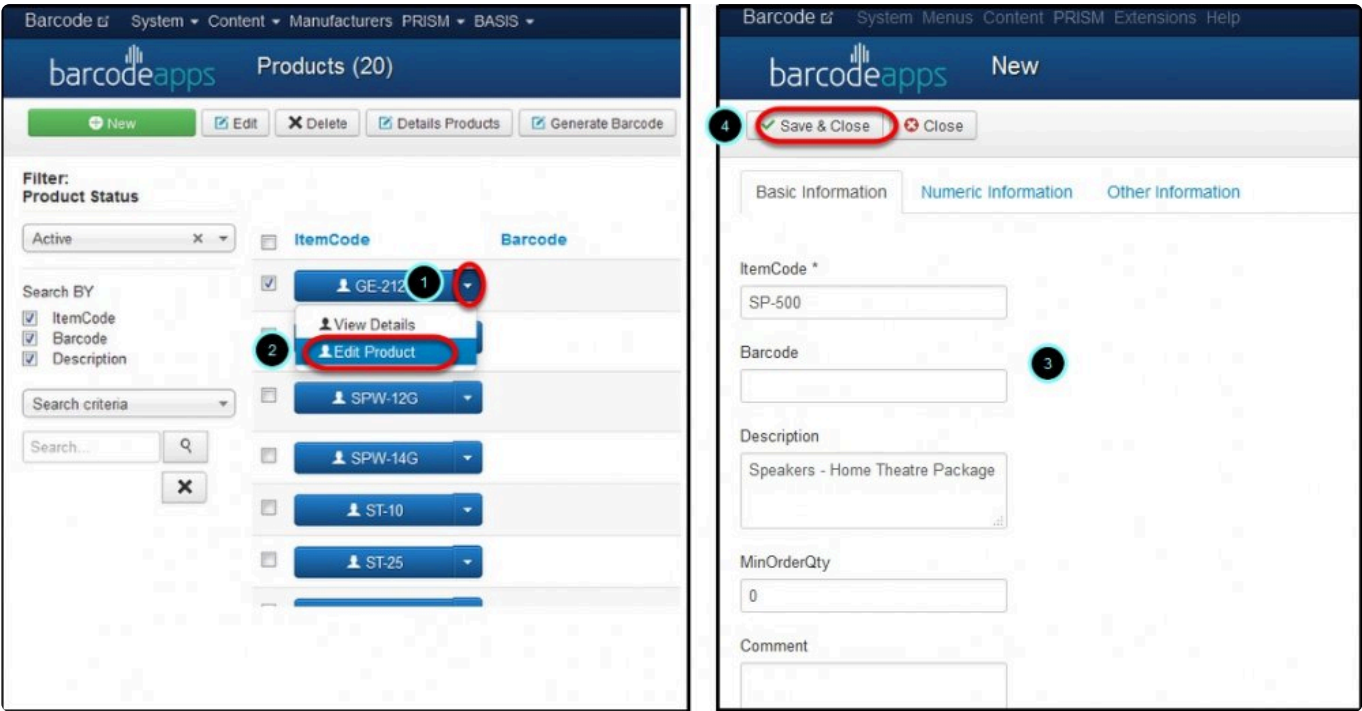
MinOrderQty

Comment

Casepack

Catalog

Another way to edit a product is to click on the down arrow just after the item code,select the option Edit Product, and then after making some changes click on Save and Close.



To sync the changes to the PRISM app (iOS and Android), tap on Generate txt.

The screenshot shows the 'Products (20)' page with a table of products. The table has columns: ItemCode, Barcode, Description, MinOrderQty, UnitPrice, Comment, and ItemID. The products listed are:

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	ItemID
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV	111
SP-500		Speakers - Home Theatre Package	0	765.4		110
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		109
SPW-14G		14 Gauge Speaker Wire	0	2.3		108
ST-10		Stand - for mini speakers	0	199		107
ST-25		Stand - 24" Speaker	0	53.6		106
ST-30		Stand - 30" Speaker	0	63.6		105
ST-40		Stand - Universal Cube Speaker	0	65.8		104
STS-01		Home Sound System with MP3 Decoder	0	2194.5		103
STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		102
STS-02		Surround Sound Home Theater System	0	2805		101

2.5.2.3. iii. How To Delete An Item

This knowledge base article will guide users to delete a product item from the [PRISM Joomla Website](#).

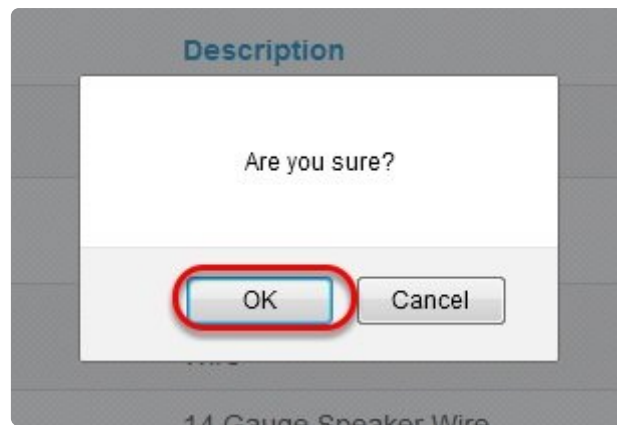
DELETING AN ITEM

To delete a product item, select a product by ticking on the box just before the item code (you can make multiple selection),and then click on Delete.

The screenshot shows the BarcodeApps interface for managing products. The top navigation bar includes links for System, Content, Manufacturers, PRISM, and BASIS. The main header displays 'Products (20)' and a toolbar with buttons for New, Edit, Delete, Details Products, Generate Barcode, Assign Categories, Generate bit, Download Excel, and Upload Excel. The 'Delete' button is highlighted with a red circle. On the left, there is a filter section for Product Status (Active) and search criteria (ItemCode, Barcode, Description). The main table lists products with columns for ItemCode, Barcode, Description, MinOrderQty, UnitPrice, Comment, and ItemID. The first row is selected, and the 'Delete' button is circled in red.

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	ItemID
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV	111
SP-500		Speakers - Home Theatre Package	0	765.4		110
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		109
SPW-14G		14 Gauge Speaker Wire	0	2.3		108
ST-10		Stand - for mini speakers	0	199		107
ST-25		Stand - 24" Speaker	0	53.6		106
ST-30		Stand - 30" Speaker	0	63.6		105
ST-40		Stand - Universal Cube Speaker	0	65.8		104
STS-01		Home Sound System with MP3 Decoder	0	2194.5		103
STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		102
STS-02		Surround Sound Home Theater System	0	2805		101

Just click on Ok to delete.



2.5.2.4. iv. Details Products

2.5.2.5. v. Generate Barcode

2.5.2.6. vi. Assign Categories

This knowledge base article will guide users to assign a category to their product item.

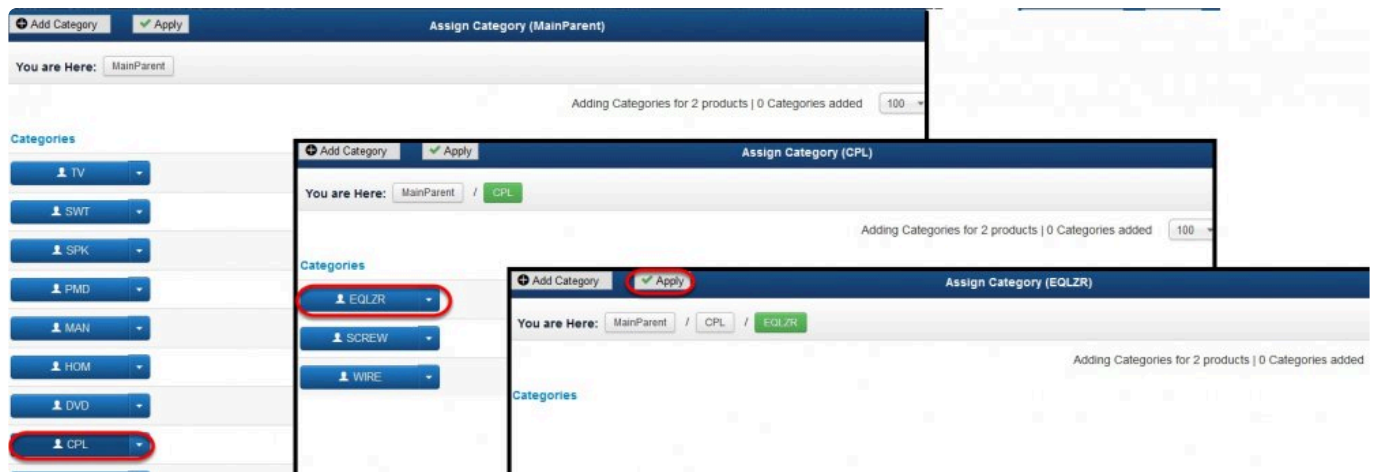
ASSIGNING CATEGORY TO A PRODUCT ITEM

To Categorize a product, select a product item by ticking on the box just before it (you can select multiple items),
and then select Assign Categories.

The screenshot shows the BarcodeApps interface with the 'Assign Categories' window open. The window displays a list of product items with checkboxes for selection. The 'Assign Categories' button is highlighted with a red circle and a '2' icon. The 'EQ-1800' and 'EQ-1245' items are selected with checkboxes marked with a '1' icon.

Item ID	Description	Quantity	Price	Weight
PCM3550	Personal Hand-held Organizer	0	424.8	275
P1210A	Semi-gloss resin paint (SP-250)	0	59.99	274
N142	Screws for Speakers (SP-250)	0	0.5	273
MD46	6" Midrange Cone Speaker	0	37.4	272
MCB-250	Entertainment Center	0	350	271
GR-250	Speaker Grill for SP-250	0	9.7	270
FX-500	Multi-fax, Printer, Copier, Scanner	0	528	269
FX-280	All-in-one Printer/Scanner /Copier	0	318.5	268
FCB-250	Finished cabinet for SP-250	0	300	267
<input checked="" type="checkbox"/> EQ-1800	Equalizer (10 band)	0	195.9	266
<input checked="" type="checkbox"/> EQ-1245	Equalizer (7 band)	0	111	265
EN-BATD	Energizer ACCU Rechargeable D Batteries	0	9.99	264

On the Assign Category window select the category on where the product item needs to be assigned.(In the example, I selected EQLZR (A sub category of CPL) for the products EQ-1800 and EQ1245)



Click on Apply.



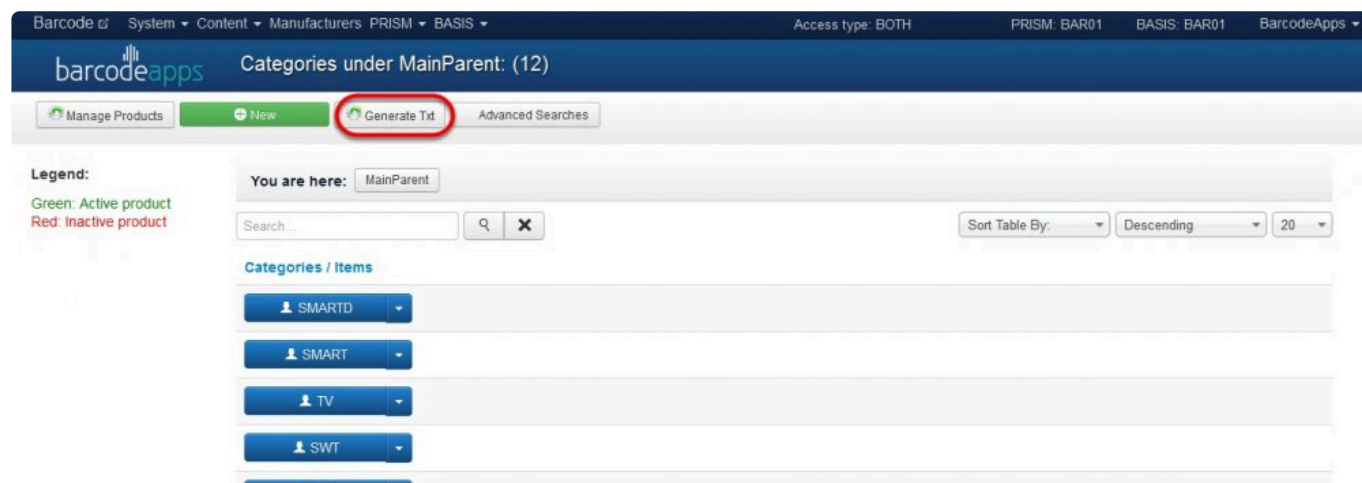
Click on “Yes” to assign the category to the product.



2.5.2.7. vii. Generate Text

GENERATE TEXT (SYNC DATA)

The Generate txt button syncs all data (Product items, Categories, , Images) from the PRISM Joomla Portal going to the Mobile devices(IOS/ ANDROID) and the PRISM Web Store.



It's a best practice to use this option whenever you make changes inside the joomla portal

2.5.2.8. viii. Download Excel

This knowledge base article will guide users on how to download and manage the Products form from the PRISM Joomla Website.

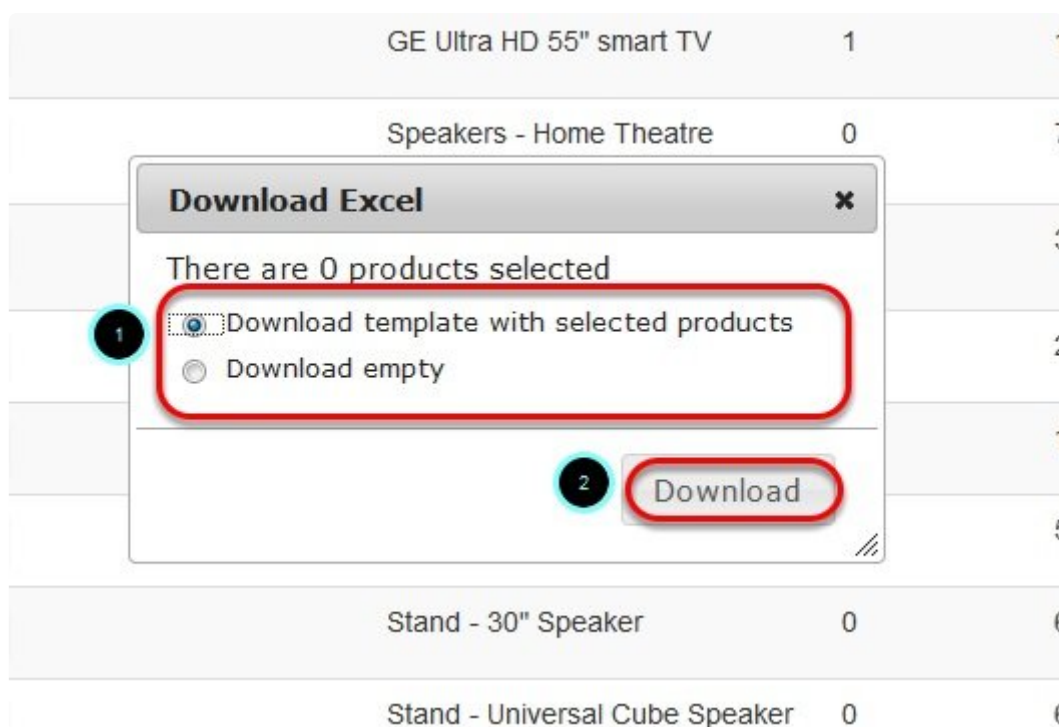
DOWNLOADING PRODUCTS FORM

To download the products form, click Download Excel

The screenshot shows the BarcodeApps interface for managing products. The top navigation bar includes 'BarcodeApps', 'System', 'Content', 'Manufacturers', 'PRISM', and 'BASIS'. The main header displays 'Products (20)'. A toolbar contains buttons for 'New', 'Edit', 'Delete', 'Details Products', 'Generate Barcode', 'Assign Categories', 'Generate bit', 'Download Excel' (highlighted with a red circle), and 'Upload Excel'. On the left, a 'Filter: Product Status' section shows 'Active' selected. Below it, 'Search BY' options include 'ItemCode', 'Barcode', and 'Description', all checked. A 'Search criteria' dropdown and a search input field are also present. The main table lists products with columns: ItemCode, Barcode, Description, MinOrderQty, UnitPrice, and Comment. The table contains six rows of product data.

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV
SP-500		Speakers - Home Theatre Package	0	765.4	
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7	
SPW-14G		14 Gauge Speaker Wire	0	2.3	
ST-10		Stand - for mini speakers	0	199	
ST-25		Stand - 24" Speaker	0	53.6	

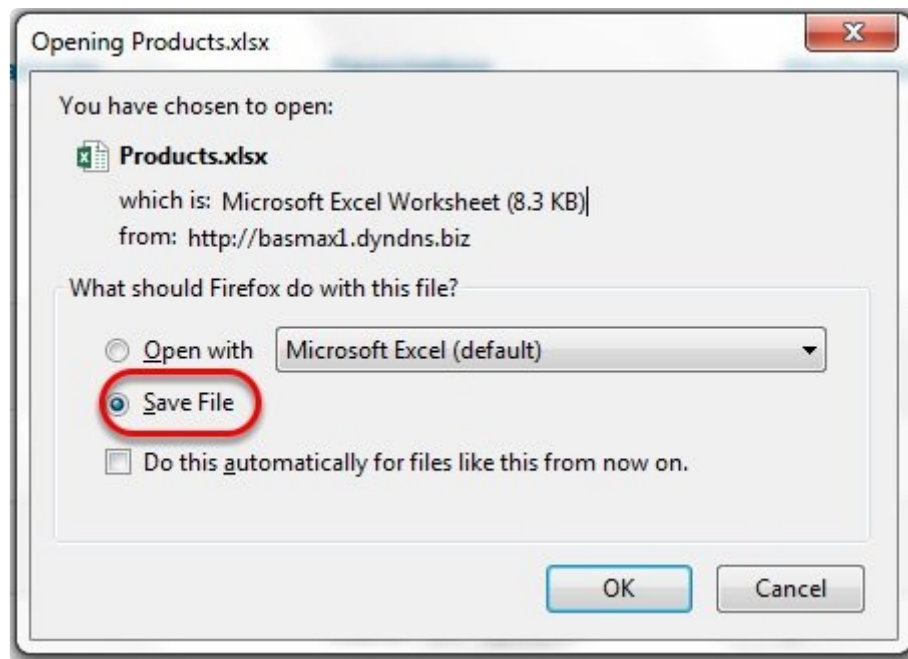
On the pop up window, select the download option and then click on Download.



Download Options

1. Download Template with selected products – This will download the product form with preselected products from the PRISM Joomla Website.
2. Download Empty – This will download a blank product form. Typically used by new customers to upload their product items on the PRISM Joomla Website.

Save the form on your computer. Now you can start to fill out the form to add your product items (see field definitions).



Product Field Definitions

	A	B	C	D	E	F	G	H	I	J	K
1	ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	CasePack	Catalog	PR2	PR3	PR4
2	VAJO-24		Desktop PC with Intel Pentium 4 Proc.	0	1199		0	CMP	0	0	0
3	V1-4A		Hi-fi Stereo 4 Head VCR	0	473.9		0	DVD	459.3	435.1	413.3
4	V1-2A		Digital-VHS VCR with HDTV-Recording	0	193.5		0	DVD	187.4	177.7	168.7
5	UAC-300		Recoton Universal AC Adapter	0	9.99		0	SWT	0	0	0
6	TV-5200		52" Dolby Pro Logic Surround Sound TV	0	658.9		0	TV	638.4	604.9	574.5
7	TV-3600		36" DBX Stereo Color Television	0	468.1		0	TV	453.5	429.7	408.2
8	TV-2100		20" TV with Flat Picture Tube	0	336.7		0	TV	326.3	309.1	293.6
9	TP-560		Toshiba Progressive-Scan DVD/DVD-R/CD-RW	0	581.7		0	DVD	563.6	533.9	507.2
10	TP-350		DVD Player/Hi-Fi VCR Combo	0	359.7		0	DVD	348.5	330.2	313.7
11	SY-MINI		Sony MiniDisc Walkman Player/Recorder	0	199		0	PMD	0	0	0
12	STS-02		Surround Sound Home Theater System	0	2805		0	HOM	2728.6	2601.6	2557.5
13	STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		0	MAN	0	0	0
14	STS-01		Home Sound System with MP3 Decoder	0	2194.5		0	HOM	2101	2041.1	2002.3
15	ST-40		Stand - Universal Cube Speaker	0	65.8		0	SPK	63.7	60.4	57.3
16	ST-30		Stand - 30" Speaker	0	63.6		0	SPK	61.6	58.3	55.4
17	ST-25		Stand - 24" Speaker	0	53.6		0	SPK	51.9	49.2	46.6
18	ST-10		Stand - for mini speakers	0	199		0	SPK	190	187	179.2
19	SPW-14G		14 Gauge Speaker Wire	0	2.3		0	CPL	2.2	2.1	2
20	SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		0	CPL	3.6	3.5	3.3
21	SP-500		Speakers - Home Theatre Package	0	765.4		0	HOM	741.6	702.6	667.5
22											

ItemCode: Mandatory: Holds the item code. (Characters up to 50). Each code must be unique.

Barcode: Optional: Holds the secondary code (or UPC) of the product. Although not required, it is recommended that each barcode is unique. The majority of our apps, when searching or scanning will first look for the Item Code then for the Barcode. Characters up to 50

+Description +: Mandatory: Holds the description of the product. Characters up to 80

MinOrderQty: Optional. Holds the minimum quantity a product is sold. If no minimum quantity is

specified, most apps in the Prism suite will default the minimum order qty to 1. Numeric, decimals allowed

UnitPrice: Mandatory: Holds the price (unit price/price level 1) for the product. Numeric, decimals allowed

Comment: Optional: Additional information concerning the product: Characters up to 50

CasePack: Optional: Specifies the case quantity a product is sold for (e.g. case of 10). Numeric, decimals allowed

Catalog: Optional: Specifies the Main Category the product belongs to (e.g. Kitchen, Summer, etc.). Characters upto 50

PR2: Optional: Holds the price (price level 2) for the product. Numeric, decimals allowed

PR3: Optional: Holds the price (price level 3) for the product. Numeric, decimals allowed

PR4: Optional: Holds the price (price level 4) for the product. Numeric, decimals allowed

Download Excel (Products Form) – 4 BarcodeA pps © 2016

PR5: Optional: Holds the price (price level 5) for the product. Numeric, decimals allowed

PR6: Optional: Holds the price (price level 6) for the product. Numeric, decimals allowed

PR7: Optional: Holds the price (price level 7) for the product. Numeric, decimals allowed

PR8: Optional: Holds the price (price level 8) for the product. Numeric, decimals allowed

PR9: Optional: Holds the price (price level 9) for the product. Numeric, decimals allowed

PriceOther1: Optional: Price for a case. Numeric, decimals allowed

DueDate: Optional: Expected date if not in stock. Characters up to 20

Exp1: Optional: Specifies if the product is taxable for tax type 1 (1 for True and 0 for False)

Exp2: Optional: Specifies if the product is taxable for tax type 2 (1 for True and 0 for False)

WHSE: Optional: Specifies the warehouse the product belongs to. Characters up to 6

+TempOnHand +: Optional: Specifies the quantity available of the product in stock. Numeric, decimals allowed

PR10: Optional: Holds the price (price level 10) for the product. Numeric, decimals allowed

PR11: Optional: Holds the price (price level 11) for the product. Numeric, decimals allowed

PR12: Optional: Holds the price (price level 12) for the product. Numeric, decimals allowed

PR13: Optional: Holds the price (price level 13) for the product. Numeric, decimals allowed

PR14: Optional: Holds the price (price level 14) for the product. Numeric, decimals allowed

PR15: Optional: Holds the price (price level 15) for the product. Numeric, decimals allowed

PR16: Optional: Holds the price (price level 16) for the product. Numeric, decimals allowed

PR17: Optional: Holds the price (price level 17) for the product. Numeric, decimals allowed

PR18: Optional: Holds the price (price level 18) for the product. Numeric, decimals allowed

PR19: Optional: Holds the price (price level 19) for the product. Numeric, decimals allowed

PR20: Optional: Holds the price (price level 20) for the product. Numeric, decimals allowed

UOM: Optional: Holds the unit of measure (primary) for the product. Characters up to 50

Style: Optional. Holds the value of a style a product can belong to (one dimensional or two dimensional matrixes).

Characters up to 20

SuggestedOrder: Optional: Holds the quantity that the manufacturer can specify as suggested ordering quantity. Integer numbers NO decimals

StyleColor: Optional: Specifies an alternate image name for the product in case the ItemCode has some characters that Windows does not allow as file names (e.g. 100.001). Characters up to 50

isParent: Optional: Specifies if a product is a parent of a subset of products for the Parent/Child logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

ParentCategory: Optional: Specifies the subcategory a product can belong to. Used for the auto category creation logic in Prism desktop. Characters up to 100

isProduct: Mandatory: Specifies if a product is an actual product (True) or if it part of the Size/Frame functionality (False or Null) logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

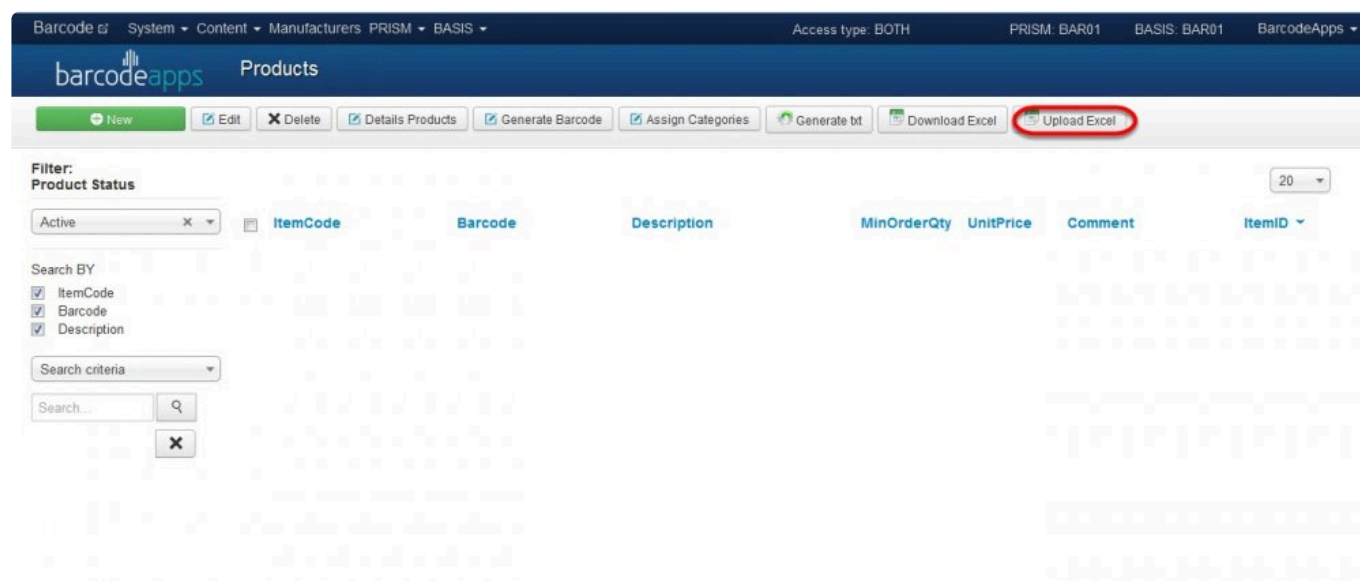
BarcodeApps © 2016

2.5.2.9. ix. Upload Excel

This knowledge base article will guide users on how they can upload their products in the PRISM Joomla website using the products form.

UPLOADING PRODUCTS FORM

To upload the products form, click on Upload Excel.



Click on browse

Upload Excel

1. Please Select a file

Browse... No file selected.

2. Select upload type:

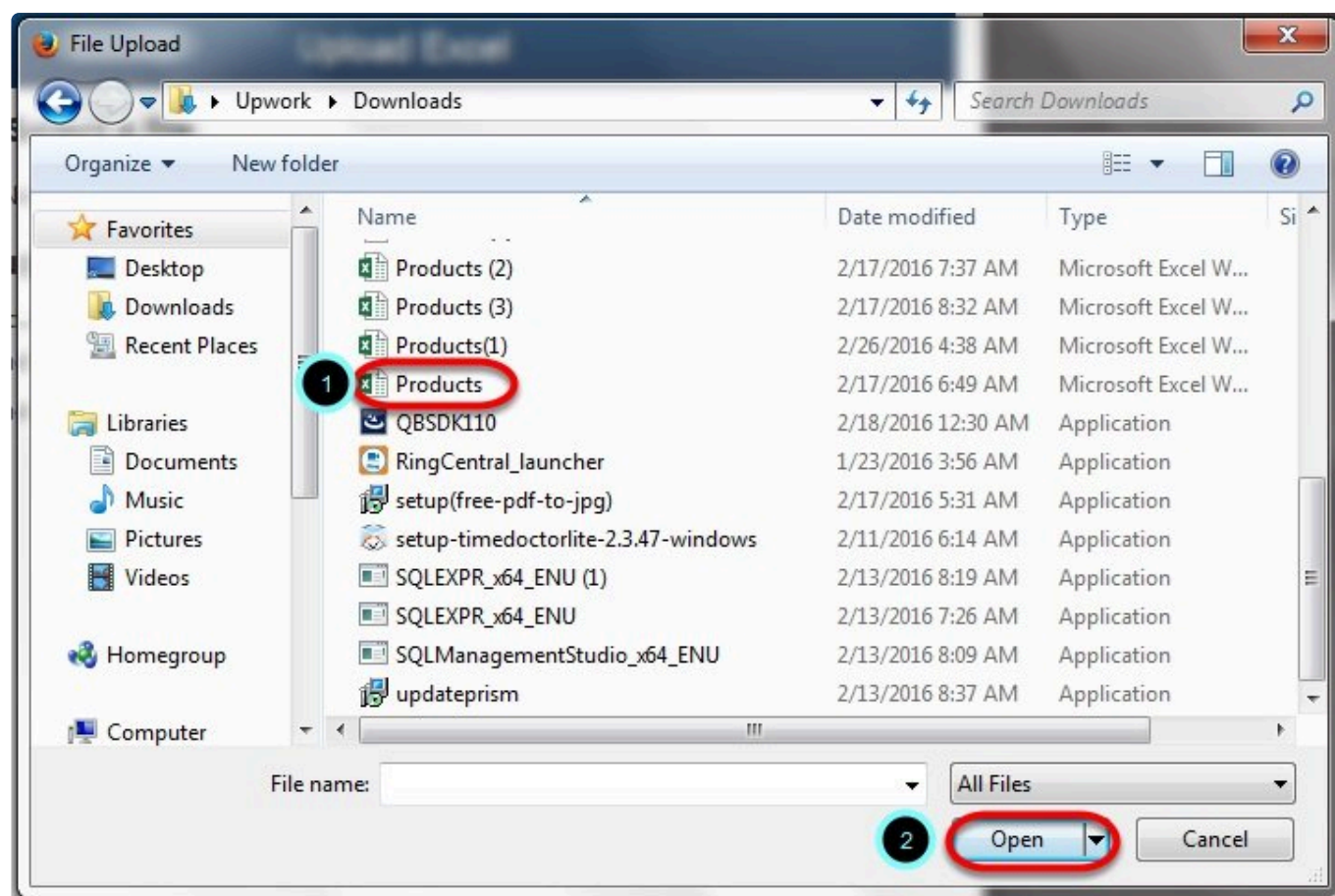
☒ Delete and insert

☐ Update and insert

☐ Update and deactivate

Upload

Locate the Products Form and click on Open.



select the upload type and then click on Upload.

Upload Excel

1. Please Select a file

Products(1).xlsx

2. Select upload type:

☒ Delete and insert

☐ Update and insert

☐ Update and deactivate

2

Upload Type

1. Delete and Insert – this option will delete all entries and insert new products.
2. Update and Insert – this option will update your product list.
3. Update and Deactivate -

Product Items are now loaded on the website.


2.5.2.10. x. How to Upload or Change product Image.

This knowledge base article will guide users to upload or change their product image using the PRISM Joomla Website.

UPLOADING OR CHANGING PRODUCT ITEMS

To upload or change an image of a product. on the Products windows click on the drop down arrow just after the product item code and then click on Edit product.

click on the add image button.

Barcode  System Menus Content PRISM Extensions Help

Access type: BOTH

barcodeapps

New

Save & Close

Close

Basic Information

Numeric Information

Other Information

ItemCode *

XBX1

Barcode

COM_BA_PRODUCTS_HEAD_BARCODE_DESC

Barcode

Description

XBOX one

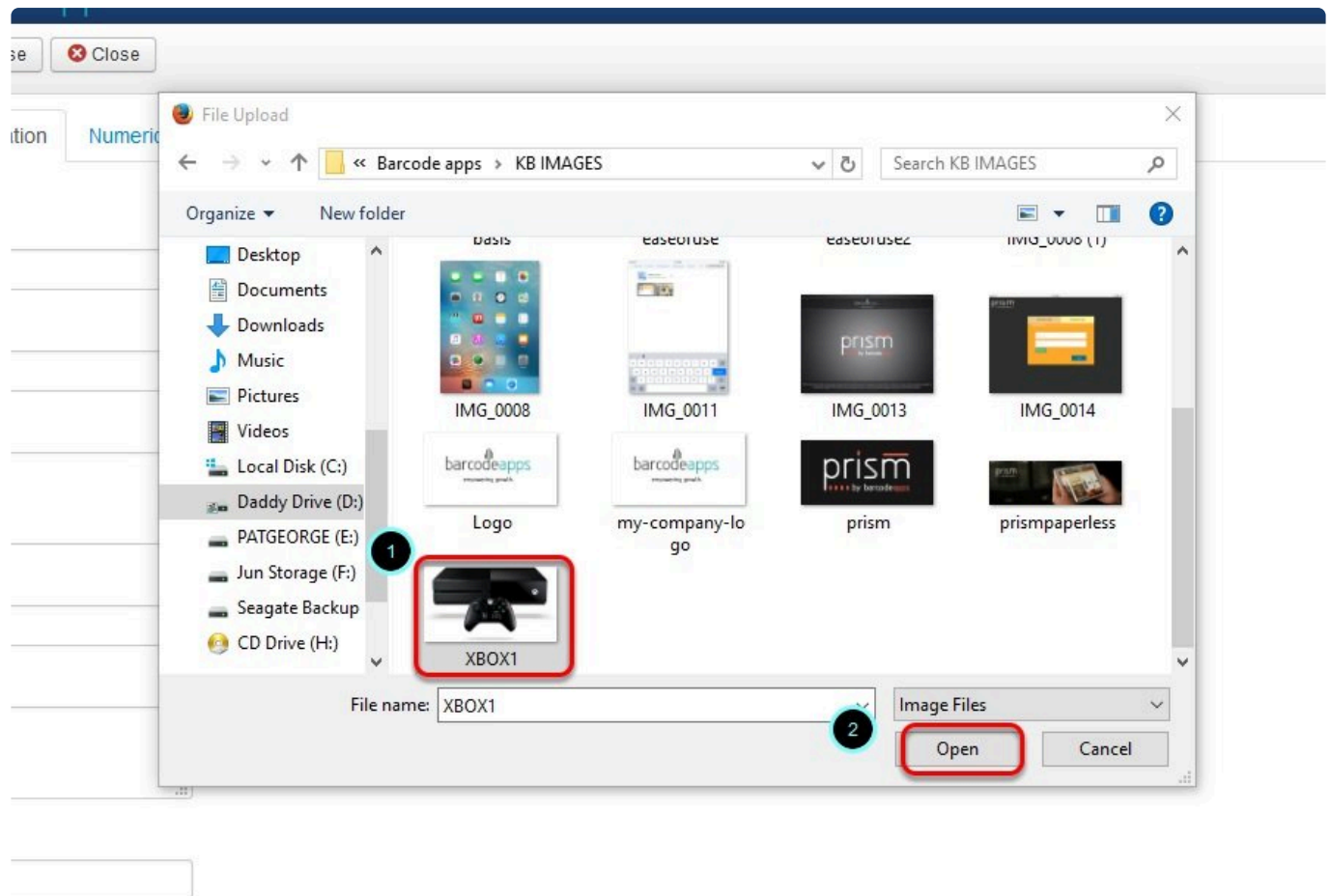
MinOrderQty

1


Product Image

Add

Locate the image of the item and then click on Open.



Click on Save and Close to finish adding the Image.

Barcode 

System


Menus

Content

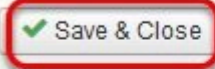
PRISM

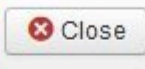
Extensions

Help



New

 Save & Close

 Close

Basic Information

Numeric Information

Other Information

ItemCode *

Barcode

Description

2.5.3. C. Order Management

2.5.3.1. i. Processed Orders

This knowledge base article is a review of the processed orders window inside the [PRISM Joomla Website](#).

PROCESSED ORDERS WINDOW

The processed orders window will show all orders that are basically processed for fulfillment.

Order Number	Customer Code	Customer Name	Order Date	RepCode	Total
9	BCAUDI	British Columbia Audio	2016-03-02 13:44	BAR01-002	\$1,347.10
8	BCAUDI	British Columbia Audio	2016-03-02 11:30	BAR01-002	\$2.30
7	ACTECH	Access Technologies	2016-03-01 18:28		\$771.40
6	ACTECH	Access Technologies	2016-03-01 18:26	BAR01-002	\$771.40
5	BAR01001		2016-02-29 21:07		\$3,732.70
4	BAR01001		2016-02-29 19:47		\$1,534.50
28	CREAUD	Creative Audio	2016-03-11 19:50		\$1,805.10
27	CREAUD	Creative Audio	2016-03-11 19:45		\$1,805.10
26	CANSPK	Canadian Speakers Limited	2016-03-10 16:41	BAR01-002	\$609.07
25	CANSPK	Canadian Speakers Limited	2016-03-10 16:36	BAR01-002	\$11,220.00

PROCESSED ORDERS WINDOW NAVIGATION

1. **Processed order count** – this shows the number of orders that are currently in the bucket.
2. **New** – this button will let the users create a manual order.
3. **Edit** – this button will let the users modify an order entry
4. **Delete** – this button will let the users delete an order.
5. **Export Excel** – this option will allow the user's to upload the orders in an Excel Format.
6. **Export XML** – this option will allow users to upload the orders in a XML format.
7. **Clear selection button** – this will reset the selection.
8. **Search and Filter tool** – this will allow users to filter searches and sort the order.

2.5.3.2. ii. Unprocessed Orders

This knowledge base article will guide users on how the uprocessed orders window functions inside the [PRISM Joomla Website](#).

UNPROCESSED ORDERS WINDOW

The unprocessed order window is a repository of fully unprocessed orders from the supplier's part. This is basically where all the orders that are sent out from the PRISM APP and PRISM WEB STORE are stored.

The screenshot displays the 'Unprocessed Orders (1)' window in the BarcodeApps application. The top navigation bar includes 'Barcode', 'System', 'Content', 'Manufacturers', 'PRISM', and 'BASIS'. The main header shows 'barcodeapps Unprocessed Orders (1)'. Below the header, there are buttons for 'New', 'Edit', 'Delete', 'Export to Excel', 'Export to XML', and 'Clear Selections'. A search bar with 'From' and 'To' fields is present. The table below has columns: Order Number, Order Type, Customer Code, Customer Name, Order Date, RepCode, and Total. The single entry in the table is: HA1-03-12-2016-03, OR, WESTEC, Western Electronics, 2016-03-12 00:03, HA1, \$700.00.

Order Number	Order Type	Customer Code	Customer Name	Order Date	RepCode	Total
HA1-03-12-2016-03	OR	WESTEC	Western Electronics	2016-03-12 00:03	HA1	\$700.00

UNPROCESSED ORDER WINDOW NAVIGATION

1. **Unprocessed order count** – this shows the number of orders that are currently in the bucket.
2. **New** – this button will let the users create a manual order.
3. **Edit** – this button will let the users modify an order entry
4. **Delete** – this button will let the users delete an order.
5. **Export Excel** – this option will allow the user's to upload the orders in an Excel Format. (See
6. **Export XML** – this option will allow users tio upload the orders in a XML format.
7. **Clear selection button** – this will reset the selection.

8. **Search and Filter tool** – this will allow users to filter searches and sort the order.

9. **Order Type** – this option will allow users to change the status of the order; options are Order and Quote.

2.5.3.3. IV. Order Source Status

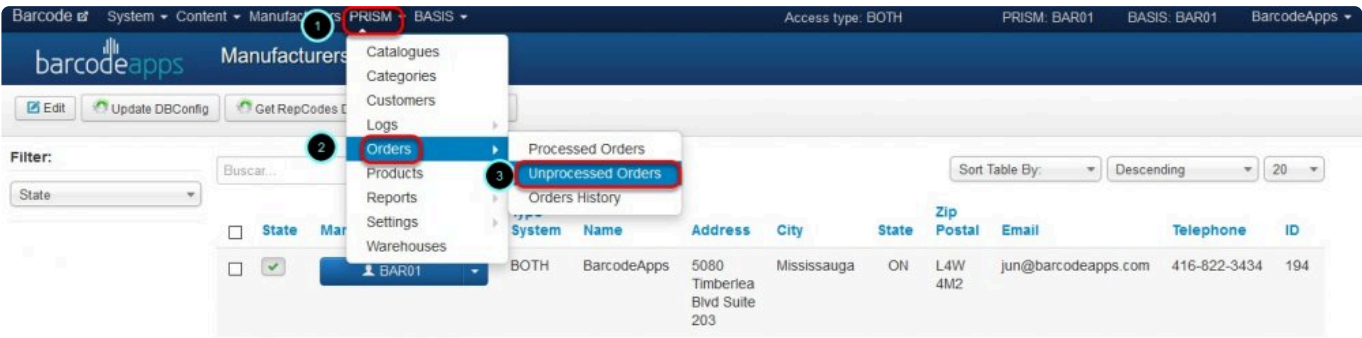
This knowledge base will guide user on how an order can be verified by checking on the status from [PRISM Joomla Website](#).

An order source status is a feature from PRISM that helps a user verify if an order was sent by a sales person or a customer. It also helps identify from which device an order was sent.

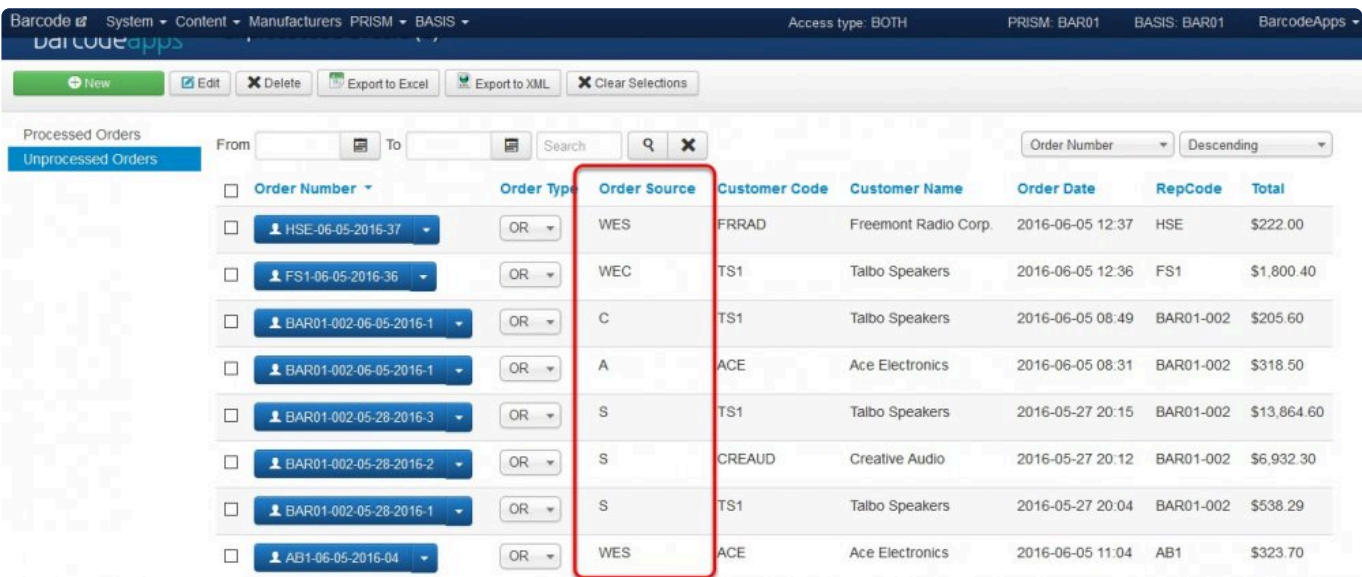
To access the feature. Login to the PRISM SELF SERVICE WEBSITE (Joomla) using your admin credentials.



On the main window, click on PRISM , Orders , and then Unprocessed Orders.



The order source status will now show on the main window.



Please see table below for Order status Reference.

SOURCE	WEB STORE	iOS	ANDROID
SALES PERSON	WES	S	A

CUSTOMER	WEC	C	A
----------	-----	---	---

2.5.4. D. Catalog Management

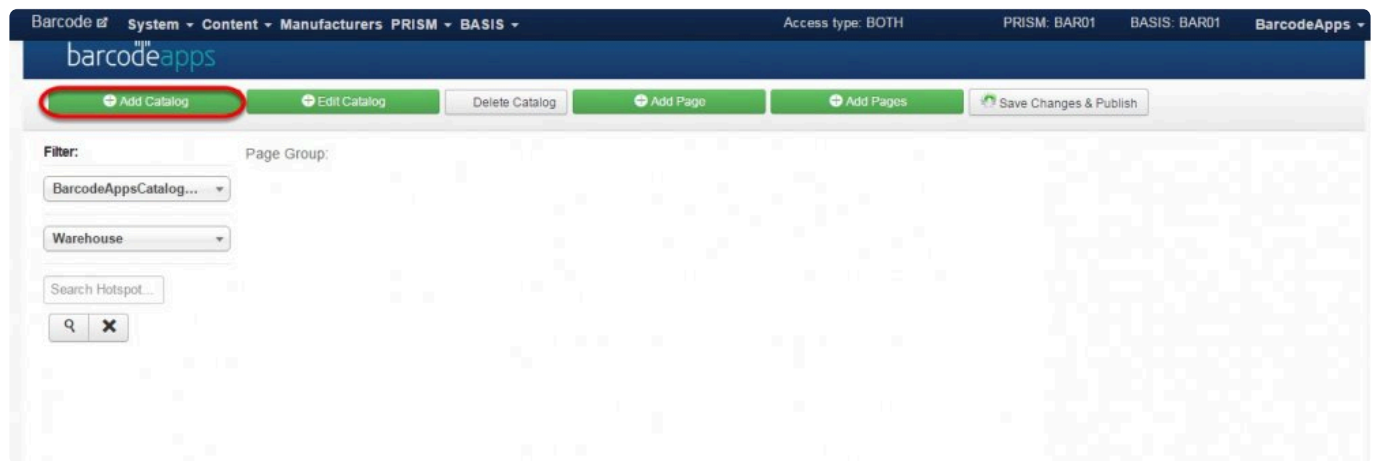
D. Catalog Management

2.5.4.1. i. Add Catalog

This knowledge base article will guide users to create a catalog using the PRISM Joomla Website.

ADDING A CATALOG

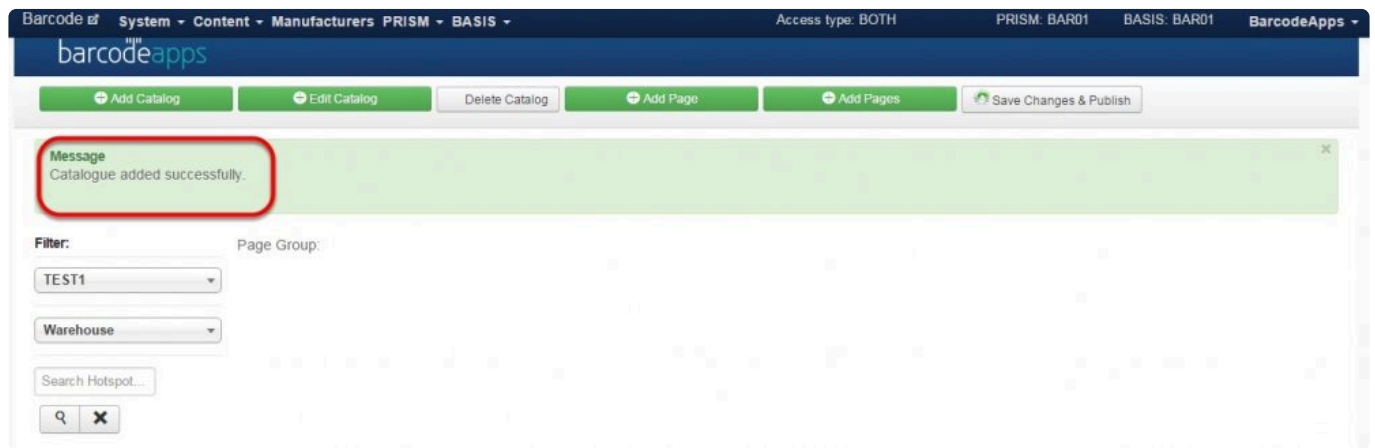
To add a catalog, click on Add Catalog.



Name the catalog, select the catalog type, then select the warehouse location (optional), and then click on Add.

A screenshot of the 'Add New Catalogue' form. The form has four numbered steps: 1. 'Name:' field with the value 'TEST1' (circled in red). 2. 'Catlog Type:' field with radio button options: 'Regular Two Page' (selected), 'Regular One Page', 'Sales sheet two page', and 'Sales sheet one page' (all circled in red). 3. 'Warehouse:' field with a dropdown menu showing 'Select Option' (circled in red). 4. 'Add' button (circled in red). The form is titled 'Add New Catalogue'.

A notification should show once the new catalog has been created. Now you can start adding pages to your catalog.



BarcodeApps © 2016

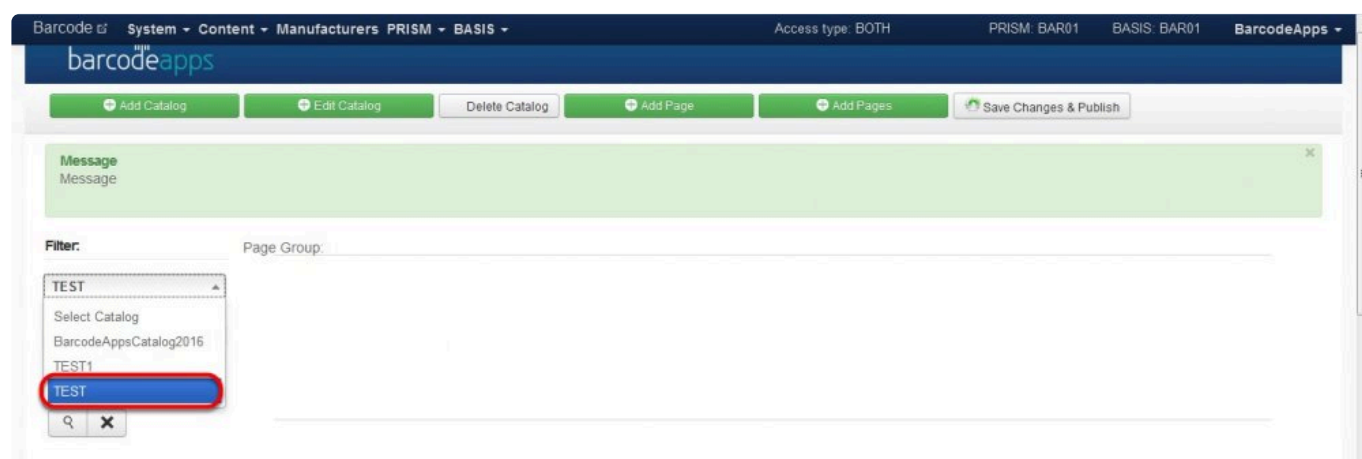
2.5.4.2. ii. Edit Catalog

2.5.4.3. iii. Delete Catalog

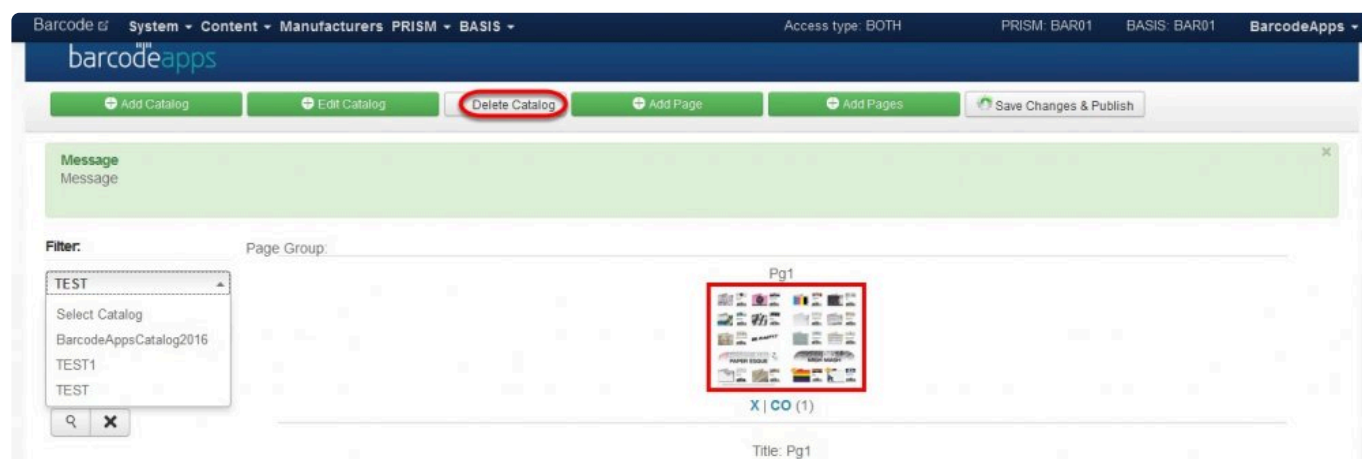
This knowledge base article will guide users to delete a catalog on the PRISM Joomla Website.

DELETING A CATALOG

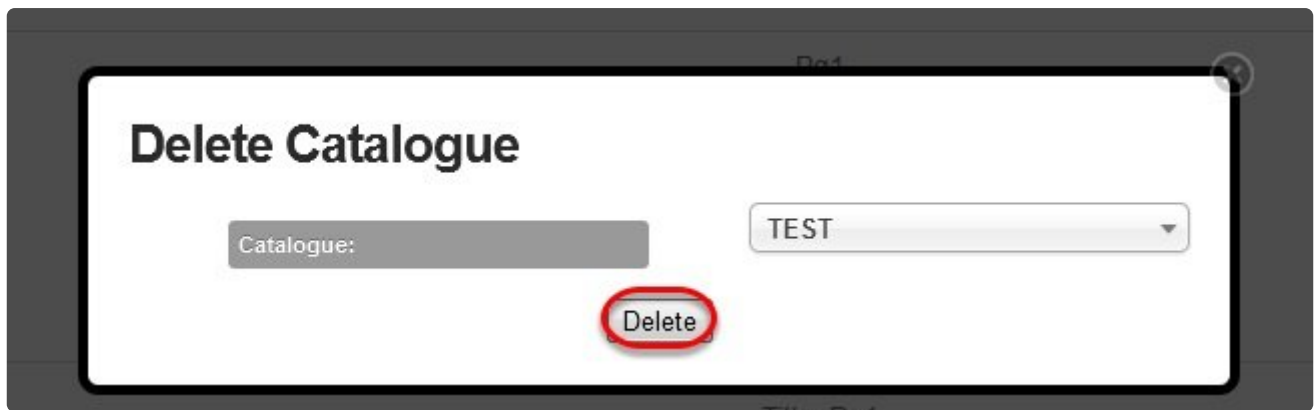
To delete a catalog, click on the drop down menu and then select the catalog name to be deleted.



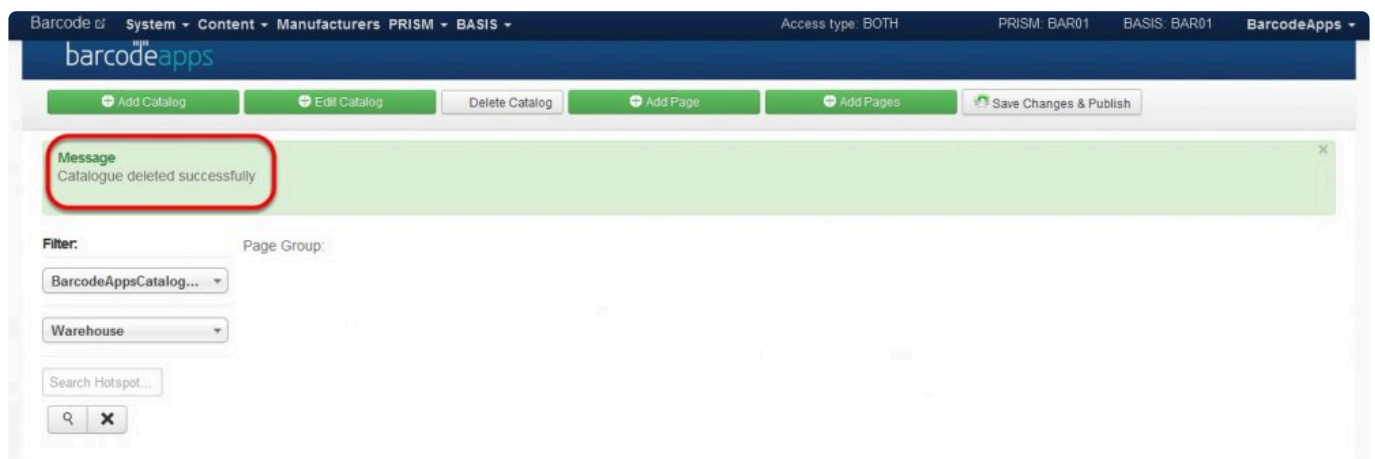
Click on Delete.



On the confirmation box, click on delete again.



A message will show once the request has been completed.



2.5.4.4. iv. Add Page

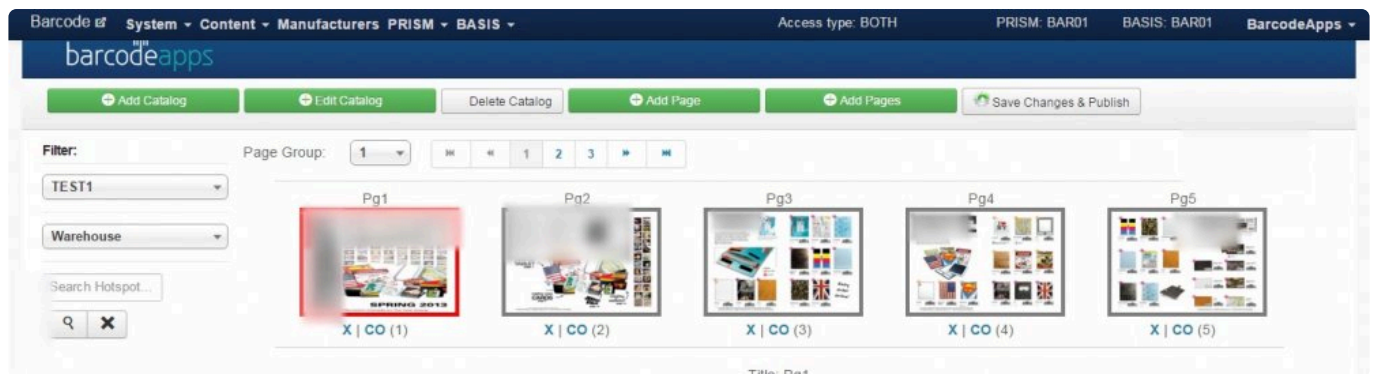
This knowledge base article will guide users on how they can add a page on their catalog.

ADDING A PAGE ON A CATALOG

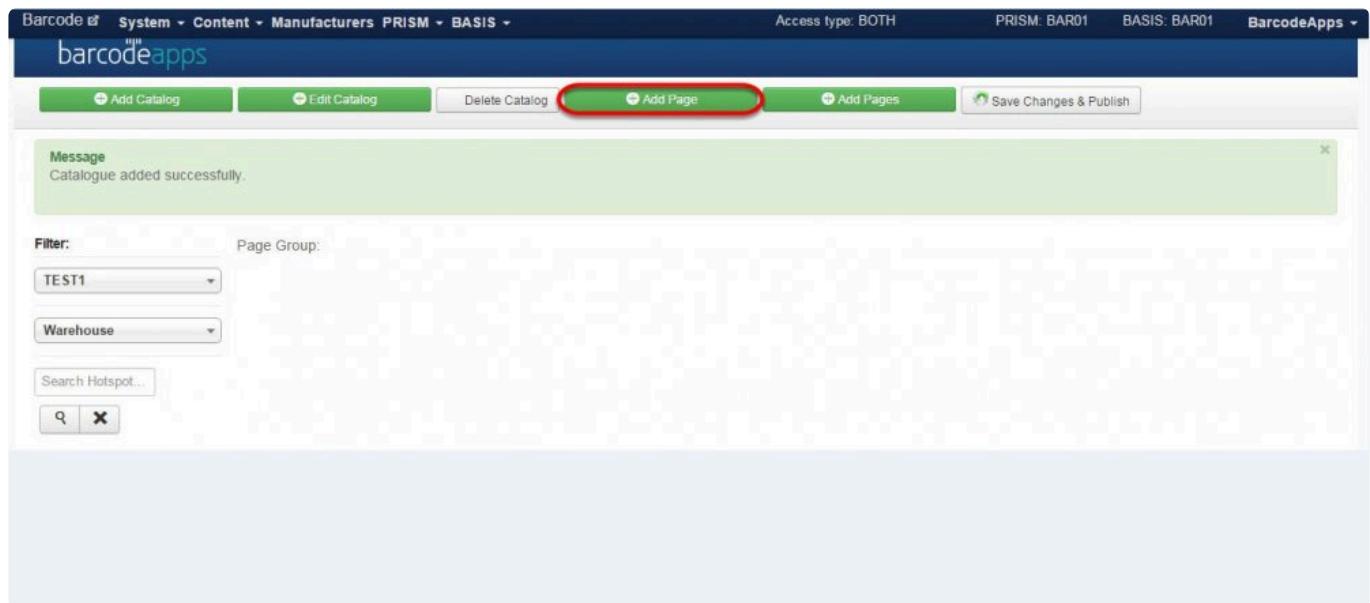
Before adding a page to your catalog there are two requirements.

1. Images should be on JPEG format.
2. The dimension of the image should be 893 × 1263 for two page catalog set up and 1786 × 1283 for one page catalog set up

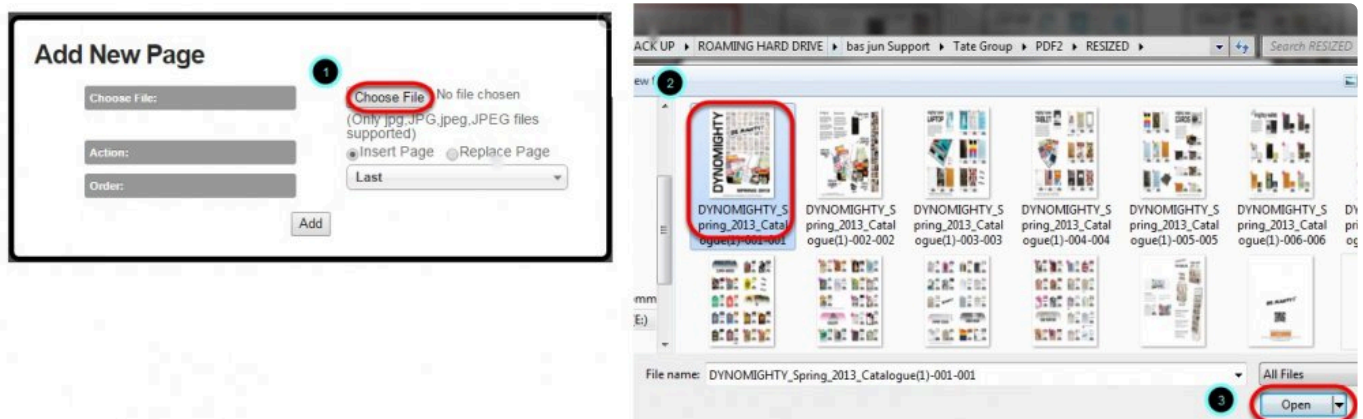
In most cases catalogs are in PDF format, a PDF file must be converted first to a JPEG file and after that, the dimension must be adjusted to 893 × 1263 for two page catalog or 1786 × 1283 for one page catalog. This can be obtained by using third party software. We recommend a free software like BOXOFT (for converting PDF to JPEG) and BIMPLITE (for adjusting the dimensions).



To add a page to your catalog, click on Add page.



Select Choose file, then locate the image that has to be uploaded then click on Open.



We have now an image uploaded.



BarcodeApps © 2016

2.5.4.5. v. Add Pages

This knowledge base article will guide users to add pages on their catalog.

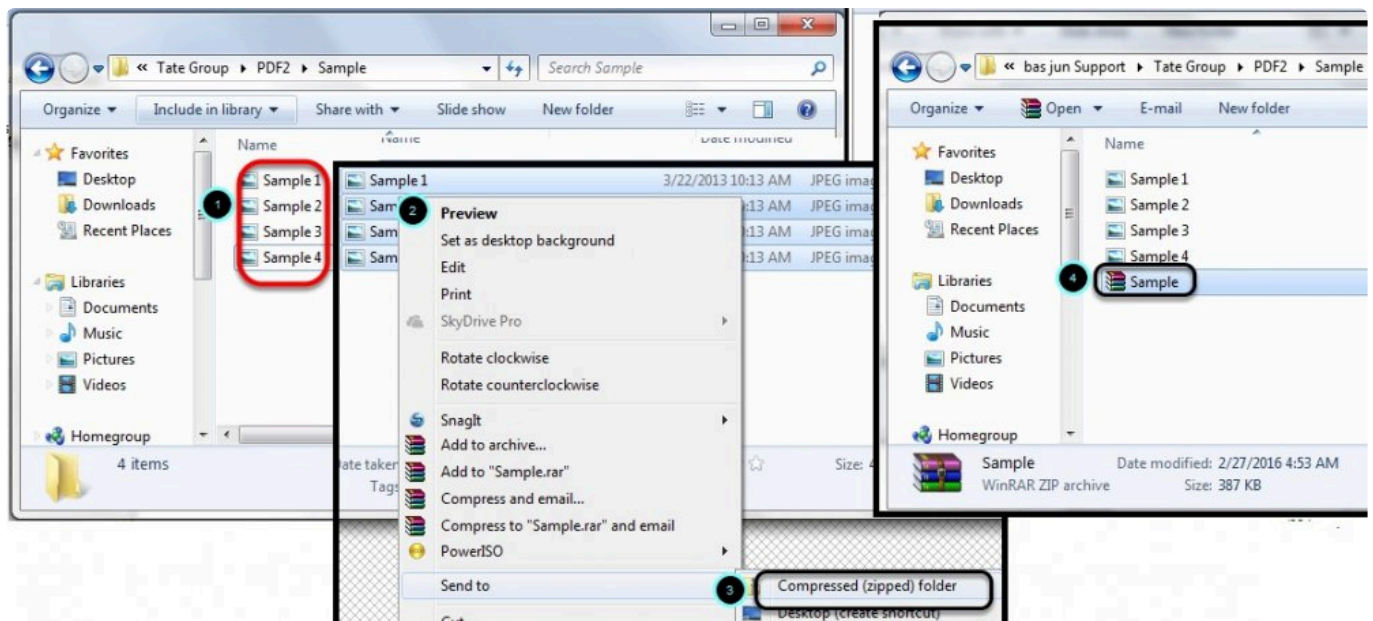
ADDING MULTIPLE PAGE ON A CATALOG

Before adding multiple pages to your catalogue there are two requirements.

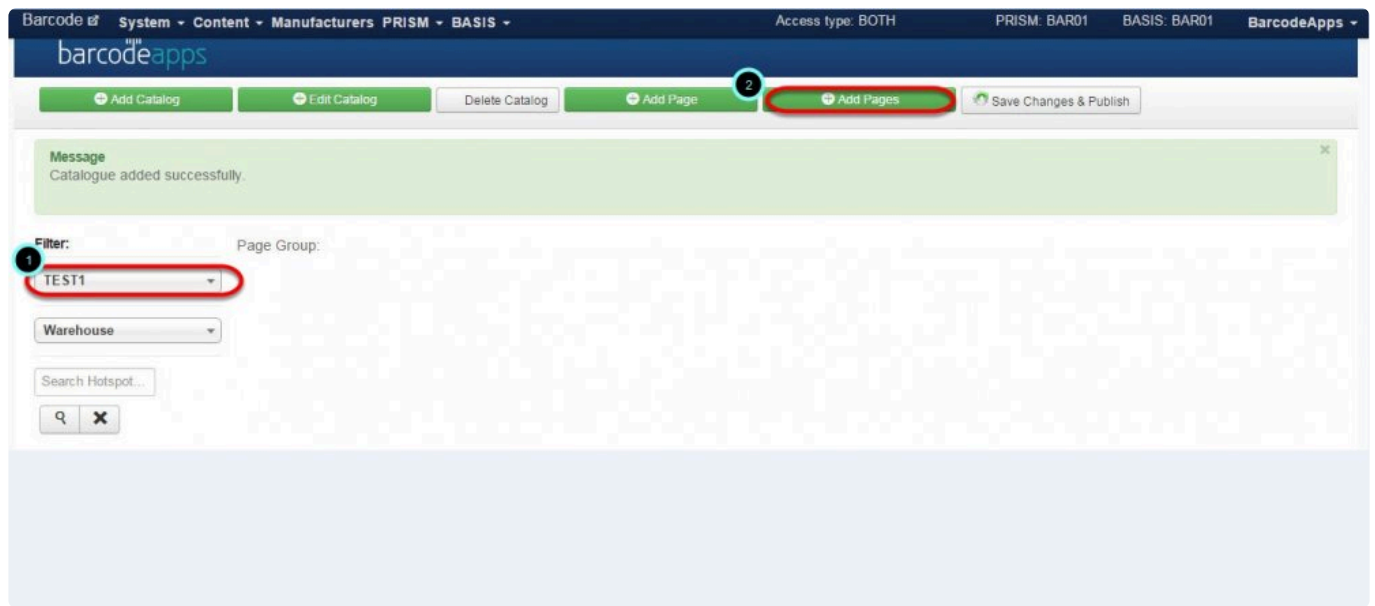
1. Images should be on JPEG format.
2. The dimension of the image should be 893 × 1263.

In most cases catalogs are in PDF format, a PDF file must be converted first to a JPEG file and after that, the dimension must be adjusted to 893 × 1263. This can be obtained by using third party software. We recommend free software like BOXOFT (for converting PDF to JPEG) and BIMPLITE (for adjusting the dimensions).

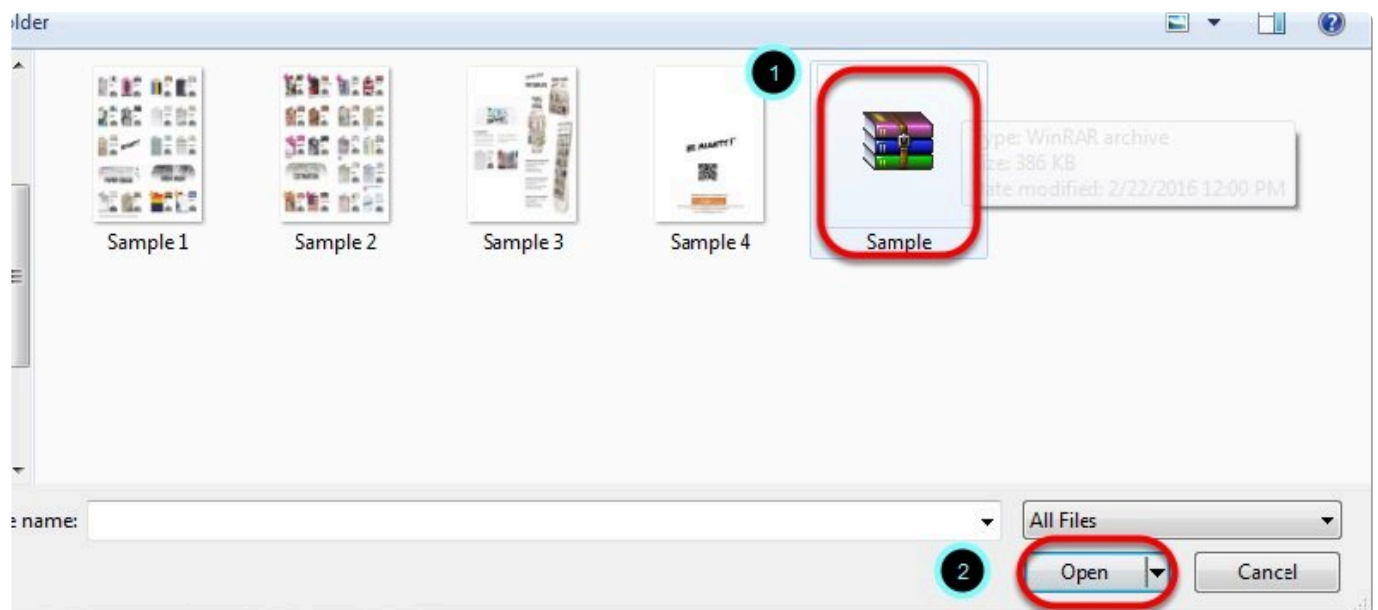
To upload multiple pages, you must compress the images first by selecting all the images to be added, right click on the selected images, and then select the option send to > compressed (zipped) folder. Now you have your compressed file ready for upload.



To add multiple paged catalog, select the catalog and then click on Add Pages.



Locate the compressed file, and then click on Open.



Wait for the Images to load.



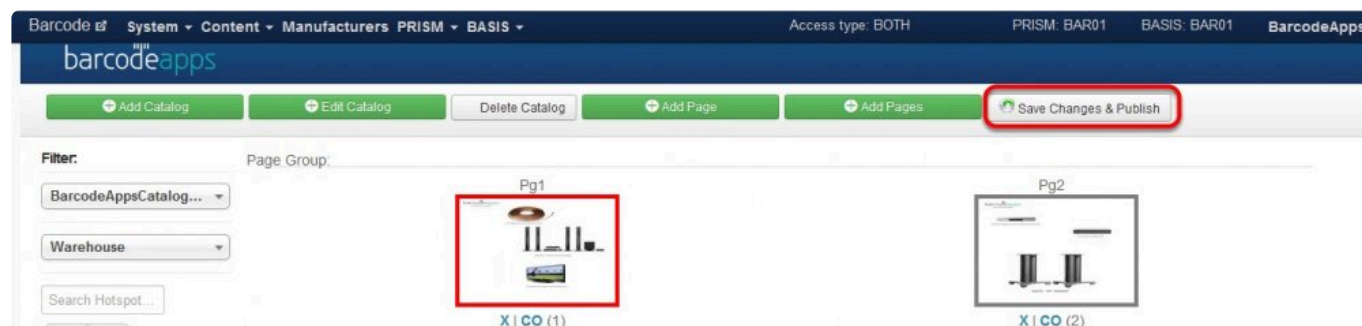
Multiple pages are now uploaded just by using a single compress file.



2.5.4.6. vi. Save Changes & Publish

SAVE CHANGES & PUBLISH BUTTON REVIEW

The save changes and publish button is basically a function inside the PRISM Joomla Portal that will let you Save all changes made on the catalog and at the same time it will sync the changes with the IPAD devices and the PRISM Webstore Portal.



BarcodeApps © 2016

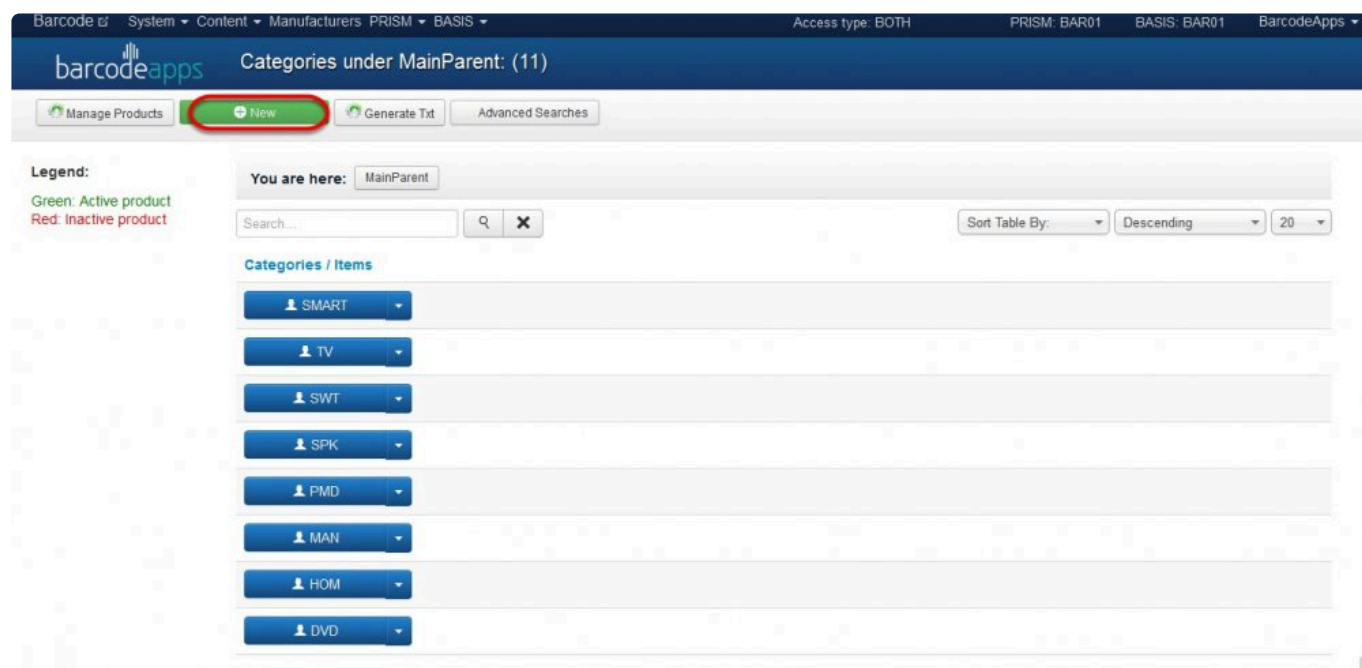
2.5.5. E. Categories Management

2.5.5.1. i. Adding New Category

This knowledge base article will guide users on how to add a new category on the PRISM Joomla Website.

ADDING CATEGORY

On the categories window, click on New.



On the New Category window, Type in the name of the new category and then click on Save and Close.

BarcodeApps System Menu Content PRISM Extensions Help Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

barcodeapps New Category

Save & Close Cancel

Basic Information

Category Name * SMARTD

Categories Manager Editing

Description

Categories Manager / Editing

A message should show that a new category has been added successfully.

BarcodeApps System Menu Content Manufacturers PRISM BASIS Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

barcodeapps Categories under MainParent: (12)

Manage Products New Generate Txt Advanced Searches

Message Category add Successful

Legend: Green: Active product Red: Inactive product

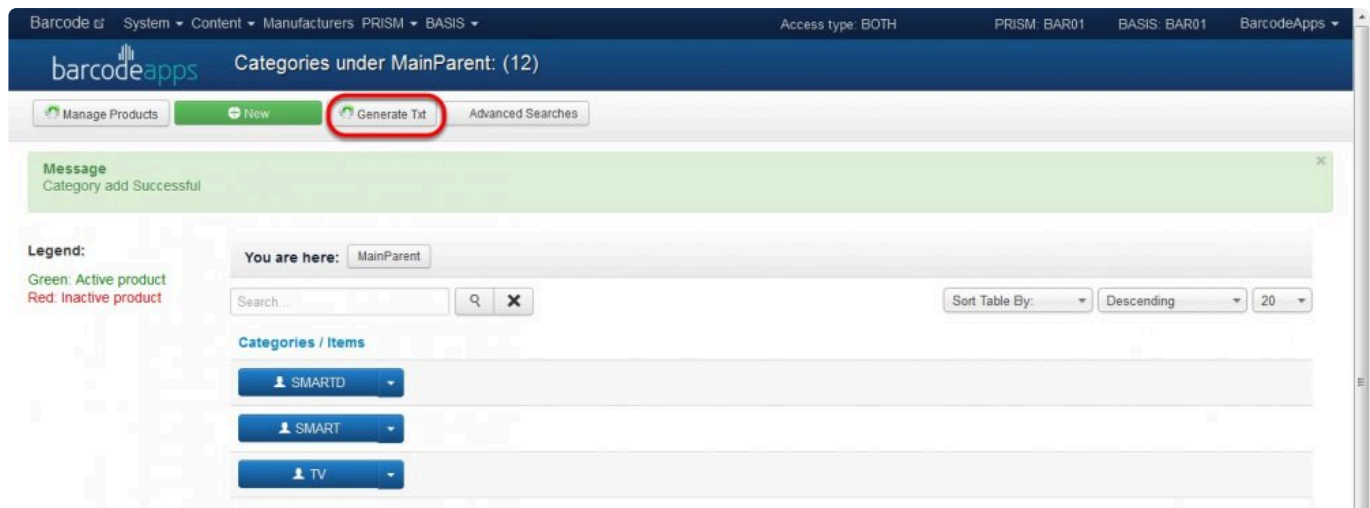
You are here: MainParent

Search... Sort Table By: Descending 20

Categories / Items

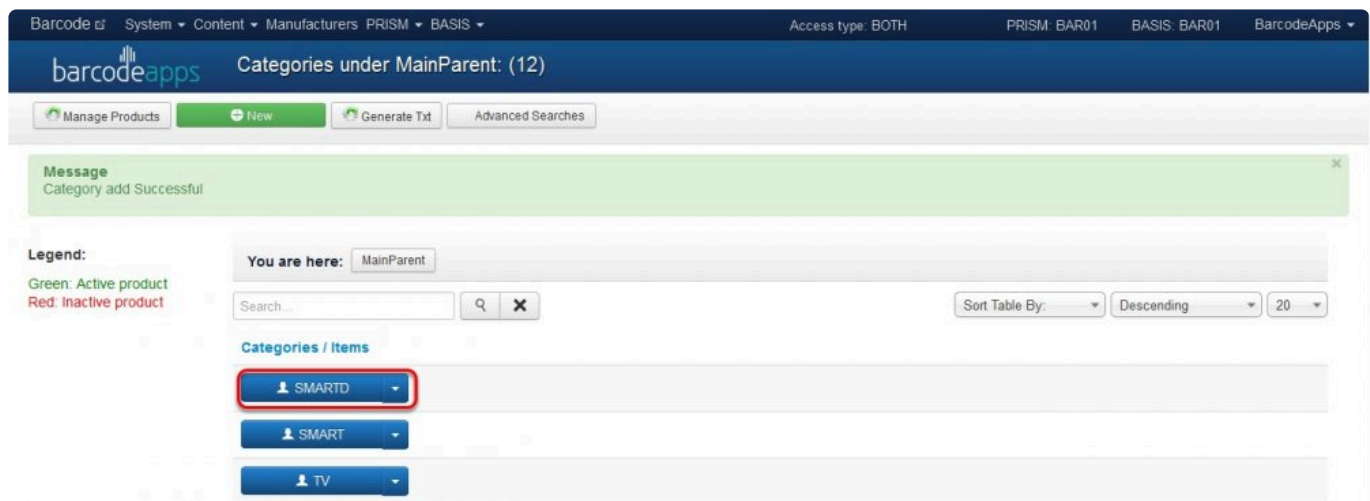
- SMARTD
- SMART
- TV

To sync the new category with the PRISM app(iOS/Android), click on Generate Txt.



SUB CATEGORY

To create a sub category. Just select a category.



On the next page, select new.

BarcodeApps System Content Manufacturers PRISM BASIS Access type: BOTH

barcodeapps Categories under SMARTD:

Manage Pro 1 + New MainParent Up One Level Generate Txt Advanced Searches Copy/Move

Legend:
Green: Active product
Red: Inactive product

You are here: MainParent / SMARTD

Search... 🔍 ✕

Categories / Items Index

Define the name of the sub category and then click on save and close

BarcodeApps System Menus Content PRISM Extensions Help Access type: BOTH

2 barcodeapps New Category

Save & Close Cancel

Basic Information

Category Name * 1 CAST DEVICE


Set Index * 1

Categories Manager Editing

Description

Categories Manager / Editing


A message should show once complete. To complete the sync with the PRISM App. Just click on Generate Text.


Barcode  System ▾ Content ▾ Manufacturers PRISM ▾ BASIS ▾

Access type: BOTH


barcodeapps


Categories under SMARTD: (1)

1  Manage Products


 New

MainParent

Up One  2

 Generate Txt



Advanced Searches

 Copy/Move


Message
Category add Successful

Legend:
Green: Active product
Red: Inactive product

You are here: MainParent / SMARTD


Search...  

Categories / Items Index


 CAST DEVICE ▾

1


* NOTE: For users who uses WEB STORE. We have to make sure that Show sub categories is enabled under PRISM SETTINGS.


Barcode 

System Menus Content PRISM Extensions Help



Edit

 Save & Close

 Close

Basic Information

Prism Settings

Basis Settings

General Settings

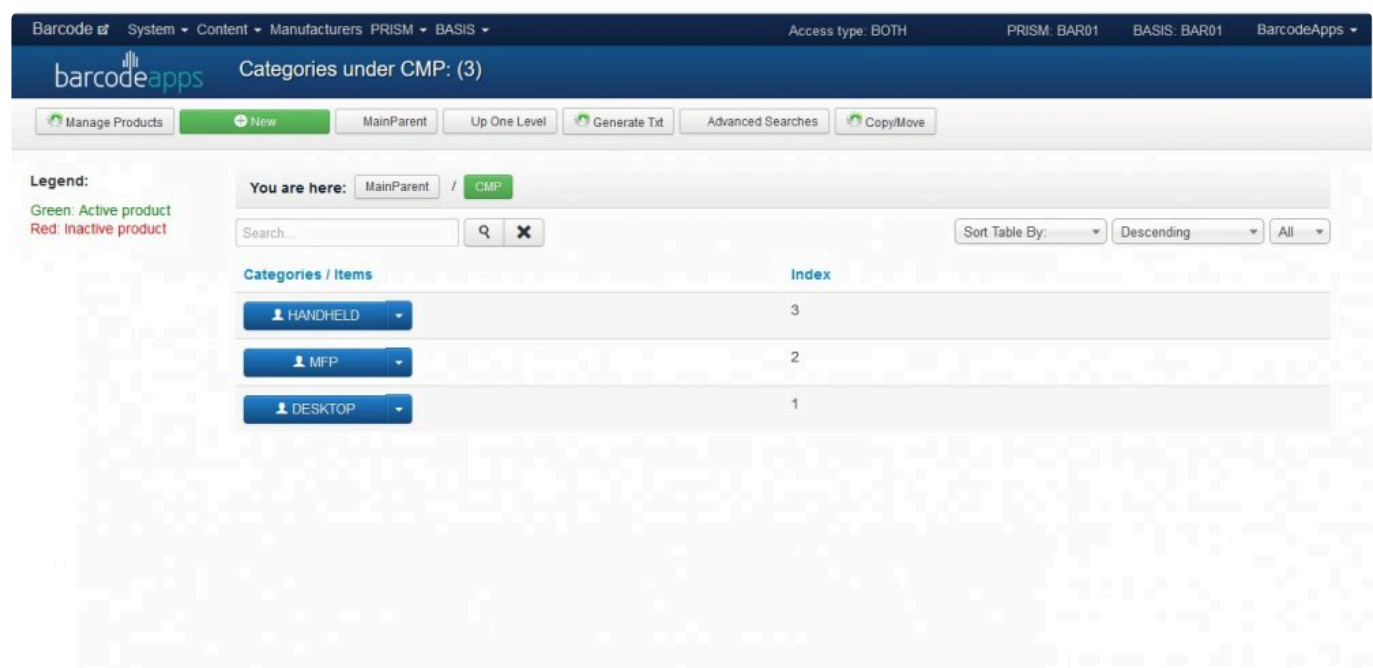
Active Offers	<div>Disable</div>
Hide All Prices	<div>Disable</div>
Advanced Categories	<div>Enable</div>
Warehouse Settings	<div>Disable</div>
Order Categories	<div>DESC</div>
Show subcategories	<div>Enable</div>
Hide Search Left	<div>Disable</div>
Verify On Hand	<div>Disable</div>
No Truncate Products Description	<div>Disable</div>
Hide Quick Add	<div>Disable</div>
Hide Footer Login	<div>Disable</div>

2.5.5.2. ii. Manage Products

This knowledge base article will guide users to manage their product categories on the PRISM Joomla Website.

MANAGING PRODUCTS CATEGORY

To add a product item on a category, click on a category where you wish to add the product item.



BarcodeApps System Content Manufacturers PRISM BASIS Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

barcodeapps Categories under CMP: (3)

Manage Products New MainParent Up One Level Generate Txt Advanced Searches CopyMove

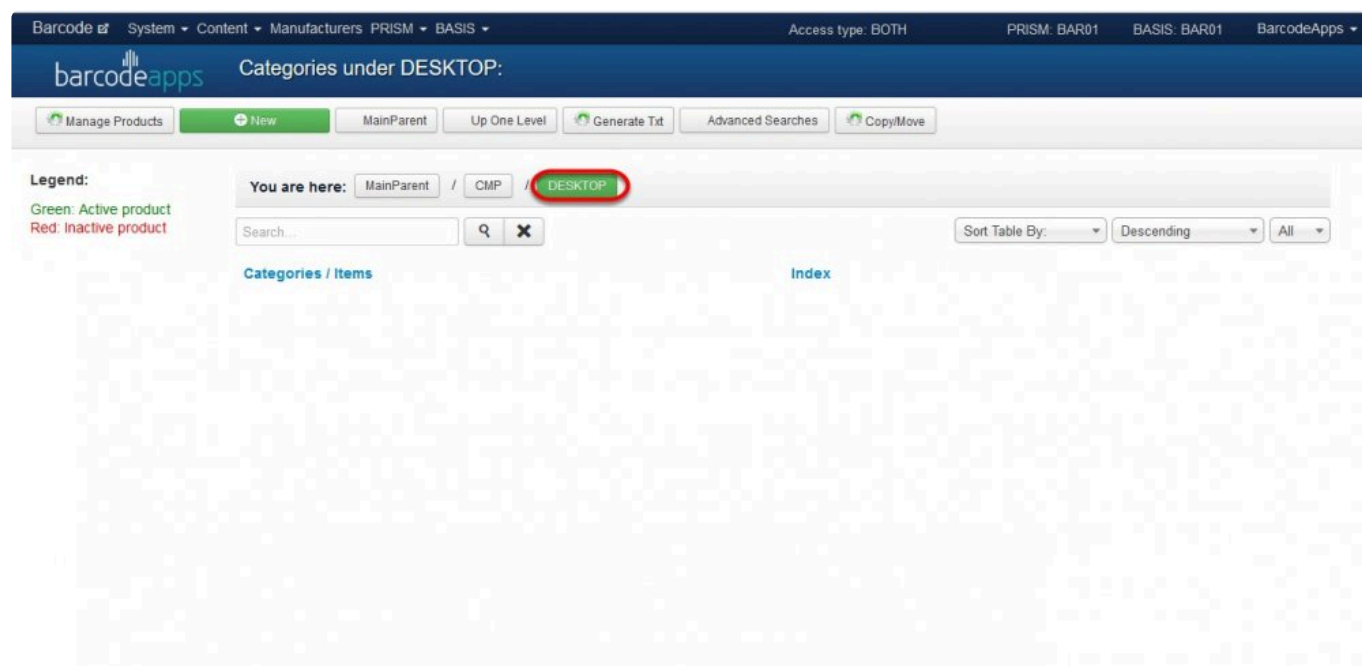
Legend:
Green: Active product
Red: inactive product

You are here: MainParent / CMP

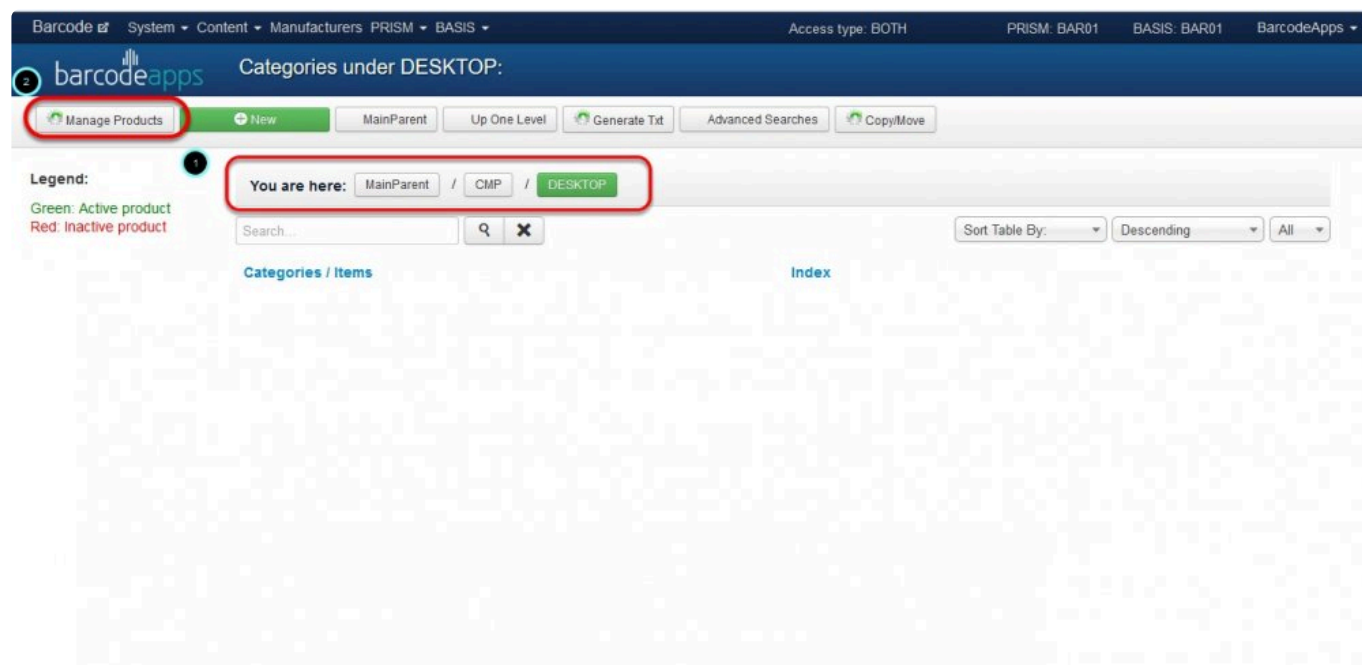
Search... [Search] [X] Sort Table By: [v] Descending [v] All [v]

Categories / Items	Index
HANDHELD [v]	3
MFP [v]	2
DESKTOP [v]	1

In our example. We will add an item under the DESKTOP sub category (sub category of CMP).



To add an item, Make sure you are inside the correct category (MAIN /CMP/DESKTOP) and then click on Manage products.



Put a check mark on the item that needs to be added (Multiple selection can be done), and then click

on Add Product.

BarcodeApps System Content Manufacturers PRISM BASIS Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

Adding products to: (DESKTOP)

2 Add Product Go to DESKTOP

Search... Filter by Imported Categories: ALL Q X Descending All Sort Table By:

<input type="checkbox"/>	ItemCode	Description
<input checked="" type="checkbox"/>	VAIO-24	Desktop PC with Intel Pentium 4 Proc.
<input type="checkbox"/>	V1-4A	Hi-fi Stereo 4 Head VCR
<input type="checkbox"/>	V1-2A	Digital-VHS VCR with HDTV-Recording
<input type="checkbox"/>	UAC-300	Recoton Universal AC Adapter
<input type="checkbox"/>	TV-5200	52" Dolby Pro Logic Surround Sound TV
<input type="checkbox"/>	TV-3600	36" DBX Stereo Color Television
<input type="checkbox"/>	TV-2100	20" TV with Flat Picture Tube
<input type="checkbox"/>	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-RW
<input type="checkbox"/>	TP-350	DVD Player/Hi-Fi VCR Combo

Now click on Go to Desktop to go back to the desktop category and check if the Item has been added.

BarcodeApps System Content Manufacturers PRISM BASIS Access type: BOTH PRISM: BAR01 BASIS: BAR01 BarcodeApps

Adding products to: (DESKTOP)

Add Product Go to DESKTOP

Message
Products Updateds

Search... Filter by Imported Categories: ALL Q X Descending All Sort Table By:

<input type="checkbox"/>	ItemCode	Description
<input type="checkbox"/>	V1-4A	Hi-fi Stereo 4 Head VCR
<input type="checkbox"/>	V1-2A	Digital-VHS VCR with HDTV-Recording
<input type="checkbox"/>	UAC-300	Recoton Universal AC Adapter
<input type="checkbox"/>	TV-5200	52" Dolby Pro Logic Surround Sound TV
<input type="checkbox"/>	TV-3600	36" DBX Stereo Color Television
<input type="checkbox"/>	TV-2100	20" TV with Flat Picture Tube
<input type="checkbox"/>	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-RW

Product update success. Item VAIO-24 is now under CMP>DESKTOP category.

The screenshot shows the BarcodeApps web interface. At the top, there is a navigation bar with 'Barcode' and 'System' menus, and a 'Content' menu with sub-items 'Manufacturers', 'PRISM', and 'BASIS'. The 'Access type' is set to 'BOTH'. The 'PRISM' and 'BASIS' sections show 'BAR01'. The 'BarcodeApps' logo is on the right. Below the navigation bar, the title 'Categories under DESKTOP: (1)' is displayed. A toolbar contains buttons: 'Manage Products', 'New', 'MainParent', 'Up One Level', 'Generate Txt', 'Advanced Searches', and 'Copy/Move'. A 'Legend' section indicates 'Green: Active product' and 'Red: Inactive product'. The 'You are here' breadcrumb shows 'MainParent / CMP / DESKTOP'. A search bar is present. Below the search bar, a table lists 'Categories / Items' and 'Index'. The table has one row with a green button labeled 'VAIO-24' and an index of '0'. The button is highlighted with a red circle.

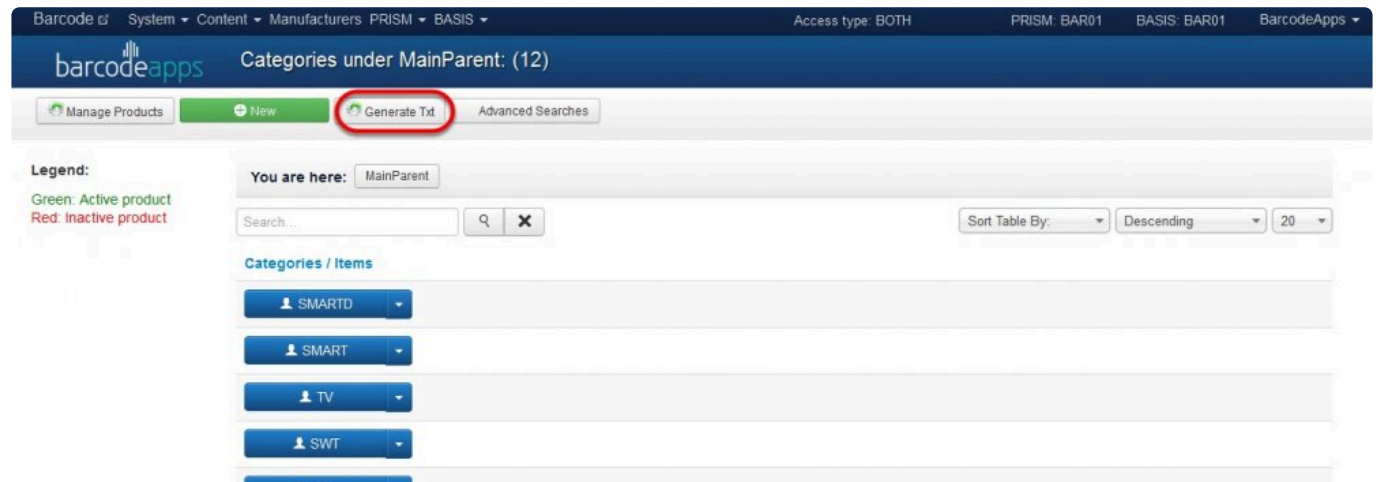
When all done on setting the category of your items, click on Generate Txt to sync the new update with the PRISM App (iOS/Android).

This screenshot is similar to the previous one, showing the same BarcodeApps interface. The 'Generate Txt' button in the toolbar is now highlighted with a red circle, indicating the next step in the process. The table below still shows the 'VAIO-24' item.

2.5.5.3. iii. Generate Text

GENERATE TEXT (SYNC DATA)

The Generate txt button syncs all data (Product items, Categories, , Images) from the PRISM Joomla Portal going to the Mobile devices(IOS/ ANDROID) and the PRISM Web Store.



It's a best practice to use this option whenever you make changes inside the Joomla portal


2.5.5.4. iv. Category Indexing

This knowledge base article will guide users on how they can Index the category from the PRISM Joomla website.

INDEXING CATEGORIES

We can index categories inside the PRISM Joomla Website to make searches more manageable and organize inside the PRISM WEB STORE.

By default all categories that are created will be defaulted to zero.

Barcode  System ▾ Content ▾ Manufacturers PRISM ▾ BASIS ▾

Access type: BOTHPRISM: BAR01BASIS: BAR01BarcodeApps ▾



barcodeappsCategories under MainParent: (10)

Manage ProductsNewGenerate TxtAdvanced Searches









MessageCategories delete Successful

Legend:
Green: Active product
Red: Inactive product

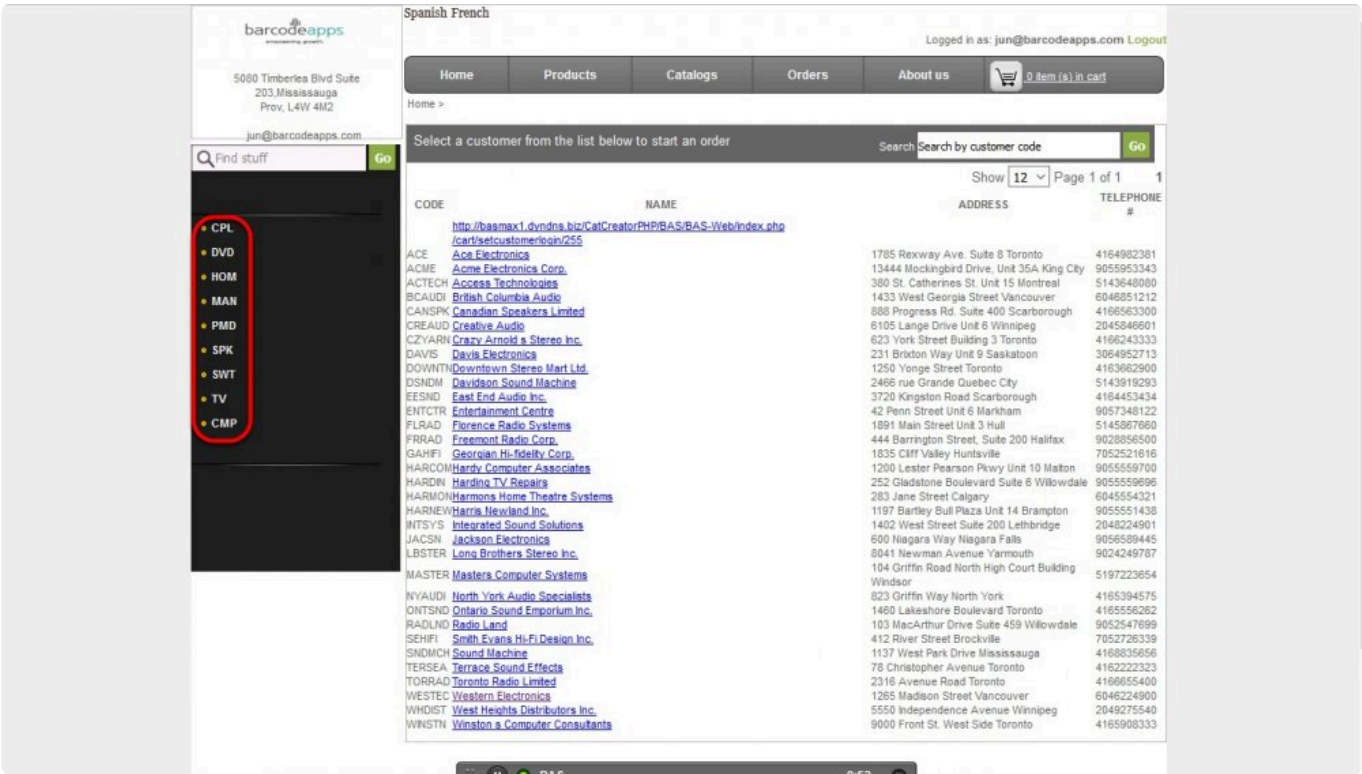
You are here: MainParent

Search...

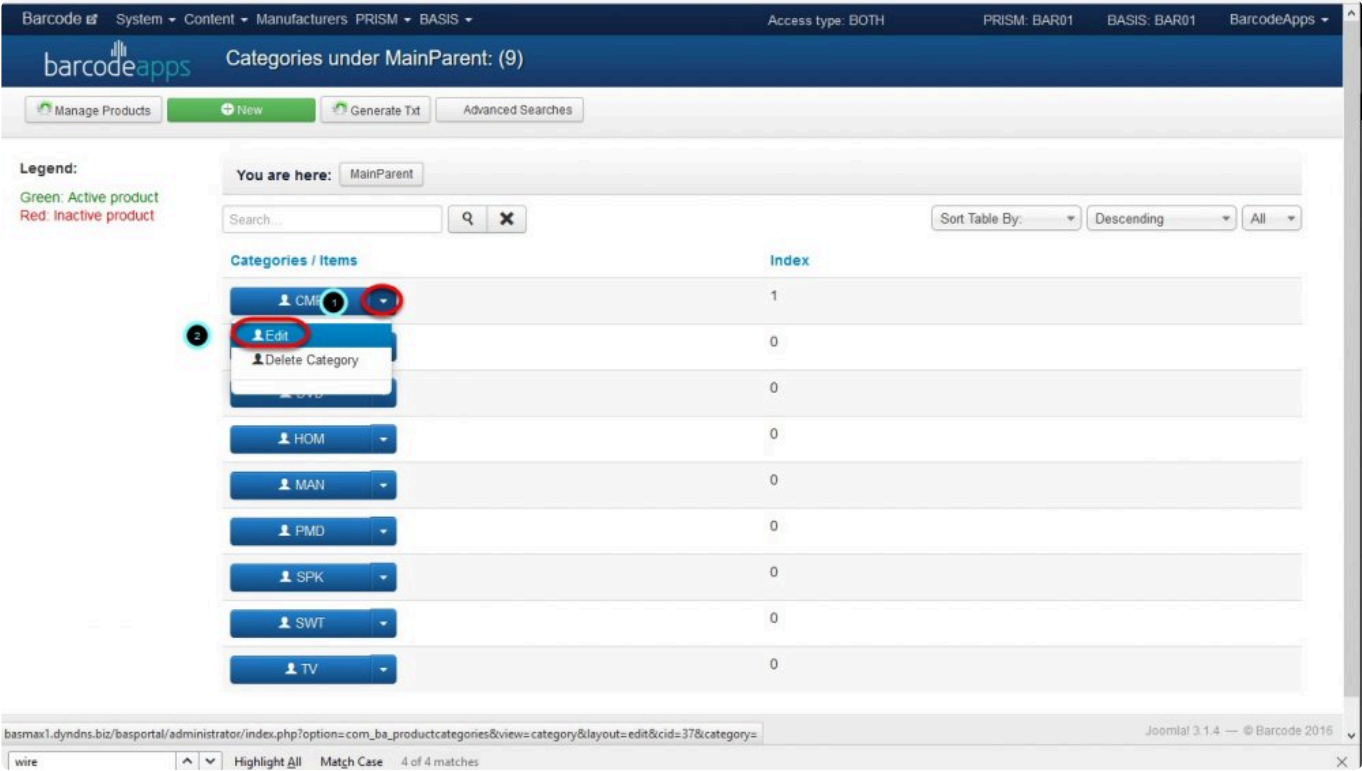
Sort Table By: ▾Descending ▾20 ▾

Categories / Items	Index
 CMP ▾	0
 CPL ▾	0
 DVD ▾	0
 HOM ▾	0
 MAN ▾	0
 PMD ▾	0
 SPK ▾	0
 SWT ▾	0

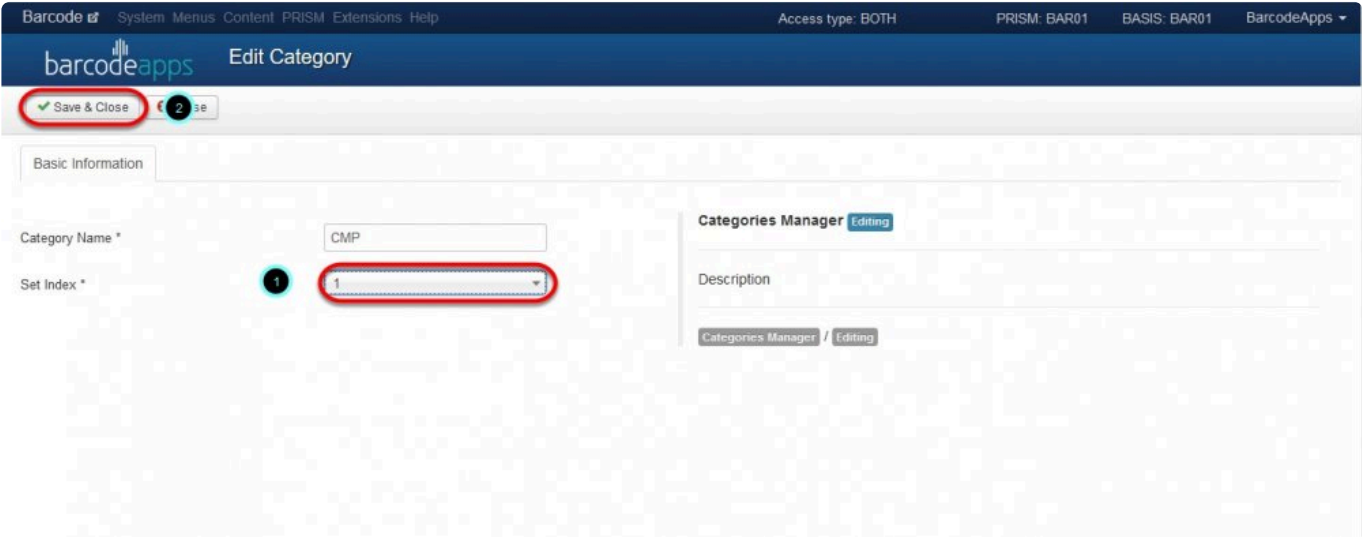
Since indexing is defaulted to zero, the arrangement of the categories inside the PRISM WEB STORE will be in random.



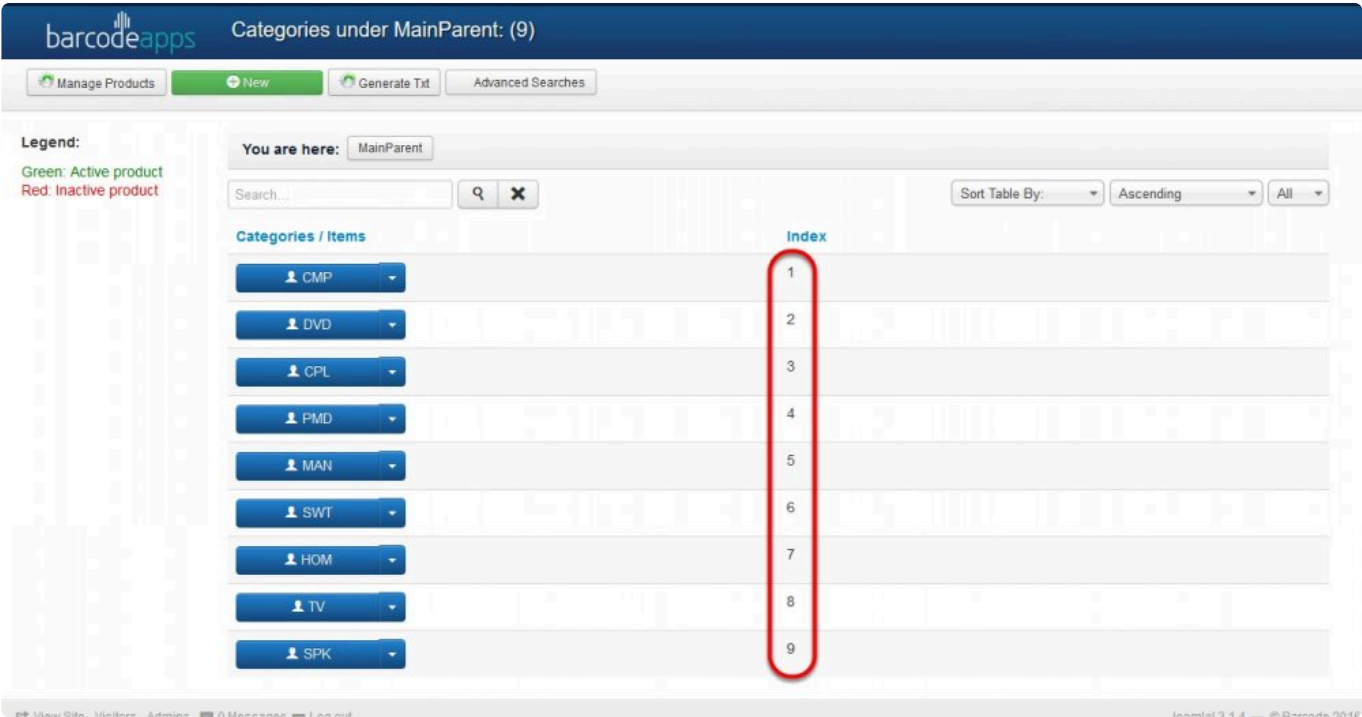
If you wish to arrange them manually, we can index the categories inside the PRISM Joomla Portal.



To index the categories, on the categories main parent window, select a category, click on the drop down arrow (after the category name) and then select Edit.



Set the index number and then hit on save and close.



Repeat the same procedure until the desired arrangement are met.

✿ NOTE: The results can always be viewed by accessing the PRISM WEB STORE.

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empowering growth

5080 Timberlea Blvd Suite
203, Mississauga
Prov, L4W 4M2

jun@barcodeapps.com

Find stuff

Go

CMP

DVD

CPL

PMD

MAN

SWT

HOM

SPK

TV

Spanish French

Logged in as: jun@barcodeapps.com Logout

HomeProductsCatalogsOrdersAbout us0 item(s) in cart

Home >

Select a customer from the list below to start an order

Search by customer codeGo

Show 12Page 1 of 11

CODE	NAME	ADDRESS	TELEPHONE #
	http://basmax1.dyndns.biz/CatCreatorPHP/BAS-Web/index.php/cart/setcustomerlogin/255		
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catherine St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West George Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3 Toronto	4166243333
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145987660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028565600
GAHFI	Georgian Hi-Fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Matton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Lono Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NVAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	416556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547899
SEHFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SNDMCH	Sound Machine	1137 West Park Drive Mississauga	4168835656
TERSEA	Terrace Sound Effects	78 Christopher Avenue Toronto	416222323
TORRAD	Toronto Radio Limited	2316 Avenue Road Toronto	4168655400
WESTEC	Western Electronics	1265 Madison Street Vancouver	6046224900
WINDGT	West Heights Distributors Inc.	5550 Independence Avenue Winnipeg	2049275540

✿ Indexing can also be applied to sub categories.

Categories under SPK: (3)

New

MainParent

Up One Level

Generate Txt

Advanced Searches

Co

You are here:

MainParent

SPK

MAIN CATEGORY

Search...

Q

X

Categories / Items

SPKR STND

SPKR BKSHLF

SPEAKER

SUB CATEGORIES

Index

1

2

3

Categories under SPK: (3)

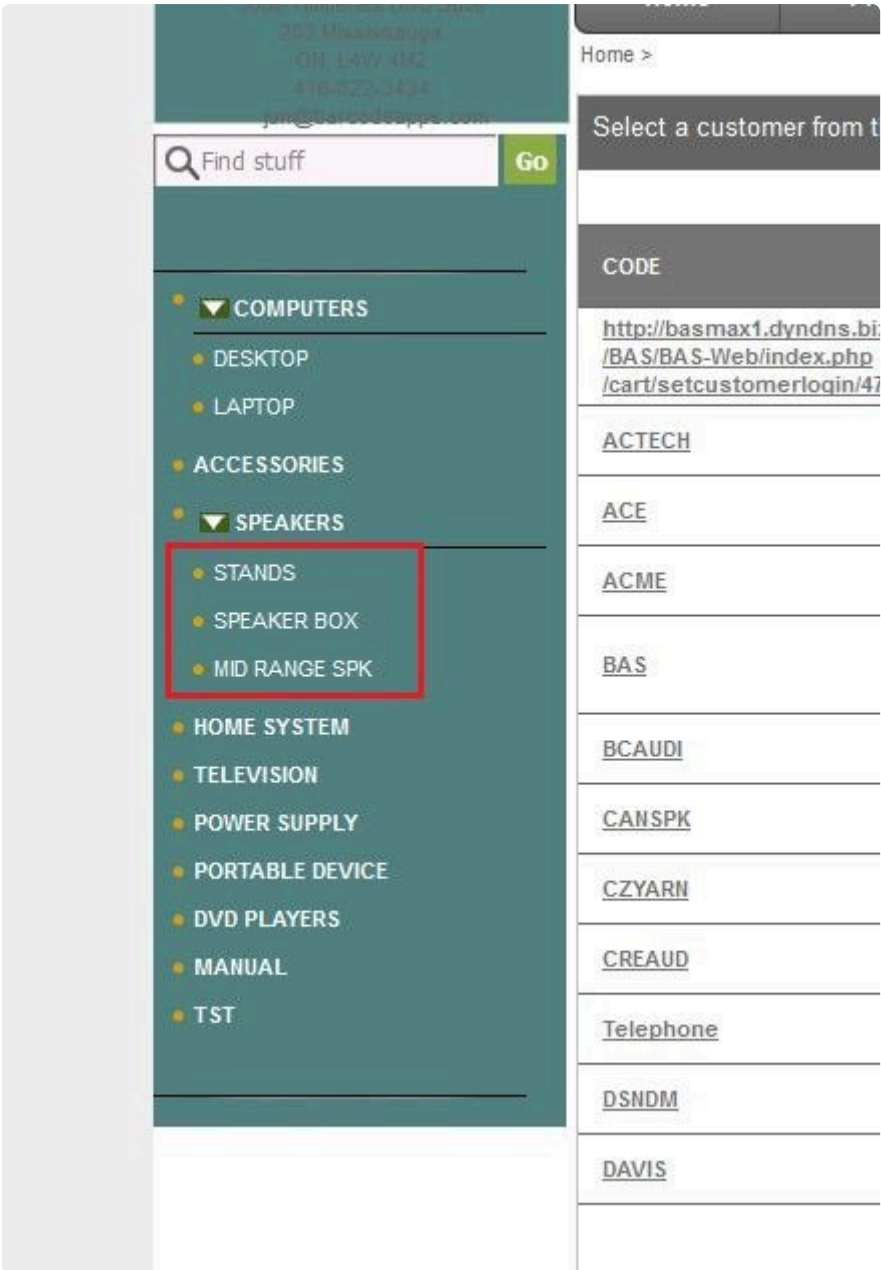
[+ New](#) [MainParent](#) [Up One Level](#) [Generate Txt](#) [Advanced Searches](#) [Co](#)

You are here: [MainParent](#) [SPK](#) [MAIN CATEGORY](#)

Search... [Q](#) [X](#)

Categories / Items		Index
SPKR STND	SUB CATEGORIES	1
SPKR BKSHLF		2
SPEAKER		3

Image below shows the result after applying index on the the sub categories.



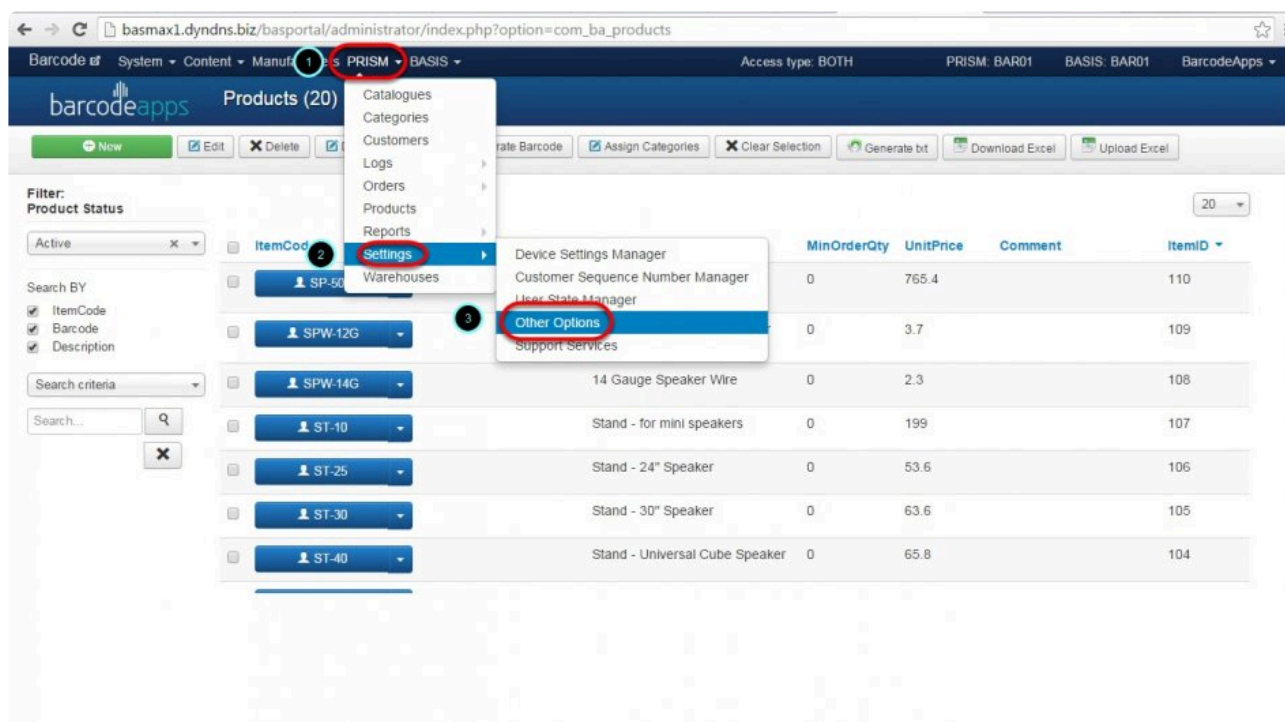
2.5.6. F. Settings (Other Options)

2.5.6.1. iv. Generate Categories From Products Excel

This knowledge base article will guide users on how they can upload their product categories on the PRISM Joomla Website using the products form.

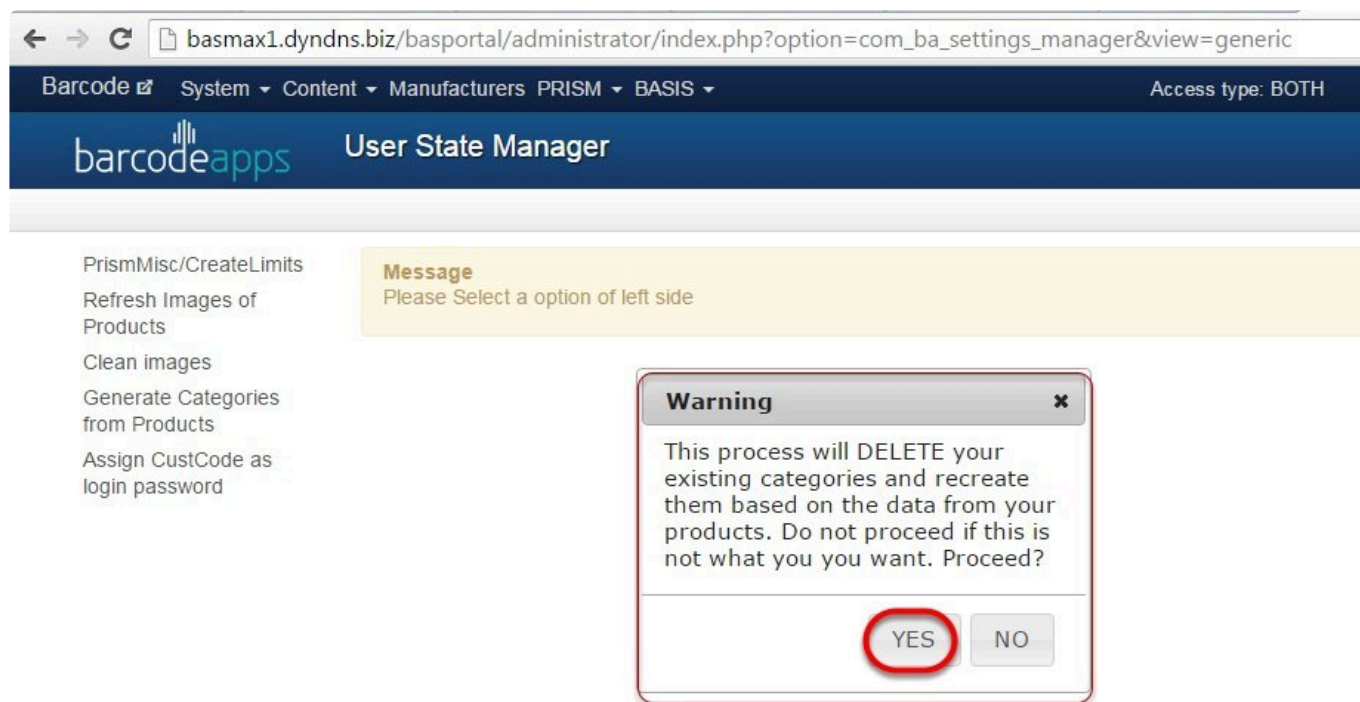
GENERATE CATEGORIES FROM PRODUCTS

Click on PRISM on the top menu, select Settings then select Other Options.

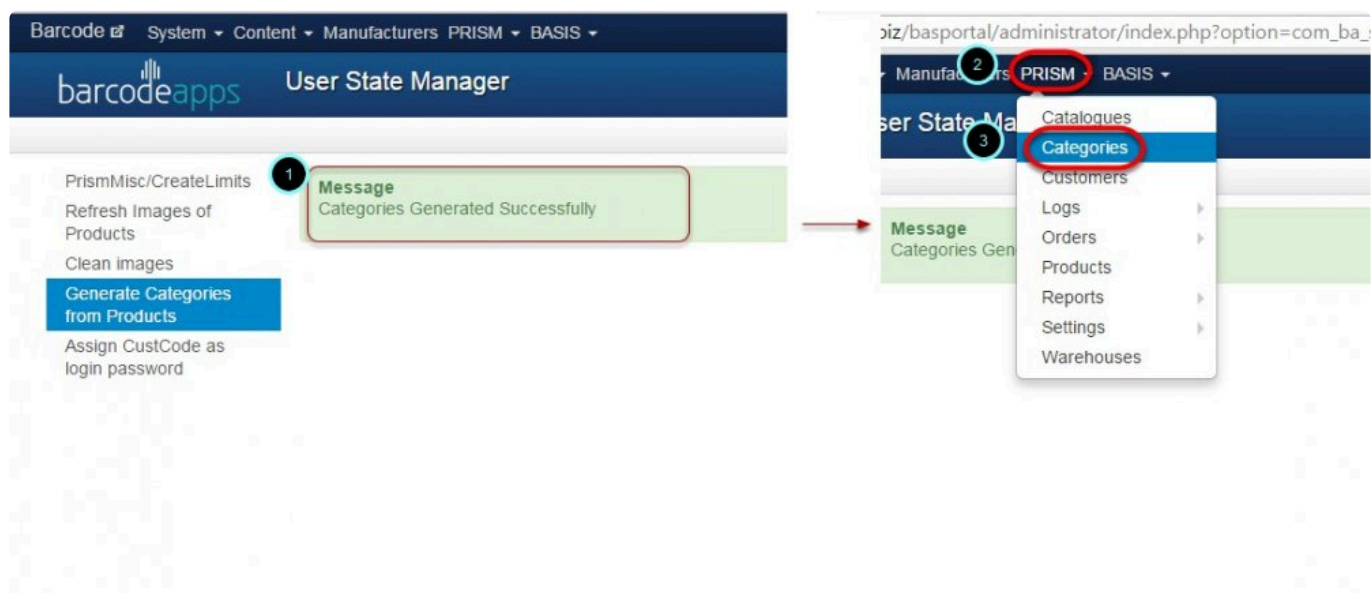


Select the option Generate Categories from Products (This will extract the categories that was assigned using the “Products Form” for each items.)

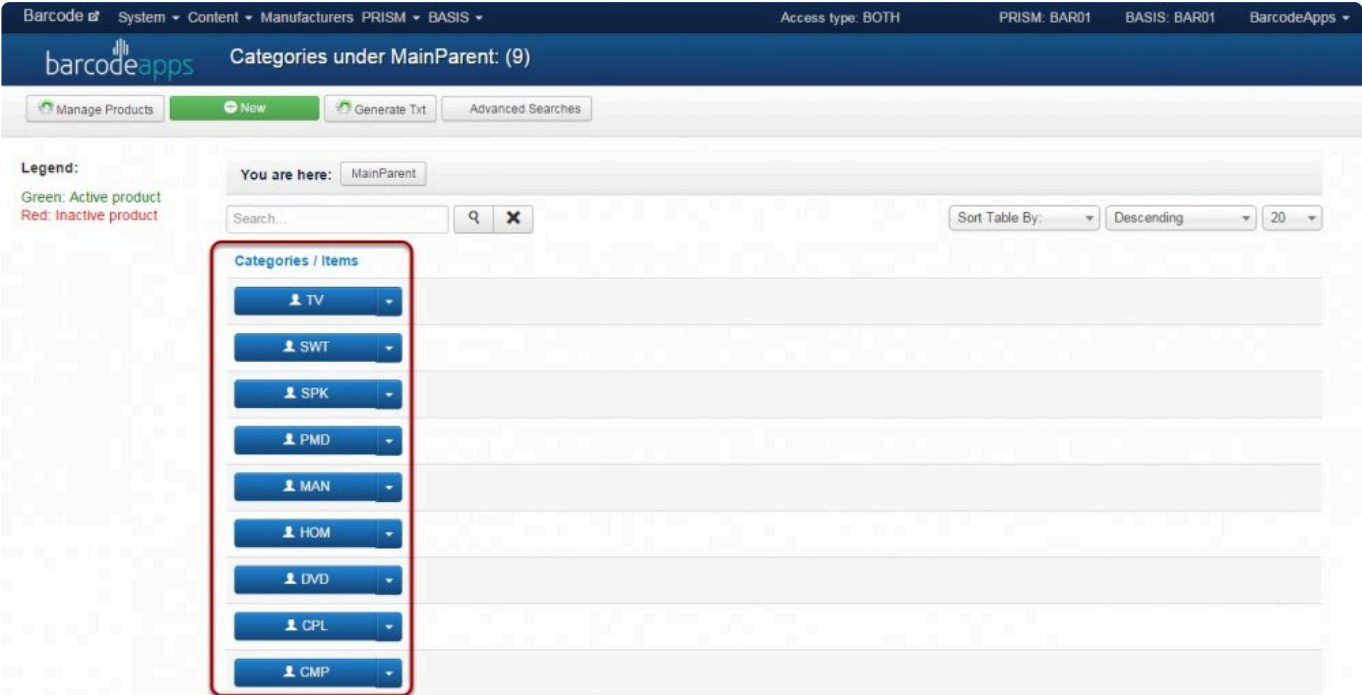
A Warning will pop up; Select Yes to upload the categories from the Product Form.



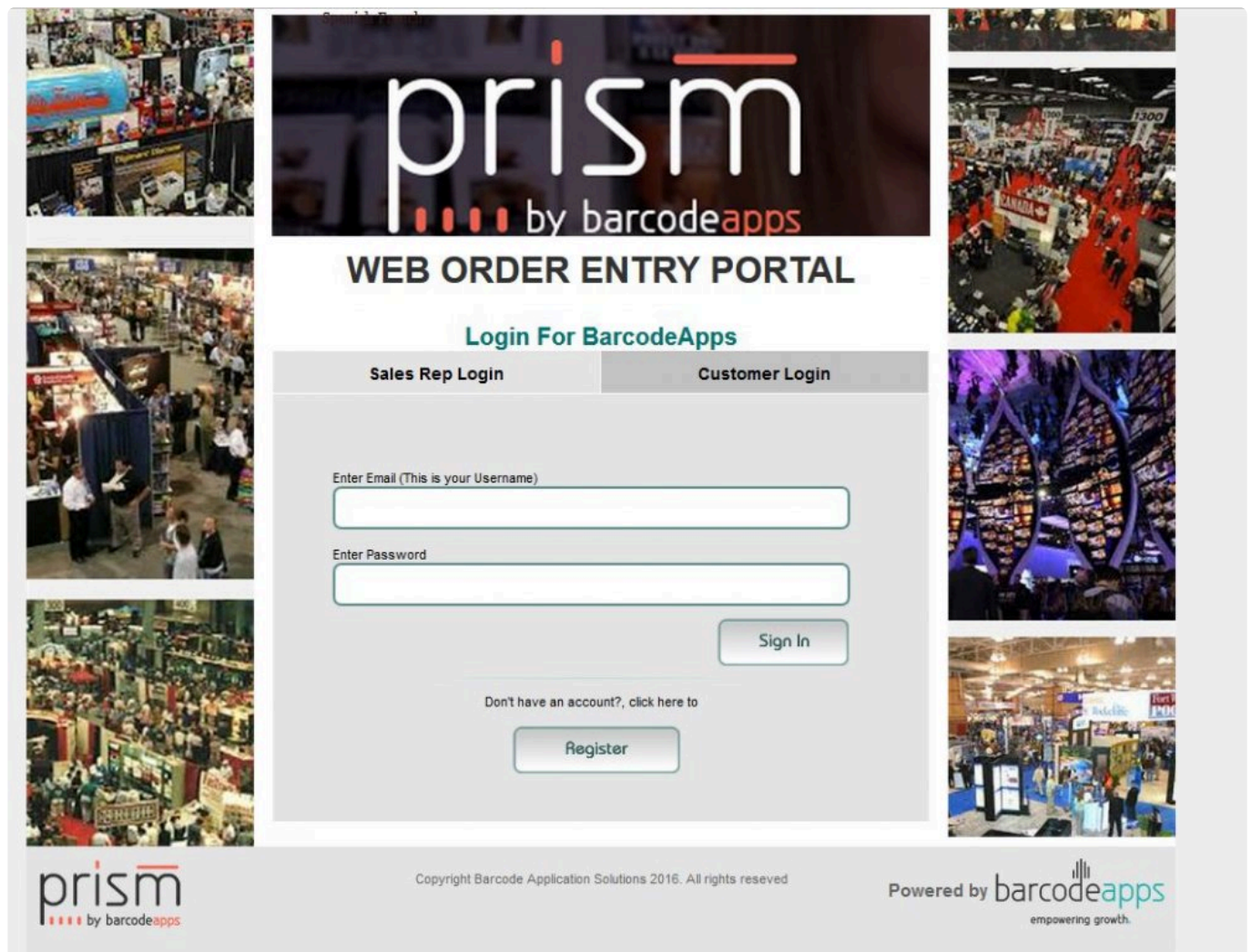
A confirmation will show up once it's finish. To check your Categories just click on PRISM on the top menu then select categories.



Product categories are now loaded.



2.6. VI. PRISM WEBSTORE



The image shows the Prism Webstore Login Portal. The central area features the Prism logo (prism by barcodeapps) and the text "WEB ORDER ENTRY PORTAL". Below this is a "Login For BarcodeApps" section with two tabs: "Sales Rep Login" and "Customer Login". The "Customer Login" tab is active, showing input fields for "Enter Email (This is your Username)" and "Enter Password", a "Sign In" button, and a "Register" button. A link "Don't have an account?, click here to" is also present. The page is framed by a collage of images showing various trade show booths and displays. The footer includes the Prism logo, copyright information "Copyright Barcode Application Solutions 2016. All rights reserved", and the text "Powered by barcodeapps empowering growth."

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by barcodeapps

WEB ORDER ENTRY PORTAL

Login For BarcodeApps

Sales Rep Login Customer Login

Enter Email (This is your Username)

Enter Password

Sign In

Don't have an account?, click here to

Register

prism
by barcodeapps

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2.6.1. A. New Customer Account Registration

This knowledge base article will guide customers on how to register for a PRISM webstore account.

PRISM WEB STORE REGISTRATION

Go to the company's PRISM web store address. On the login screen click Register.

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WEB ORDER ENTRY PORTAL

[Login For BarcodeApps](#)

Sales Rep Login **Customer Login**

Enter Email (This is your Username)

Enter Password

[Sign In](#)

Don't have an account?, click here to
[Register](#)

PRISM iPad
www.prismforipad.com

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Barcode Application Solutions
www.barcodeapps.com

Fill out the information needed and click Register once done.

basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/register/BAR01

WEB ORDER ENTRY PORTAL

Register

1

* First Name
Trisha

* Last Name
Dutilleul

* Company/Organization
BarcodeApps

* Address
Mississauga

* City
ON

* State/Province
Ontario

* Zip/Postal Code
ON L4W 4M2

* Country
Canada

* Phone
855-822-3434

* Email
trish@barcodeapps.com

* Password

Web Address
http://www.barcodeapps.com/

2 Register

PRISM iPad
www.primforipad.com

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Powered by BAS
Barcode Application Solutions
www.barcodeapps.com

A thank you message will pop up once you have successfully registered.

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WEB ORDER ENTRY PORTAL

Login For BarcodeApps

Thank you Trisha. We will be contacting you shortly.

Sales Rep Login Customer Login

Enter Email (This is your Username)
Badmin

Enter Password
••••••••

Sign In

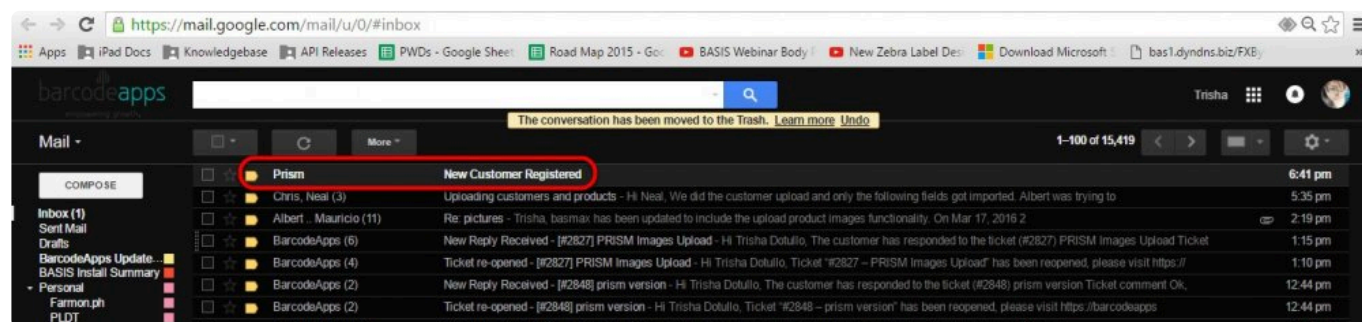
Don't have an account?, click here to

Register

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A confirmation email will be sent to the email address you registered to confirm your successful registration.



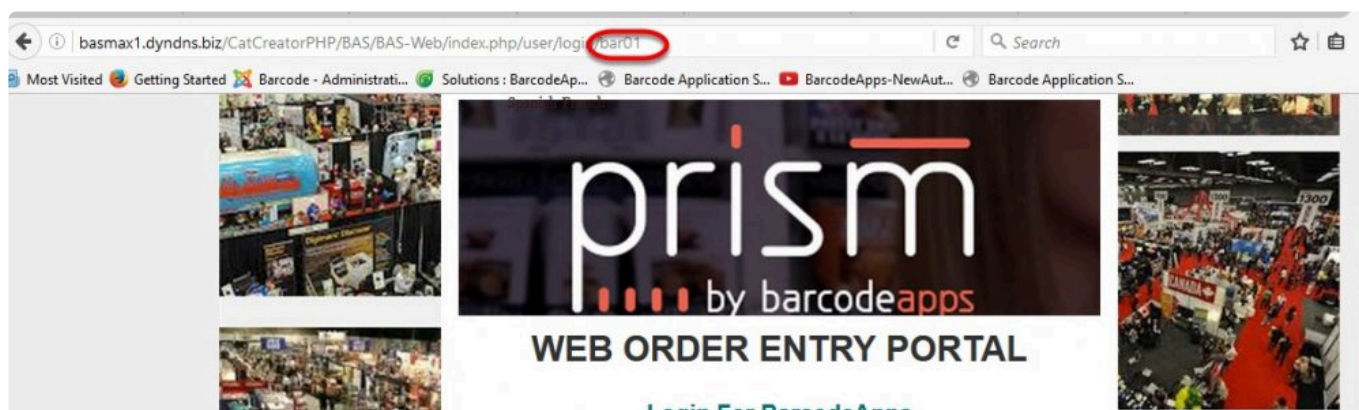
2.6.2. B. Logging In To PRISM Webstore

2.6.2.1. i. Salespeople Login

This knowledge base article will show on how to login as a sales person in the PRISM WEB STORE PORTAL.

LOG IN AS A SALES PERSON

Go to [http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/login/\(MANUFACTURER CODE, e.g BAR01\)](http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/login/(MANUFACTURER CODE, e.g BAR01))



To login as a sales rep in PRISM WEBSTORE , click on Sales Rep Login and type in your username and password.

Then click on Sign in.

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WEB ORDER ENTRY PORTAL

Login For BarcodeApps

Sales Rep Login Customer Login

User Name

Password

Sign In

PRISM4iPad
www.prismforipad.com

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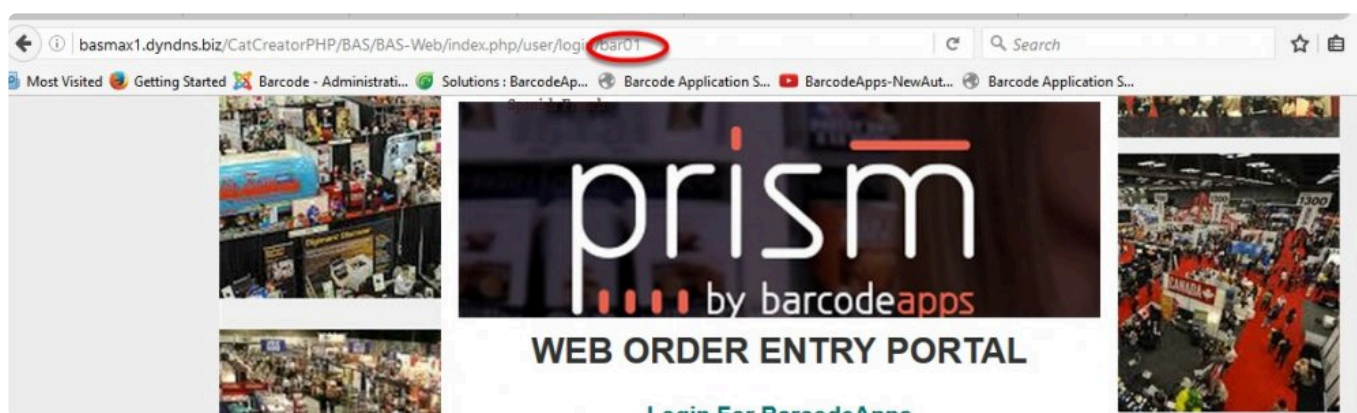
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2.6.2.2. ii. Customer Login

This knowledge base article will show on how to login as a customer in the PRISM WEB STORE PORTAL.

LOG IN AS A CUSTOMER

Go to [http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/login/\(MANUFACTURER CODE, e.g BAR01\)](http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/login/(MANUFACTURER CODE, e.g BAR01))



To login as a customer in PRISM WEBSTORE , click on customer login and type in your username and password. Then click on Sign in.

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by barcodeapps

WEB ORDER ENTRY PORTAL

Login For BarcodeApps

Sales Rep Login **1** **Customer Login**

Enter Email (This is your Username)

2

Enter Password

3

Sign In

Don't have an account?, click here to

Register

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www.prismforipad.com

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Barcode Application Solutions

2.6.2.3. iii. PRISM Webstore Menu

This knowledgebase article will explain the different menus and their functions inside the PRISM webstore.

PRISM WEBSTORE MENU

The screenshot shows the PRISM Webstore interface. The top navigation bar includes links for Home, Products, Catalogs, Orders, About us, and a shopping cart. A sidebar on the left contains a search bar and a list of product categories. The main content area displays a table of customer information.

Callouts:

- 1. Logged in as: jun@barcodeapps.com — Current Order for: Ace Elect...
- 2. Home
- 3. Products
- 4. Catalogs
- 5. Orders
- 6. About us
- 7. Shopping cart (3 item(s) in cart)
- 8. Find stuff
- 9. Search (Search by customer code)
- 10. Product categories list (CMP, DVD, CPL, PMD, MAN, SWT, HOM, TV, SPK)
- 11. Logout

Customer List Table:

CODE	NAME	ADDRESS	TELEPHONE #
ACE	http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/cart/setcustomerlogin/255	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Ace Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catherines St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3 Toronto	4166243333
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145867660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSDN	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SEHIFI	Smith Evans Hi-Fi Design Inc.	4437 West Park Drive Mississauga	4168995555


1. Logged in as – Shows who is currently logged in in PRISM webstore.
2. Home – Clicking this menu will bring you to the home page showing you the customers list.
3. Products – Clicking this menu will bring you to the products screen.
4. Catalogs – Clicking this menu will bring you to the catalog screen.
5. Orders – Clicking this menu will bring you to the order screen showing you your pending, processed and cancelled orders.
6. About Us – Displays your company information.

7. Add to Cart – The shopping cart icon is the repository of all items ordered.
8. Find stuff – Use this field to do an item search.
9. Search – Use this field to do a customer search.
10. Category Pane – This will display all your category codes.
11. Logout – Clicking logout will sign you out from the PRISM webstore.

CUSTOMER VIEW

dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/category/customersList

Logged in as: jun@barcodeapps.com – Current Order for: Ace Electronics [Logout](#)

Home Products Catalogs Orders About us  3 item(s) in cart

Spanish French

Select a customer from the list below to start an order

Search Search by customer code

Show 12 Page 1 of 1

CODE	NAME	ADDRESS	TELEPHONE #
	http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/cart/setcustomerlogin/255		
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catherine's St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3 Toronto	4166243333
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145867660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
GAHIFI	Georgian Hi-Fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
NTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSD	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339

PRODUCTS VIEW

basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/product/productlist

Search

☆

📄

🔒

↓

1

Getting StartedBarcode - Administrati...Solutions : BarcodeAp...Barcode Application S...BarcodeApps-NewAut...Barcode Application S...

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203, Mississauga
Prov, L4W 4M2

jun@barcodeapps.com

Find stuff

Go

CMP

DVD

CPL

PMD

MAN

SWT

HOM

TV

SPK

Spanish French

Logged in as: jun@barcodeapps.comLogout

Home

Products

Catalogs

Orders

About us

0 item(s) in cart

Home >

Shop by Products


Search

Go

Show 12Page 1 of 5123>Last>

CD-204

Compact Disk Player with Autoskip



0


\$323.70

-

+

CD-800

Compact Disk Player - 5 disk capacity



0


\$528.30

-

+

EN-BATD

Energizer ACCU Rechargeable D Batteries



0


\$9.99

-

+


EQ-1245

Equalizer (7 band)




EQ-1800

Equalizer (10 band)



FCB-250

Finished cabinet for SP-250



Page 468 of 1305

CATALOGS VIEW

The screenshot displays the BarcodeApps website interface. The top navigation bar includes links for Home, Products, Catalogs (highlighted), Orders, and About us. The main content area is titled 'Shop by Catalogs' and features a search bar with a 'Go' button. Below the search bar, two catalog covers are displayed: 'BarcodeAppsCatalog2016' and 'TEST1'. The 'TEST1' catalog cover prominently features the text 'DYNAMIGHTY BE MIGHTY!' and 'SPRING 2013'. The page also includes pagination information indicating 'Page 1 of 1'.

ORDERS VIEW

basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/order/orderlist

Search

☆ | 📄 | 📧 | ⬇ | 1

Getting Started | Barcode - Administrati... | Solutions : BarcodeAp... | Barcode Application S... | BarcodeApps-NewAut... | Barcode Application S...

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203, Mississauga
Prov, L4W 4M2

jun@barcodeapps.com

Spanish French

Home | Products | Catalogs | Orders | About us

0 item(s) in cart

Logged in as: jun@barcodeapps.com Logout

Pending | Processed | Canceled | Draft

Search Order Go

Viewing Pending Orders

Order ID	Order Number	Order Date	Total
29	HA1-03-12-2016-03	2016-03-12 00:03:12.000	\$700.00

ABOUT US

The screenshot shows a web browser window with the URL `dns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/abouts`. The browser's address bar and tabs are visible at the top. The website header includes the BarcodeApps logo, contact information (5080 Timberlea Blvd Suite 203, Mississauga, Prov, L4W 4M2, jun@barcodeapps.com), and a navigation menu with links for Home, Products, Catalogs, Orders, and About us. The 'About us' link is highlighted with a red rectangle. A shopping cart icon shows '0 item(s) in cart'. The user is logged in as 'jun@barcodeapps.com' with a 'Logout' link. The main content area contains the text 'Fully customizable About us to your own unique company info. Supports HTML formatting'.

dns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/user/abouts

Spanish French

Logged in as: jun@barcodeapps.com Logout

Home Products Catalogs Orders About us 0 item(s) in cart

Home >

Fully customizable About us to your own unique company info. Supports HTML formatting

SHOPPING CART

dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/product/productlist







Barcode - Administrati... Solutions : BarcodeAp... Barcode Application S... BarcodeApps-NewAut... Barcode Application S...

Spanish French

Logged in as: jun@barcodeapps.com -- Current Order for: Ace Electronics Logout

Home Products Catalogs Orders About us 3 item(s) in cart

5080 Timberlea Blvd Suite 203, Mississauga Prov, L4W 4M2

Item Description	Item Code	Price	Qty	Action	Total
 Compact Disk Player with Autoskip Comment: <input type="text"/>	CD-204	\$323.70	1		\$323.70
 Compact Disk Player - 5 disk capacity Comment: <input type="text"/>	CD-800	\$528.30	1		\$528.30
 Energizer ACCU Rechargeable D Batteries Comment: <input type="text"/>	EN-BATD	\$9.99	1		\$9.99
Grand Total: \$861.99					

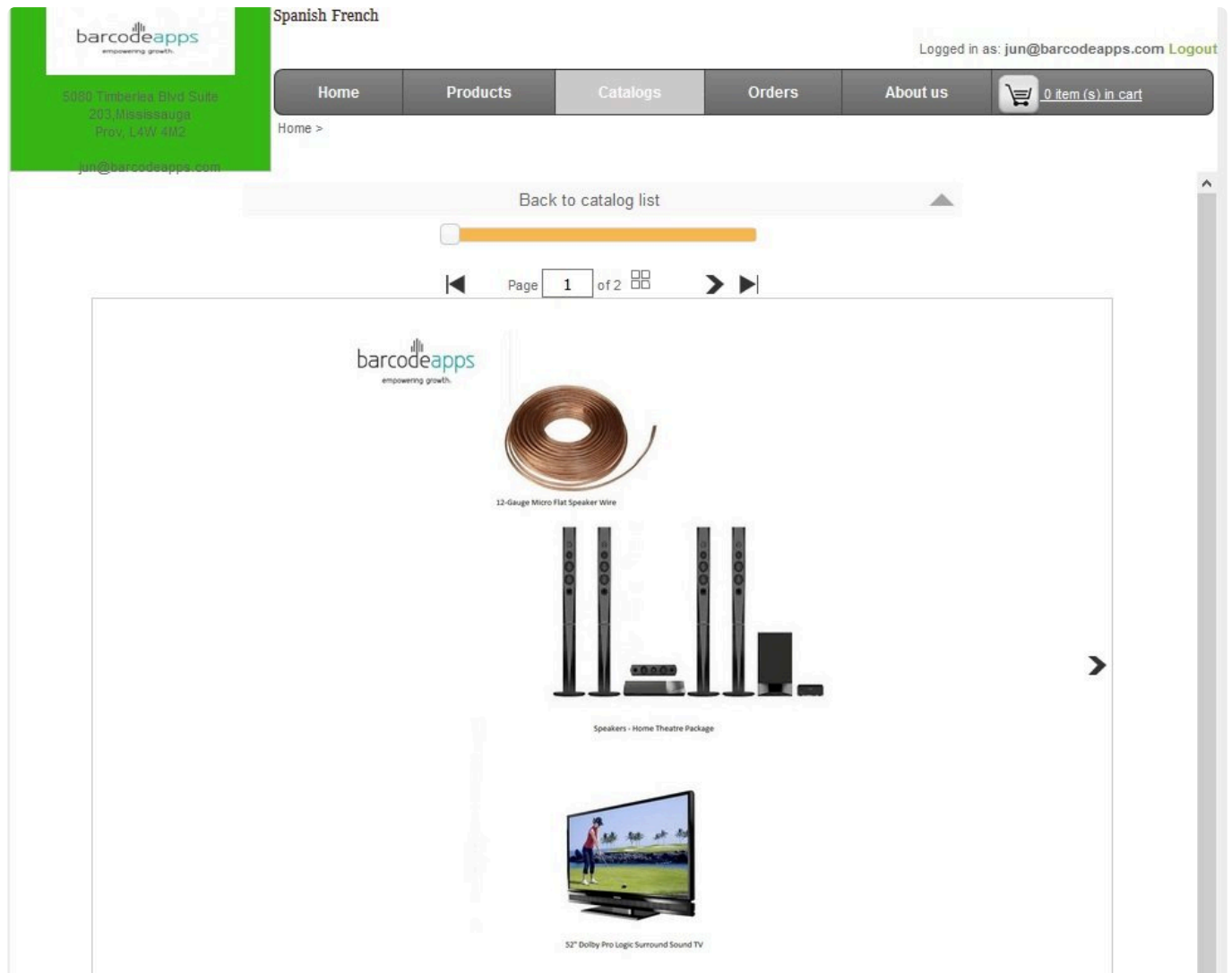
Close and Continue Shopping Create New Order Save as draft Cancel Order Checkout!

1	\$323.70	-	+	1	\$528.30	-	+	1	\$9.99	-	+
EQ-1245 Equalizer (7 band)		EQ-1800 Equalizer (10 band)		FCB-250 Finished cabinet for SP-250							

2.6.2.4. iv. Catalog Page Selector

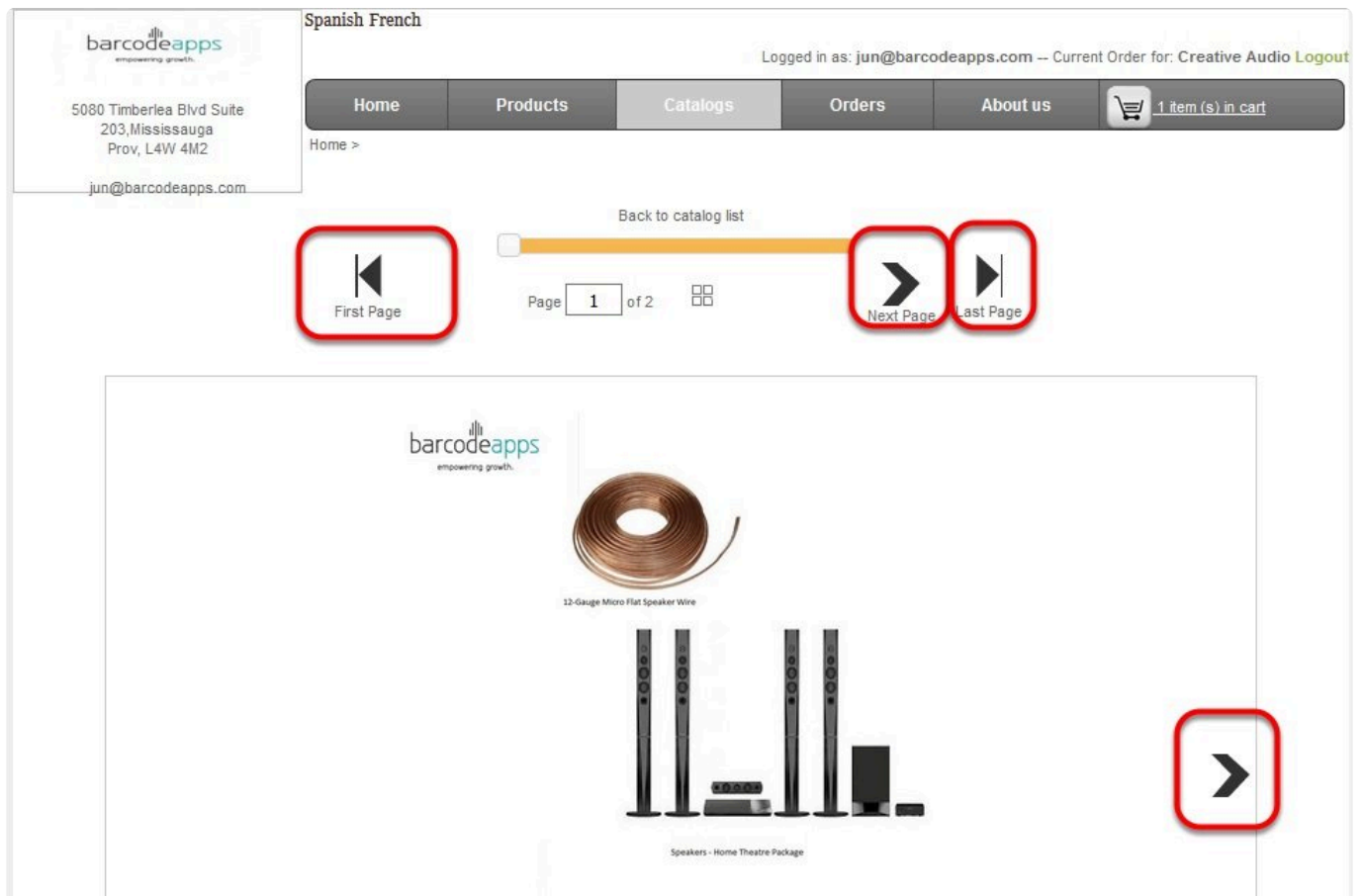
This knowledge base article will guide PRISM web store users on how to navigate through their catalogs in PRISM web store.

CATALOG NAVIGATION

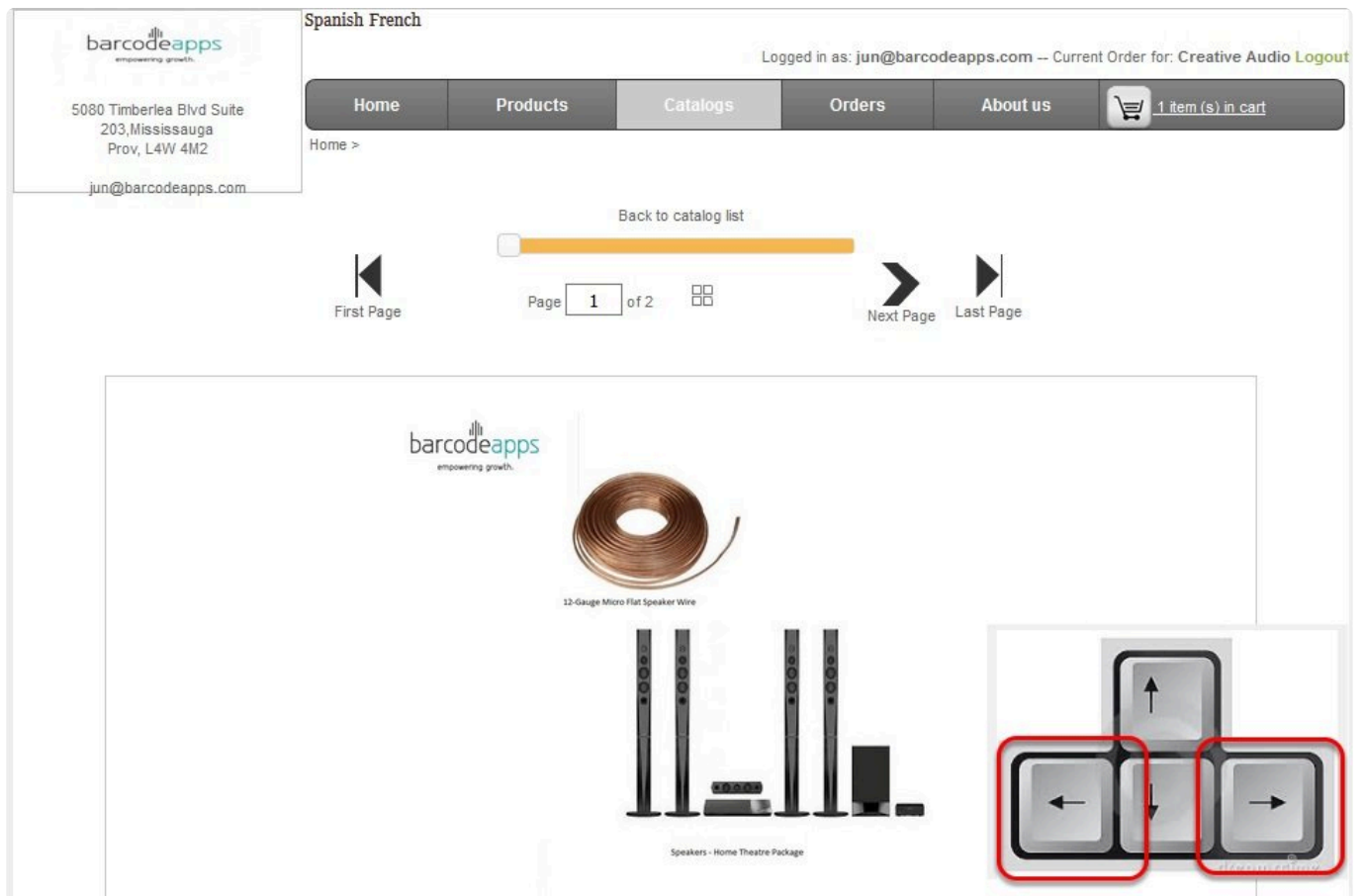


There are 4 ways to navigate through your catalogs in PRISM webstore.

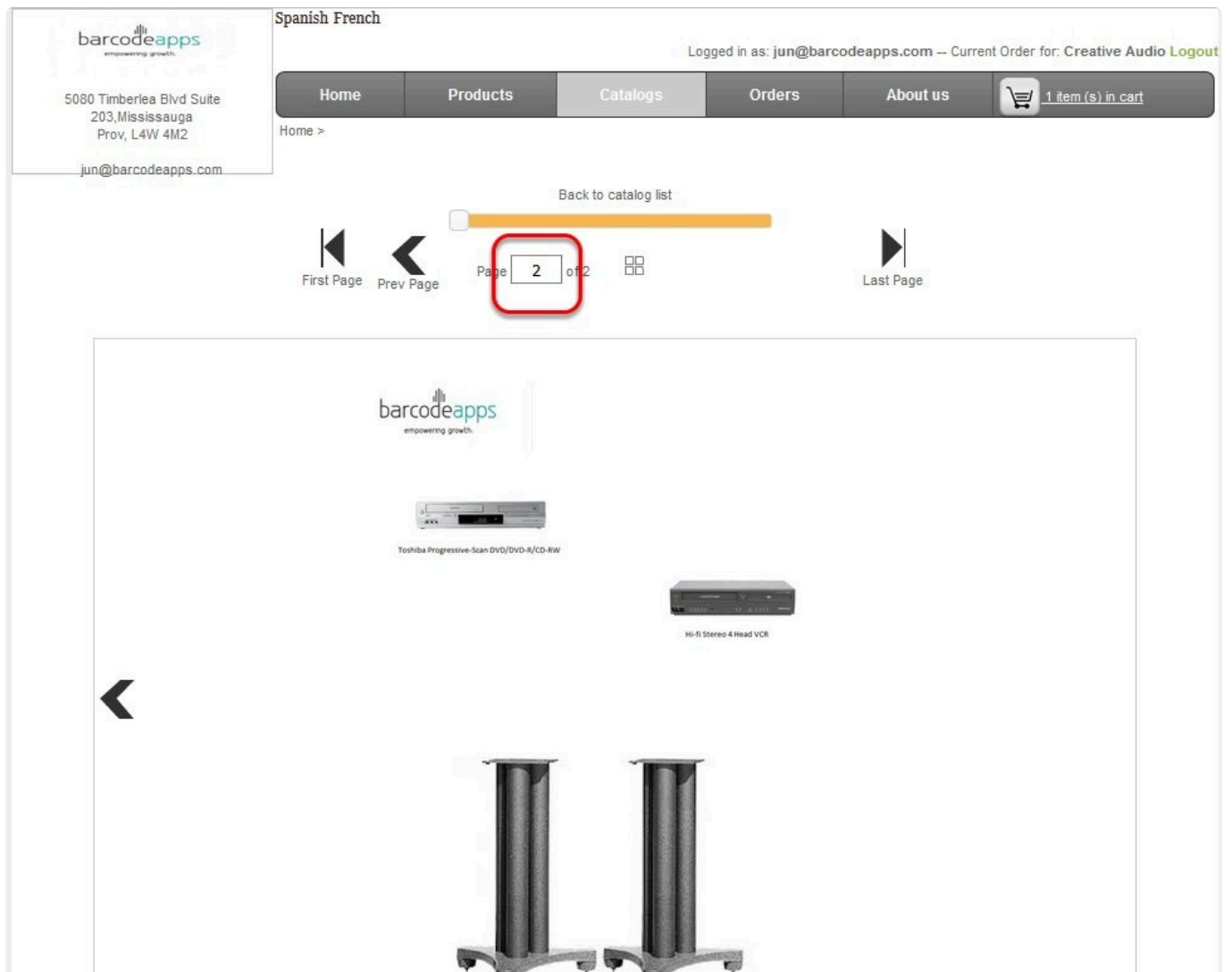
First, you can navigate catalog pages by clicking on the arrow heads.



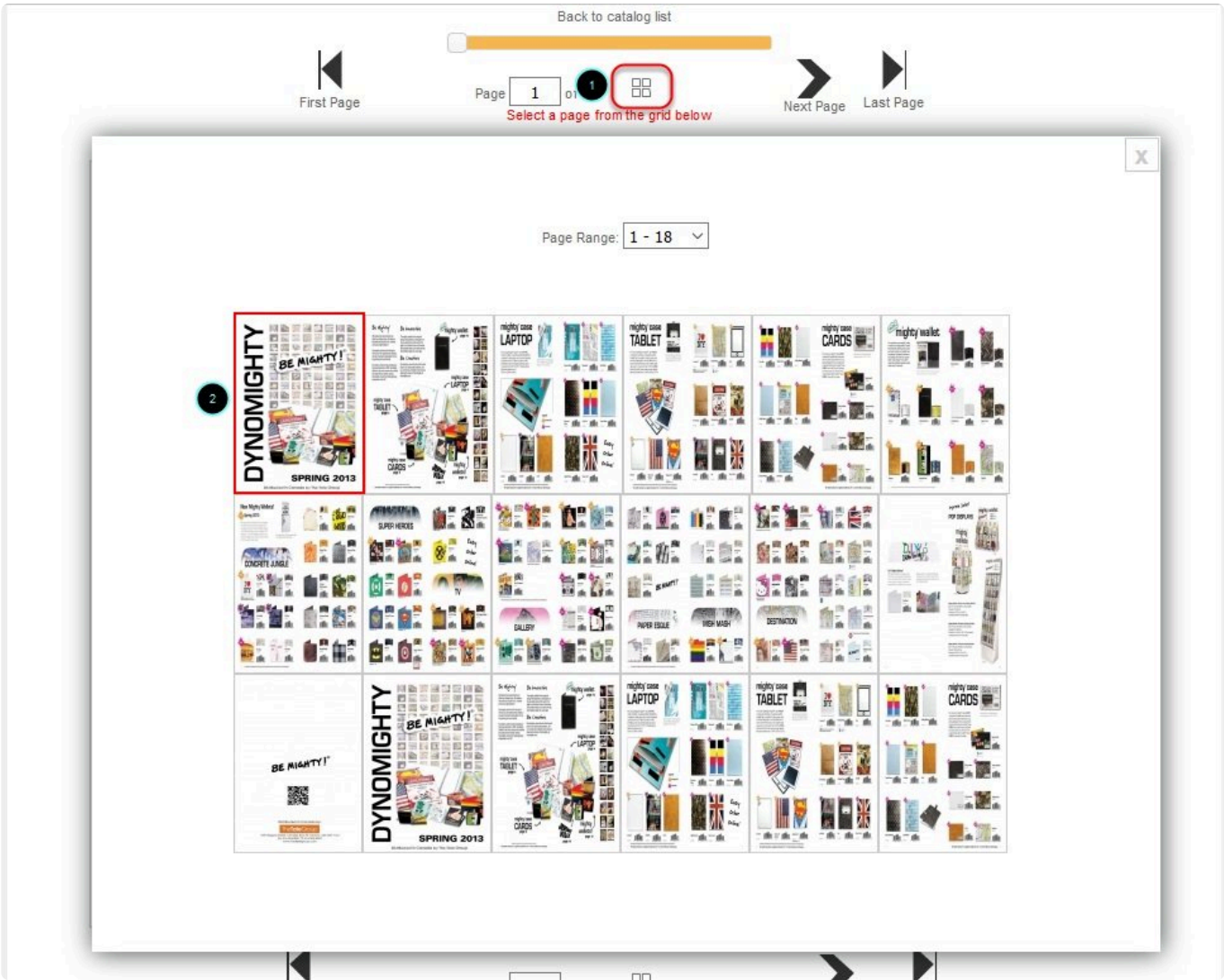
Second, you can use the arrow keys on your keyboard.



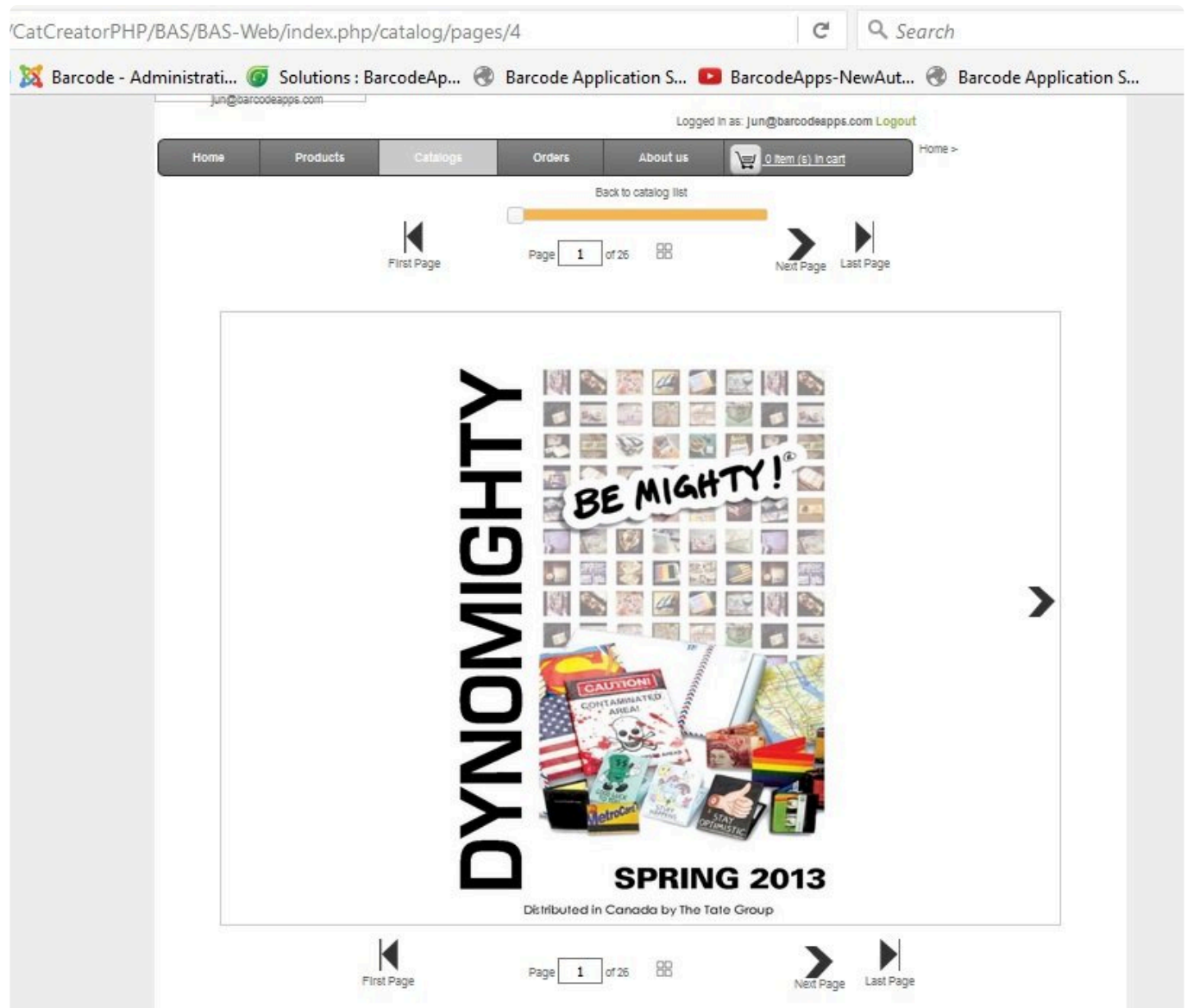
Third, you can specify the page number in the page field then hit Enter on your keyboard.



Lastly, you may click on the grid icon. This option will show you a maximum of 18 thumbnails embedded on a single page. Click on any catalog page to view the actual page.

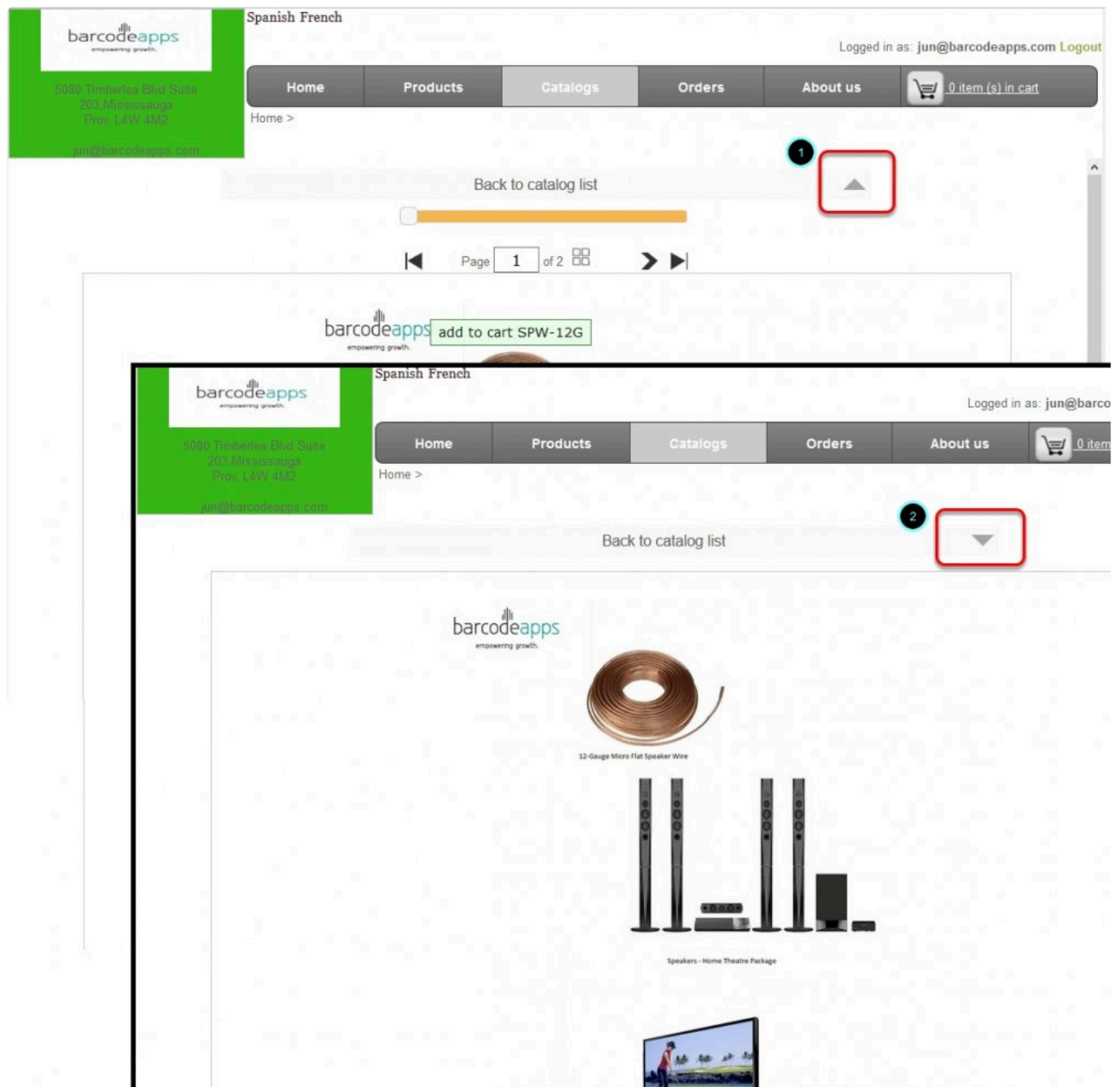


ACTUAL CATALOG PAGE VIEW



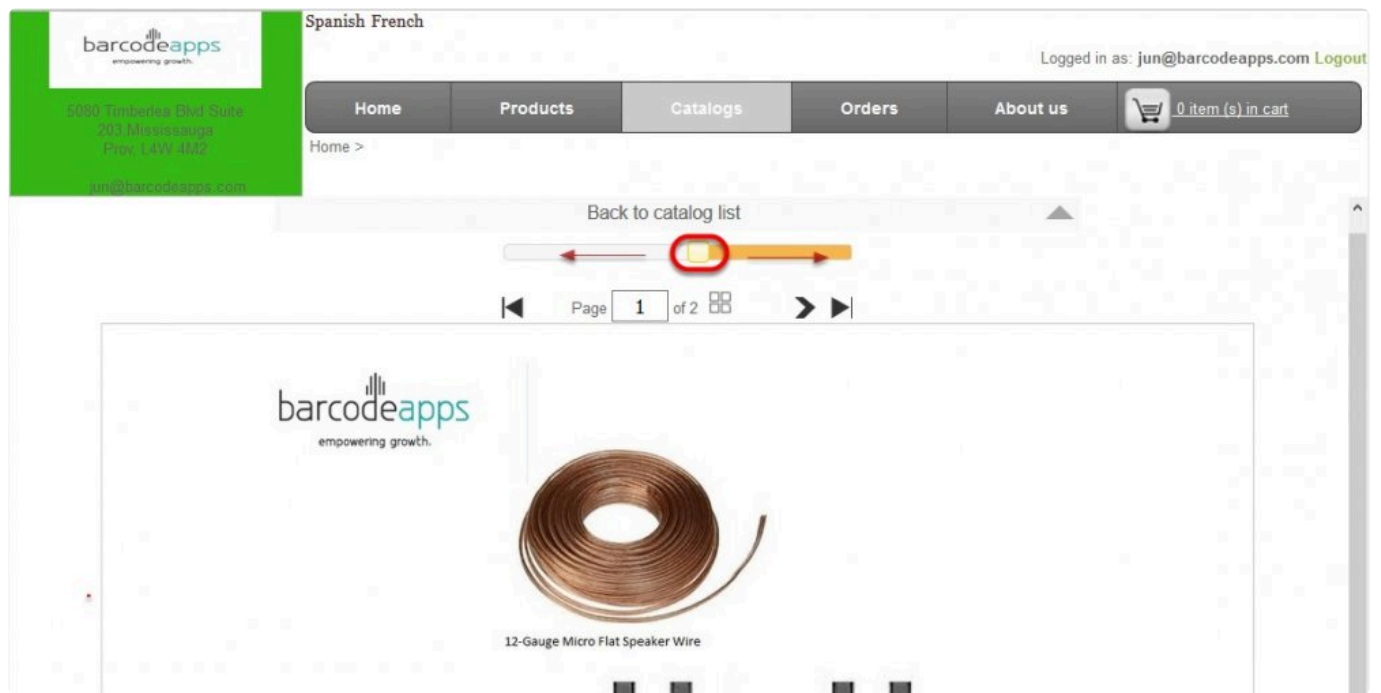
HIDING PAGE SELECTOR TOOLBAR

To Hide the page selector toolbar, just click on the arrow to hide the toolbar.



ZOOM OPTION

To Zoom in a catalog page, move the slider to the left. To zoom out, move it going to the right.



2.6.3. C. Creating A New Order

2.6.3.1. i. Creating A New Order

This knowledge base article will guide users on how to create an order using the PRISM Web Store Portal.

CREATING A NEW ORDER IN PRISM WEBSTORE

To create a new order first select a customer in the customer screen.

The screenshot shows the BarcodeApps PRISM Web Store Portal. The user is logged in as jun@barcodeapps.com. The current order is for Creative Audio. The user is in the 'Orders' section, and the 'Home' button is selected. The user is prompted to 'Select a customer from the list below to start an order'. A search bar is available with the text 'Search by customer code'. The list of customers is displayed in a table with columns: CODE, NAME, ADDRESS, and TELEPHONE #. The customer 'Creative Audio' is highlighted with a red circle.

CODE	NAME	ADDRESS	TELEPHONE #
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catherine's St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3 Toronto	4166243333
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145867660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SNDMCH	Sound Machine	1137 West Park Drive Mississauga	4168835656
TERSEA	Terrace Sound Effects	78 Christopher Avenue Toronto	4162222323
TORRAD	Toronto Radio Limited	2316 Avenue Road Toronto	4166655400
WESTEC	Western Electronics	1265 Madison Street Vancouver	6046224900
WHDIST	West Heights Distributors Inc.	5550 Independence Avenue Winnipeg	2049275540
WINSTN	Winston s Computer Consultants	9000 Front St. West Side Toronto	4165908333

Click Yes on the notification window if starting a new order. Click No if you do not want to clear the items on your shopping cart.

basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/category/customersList

Visited Getting Started Barcode - Administrati... Solutions : BarcodeAp... Barcode Application S... BarcodeApps

Show 12

CODE	NAME	ADDRESS
ACE	http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/cart/setcustomerlogin/255	1785 Rexway Ave. Suite 8 Toron
ACME	Ace Electronics	13444 Mockingbird Drive, Unit 3!
ACT		City
BCA		380 St. Catherine's St. Unit 15 M
CAN		1433 West Georgia Street Vanco
CRE		888 Progress Rd. Suite 400 Scarl
CZY		6105 Lange Drive Unit 6 Winnip
DAV		623 York Street Building 3 Toron
DOW		231 Brixton Way Unit 9 Saskatoo
DSN		1250 Yonge Street Toronto
EESN		2486 rue Grande Quebec City
ENTCTR	East End Audio Inc.	3720 Kingston Road Scarboroug
FLRAD	Entertainment Centre	42 Penn Street Unit 6 Markham
FRRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull
GAHIFI	Freemont Radio Corp.	444 Barrington Street, Suite 200
HARCOM	Georgian Hi-fidelity Corp.	1835 Cliff Valley Huntsville
HARDIN	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 1
HARMON	Harding TV Repairs	252 Gladstone Boulevard Suite 6
HARNEW	Harmons Home Theatre Systems	Willowdale
INTSYS	Harris Newland Inc.	283 Jane Street Calgary
JACSN	Integrated Sound Solutions	1197 Bartley Bull Plaza Unit 14 E
LBSTER	Jackson Electronics	1402 West Street Suite 200 Leth
MASTER	Long Brothers Stereo Inc.	600 Niagara Way Niagara Falls
NYAUDI	Masters Computer Systems	8041 Newman Avenue Yarmouth
ONTSND	North York Audio Specialists	104 Griffin Road North High Cou
RADLND	Ontario Sound Emporium Inc.	Building Windsor
SEHIFI	Radio Land	823 Griffin Way North York
SNDMCH	Smith Evans Hi-Fi Design Inc.	1480 Lakeshore Boulevard Toron
TERSEA	Sound Machine	103 MacArthur Drive Suite 459
		Willowdale
		412 River Street Brockville
		1137 West Park Drive Mississauga
		78 Christopher Avenue Toronto


Your order will be cleared and items on the shopping cart will be deleted. Proceed?

No Yes

Once the customer is selected add items to your shopping cart. To add an item to your shopping cart click on the plus sign (+) underneath the product image. Note: Clicking the plus (+) increases the quantity and clicking the minus (-) sign decreases the quantity.

Spanish French







Logged in as: jun@barcodeapps.com -- Current Order for: Creative Audio [Logout](#)

Home Products Catalogs Orders About us  2 item(s) in cart


Home >

Shop by Products Search [Go](#)

Show 12 Page 1 of 5 1 2 3 > [Last](#)

<p>CD-204 Compact Disk Player with Autoskip</p>  <p><input type="text" value="1"/> \$323.70 <input type="button" value="-"/> <input type="button" value="+"/></p>	<p>CD-800 Compact Disk Player - 5 disk capacity</p>  <p><input type="text" value="2"/> \$528.30 <input type="button" value="-"/> <input type="button" value="+"/></p>	<p>EN-BATD Energizer ACCU Rechargeable D Batteries</p>  <p><input type="text" value="0"/> \$9.99 <input type="button" value="-"/> <input type="button" value="+"/></p>
<p>EQ-1245 Equalizer (7 band)</p> 	<p>EQ-1800 Equalizer (10 band)</p> 	<p>FCB-250 Finished cabinet for SP-250</p> 


Alternatively, you can click on the product image and you will be brought to the items view. You can manually specify the quantity in the quantity field. Then hit Add to Cart.




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Click on the picture above to see a larger version.

CD-800

Compact Disk Player - 5 disk capacity

Price: **\$528.30**
Minimum Order Qty: 0

1 Quantity: -

Comments:


Additional Info

[Back](#)

2 [Add to cart](#)

This item has already been added to order. To update the quantity, simply modify it on the quantity box and click on "Add to cart"

When done adding items click on the Shopping Cart icon.


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Find stuff

- CPL
- DVD
- HOM
- MAN
- PMD
- SMART
- SMARTD
- SPK
- SWT
- TV
- CMP

Spanish French







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Home >


Shop by Products

Show Page 2 of 5 [≤](#) [1](#) [2](#) [3](#) [4](#) [≥](#) [Last](#)

<div>N142 Screws for Speakers (SP-250)</div> <div></div> <div><input type="text" value="0"/> \$0.50 <input type="button" value="-"/> <input data-bbox="715 891 746 925" type="button" value="+"/></div>	<div>P1210A Semi-gloss resin paint (SP-250)</div> <div></div> <div><input type="text" value="0"/> \$59.99 <input type="button" value="-"/> <input data-bbox="1066 891 1098 925" type="button" value="+"/></div>	<div>PCM3550 Personal Hand-held Organizer</div> <div></div> <div><input type="text" value="1"/> \$424.80 <input type="button" value="-"/> <input data-bbox="1428 891 1460 925" type="button" value="+"/></div>
<div>PCM8420 Personal Organizer</div> <div></div>	<div>PRCB-250 Unfinished Speaker Cabinet</div> <div></div>	<div>PS-2 Sony Playstation 2</div> <div></div>

CHECKING OUT SCREEN

In the check out screen you can review the items added to your cart, edit their quantity or delete an item. To proceed with your order click the Checkout button.




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3 item(s) in cart


Item Description



Compact Disk Player - 5 disk capacity


Comment:

Compact Disk Player with Autokip






Comment:

Personal Hand-held Organizer



Comment:

Item Code	Price	Qty	Action	Total
CD-800	\$528.30	<input type="text" value="2"/>		\$1056.60
CD-204	\$323.70	<input type="text" value="1"/>		\$323.70
PCM3550	\$424.80	<input type="text" value="1"/>		\$424.80

Grand Total: **\$1805.10**

[Close and Continue Shopping](#)
[Create New Order](#)
[Save as draft](#)
[Cancel Order](#)
[Checkout!](#)

<div>0</div> <div>\$0.50</div> <div>-</div> <div>+</div>	<div>0</div> <div>\$59.99</div> <div>-</div> <div>+</div>	<div>1</div> <div>\$424.80</div> <div>-</div> <div>+</div>
PCM8420 Personal Organizer	PRCB-250 Unfinished Speaker Cabinet	PS-2 Sony Playstation 2

ORDER SUMMARY SCREEN

In the order summary screen you can specify the shipping date and select the type of payment option (e.g. COD, Credit Card, and Credit Card on file). You can also specify if the order is a back order, complete ship only or set order to confirm/hold. Once done click Complete Order. Click Close and Continue Shopping should you want to add more items to your order.

jun@barcodeapps.com

Order Summary

Customer Code: CREAUD Order Date : 2016-03-11 19:37:14
Customer Name: Creative Audio Sales Person Name: 1 Req. Ship date
Shipping address: 6105 Lange Drive Unit 6, Winnipeg, MB, R6E 1J6 Cancel date

Product Code	Description	Quantity	Price
CD-800	Compact Disk Player - 5 disk capacity Comment:	2	\$1056.60
CD-204	Compact Disk Player with Autoskip Comment:	1	\$323.70
PCM3550	Personal Hand-held Organizer Comment:	1	\$424.80
Order Total			\$1805.10

Shipping address & Special instructions:

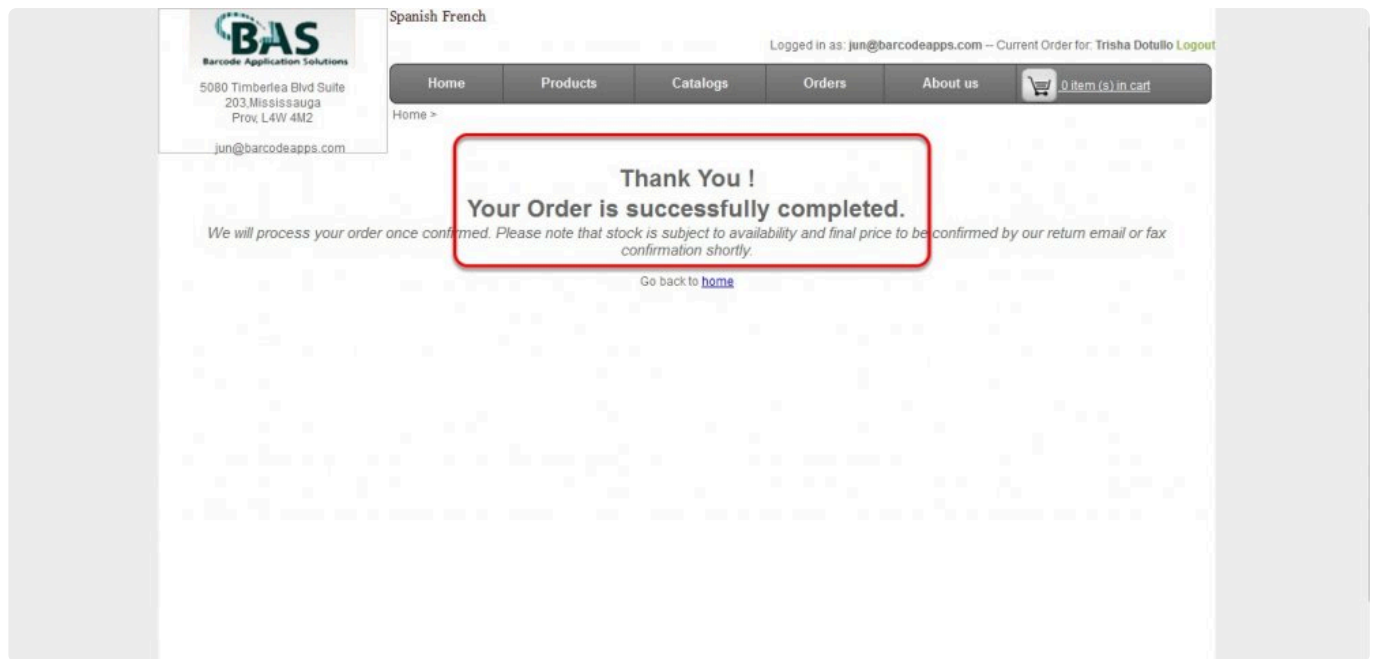
2 Payment Options ▼

Back Order ☒
Complete ship only ☐
Confirm/Hold ☐

Close and Continue Shopping Clear Order 3 Complete Order

ORDER CONFIRMATION

A message will pop up on your screen to confirm that you have successfully submitted your order in PRISM Web store.




2.6.3.2. ii. Shop By Catalog

This knowledge base article will guide customers on how to add items to an order using the catalog functionality in PRISM web store.

Shopping by Catalog

First, select a customer.



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[0 item\(s\) in cart](#)

Home >

Select a customer from the list below to start an order


Search Search by customer code [Go](#)

Show Page 1 of 1 1

CODE	NAME	ADDRESS	TELEPHONE #
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catherine's St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
CZYARN	Crazy Arnold's Stereo Inc.	623 York Street Building 3 Toronto	4166243333
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145867660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SNDMCH	Sound Machine	1137 West Park Drive Mississauga	4168835656
TERSEA	Terrace Sound Effects	78 Christopher Avenue Toronto	4162222323
TORRAD	Toronto Radio Limited	2316 Avenue Road Toronto	4166655400
WESTEC	Western Electronics	1265 Madison Street Vancouver	6046224900
WHDIST	West Heights Distributors Inc.	5550 Independence Avenue Winnipeg	2049275540
WINSTN	Winston's Computer Consultants	9000 Front St. West Side Toronto	4165908333

- CPL
- DVD
- HOM
- MAN
- PMD
- SMART
- SMARTD
- SPK
- SWT
- TV
- CMP

Click Yes on the notification window if starting a new order. Click No if you do not want to clear the items on your shopping cart.



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- TV
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 0 item(s) in cart

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Select a customer from the list below to start an order

Search by customer code

Show 72 Page 1 of 1 1


CODE	NAME	ADDRESS	TELEPHONE #
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
ACTECH	Access Technologies	380 St. Catharines St. Unit 15 Montreal	5143648080
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
		reet Building 3 Toronto	4166243333
		Way Unit 9 Saskatoon	3064952713
		Street Toronto	4163662900
		ande Quebec City	5143919293
		on Road Scarborough	4164453434
		et Unit 6 Markham	9057348122
		Street Unit 3 Hull	5145867660
		on Street, Suite 200 Halifax	9028856500
		alley Huntsville	7052521616
			9055559700
			9055559696
			6045554321
			9055551438
			2048224901
			9056589445
			9024249787
			5197223654
			4165394575
			4165556262
			9052547699
			7052726339
			4168835656
			4162222323
			4166855400
			6046224900
			2049275540
			4165908333

Your order will be cleared and items on the shopping cart will be deleted. Proceed?

NoYes

BARCOM	Barney Computer As	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SNDMCH	Sound Machine	1137 West Park Drive Mississauga	4168835656
TERSEA	Terrace Sound Effects	78 Christopher Avenue Toronto	4162222323
TORRAD	Toronto Radio Limited	2316 Avenue Road Toronto	4166855400
WESTEC	Western Electronics	1265 Madison Street Vancouver	6046224900
WHDIST	West Heights Distributors Inc.	5550 Independence Avenue Winnipeg	2049275540
WINSTN	Winston s Computer Consultants	9000 Front St. West Side Toronto	4165908333

Go to Catalogs menu.




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- SMARTD
- SPK
- SWT
- TV
- CMP

Spanish French







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Home >

Shop by Products

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<div>CD-204 Compact Disk Player with Autoskip</div> <div></div> <div><div><input type="text" value="0"/></div><div>\$323.70</div><div><input type="button" value="-"/> <input type="button" value="+"/></div></div>	<div>CD-800 Compact Disk Player - 5 disk capacity</div> <div></div> <div><div><input type="text" value="0"/></div><div>\$528.30</div><div><input type="button" value="-"/> <input type="button" value="+"/></div></div>	<div>EN-BATD Energizer ACCU Rechargeable D Batteries</div> <div></div> <div><div><input type="text" value="0"/></div><div>\$9.99</div><div><input type="button" value="-"/> <input type="button" value="+"/></div></div>
<div>EQ-1245 Equalizer (7 band)</div> <div></div>	<div>EQ-1800 Equalizer (10 band)</div> <div></div>	<div>FCB-250 Finished cabinet for SP-250</div> <div></div>

Click on the catalog you want to view.



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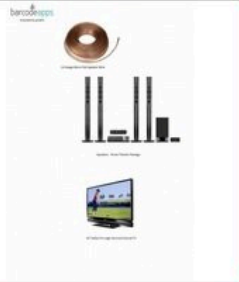
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Home >

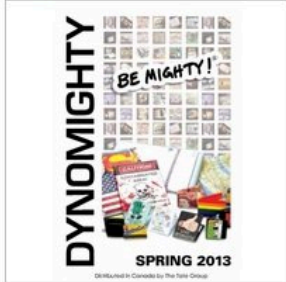
Shop by Catalogs

Search Catalogs [Go](#)

BarcodeAppsCatalog2016



TEST1

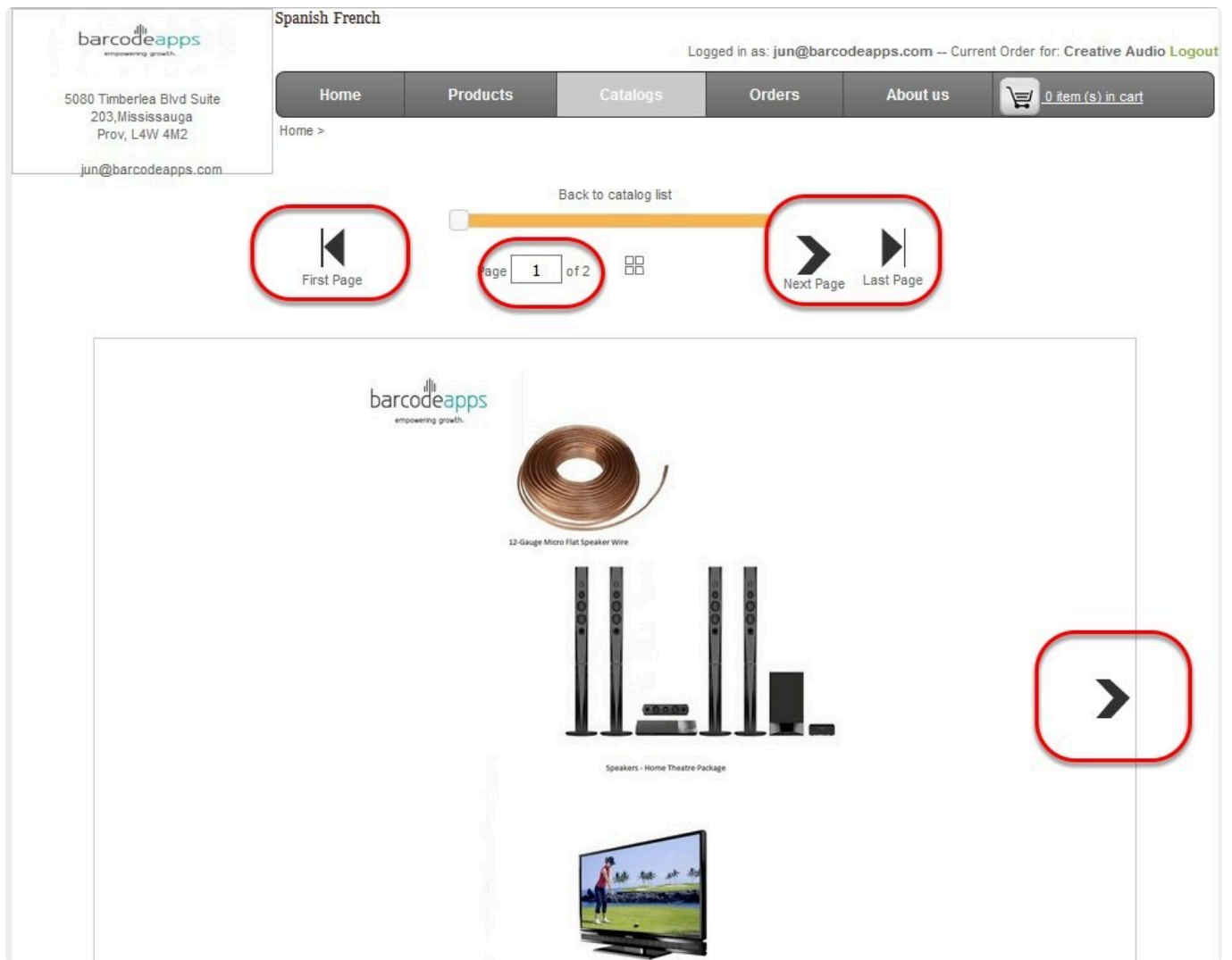


Show Page 1 of 1 1

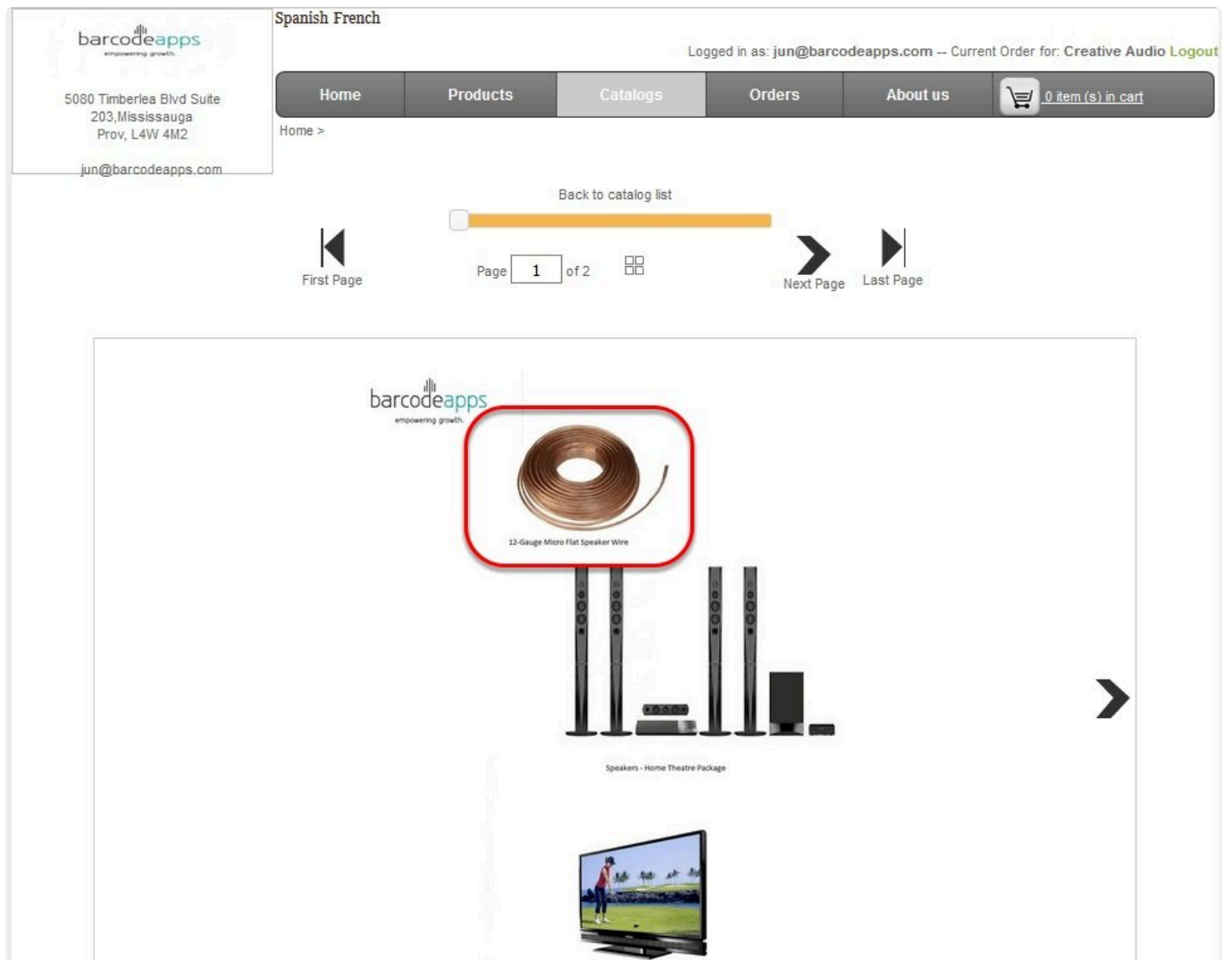
Show Page 1 of 1 1

Click on the arrow heads to navigate through your catalog pages or you can simply use your keyboard's arrow keys.


To jump to a specific page, just specify the page number inside the page field then hit Enter on your keyboard.



To add an item to your order click on the product image from your catalog page.




In the item details screen, you can specify the quantity you desire in the quantity field. Alternatively, you can click on the plus sign (+) or minus sign (-) buttons. Once done click on the Add to cart button. Click on the Shopping Cart icon to review items added to your order.




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[Home >](#)



Click on the picture above to see a larger version.

SP-500

Speakers - Home Theatre Package

Price: **\$765.40**
Minimum Order Qty: 0

Quantity:
Comments:

Additional Info

[Back](#)

[Add to cart](#)

2.6.3.3. iii. Check Out Menu

This knowledge base article will explain the different menus and their functions when completing an order in PRISM web store.

CHECKOUT MENU

The screenshot shows the BarcodeApps checkout interface. At the top, there's a header with the BarcodeApps logo, contact information (5080 Timberlea Blvd Suite 203, Mississauga, Prov, L4W 4M2), and a navigation bar with links: Home, Products, Catalogs, Orders, About us. A shopping cart icon shows '3 item(s) in cart'. The user is logged in as 'jun@barcodeapps.com' with a 'Logout' link. The language is set to 'Spanish French'.

Item Description	Item Code	Price	Qty	Action	Total
Compact Disk Player - 5 disk capacity Comment: <input type="text"/>	CD-800	\$528.30	2		\$1056.60
Compact Disk Player with Autoskip Comment: <input type="text"/>	CD-204	\$323.70	1		\$323.70
Personal Hand-held Organizer Comment: <input type="text"/>	PCM3550	\$424.80	1		\$424.80

Grand Total: **\$1805.10**

At the bottom, there are several buttons: 'Close and Continue Shopping', 'Create New Order', 'Save as draft', 'Cancel Order', and 'Checkout!'. Below these buttons is a summary table:

0	\$0.50	-	+	0	\$59.99	-	+	1	\$424.80	-	+
PCM8420 Personal Organizer				PRCB-250 Unfinished Speaker Cabinet				PS-2 Sony Playstation 2			

- 1. Comment** – Additional information can be added on the comments field.
- 2. Quantity Box** – In this box you can specify or edit the quantity of your item.
- 3. Delete** (red X button) – Clicking on this button will remove the item from your order.
- 4. Close and Continue Shopping** – This closes the checkout screen and brings you back to the products screen.
- 5. Create New Order** – This option allows you to create a new order and will prompt you to cancel your existing order or save your existing order as a draft.

6. **Save as draft** – This will save your current order as a draft.
7. **Cancel Order** – Click on this button to cancel your order.
8. **Checkout** – Click on this button if you want to complete your order.

2.6.3.4. iv. Cancel Order

This knowledge base article will guide users on how they can cancel an order using the PRISM Web Store.

Cancelling an Order

To cancel an order.

Spanish French

Logged in as: jun@barcodeapps.com -- Current Order for: Creative Audio [Logout](#)

Home Products Catalogs Orders About us 0 item(s) in cart

Home >


Select a customer from the list below to start an order

Search Search by customer code

Show Page 1 of 1 1

CODE	NAME	ADDRESS	TELEPHONE #
5145867660	http://basmax1.dyndns.biz/CatCreatorPHP/BAS/BAS-Web/index.php/cart/setcustomerlogin/473		1
ACE	Ace Electronics	Florence Radio Systems 1891 Main Street Unit 3	14
ACME	Acme Electronics Corp.	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACTECH	Access Technologies	13444 Mockingbird Drive, Unit 35A King City	9055953343
BCAUDI	British Columbia Audio	380 St. Catherine's St. Unit 15 Montreal	5143648080
CANSPK	Canadian Speakers Limited	1433 West Georgia Street Vancouver	6046851212
CREAUD	Creative Audio	888 Progress Rd. Suite 400 Scarborough	4166563300
CZYARN	Crazy Arnold's Stereo Inc.	6105 Lange Drive Unit 6 Winnipeg	2045846601
DAVIS	Davis Electronics	623 York Street Building 3 Toronto	4166243333
DOWNTN	Downtown Stereo Mart Ltd.	231 Brixton Way Unit 9 Saskatoon	3064952713
DSNDM	Davidson Sound Machine	1250 Yonge Street Toronto	4163662900
EESND	East End Audio Inc.	2466 rue Grande Quebec City	5143919293
ENTCTR	Entertainment Centre	3720 Kingston Road Scarborough	4164453434
FLRAD	Florence Radio Systems	42 Penn Street Unit 6 Markham	9057348122
FRRAD	Freemont Radio Corp.	1891 Main Street Unit 3 Hull	5145867660
GAHIFI	Georgian Hi-fidelity Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
HARCOM	Hardy Computer Associates	1835 Cliff Valley Huntsville	7052521616
HARDIN	Harding TV Repairs	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARMON	Harmons Home Theatre Systems	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARNEW	Harris Newland Inc.	283 Jane Street Calgary	6045554321
INTSYS	Integrated Sound Solutions	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
JACSN	Jackson Electronics	1402 West Street Suite 200 Lethbridge	2048224901
LBSTER	Long Brothers Stereo Inc.	600 Niagara Way Niagara Falls	9056589445
MASTER	Masters Computer Systems	8041 Newman Avenue Yarmouth	9024249787
NYAUDI	North York Audio Specialists	104 Griffin Road North High Court Building Windsor	5197223654
ONTSND	Ontario Sound Emporium Inc.	823 Griffin Way North York	4165394575
		1460 Lakeshore Boulevard Toronto	4165556262

Click on the cancel button on the bottom of the order summary window




junpbas@gmail.com







Spanish French

Logged in as: junpbas@gmail.com -- Current Order for: A AUTO UPHOLSTERY [Logout](#)

HomeProductsCatalogsOrdersAbout us

 3 item (s) in cart

Home >

Item Description	Item Code	Price	Qty	Action	Total
 <div>6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA</div> <div>Comment: <input type="text"/></div>	00019-10	\$29.95	<input type="text" value="1"/>		\$29.95
 <div>6800 W5331 240 PC NUTS</div> <div>Comment: <input type="text"/></div>	00106-20	\$15.80	<input type="text" value="1"/>		\$15.80
 <div>6800 W5216 350 PC MACH LOCK</div> <div>Comment: <input type="text"/></div>	00121-20	\$9.80	<input type="text" value="1"/>		\$9.80

Grand Total: **\$55.55**

Close and Continue Shopping

Create New Order

Save as draft

Cancel Order

Checkout!

00121-30 6800 W5218 720 PC INT/EXT MACH WASHER SMALL DRAWER ASSORTMENT	00150-25 6800 W5342 106 PC SOCKET HEADS SMALL DRAWER ASSORTMENT	00165-10 451 PC PHILLIP HEAD MACHINE SCREW SMALL DRAWER ASSORT LIST 86.73
--	---	---

Click Yes on the confirmation box.

ment:

W5331 240 PC NUTS

ment:

W5216 350

ment:

Cancel Order

Are you sure cancel this order?

YES

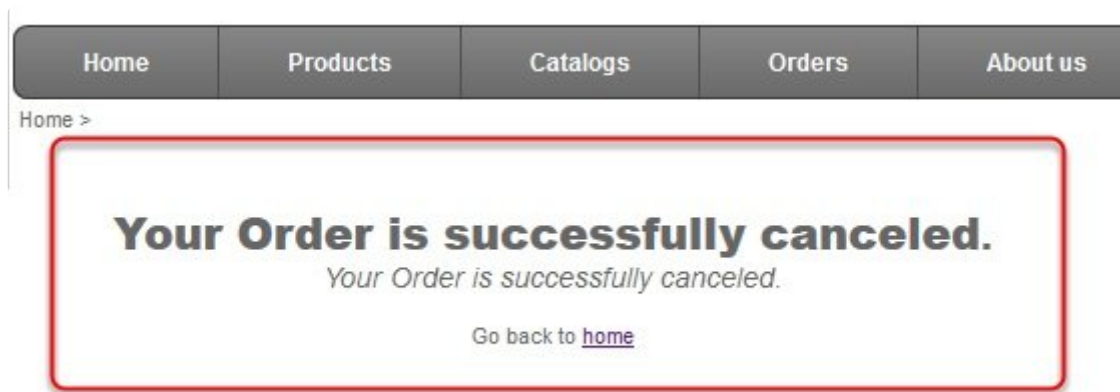
NO

Create New Order

Save as draft

Cancel Order

An order summary will show once cancellation is completed




RECOVER CANCELLED ORDER

If an order is cancelled by mistake or there is a sudden change of mind to push the order back. The cancelled order can always be recovered.

To recover a cancelled order, click on Orders from the PRISM WEB STORE options




Click on canceled.



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[Catalogs](#)
[Orders](#)
[About us](#)
 0 item(s) in cart

Home >


[Pending](#) | [Processed](#) | **[Canceled](#)** | [Draft](#)

Search Order [Go](#)

Viewing Pending Orders

Order ID	Customer Name	Order Date	Total
5	BUILDERS TRASH SERVICE	2016-04-04 17:17:59.000	\$223.15
10	3M	2016-04-05 12:24:46.000	\$9.80


All cancelled order should appear now on the table below. Now select the order that has to be recovered



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 0 item(s) in cart

Home >


[Pending](#) | [Processed](#) | **[Canceled](#)** | [Draft](#)

Search Order [Go](#)

Viewing Canceled Orders

Order ID	Customer Name	Order Date	Total
2	BRIDGES BROS. TRUCKING L.L.C.	2016-06-08 15:05:01.000	\$80.24
3	BRIDGES BROS. TRUCKING L.L.C.	2016-06-08 15:05:37.000	\$79.00
4	BRIDGES BROS. TRUCKING L.L.C.	2016-06-08 15:05:56.000	\$71.02
5	BRIDGES BROS. TRUCKING L.L.C.	2016-06-08 15:14:55.000	\$55.55


The order details should show now on the screen. To use the same details, just click on Copy Order.



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[Home >](#)

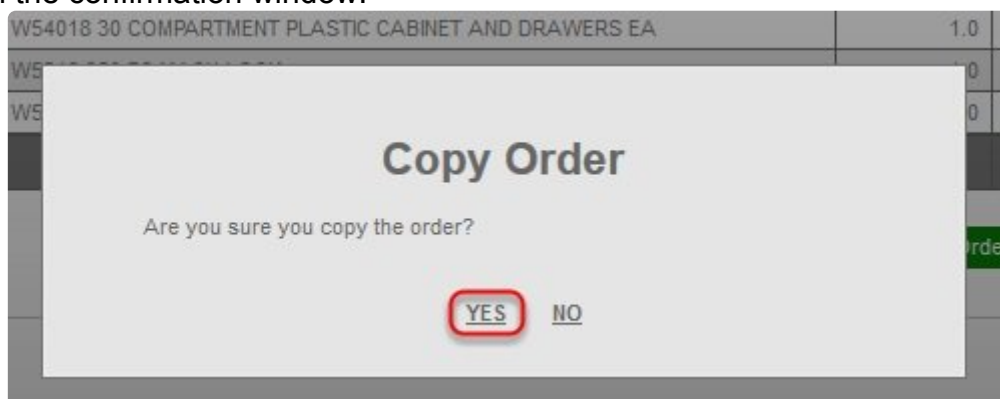
Order Details: 225-06-08-2016-14

Customer Name: Babcock Sales Person Name: 814

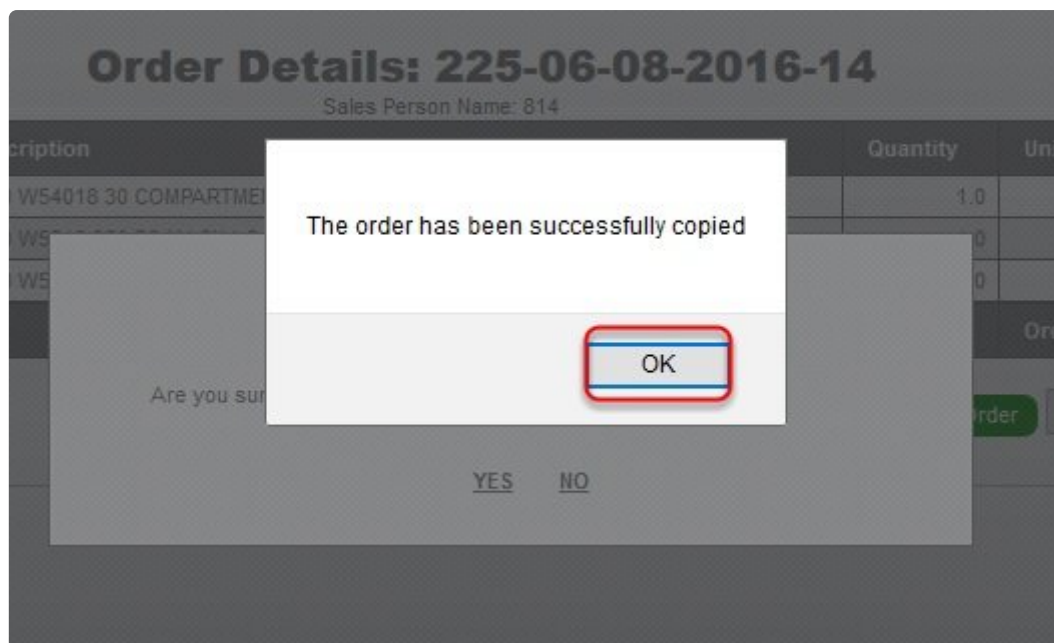
S.No.	Product Code	Description	Quantity	Unit Price	Sub Total
1	00019-10	6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA	1.0	\$29.95	\$29.95
2	00121-20	6800 W5216 350 PC MACH LOCK	1.0	\$9.80	\$9.80
3	00106-20	6800 W5331 240 PC NUTS	1.0	\$15.80	\$15.80
Order Total					\$55.55

[Copy Order](#) [Back to Order Summary](#)


Click Yes on the confirmation window.



Click on Ok.




Now the order is back on the shopping cart just click on Check out to complete the order.







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Home >

Item Description	Item Code	Price	Qty	Action	Total
 6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA Comment: <input type="text"/>	00019-10	\$29.95	<input type="text" value="1.0"/>		\$29.95
 6800 W5216 350 PC MACH LOCK Comment: <input type="text"/>	00121-20	\$9.80	<input type="text" value="1.0"/>		\$9.80
 6800 W5331 240 PC NUTS Comment: <input type="text"/>	00106-20	\$15.80	<input type="text" value="1.0"/>		\$15.80

Grand Total: **\$55.55**


[Close and Continue Shopping](#) [Create New Order](#) [Save as draft](#) [Cancel Order](#) [Checkout!](#)

2.6.3.5. v. Save as Draft

This knowledge base article will guide user to save an order as a draft using the PRISM Web Store.

SAVING AS DRAFT

To save an Order as a Draft.







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Item Description	Item Code	Price	Qty	Action	Total
 6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA Comment: <input type="text"/>	00019-10	\$29.95	<input type="text" value="1.0"/>		\$29.95
 6800 W5216 350 PC MACH LOCK Comment: <input type="text"/>	00121-20	\$9.80	<input type="text" value="1.0"/>		\$9.80
 6800 W5331 240 PC NUTS Comment: <input type="text"/>	00106-20	\$15.80	<input type="text" value="1.0"/>		\$15.80

Grand Total: **\$55.55**


[Close and Continue Shopping](#) [Create New Order](#) [Save as draft](#) [Cancel Order](#) [Checkout!](#)

Click on the save as draft button on the bottom of the order summary window


Spanish French







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Home >



Item Description	Item Code	Price	Qty	Action	Total
 6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA Comment: <input type="text"/>	00019-10	\$29.95	<input type="text" value="1.0"/>		\$29.95
 6800 W5216 350 PC MACH LOCK Comment: <input type="text"/>	00121-20	\$9.80	<input type="text" value="1.0"/>		\$9.80
 6800 W5331 240 PC NUTS Comment: <input type="text"/>	00106-20	\$15.80	<input type="text" value="1.0"/>		\$15.80

Grand Total: **\$55.55**

Close and Continue Shopping

Create New Order

Save as draft

Cancel Order

Checkout!

Click yes on the confirmation box.

ent:

216 350 PC MACH LOCK

ent:

331 240

ent:

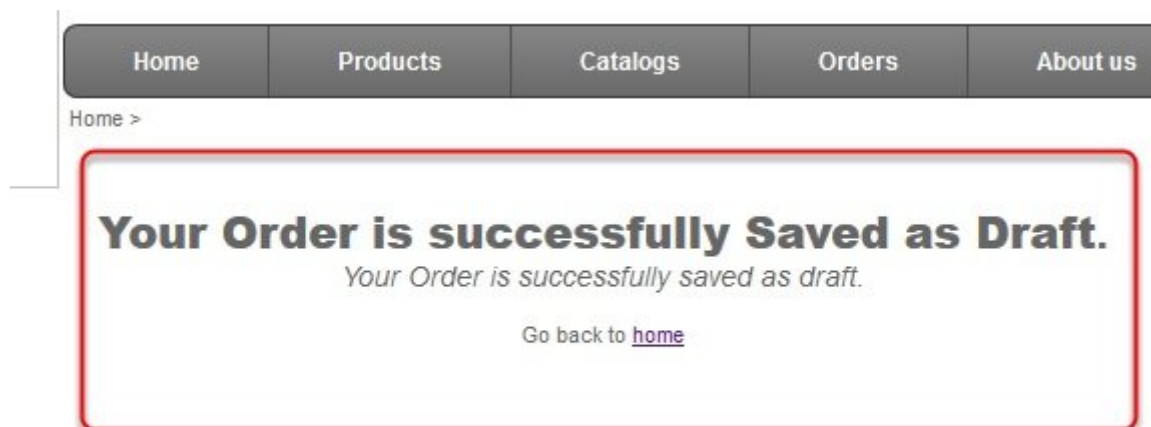
Save as draft

Are you sure save as draft?

YES

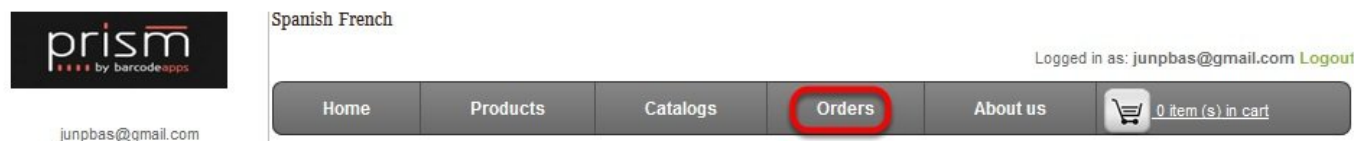
NO

An order summary will show once draft is saved

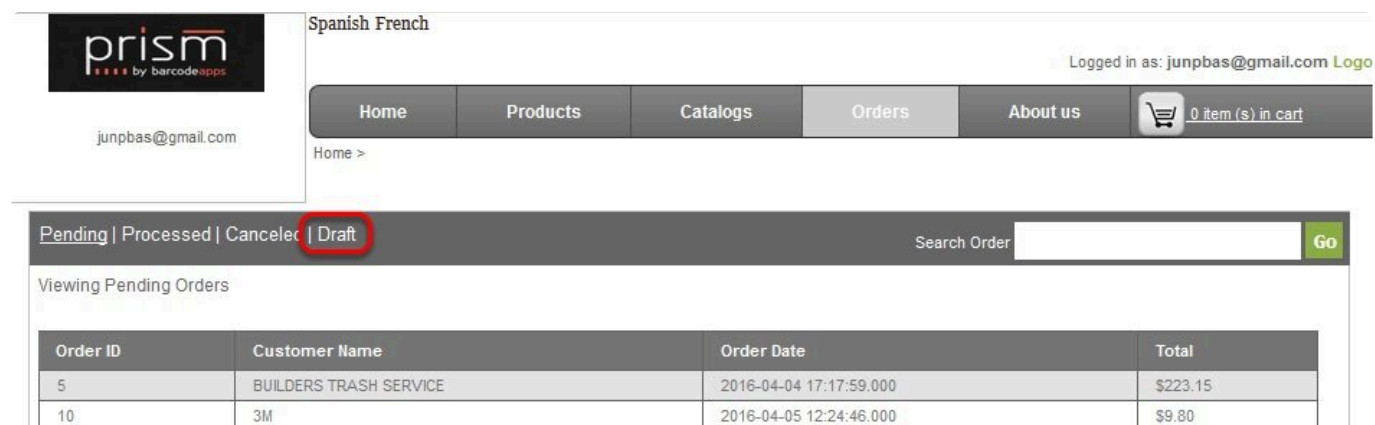


REVIEWING DRAFT ORDERS


To review draft orders, click on the orders tab on the Home window.



Click on Draft.




Click on the Draft that needs to be reviewed.



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Home Products Catalogs **Orders** About us  0 item(s) in cart

Home >


Pending | Processed | Canceled | **Draft**

Search Order [Go](#)

Viewing Orders Saved as Draft

Order ID	Customer Name	Order Date	Total
1	BRIDGES BROS. TRUCKING L.L.C.	2016-06-08 15:04:38.000	\$55.40
6	BARCOCK	2016-06-08 15:31:05.000	\$55.55


The order details should show now on the screen. To use the same details in an Order, just click on Copy Order.



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Home Products Catalogs **Orders** About us  0 item(s) in cart

Home >

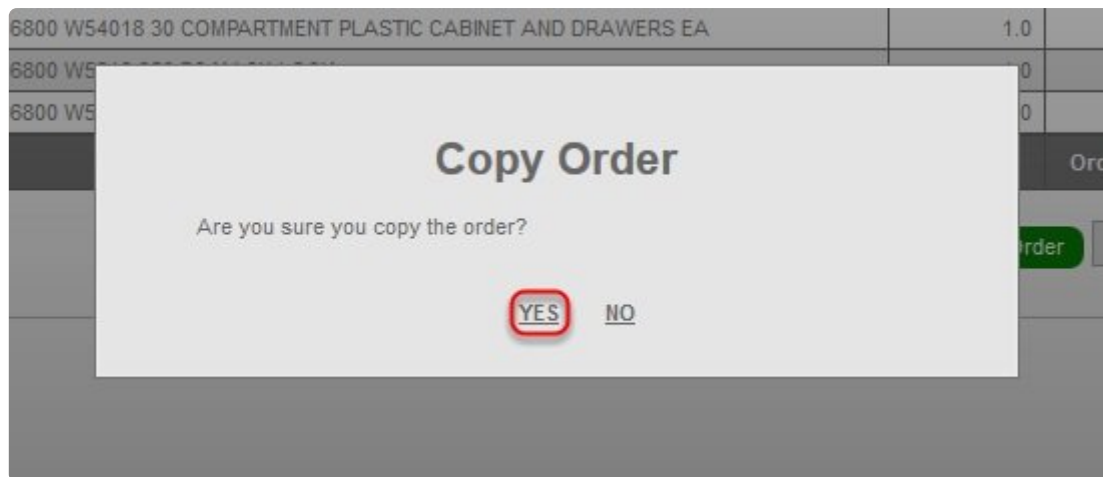
Order Details: 814-06-08-2016-31

Customer Name: Babcock Sales Person Name: 814

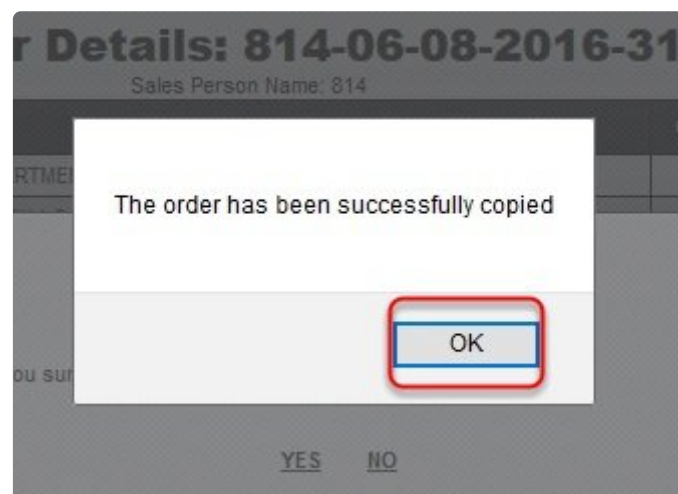
S.No.	Product Code	Description	Quantity	Unit Price	Sub Total
1	00019-10	6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA	1.0	\$29.95	\$29.95
2	00121-20	6800 W5216 350 PC MACH LOCK	1.0	\$9.80	\$9.80
3	00106-20	6800 W5331 240 PC NUTS	1.0	\$15.80	\$15.80
				Order Total	\$55.55

[Copy Order](#) [Back to Order Summary](#)


Click Yes on the confirmation window



Click on OK




Now the order is back on the shopping cart just click on Check out to complete the order.



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Home >

[CLOSE](#)

Item Description	Item Code	Price	Qty	Action	Total
 6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA Comment: <input type="text"/>	00019-10	\$29.95	<input type="text" value="1.0"/>		\$29.95
 6800 W5216 350 PC MACH LOCK Comment: <input type="text"/>	00121-20	\$9.80	<input type="text" value="1.0"/>		\$9.80
 6800 W5331 240 PC NUTS Comment: <input type="text"/>	00106-20	\$15.80	<input type="text" value="1.0"/>		\$15.80

Grand Total: **\$55.55**

[Close and Continue Shopping](#) [Create New Order](#) [Save as draft](#) [Cancel Order](#) [Checkout!](#)


2.6.4. D. PRISM WEBSTORE FEATURES

2.6.4.1. i. Related Products

This knowledge base article will explain how to enable and use the relate product feature in PRISM.

RELATING A PRODUCT TO OTHER PRODUCTS


A product item can be related or be linked to another product in an inventory. This feature can be best used to show other items with the same class, items that are compatible with the featured items, etc. In our example below, MD46 is related to the items shown on the bottom.

Spanish French

3025 Timberline Blvd Suite 201
Mesa Arizona 85205
Phone: 480-410-4100
info@barcodeapps.com

Logged in as: [junt@barcodeapps.com](#) [Logout](#)

[Home](#) [Products](#) [Catalogs](#) [Orders](#) [About us](#) [0 item\(s\) in cart](#) [Home >](#)



MD46

6" Midrange Cone Speaker

MAIN PRODUCT

Click on the picture above to see a larger version.






Price: **\$37.40**
Minimum Order Qty: 0

Quantity:
Comments:

Additional Info

[Back](#) [Add to cart](#)

Related Products

<p>8P-20 Speakers - 10" Bookshelf</p> 	<p>8P-101 Speakers - Bookshelf</p> 	<p>PRCB-260 Unfinished Speaker Cabinet</p> 
<p>8T-26 Stand - 24" Speaker</p> 	<p>8T-30 Stand - 30" Speaker</p> 	

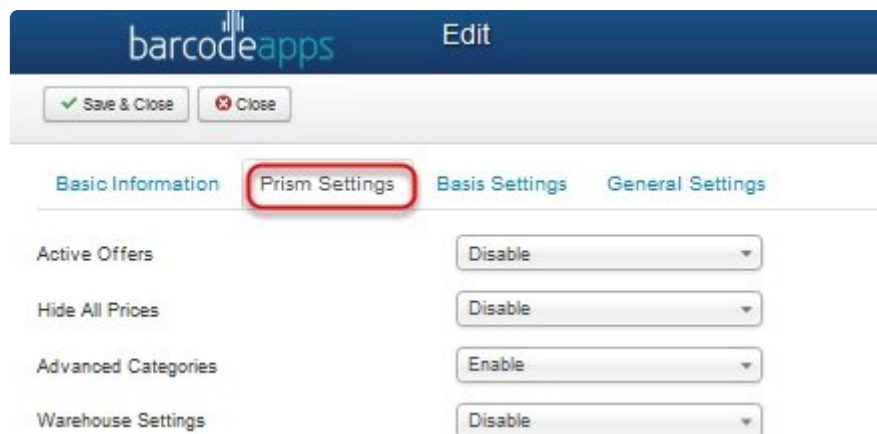
ENABLING RELATED PRODUCTS FEATURE

To enable related products. Login to the Prism Joomla Website using your admin credentials. On the manufacturer window click on the drop down arrow just before the manufacturer code and then select edit.

The screenshot shows the BarcodeApps web interface. At the top, there is a navigation bar with links: Barcode, System, Content, Manufacturers, PRISM, and BASIS. Below this is a header for 'Manufacturers (1)' with the BarcodeApps logo. A toolbar contains buttons for 'Edit', 'Update DBConfig', 'Get RepCodes Details', and 'Details Config'. A filter section on the left shows a dropdown for 'State'. A search bar with 'Buscar...' and a magnifying glass icon is also present. The main table lists manufacturers with columns: State, Manufacturer Code, Type System, Name, Address, and City. The first row shows a manufacturer with code 'BAR01' and name 'BarcodeApps'. A dropdown arrow next to the code is circled in red and labeled with a '1'. The dropdown menu is open, showing options: 'User details', 'Details Config', 'Edit' (circled in red and labeled with a '2'), and 'Integrations'.

State	Manufacturer Code	Type System	Name	Address	City
<input type="checkbox"/>	<input checked="" type="checkbox"/> BAR01	BOTH	BarcodeApps	5080 Timberlea Blvd Suite 203	Mississau

Click on the PRISM settings tab.



The image shows the 'Edit' screen for BarcodeApps. At the top, there is a dark blue header with the 'barcodeapps' logo and the word 'Edit'. Below the header, there are two buttons: 'Save & Close' with a green checkmark icon and 'Close' with a red 'X' icon. A horizontal tab bar contains four tabs: 'Basic Information', 'Prism Settings' (which is highlighted with a red border), 'Basis Settings', and 'General Settings'. Below the tabs, there are four settings rows, each with a label on the left and a dropdown menu on the right:

Setting	Value
Active Offers	Disable
Hide All Prices	Disable
Advanced Categories	Enable
Warehouse Settings	Disable

Enable Related Products and Reciprocal Affinities.

barcodeapps

Edit

Save & Close

Close

Basic Information

Prism Settings

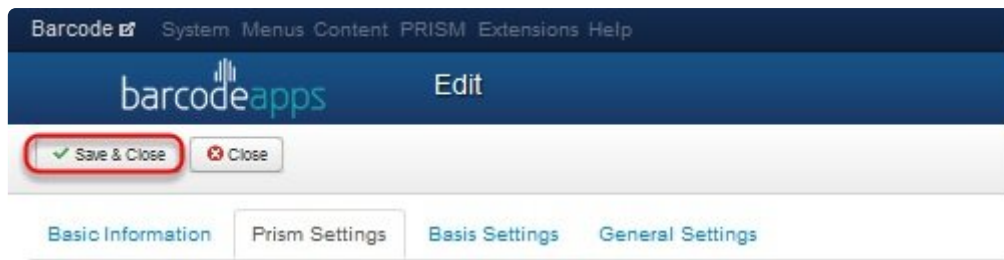
Basis Settings

General Settings

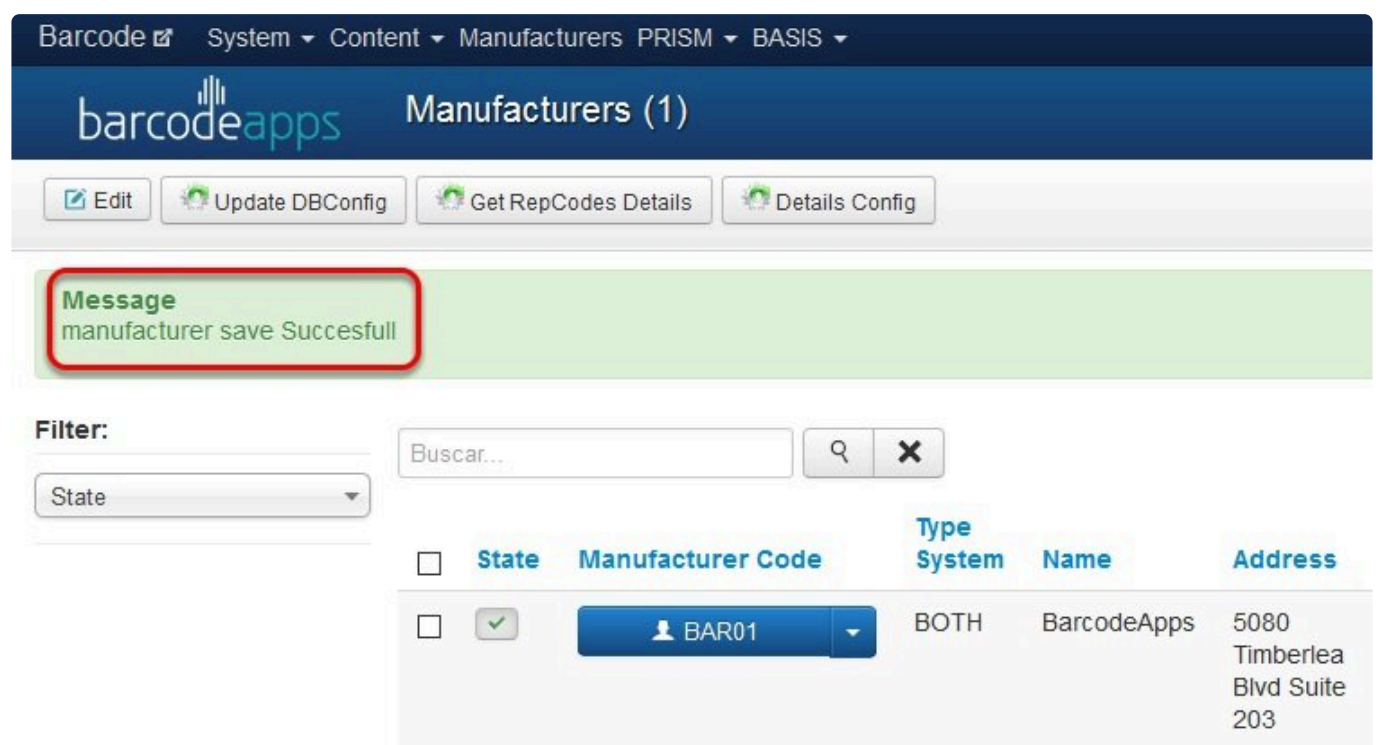
Active Offers	Disable
Hide All Prices	Disable
Advanced Categories	Enable
Warehouse Settings	Disable
Order Categories	ASC
Show subcategories	Enable
Hide Search Left	Disable
Verify On Hand	Disable
No Truncate Products Description	Disable
Hide Quick Add	Disable
Hide Footer Login	Disable
Hide Ship Date	Disable
Hide Additional Info of Products	Disable
Allow Download Catalogs	Disable
SHOW IN/OUT STOCK - Product Details	Disable
Add Min qty	Disable
Active Tab Login	Customer
First section to show	Categories List
Related Products	1 Enable
Reciprocal Affinities	2 Enable
Canadian Spelling	Disable
Hide CreditData	Disable



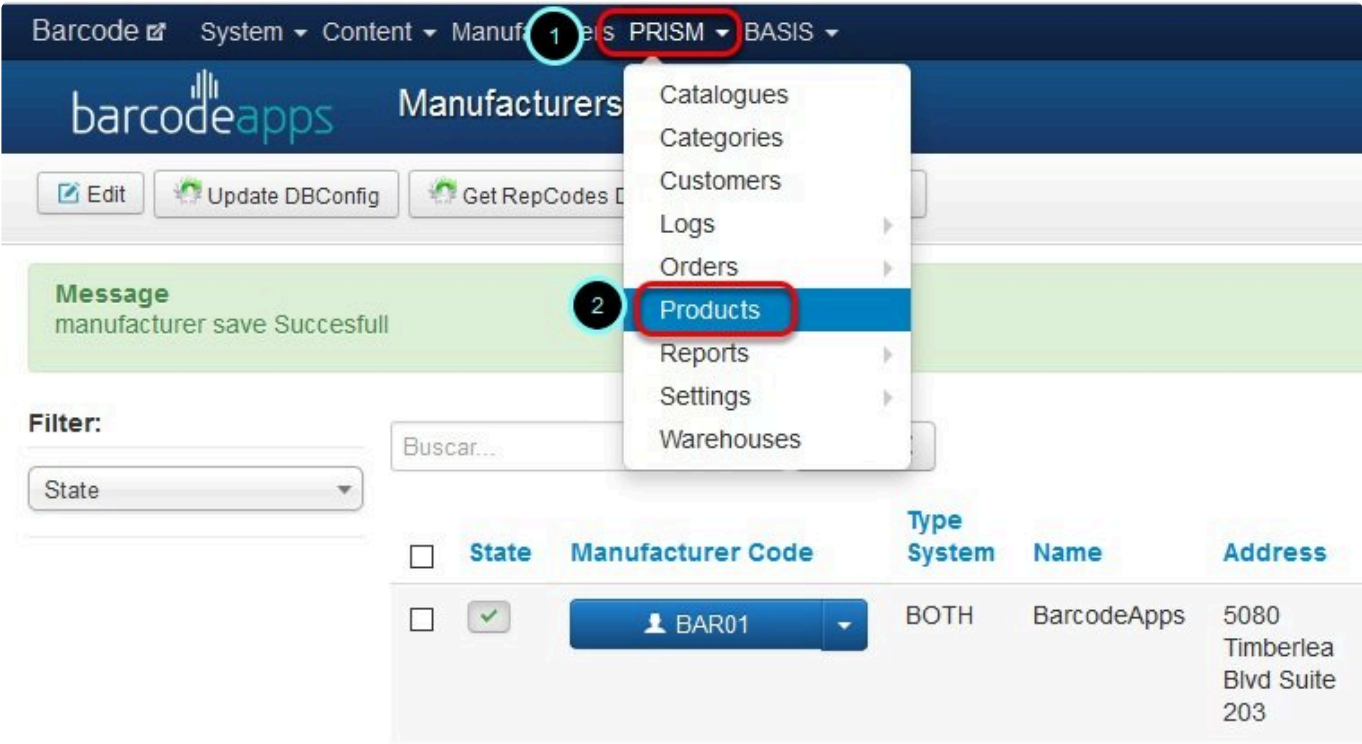
Note: Enabling Reciprocal Affinities will automatically create a two way relationship between product A and product B. Disabling it creates a one way relationship.



Click on Save and Close.



A message will show up if the manufacturer settings was changed successfully.



RELATING A PRODUCT TO OTHER PRODUCTS

To relate an item. On the manufacturers window click on PRISM and then Products. Click on the drop down arrow just before the item code and then select related products.

Barcode System ▾ Content ▾ Manufacturers PRISM ▾ BASIS ▾

Access type: BOTHPRISM: BAR01BASIS: BAR01BarcodeApp

New

Edit

Delete

Details Products

Generate Barcode

Assign Categories

Clear Selection

Generate txt

Download Excel

Upload Excel

<input type="checkbox"/>	<div><div>P1210A</div><div></div></div>	Semi-gloss resin paint (SP-250)	0	59.99	326
<input type="checkbox"/>	<div><div>N142</div><div></div></div>	Screws for Speakers (SP-250)	0	0.5	325
<input type="checkbox"/>	<div><div>MD46</div><div></div></div>	6" Midrange Cone Speaker	0	37.4	324
<input type="checkbox"/>	<div><div>View Details</div><div>Edit Product</div><div>Related Products</div></div>	Entertainment Center	0	3525	323
<input type="checkbox"/>	<div><div>FX-500</div><div></div></div>	Multi-fax, Printer, Copier, Scanner	0	528	321
<input type="checkbox"/>	<div><div>FX-280</div><div></div></div>	All-in-one Printer/Scanner /Copier	0	318.5	320
<input type="checkbox"/>	<div><div>FCB-250</div><div></div></div>	Finished cabinet for SP-250	0	300	319
<input type="checkbox"/>	<div><div>EQ-1800</div><div></div></div>	Equalizer (10 band)	0	195.9	318
<input type="checkbox"/>	<div><div>EQ-1245</div><div></div></div>	Equalizer (7 band)	0	111	317
<input type="checkbox"/>	<div><div>EN-BATD</div><div></div></div>	Energizer ACCU Rechargeable D Batteries	0	9.99	316
<input type="checkbox"/>	<div><div>CD-800</div><div></div></div>	Compact Disk Player - 5 disk capacity	0	528.3	315

Click on Manage Products.

Barcode System ▾ Content ▾ Manufacturers PRISM ▾ BASIS ▾

barcodeapps

Related Products for MD46

Manage Products

Delete

Close


Search...

☐

ItemCode

Description

Put a check mark on the item that needs to be linked and then click on Add product when finish.

Barcode 


System ▾

Content ▾

Manufacturers













PRISM ▾

BASIS ▾

 Add Product

2

Go to Product MD46

<input type="checkbox"/>	<div> SP-30 ▾</div>	Speakers - Ceiling
<input type="checkbox"/>	<div> SP-250 ▾</div>	Speakers - Indoor/Outdoor
<input checked="" type="checkbox"/>	<div> SP-20 ▾</div>	Speakers - 10" Bookshelf
<input checked="" type="checkbox"/>	<div> SP-101 ▾</div>	Speakers - Bookshelf
<input type="checkbox"/>	<div> SBX-250 ▾</div>	Cardboard container for SP-250
<input type="checkbox"/>	<div> SAP90 ▾</div>	Cables: Shielded Phono/RCA/6ft.
<div>1</div> <input type="checkbox"/>	<div> RCA-R ▾</div>	RCA Stereo CD Clock Radio
<input type="checkbox"/>	<div> RC4850 ▾</div>	Receiver - 220 watts
<input type="checkbox"/>	<div> RC2400 ▾</div>	Receiver - 100 watts
<input type="checkbox"/>	<div> PS-2 ▾</div>	Sony Playstation 2
<input checked="" type="checkbox"/>	<div> PRCB-250 ▾</div>	Unfinished Speaker Cabinet
<input type="checkbox"/>	<div> PCM8420 ▾</div>	Personal Organizer

Once finish the items should show on the related products window for the selected item.

[Barcode](#) ▾ [System](#) ▾ [Content](#) ▾ [Manufacturers](#) [PRISM](#) ▾ [BASIS](#) ▾

barcodeapps Related Products for MD46 (5)


[Manage Products](#) [Delete](#) [Close](#)

<input type="checkbox"/>	ItemCode	Description
<input type="checkbox"/>	ST-25	Stand - 24" Speaker
<input type="checkbox"/>	ST-30	Stand - 30" Speaker
<input type="checkbox"/>	SP-20	Speakers - 10" Bookshelf
<input type="checkbox"/>	SP-101	Speakers - Bookshelf
<input type="checkbox"/>	PRCB-250	Unfinished Speaker Cabinet

To check the result just login to the PRISM WEB STORE and then select the item to verify if the items added will appear on the related products window.

Logged in as: jandstarrodeapps.com [Logout](#)

[Home](#) [Products](#) [Catalogs](#) [Orders](#) [About us](#) [Shopping Cart](#) [Home >](#)



MD46

8" Midrange Cone Speaker

MAIN PRODUCT

Click on the picture above to see a larger version.

Price: **\$37.40**

Minimum Order Qty: 0






Quantity:

Comments:

Additional Info

[Back](#) [Add to cart](#)

Related Products

<p>SP-20 Speakers - 10" Bookshelf</p> 	<p>SP-101 Speakers - Bookshelf</p> 	<p>PROB-200 Unfinished Speaker Cabinet</p> 
<p>ST-26 Stand - 24" Speaker</p> 	<p>ST-30 Stand - 30" Speaker</p> 	

2.6.4.2. II. PRISM WEB Delivery Options

This knowledge base article will guide user on how to add the delivery option in the PRISM WEB STORE.

The Delivery Option is one of the feature in the PRISM WEB STORE which helps to identify what type of delivery is needed for an order.

The two options for delivery are Courier and Pickup which can be changed once inside the Order Summary Window.

Order Summary

Customer Code: ACE

Customer Name: Ace Electronics

Shipping address: 1785 Rexway Ave. Suite 8, Toronto, ON, M9A 2B2

Sales Person Name:

Order Date : 2016-06-05 09:51:18

Req. Ship date

Cancel date

Product Code	Description	Quantity	Price
CD-204	Compact Disk Player with Autoskip Comment:	1	\$323.70
Order Total			\$323.70

Shipping address & Special instructions:

Delivery Method: Courier ▾

Payment Options ▾

Back Order ☒

Complete ship only ☐

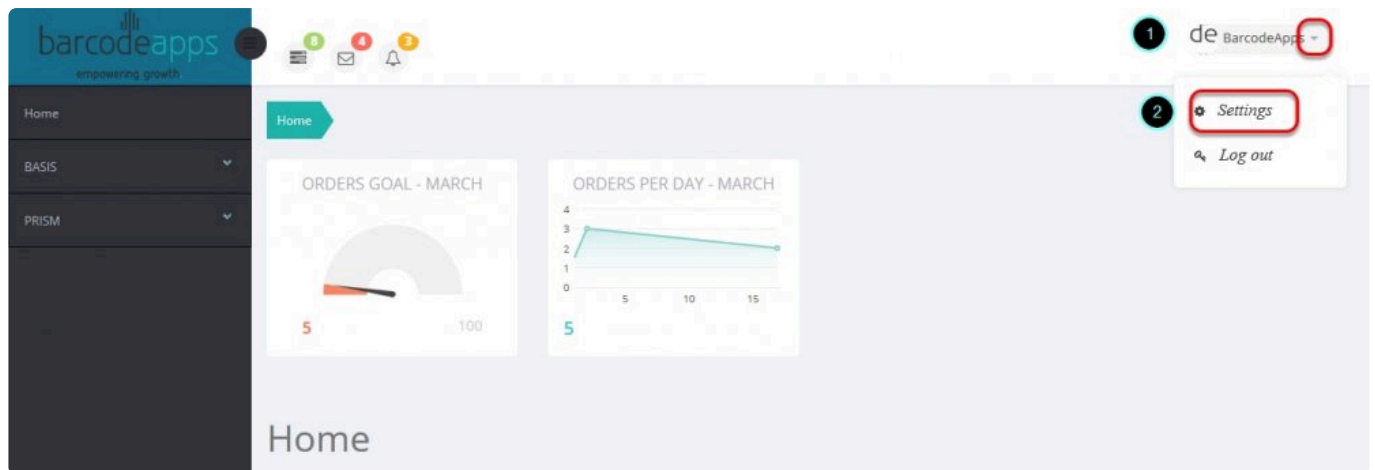
Confirm/Hold ☐

Close and Continue Shopping

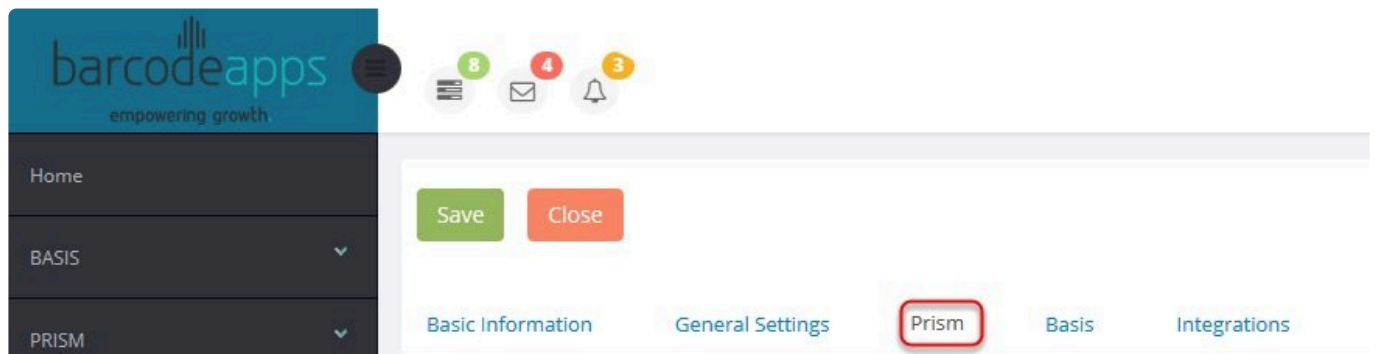
Clear Order

Complete Order

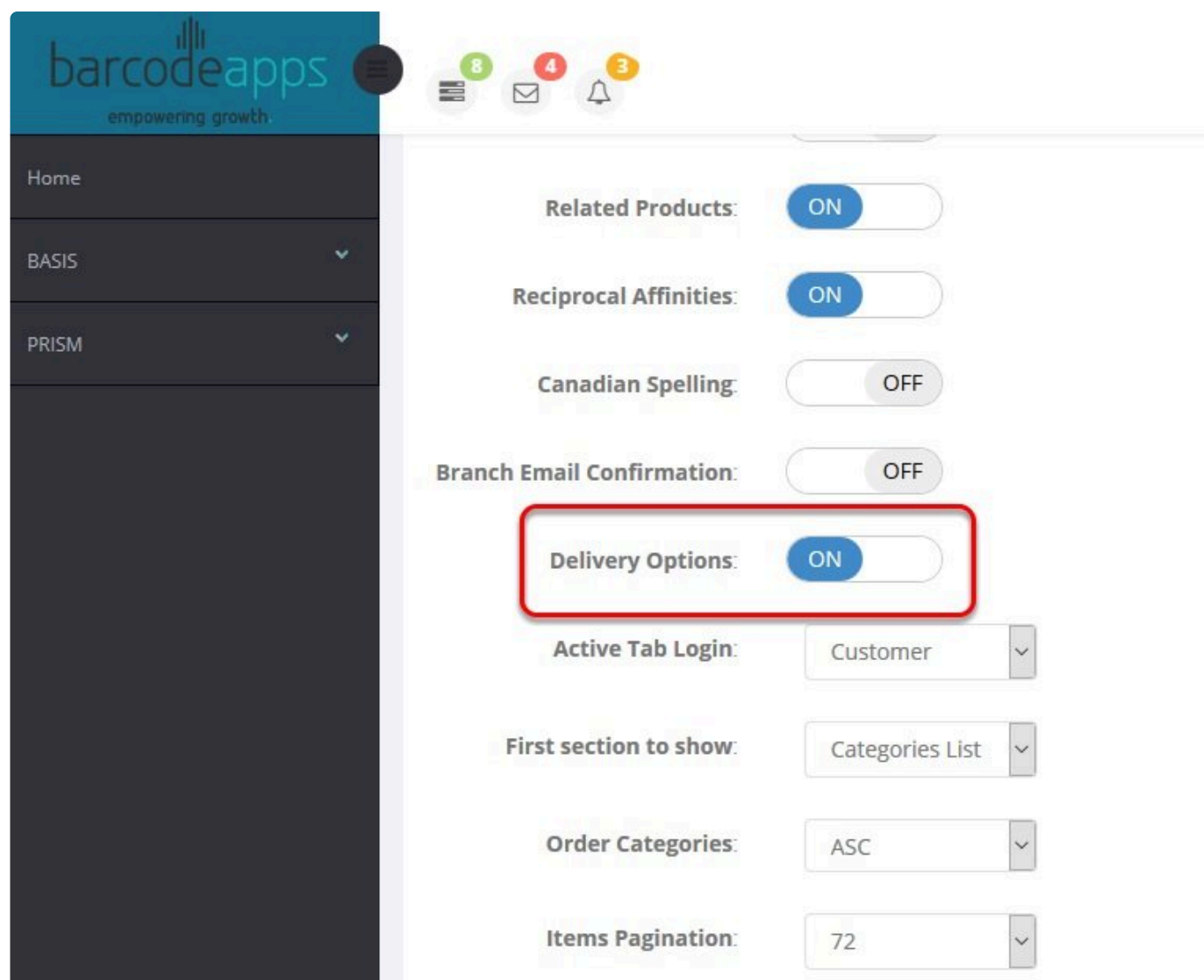
To enable the delivery options. Login to the PRISM SELF SERVICE WEBSITE (JOOMLA) using an admin credential. On the Home window, click on the drop down arrow just beside your company logo and then click on settings from the selection.



click on the PRISM tab.



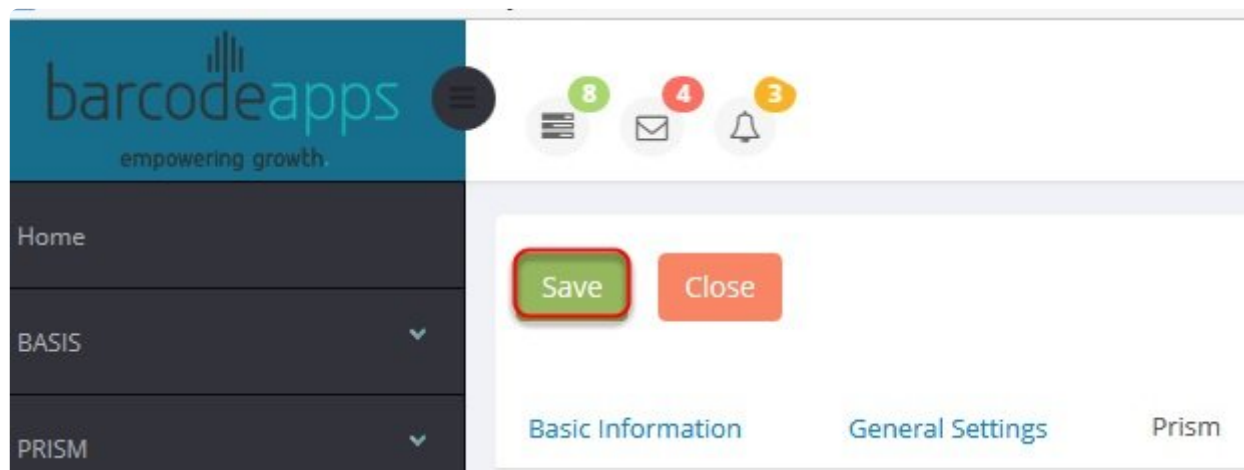
Enable the delivery options by clicking on the slider to ON



The image shows the BarcodeApps settings interface. On the left is a dark sidebar with the BarcodeApps logo and navigation links: Home, BASIS, and PRISM. The main content area is white and contains several settings:

- Related Products:** ON (toggle)
- Reciprocal Affinities:** ON (toggle)
- Canadian Spelling:** OFF (toggle)
- Branch Email Confirmation:** OFF (toggle)
- Delivery Options:** ON (toggle, highlighted with a red box)
- Active Tab Login:** Customer (dropdown)
- First section to show:** Categories List (dropdown)
- Order Categories:** ASC (dropdown)
- Items Pagination:** 72 (dropdown)

Click on Save to save the changes.



The image shows the BarcodeApps settings interface after the changes. The sidebar is the same. The main content area now displays two buttons: **Save** (green) and **Close** (orange). Below these buttons are three tabs: **Basic Information**, **General Settings** (which is active), and **Prism**.

Now we can login and create an order on the PRISM WEB STORE and the delivery option should now be available in every order summary.

Order Summary

Customer Code: ACE
 Customer Name: **Ace Electronics**
 Shipping address: 1785 Rexway Ave. Suite 8, Toronto, ON, M9A 2B2

Order Date : 2016-06-05 09:51:18

Sales Person Name:

Req. Ship date

Cancel date

Product Code	Description	Quantity	Price
CD-204	Compact Disk Player with Autoskip Comment:	1	\$323.70
Order Total			\$323.70

Shipping address & Special instructions:

 Delivery Method: Courier ▾

Payment Options ▾

 Back Order ☒
 Complete ship only ☐
 Confirm/Hold ☐

Close and Continue Shopping

Clear Order

Complete Order

The email confirmation will also include the delivery option which will help the recipient determine what type of delivery is needed for the order.

New Order from BarcodeApps

Inbox x

Click to save the changes

prism

Prism

to adurk, me

Dear Ace Electronics,

Thanks for your order. Please find the order details.

Order No. # AB1-06-05-2016-04

Sequence No.: 46

Customer code: ACE

Customer phone: 4164982381

Shipping address: 1785 Rexway Ave. Suite 8
Toronto, M9A 2B2

Req. Ship Date: 2016-06-07

Cancel Date: 2016-06-30

Cust PO:

Back Order: Yes

Delivery Method: Courier

7:04 PM (6 minutes ago)

Order Summary

Product	Description	Quantity	Unit Price	Total
CD-204	Compact Disk Player with Autoskip	1	\$323.70	\$323.70

Order Total\$323.70

Note: Subtotal does not include applicable taxes and shipping charges.

Message:

Thank You
BarcodeApps
416-822-3434

2.6.4.3. III. Hide Ship, Cancel Dates and Check mark groups

This knowledge base article will guide users in hiding the the Ship,Cancel Dates and check mark Groups inside the Order summary window from the PRISM Webstore PORTAL.

On the Order Summary Window we have the option to hide the Ship, Cancel Date and the Check Mark Groups.

Order Summary

Customer Code: ACTECH
 Customer Name: Access Technologies
 Shipping address: 380 St. Catherine St. Unit 15, Montreal, QC, H2R 4V3

Sales Person Name:

Order Date : 2016-12-13 23:12:43

1 Req. Ship date

2 Cancel date

Product Code	Description	Quantity	Price
CD-204	Compact Disk Player with Autoskip Comment:	2	\$647.40
CD-800	Compact Disk Player - 5 disk capacity Comment:	1	\$528.30
Order Total			\$1175.70

Shipping address & Special instructions:

Delivery Method: Courier

Payment Options

Back Order ☒
 Complete ship only ☐
 Confirm/Hold ☐

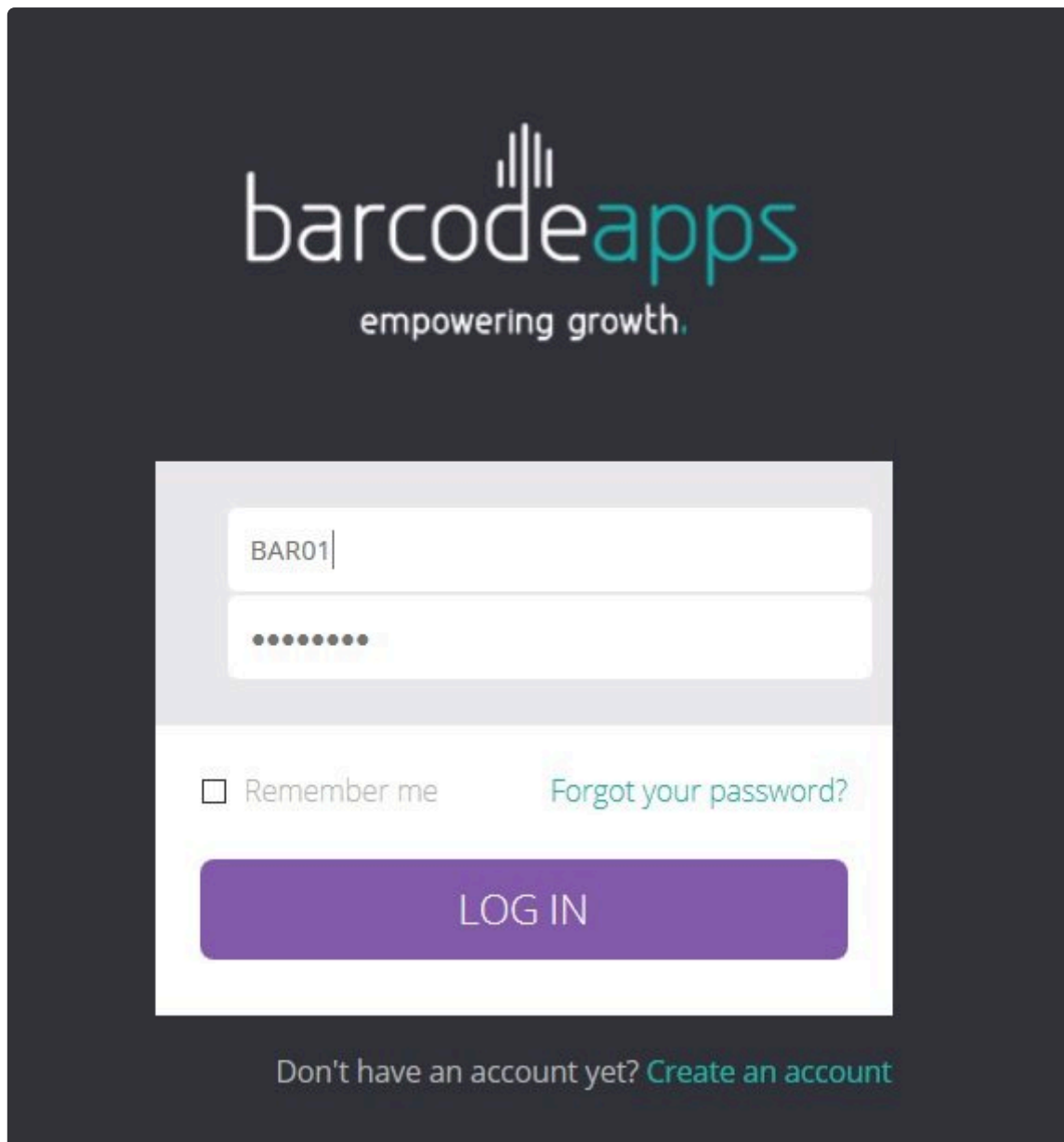
3

Close and Continue Shopping

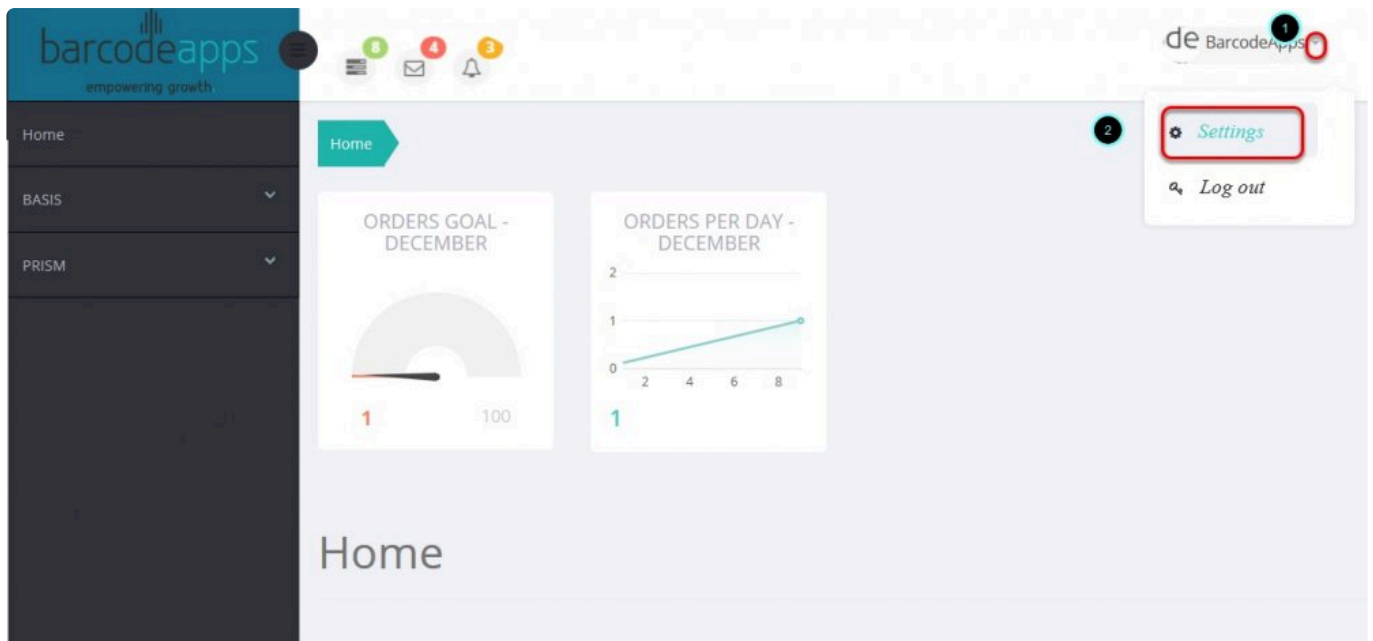
Clear Order

Complete Order

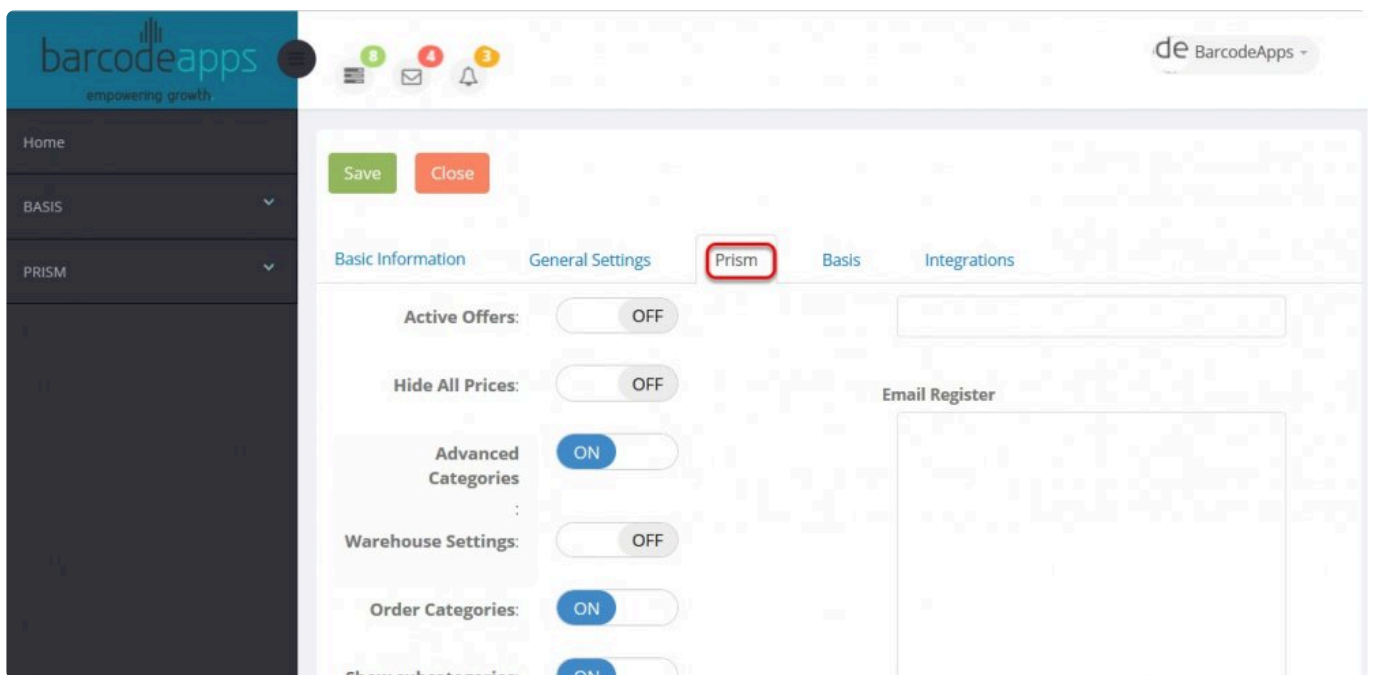
To get started login to the [PRISM ADMIN PORTAL](#) using your admin credentials.



On the main window click on the drop down arrow on the top right corner and then click on settings.

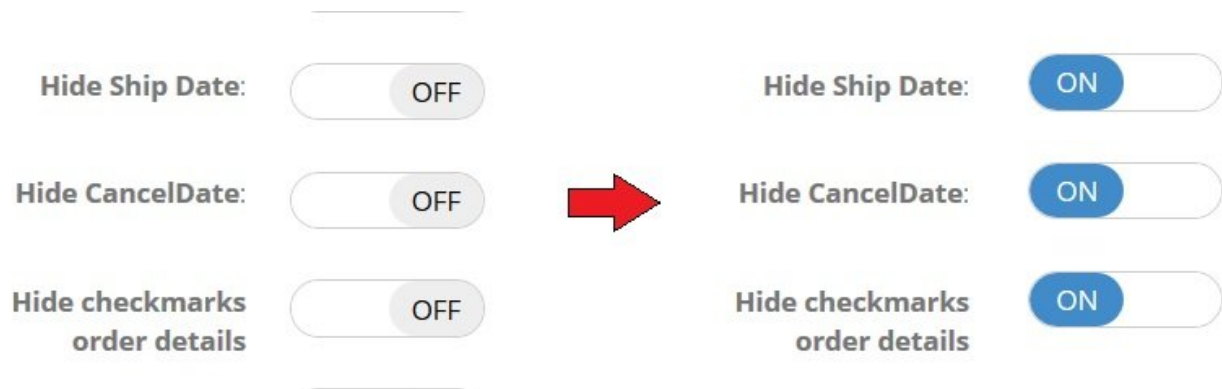


Click on PRISM on the settings window

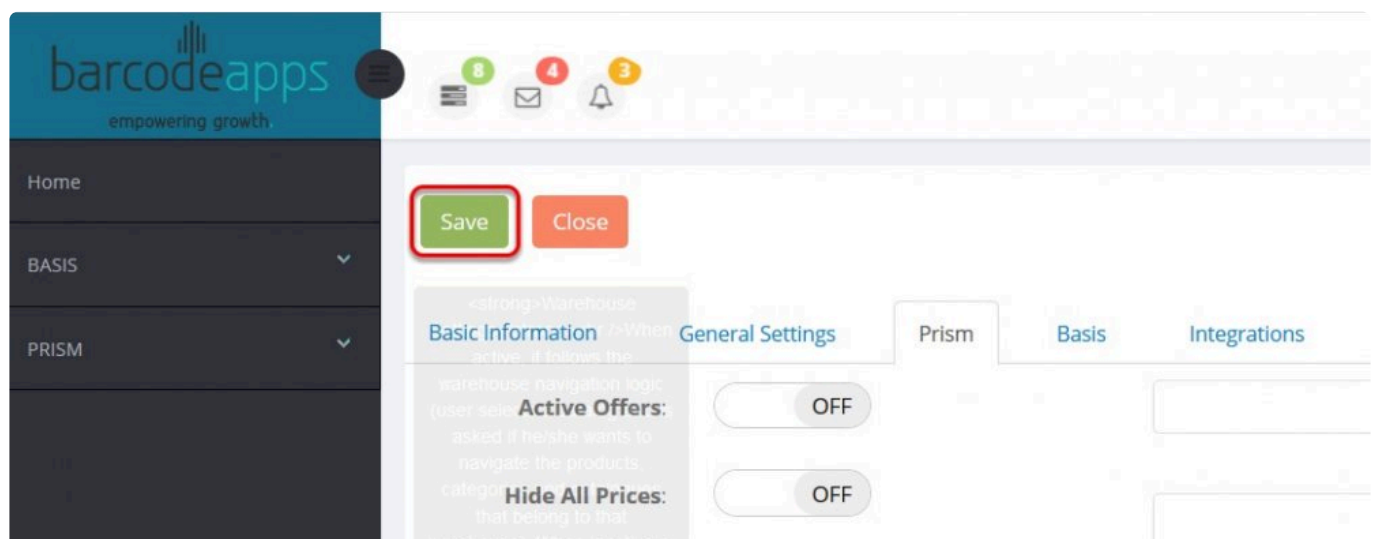


From here we will find the hide checkmarks order details (check mark groups), hide ship date (ship date), and hide cancel dates(

cancel date). which is by default OFF. To hide the feature just click on the sliding bar to switch it ON.



Once done, click on the Save button to apply the changes.



To test the results, RELOGIN to the PRISM WEBSTORE Portal and check the order summary window.

Order Summary

Customer Code: ACTECH
Customer Name: Access Technologies
Shipping address: 380 St. Catherine's St. Unit 15, Montreal, QC, H2R 4V3

Sales Person Name:

Order Date : 2016-12-15 20:57:25

Product Code	Description	Quantity	Price
CD-204	Compact Disk Player with Autoskip Comment:	1	\$323.70
CD-800	Compact Disk Player - 5 disk capacity Comment:	1	\$528.30
Order Total			\$852.00

Shipping address & Special instructions:
Delivery Method: Courier

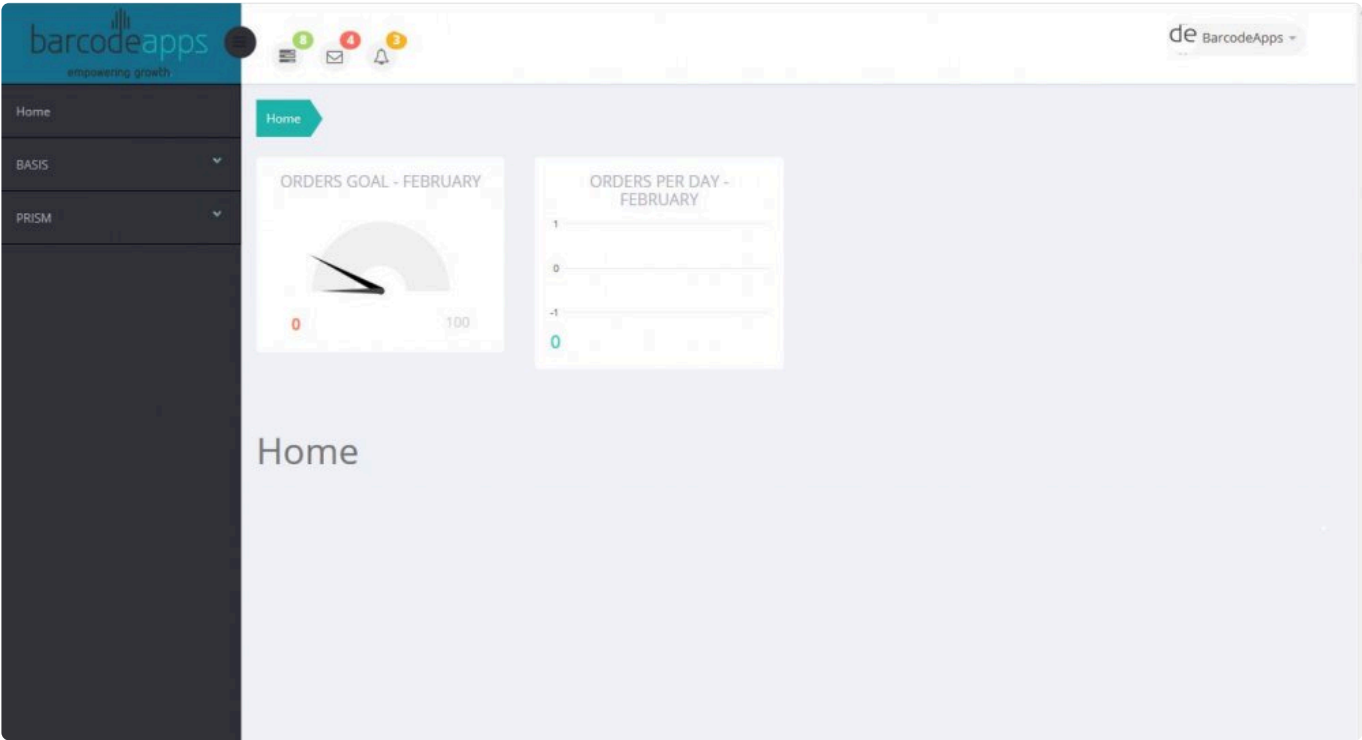
Payment Options

Close and Continue Shopping

Clear Order

Complete Order

3. PRISM NEW PORTAL



3.1. A. Customer Management (New Portal)

barcodeapps
empowering growth

Home

BASIS

PRISM

3

4

5

ACTIONS

FILTERS

UPLOAD/DOWNLOAD

INTEGRATIONS

TOTAL: 34

100

Add

Delete

Generate Txt

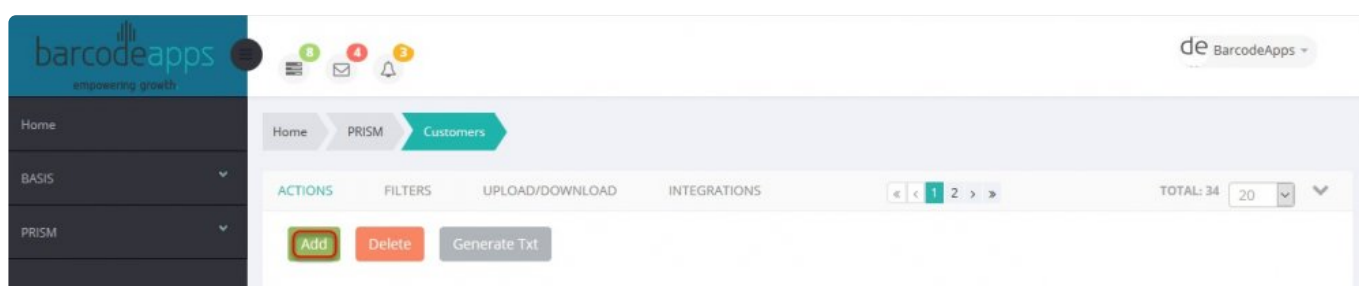
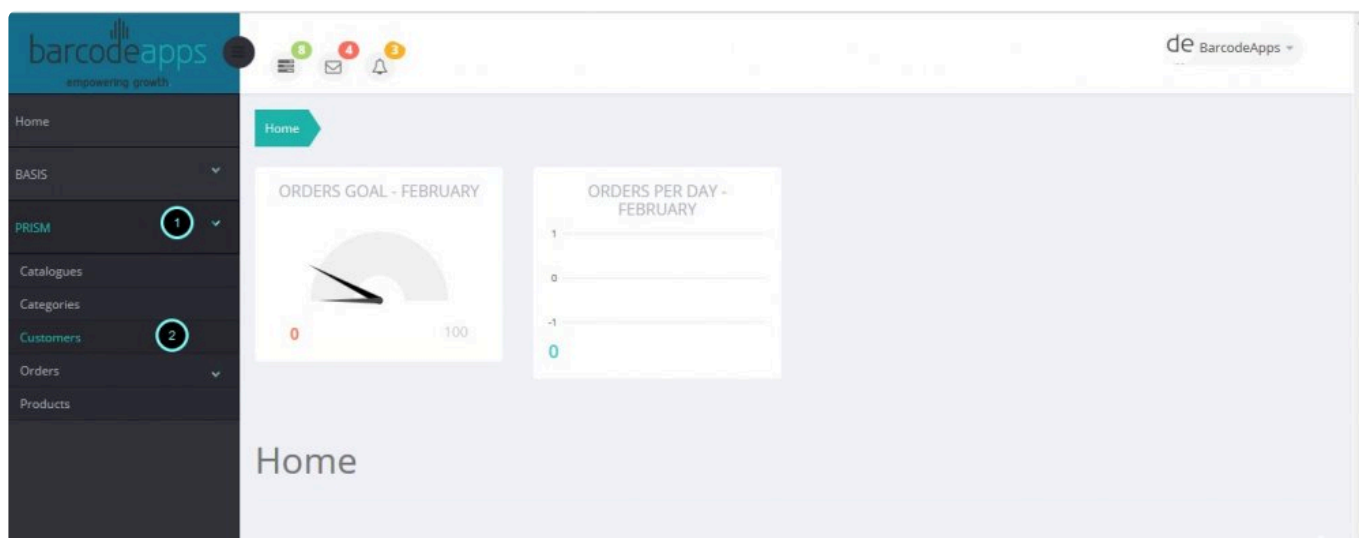
<input type="checkbox"/>	Customer Code	Customer Name	Telephone	Address	City
<input type="checkbox"/>	<div>JUNTST</div>	JUN TEST	8008001234	Toronto Toronto	Toronto
<input type="checkbox"/>	<div>WINSTN</div>	Winston s Computer Consultants	4165908333	9000 Front St. West Side	Toronto
<input type="checkbox"/>	<div>WHDIST</div>	West Heights Distributors Inc.	2049275540	5550 Independence Avenue	Winnipeg
<input type="checkbox"/>	<div>WESTEC</div>	Western Electronics	6046224900	1265 Madison Street	Vancouver
<input type="checkbox"/>	<div>TORRAD</div>	Toronto Radio Limited	4166655400	2316 Avenue Road	Toronto
<input type="checkbox"/>	<div>TERSEA</div>	Terrace Sound Effects	4162222323	78 Christopher Avenue	Toronto
<input type="checkbox"/>	<div>SNDMCH</div>	Sound Machine	4168835656	1137 West Park Drive	Mississauga
<input type="checkbox"/>	<div>SEHIFI</div>	Smith Evans Hi-Fi Design Inc.	7052726339	412 River Street	Brockville
<input type="checkbox"/>	<div>RADLND</div>	Radio Land	9052547699	103 MacArthur Drive Suite 459	Willowdale

3.1.1. I. Adding Customers (New Portal)

This knowledge base article will guide users on how to add a new customer using the [PRISM Joomla Website](#).

ADDING NEW CUSTOMER

To add a customer manually, From the Homepage click on PRISM and then Customers
Click on Add



Fill out the information needed.

The screenshot shows the BarcodeApps web application interface. On the left is a dark sidebar with a 'barcodeapps' logo and the tagline 'empowering growth'. Below the logo are navigation links: 'Home', 'BASIS', and 'PRISM'. The main content area has a light gray background. At the top of this area are two buttons: 'Save & Close' (green) and 'Close' (orange). Below these buttons is a form titled 'Basic Information'. This form is enclosed in a red rectangular border and contains the following fields: 'Customer Code *' (with an asterisk indicating it's mandatory), 'Customer Name *' (also mandatory), 'Address', 'City', 'State', and 'Zip Postal'. Each field is represented by a white text input box.

BASIC INFORMATION FIELD DEFINITION

1. **CustomerCode**: Mandatory: Holds the customer code. (Characters up to 20). Each code must be unique.
2. **CustomerName**: Mandatory: Holds a customer name (usually the business name) Characters up to 100.123
3. **Address**: Optional: Holds the customer address (Street number, name, type, unit number). Characters up to 70
4. **City**: Optional: Holds the customer city. Characters up to 100
5. **StateProv**: Optional: Holds the customer state (if US location) or province (if Canada location). Characters up to 4
6. **PostalZip**: Optional: Holds the customer zip code (if US location) or postal code (if Canada location). Characters up to 10
7. **EMAIL**: Optional: Holds the customer email address. Works in key with the field zzz to give the customer access to several Prism apps (Prism for iPad and Prism website) Characters up to 50
8. **WEB**: Optional: Holds the customer website URL. Characters up to 50

Customer Code *

1

Customer Name *

2

Address

3

City

4

State

5

Zip Postal

6

Email

7

Web

8

9. **Fax**: Optional: Holds the customer fax number. Characters up to 12

10. **Cell**: Optional: Holds the customer cell number. Characters up to 12

11. **BilltoPhone**: Optional: This is actually the customer code of the BILL TO if the customer is part of a Bill To Ship

to setting. For example if a company has a head office in Toronto and 3 ship to stores then PRISM will require 4

customers where the BILL TO is a customer and the ship to's are also customers but in their case the BILL TO

code would be inserted in this field. Characters up to 20

12. **HeadOfficeName**: Optional: As per explanation above this is the name of the Head Office (Optional)
Characters up to 50

13. **RepCode**: Optional: Holds the code of the rep (sales person) who represents the customer.
Characters up to 30

14. **Contact1**: Optional: Holds the name of the main contact person for the customer. Characters up to 20

15. **Contact2**: Optional: Holds the name of the secondary contact person for the customer. Characters up to 20

The image shows a vertical stack of seven input fields, each with a label and a character count indicator. The labels are: Fax, Cell, Billtophone, Headofficename, Repcode, Contact1, and Contact2. The character counts are: 9, 10, 11, 12, 13, 14, and 15 respectively. Each field is a white rectangle with a thin border, and the character count is inside a small black circle with a red border.

Field Label	Character Count
Fax	9
Cell	10
Billtophone	11
Headofficename	12
Repcode	13
Contact1	14
Contact2	15

16. **Notes**: Optional: Holds any customer comments that will be displayed on the Customer Details screen of all Prism products. Characters up to 50

17. **Num1**: Optional: Holds the tax rate that applies to the customer for the first tax type (e.g. 15, 10, etc.).

Integer numbers NO decimals

18. **Num2**: Optional: Holds the tax rate that applies to the customer for the second tax type (e.g. 15, 10, etc.).

Adding Customer – 5 BarcodeApps © 2016

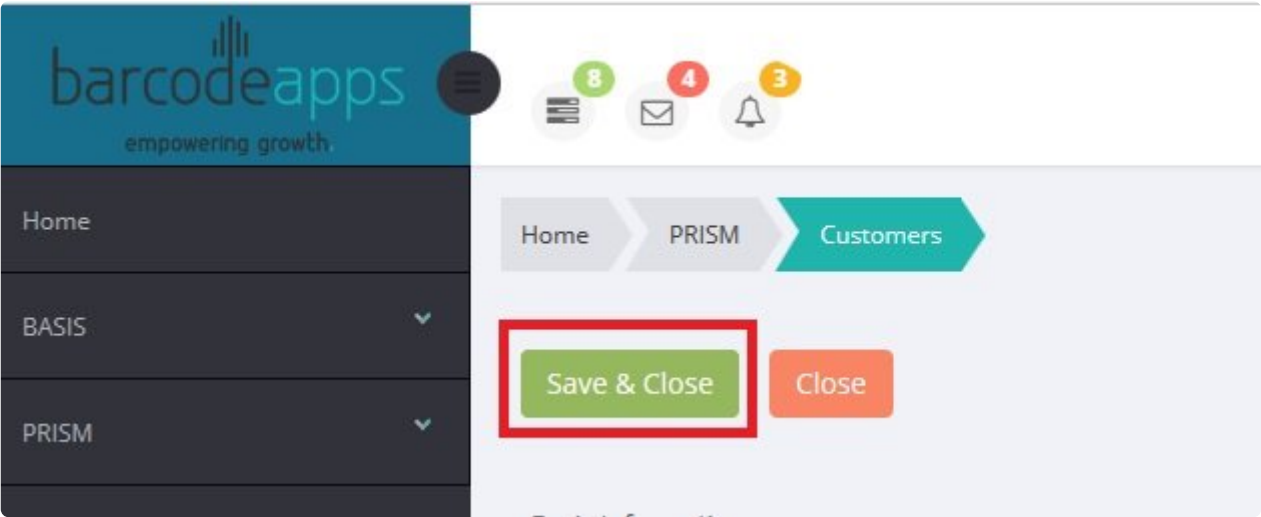
Integer numbers NO decimals

19. **BVWh**: Optional: Warehouse attached to that customer in BV Characters up to 3

The screenshot displays a vertical form with the following fields:

- Notes**: A text input field with a circular icon containing the number 16.
- num1**: A text input field with a circular icon containing the number 17.
- Num2**: A text input field with a circular icon containing the number 18.
- BVWH**: A text input field with a circular icon containing the number 19.
- Password**: A password input field with a circular icon containing the number 20 and a series of dots.
- Validated**: A dropdown menu with a circular icon containing the number 21 and the text "ue".
- Active**: A dropdown menu with a circular icon containing the number 22 and the text "ue".

To save the changes just click on save and close



The image shows the main content area of the BarcodeApps application. At the top, there's a header with the BarcodeApps logo and tagline. Below the logo are three notification icons. To the right of the logo is a search bar with the text 'de BarcodeApps'. Below the search bar is a navigation bar with tabs: ACTIONS, FILTERS, UPLOAD/DOWNLOAD, and INTEGRATIONS. To the right of the tabs is a pagination control showing '< 1 2 >' and a 'TOTAL: 34' label with a dropdown menu showing '20'. Below the navigation bar are three buttons: 'Add' (green), 'Delete' (orange), and 'Generate Txt' (grey). Below the buttons is a table with the following columns: Customer Code, Customer Name, Telephone, Address, and City. The table contains 10 rows of customer data. Each row has a checkbox on the left and a dropdown menu next to the Customer Code.

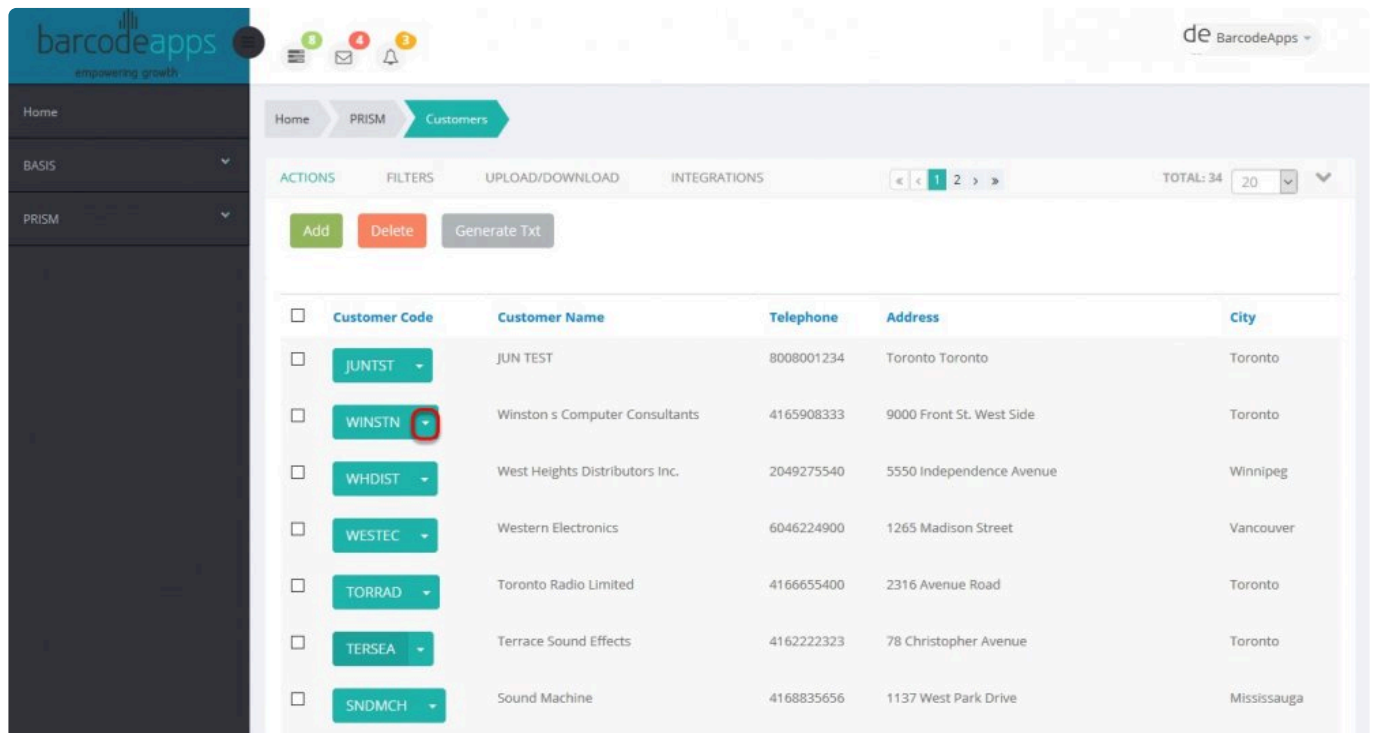
<input type="checkbox"/>	Customer Code	Customer Name	Telephone	Address	City
<input type="checkbox"/>	JUNTST	JUN TEST	8008001234	Toronto Toronto	Toronto
<input type="checkbox"/>	WINSTN	Winston s Computer Consultants	4165908333	9000 Front St. West Side	Toronto
<input type="checkbox"/>	WHDIST	West Heights Distributors Inc.	2049275540	5550 Independence Avenue	Winnipeg
<input type="checkbox"/>	WESTEC	Western Electronics	6046224900	1265 Madison Street	Vancouver
<input type="checkbox"/>	TORRAD	Toronto Radio Limited	4166655400	2316 Avenue Road	Toronto
<input type="checkbox"/>	TERSEA	Terrace Sound Effects	4162222323	78 Christopher Avenue	Toronto
<input type="checkbox"/>	SNDMCH	Sound Machine	4168835656	1137 West Park Drive	Mississauga
<input type="checkbox"/>	SEHIFI	Smith Evans Hi-Fi Design Inc.	7052726339	412 River Street	Brockville
<input type="checkbox"/>	RADLND	Radio Land	9052547699	103 MacArthur Drive Suite 459	Willowdale

3.1.2. II. Editing Customer Details (New Portal)

This knowledge base article will guide users on how they can edit the details of their customer.

EDITING CUSTOMER DETAILS

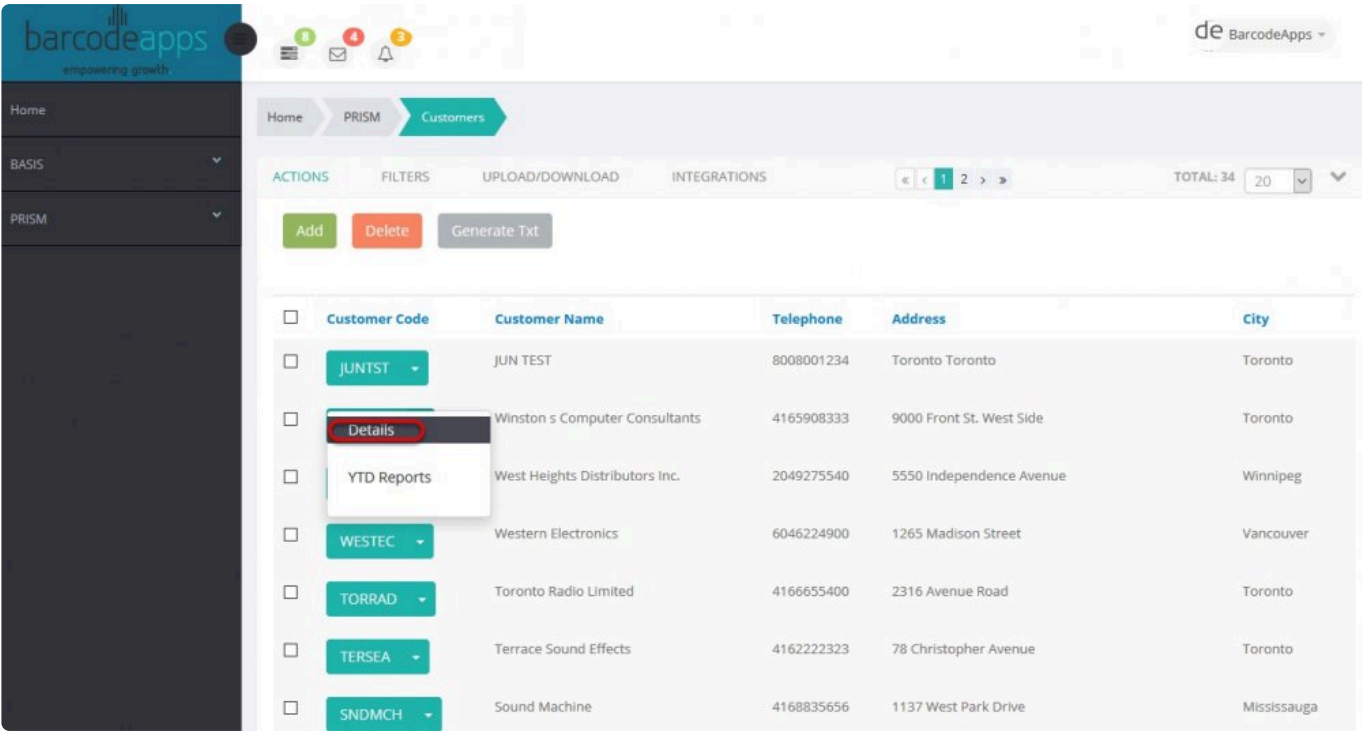
To edit customer details, click on the drop down arrow just after the customer code



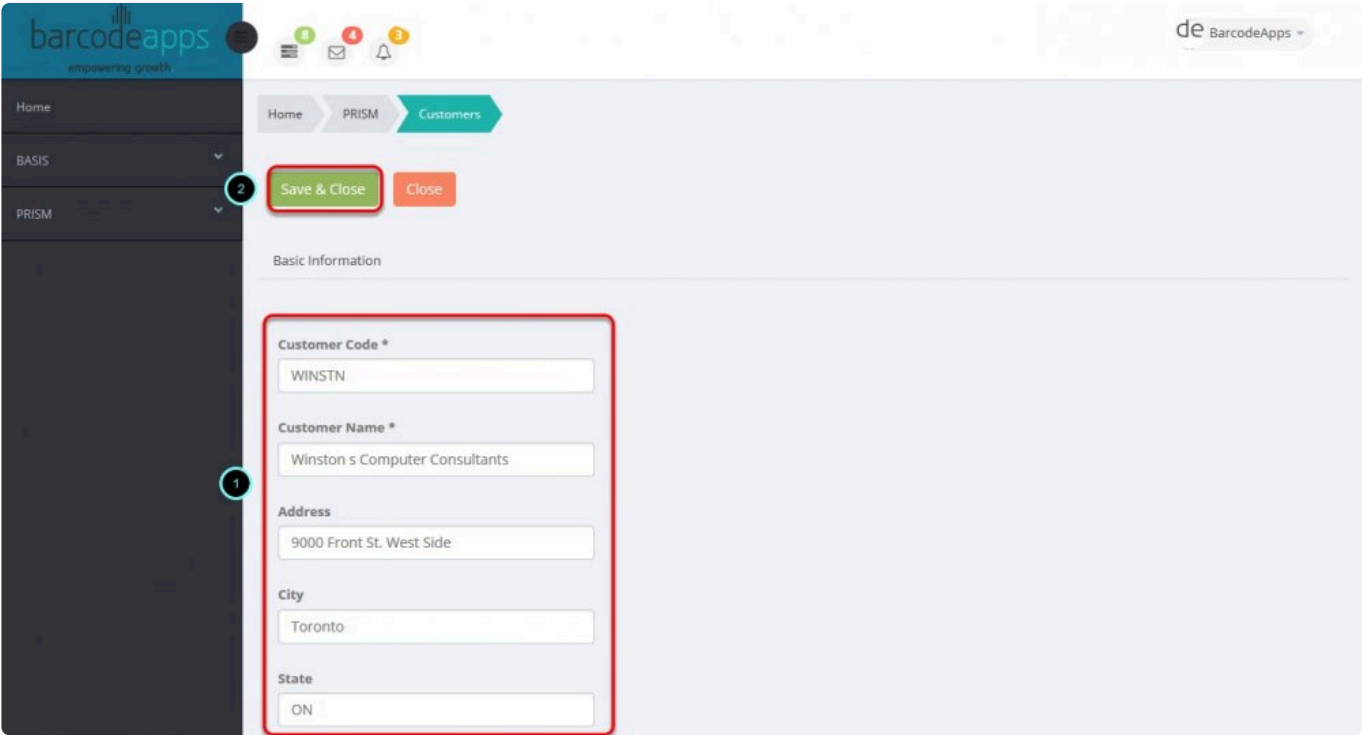
The screenshot shows the BarcodeApps web application interface. On the left is a dark sidebar with the BarcodeApps logo and navigation links: Home, BASIS, and PRISM. The main content area has a breadcrumb trail: Home > PRISM > Customers. Below the breadcrumb are tabs for ACTIONS, FILTERS, UPLOAD/DOWNLOAD, and INTEGRATIONS. There are also buttons for Add, Delete, and Generate Txt. A table lists customer details with columns: Customer Code, Customer Name, Telephone, Address, and City. The 'WINSTN' entry is highlighted, and a red circle is drawn around the dropdown arrow next to its code.

Customer Code	Customer Name	Telephone	Address	City
JUNTST	JUN TEST	8008001234	Toronto Toronto	Toronto
WINSTN	Winston s Computer Consultants	4165908333	9000 Front St. West Side	Toronto
WHDIST	West Heights Distributors Inc.	2049275540	5550 Independence Avenue	Winnipeg
WESTEC	Western Electronics	6046224900	1265 Madison Street	Vancouver
TORRAD	Toronto Radio Limited	4166655400	2316 Avenue Road	Toronto
TERSEA	Terrace Sound Effects	4162222323	78 Christopher Avenue	Toronto
SNDMCH	Sound Machine	4168835656	1137 West Park Drive	Mississauga

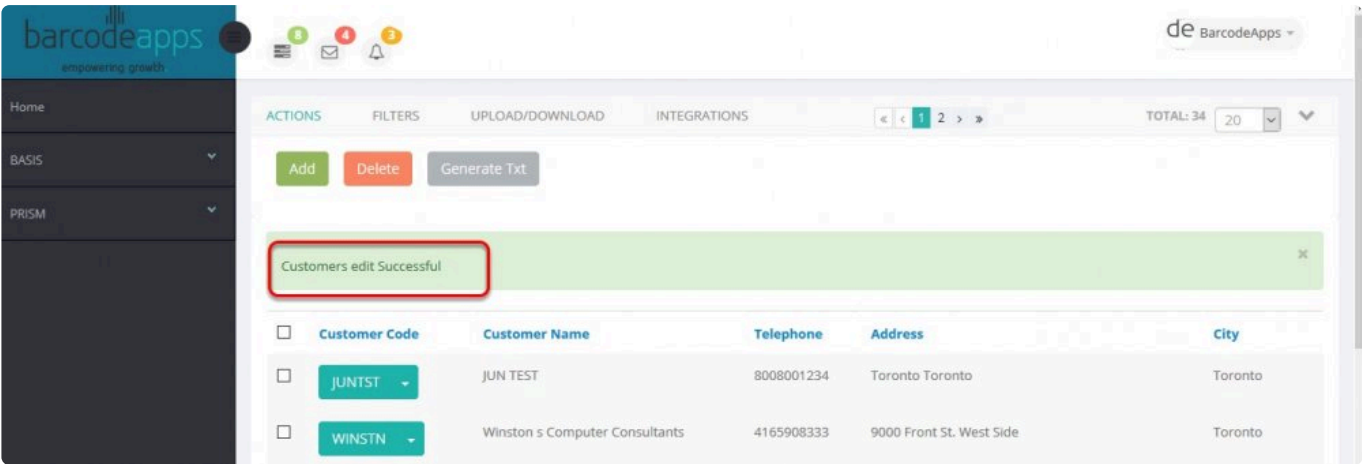
then select the option Details



We can start making some changes on the information. Once done just click on Save and Close



A prompt will show if the update was a success



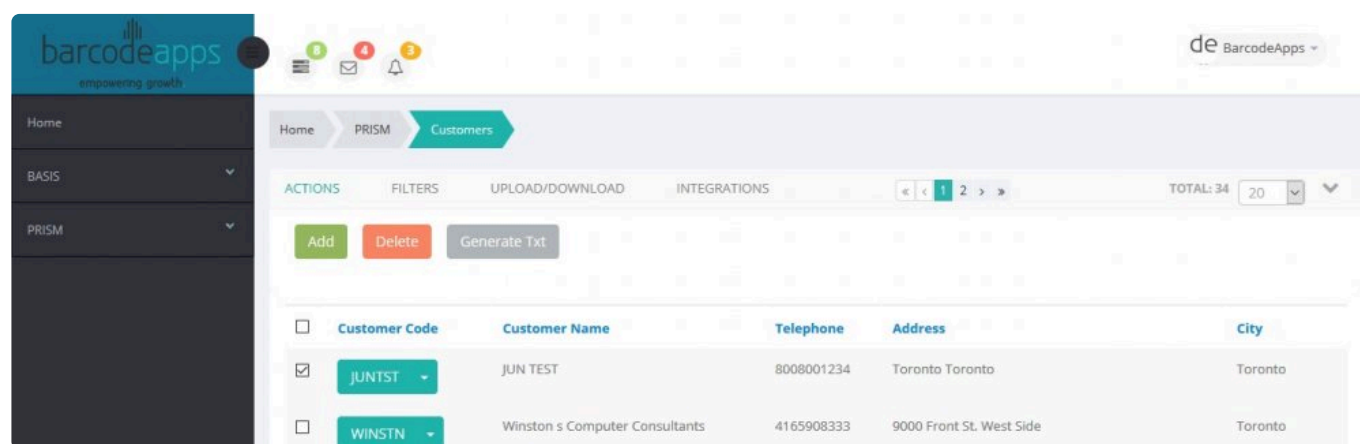
p(banner important).Note: Making changes on the customer details inside the PRISM portal is IDEAL only when NOT using any accounting packages.

3.1.3. III. Deleting a Customer (New Portal)

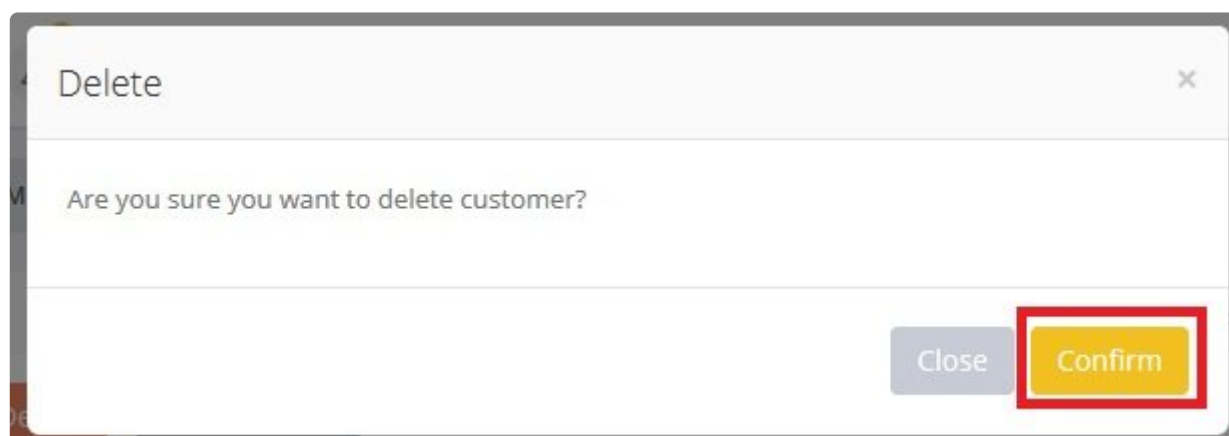
This knowledge base article will guide users to delete a customer from the [PRISM Joomla Website](#).

DELETING A CUSTOMER

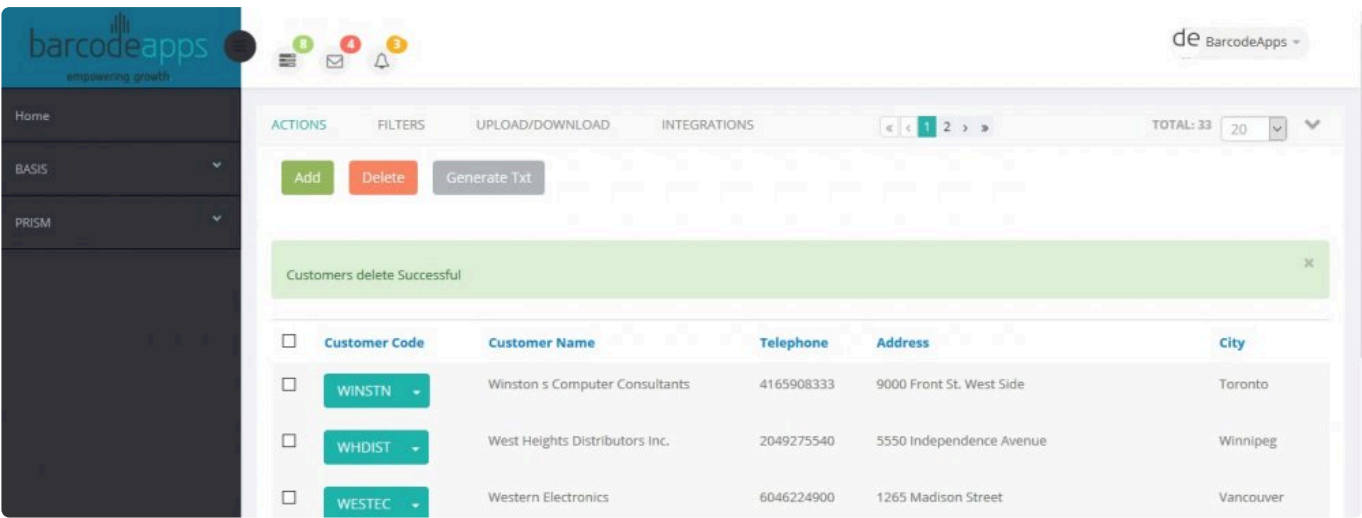
To delete a customer, make a selection of the customers that needs to be deleted by putting a check mark on the box (Multiple Selection can be done), and then click on Delete.



Click on confirm.



A notification will show once the delete was successful



Generate Txt

now click on to sync the changes with the PRISM App

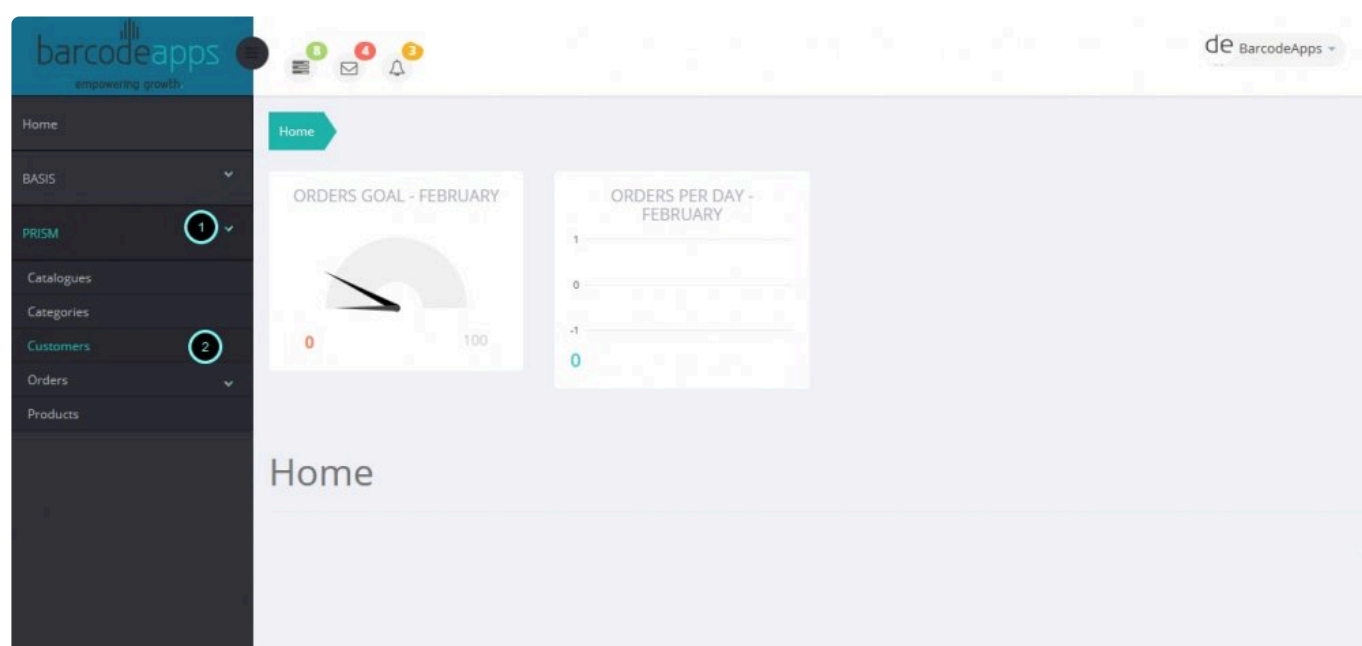
! Note: Making changes on the customer details inside the PRISM portal is IDEAL only when NOT using any accounting packages.

3.1.4. V. Download Excel Customers (New Portal)

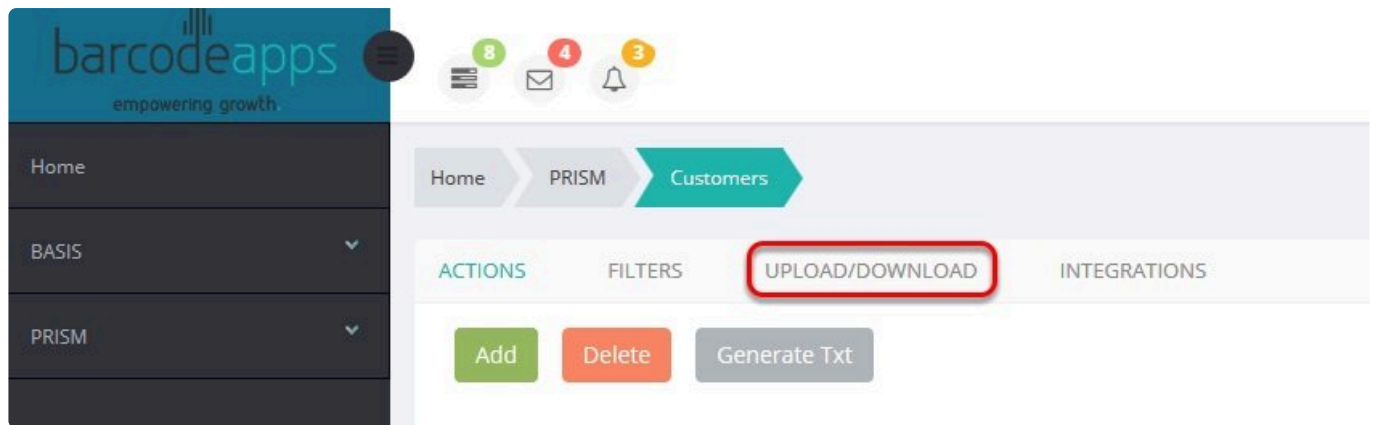
This knowledge base article will guide users to download and manage the customer form from the [PRISM Joomla Website](#).

DOWNLOADING EXCEL (CUSTOMERS FORM)

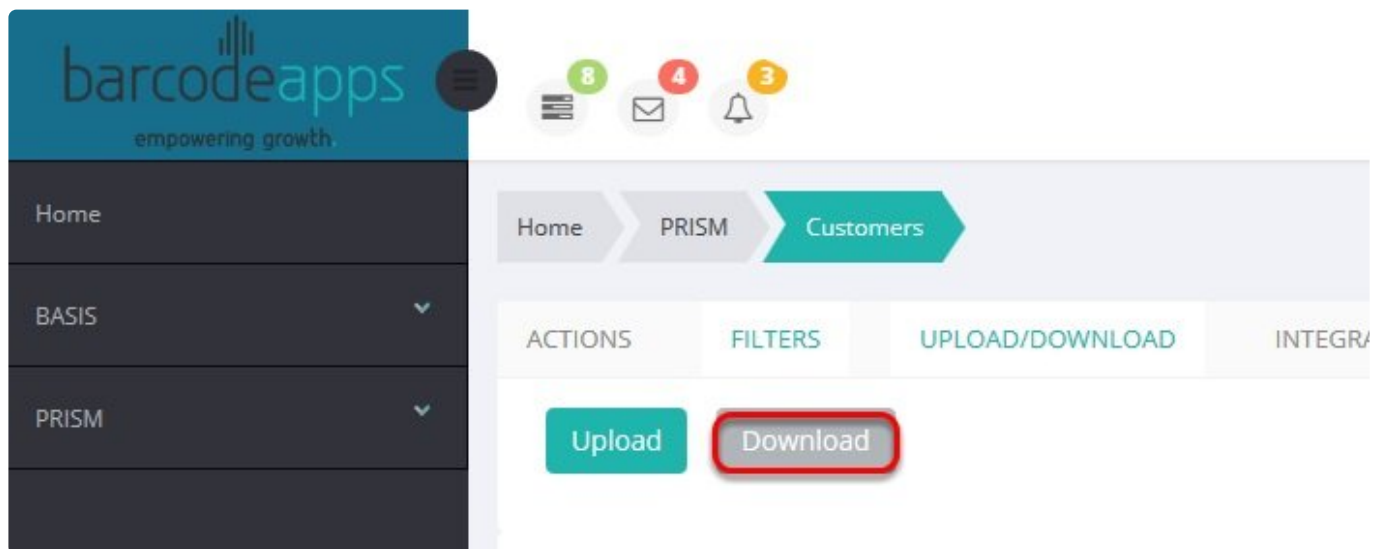
To download the customer form. On the homepage click on PRISM and then Customers.



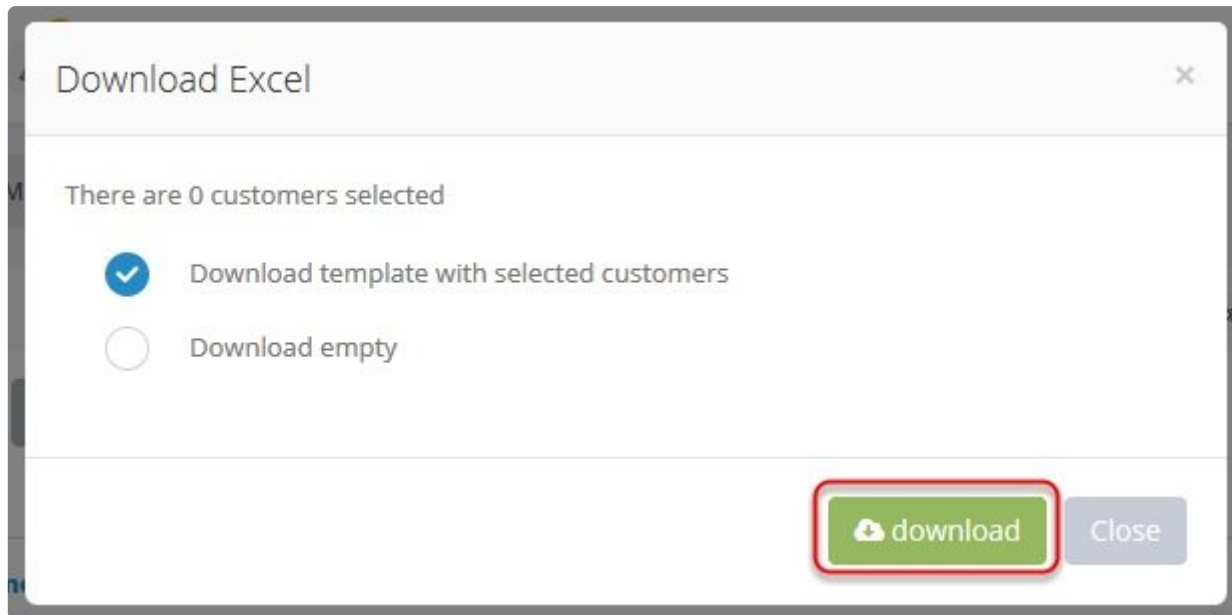
Click on the Upload/Download section



Click on Download Excel



On the pop up window, select the download option and then click on Download.



DOWNLOAD OPTIONS

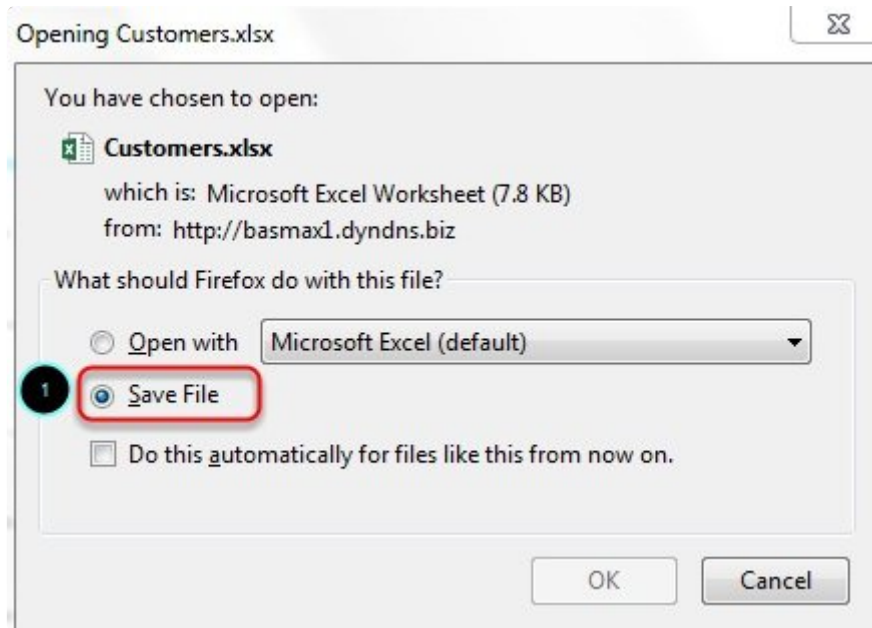
- 1 ☒ Download template with selected customers
- 2 ☐ Download empty

1. **Download Template with selected customers** – This will download the customer form with pre selected customers from the PRISM Joomla Website.

2. **Download Empty** – This will download a blank customer form. Typically used by new customers to upload their clients on the PRISM Joomla Website.

Save the form on your computer. Now you can start to fill out the form and once done you can start uploading it.

(See Uploading Excel Form)



Customers Form Field Definitions

	A	B	C	D	E	F	G	H
	Telephone	CustomerCode	CustomerName	Address	City	StateProv	PostalZip	EMAIL
2	416-822-3434	BAR01001	Trisha Dotullo	5080 Timberlea	Mississauga	ON	L4W 4M2	trisha@barcodeapps.com
3	4165908333	WINSTN	Winston s Computer Consultant	9000 Front St. W	Toronto	ON	M4G 2B2	gwinston@winstoncomputer.com
4	2049275540	WHDIST	West Heights Distributors Inc.	5550 Independe	Winnipeg	MB	R3J 1P9	julesb@westheights.com
5	6046224900	WESTEC	Western Electronics	1265 Madison S	Vancouver	BC	V1S 3L3	kwong@westernelectronics.com
6	4166655400	TORRAD	Toronto Radio Limited	2316 Avenue Ro	Toronto	ON	M5A 1X5	rtucker@torontoradio.com
7	4162222323	TERSEA	Terrace Sound Effects	78 Christopher A	Toronto	ON	M8V 8R2	hsmlyth@home.com
8	4168835656	SNDMCH	Sound Machine	1137 West Park	Mississauga	ON	L4W 5N3	wendy@soundmachine.com
9	7052726339	SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street	Brockville	ON	L92 3K7	croberts@smithevanshifi.com
10	9052547699	RADLND	Radio Land	103 MacArthur C	Willowdale	ON	L8T 2T2	dmacarthur@radioland.com
11	4165556262	ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore	Toronto	ON	M6G 1J5	kevinh@ose.com
12	4165394575	NYAUDI	North York Audio Specialists	823 Griffin Way	North York	ON	M3P 2D5	ghinnings@northyorkaudio.ca
13	5197223654	MASTER	Masters Computer Systems	104 Griffin Road	Windsor	ON	N1R 5G8	dmasters@masterscs.com
14	9024249787	LBSTER	Long Brothers Stereo Inc.	8041 Newman A	Yarmouth	NS	B4K 2LW	scrocker@longbrothersstereo.ca
15	9056589445	JACSJN	Jackson Electronics	600 Niagara Wa	Niagara Falls	ON	NOF 7R9	jjackson@jacksonelectronics.com
16	2048224901	INTSYS	Integrated Sound Solutions	1402 West Stre	Lethbridge	AB	T5H 2L4	djackson@integratedsound.com
17	9055551438	HARNEW	Harris Newland Inc.	1197 Bartley Bul	Brampton	ON	L6W 7J8	lnewland@harrisnewland.com
18	6045554321	HARMON	Harmons Home Theatre System	283 Jane Street	Calgary	AB	T7E 1K3	wharmon@hhhs.com
19	9055559696	HARDIN	Harding TV Repairs	252 Gladstone E	Willowdale	ON	L2J 4S3	sharding@hardingtv.com
20	9055559700	HARCOM	Hardy Computer Associates	1200 Lester Pea	Malton	ON	L9V 1M2	whardy@hardyca.com
21	7052521616	GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley	Huntsville	ON	N2J 5T5	ibarnett@georgianhifi.com
22								
23								
24								
25								

Telephone: Mandatory: Holds the customer main telephone number (Characters up to 40). This doesn't have to be unique, although it is recommended.

CustomerCode: Mandatory: Holds the customer code. (Characters up to 20). Each code must be unique.

CustomerName: Mandatory: Holds a customer name (usually the business name) Characters up to 100.

Address: Optional: Holds the customer address (Street number, name, type, unit number). Characters up to 70

City: Optional: Holds the customer city. Characters up to 100

StateProv: Optional: Holds the customer state (if US location) or province (if Canada location). Characters up to 4

PostalZip: Optional: Holds the customer zip code (if US location) or postal code (if Canada location). Characters up to 10

EMAIL: Optional: Holds the customer email address. Works in key with the field zzz to give the customer access

to several Prism apps (Prism for iPad and Prism website) Characters up to 50

WEB: Optional: Holds the customer website URL. Characters up to 50

Fax: Optional: Holds the customer fax number. Characters up to 12

Cell: Optional: Holds the customer cell number. Characters up to 12

BilltoPhone: Optional: This is actually the customer code of the BILL TO if the customer is part of a Bill To Ship to

setting. For example if a company has a head office in Toronto and 3 ship to stores then PRISM will require 4

customers where the BILL TO is a customer and the ship to's are also customers but in their case the BILL TO

code would be inserted in this field. Characters up to 20

HeadOfficeName: Optional: As per explanation above this is the name of the Head Office (Optional) Characters up to 50

+PaymentTerms +: Optional: Terms of payment assigned to this customers Characters up to 20

RepCode: Optional: Holds the code of the rep (sales person) who represents the customer. Characters up to 30

Contact1: Optional: Holds the name of the main contact person for the customer. Characters up to 20

Contact2: Optional: Holds the name of the secondary contact person for the customer. Characters up to 20

Notes: Optional: Holds any customer comments that will be displayed on the Customer Details screen of all Prism

products. Characters up to 50

Num1: Optional: Holds the tax rate that applies to the customer for the first tax type (e.g. 15, 10, etc.). Integer

numbers NO decimals

Num2: Optional: Holds the tax rate that applies to the customer for the second tax type (e.g. 15, 10, etc.). Integer

Integer

numbers NO decimals

BVWh: Optional: Warehouse attached to that customer in BV Characters up to 3

zzz: Holds the customer password that works in key with the email for access to several Prism programs such as

the customer login on the iPad app and the customer login on the online shopping website. Characters up to 9

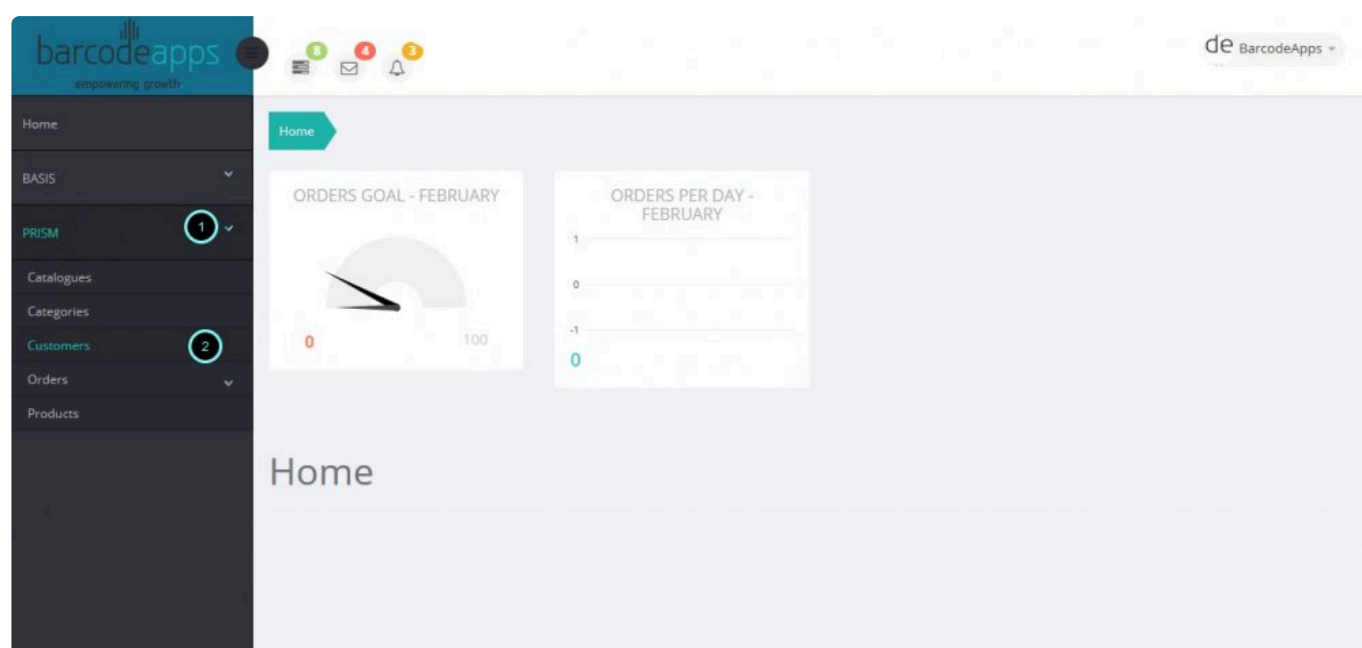
p>{color:gray}. BarcodeApps © 2016

3.1.5. VI. Upload Excel Customer(New Portal)

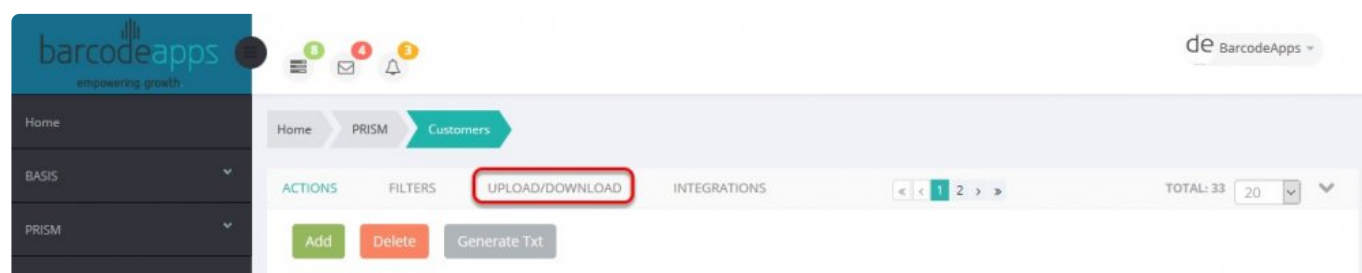
This knowledge base article will guide users on how to upload their clients information using the customers form.

UPLOADING EXCEL (CUSTOMERS FORM)

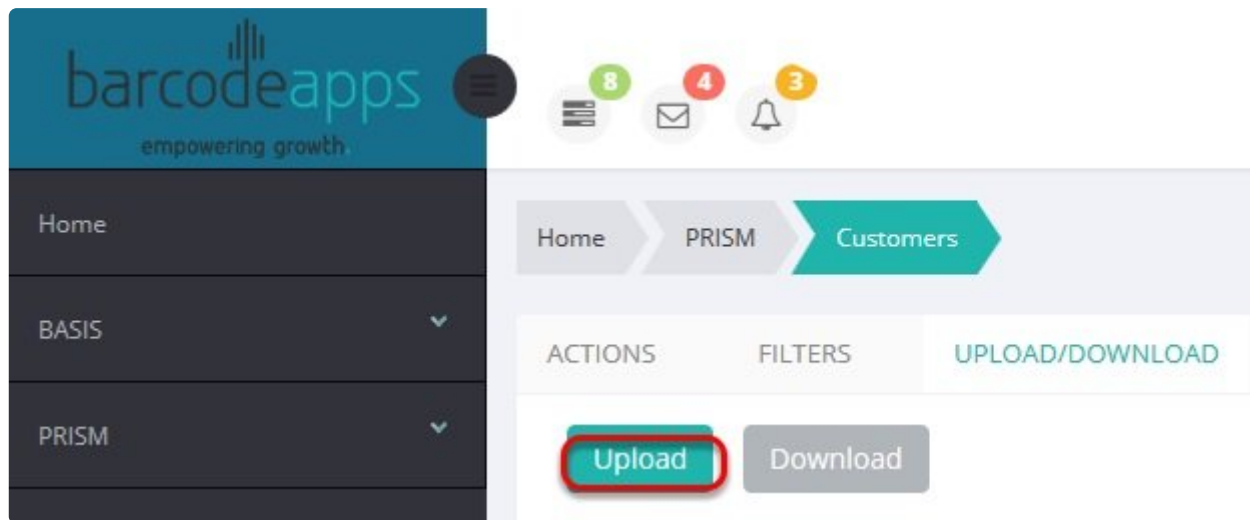
To upload the customer form. On the Homepage click on PRISM and then Customers.



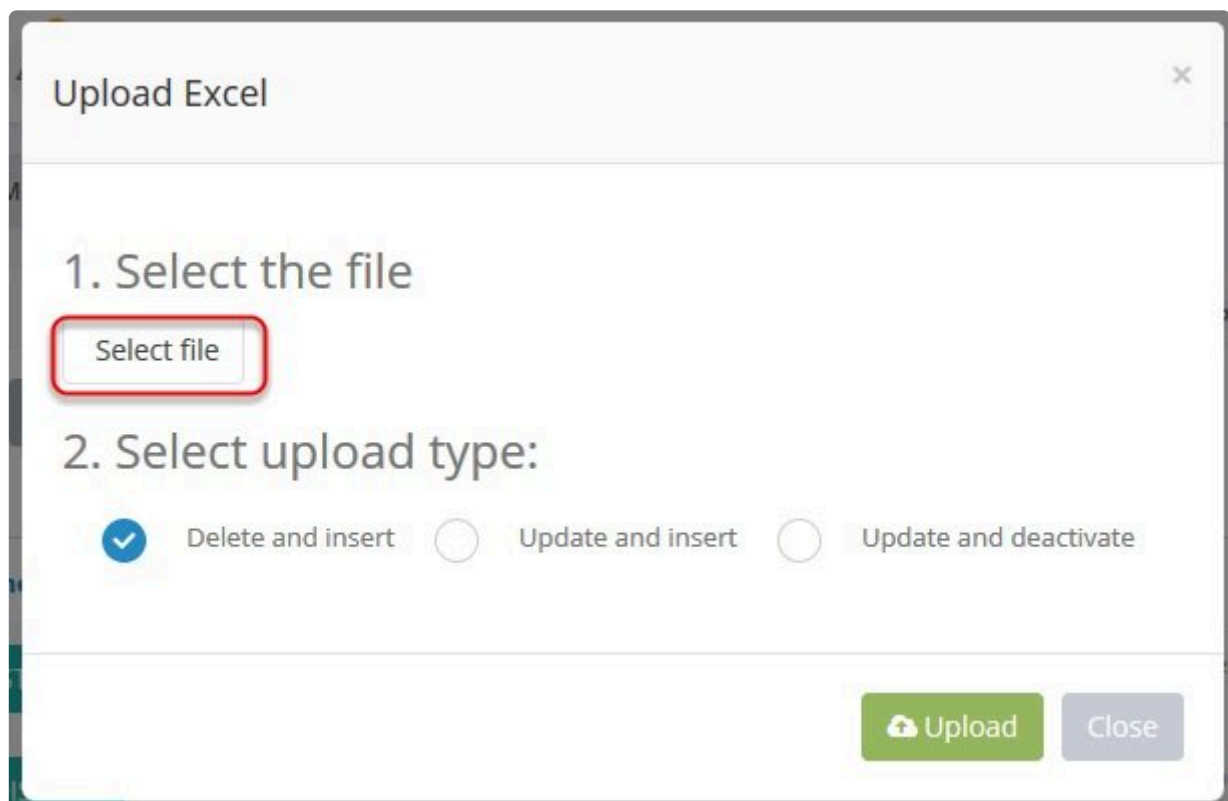
Click on Upload/Download.



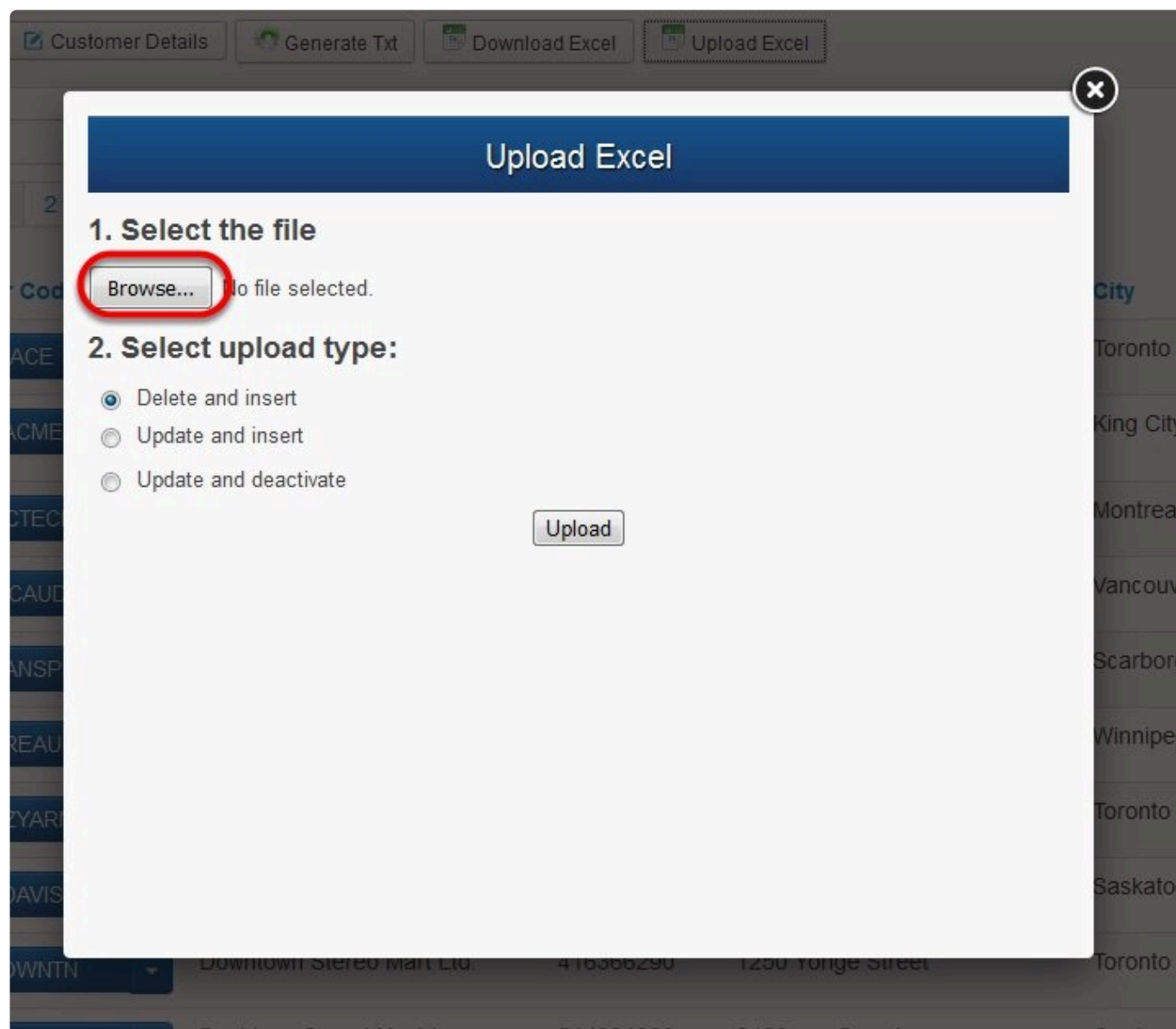
Click on Upload



On the pop up window. click on Select file



Browse to the location of the excel file to be uploaded.



The screenshot shows a web application interface with a top navigation bar containing buttons: 'Customer Details', 'Generate Txt', 'Download Excel', and 'Upload Excel'. The 'Upload Excel' button is highlighted with a dashed border. A modal dialog box titled 'Upload Excel' is open in the center. It has a blue header bar with the title. Below the header, the dialog is divided into two sections. The first section, '1. Select the file', contains a 'Browse...' button which is circled in red, and the text 'No file selected.' to its right. The second section, '2. Select upload type:', contains three radio button options: 'Delete and insert' (which is selected), 'Update and insert', and 'Update and deactivate'. At the bottom center of the dialog is an 'Upload' button. The background of the application shows a list of items with columns for name, phone number, and address, with some entries like 'Downtown Stereo Mart Ltd.' and 'Davidson Sound Machine' visible.

Select the upload type and then select Upload.

Upload Excel

1. Select the file

Select file

2. Select upload type:

☒ Delete and insert ☐ Update and insert ☐ Update and deactivate

1

2

Upload Close

Upload Type

1. Delete and Insert – this option will delete all entries and insert new customers.
2. Update and Insert – this option will update your customer list.
3. Update and Deactivate -

Customers are now uploaded on the website.

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Home

BASIS

PRISM

34

4

4

3

de BarcodeApps

ACTIONS

FILTERS

UPLOAD/DOWNLOAD

INTEGRATIONS

< 1 2 >

TOTAL: 34 20

Add

Delete

Generate Txt

<input type="checkbox"/>	Customer Code	Customer Name	Telephone	Address	City
<input type="checkbox"/>	JUNTST	JUN TEST	8008001234	Toronto Toronto	Toronto
<input type="checkbox"/>	WINSTN	Winston s Computer Consultants	4165908333	9000 Front St. West Side	Toronto
<input type="checkbox"/>	WHDIST	West Heights Distributors Inc.	2049275540	5550 Independence Avenue	Winnipeg
<input type="checkbox"/>	WESTEC	Western Electronics	6046224900	1265 Madison Street	Vancouver
<input type="checkbox"/>	TORRAD	Toronto Radio Limited	4166655400	2316 Avenue Road	Toronto
<input type="checkbox"/>	TERSEA	Terrace Sound Effects	4162222323	78 Christopher Avenue	Toronto
<input type="checkbox"/>	SNDMCH	Sound Machine	4168835656	1137 West Park Drive	Mississauga
<input type="checkbox"/>	SEHIFI	Smith Evans Hi-Fi Design Inc.	7052726339	412 River Street	Brockville
<input type="checkbox"/>	RADLND	Radio Land	9052547699	103 MacArthur Drive Suite 459	Willowdale

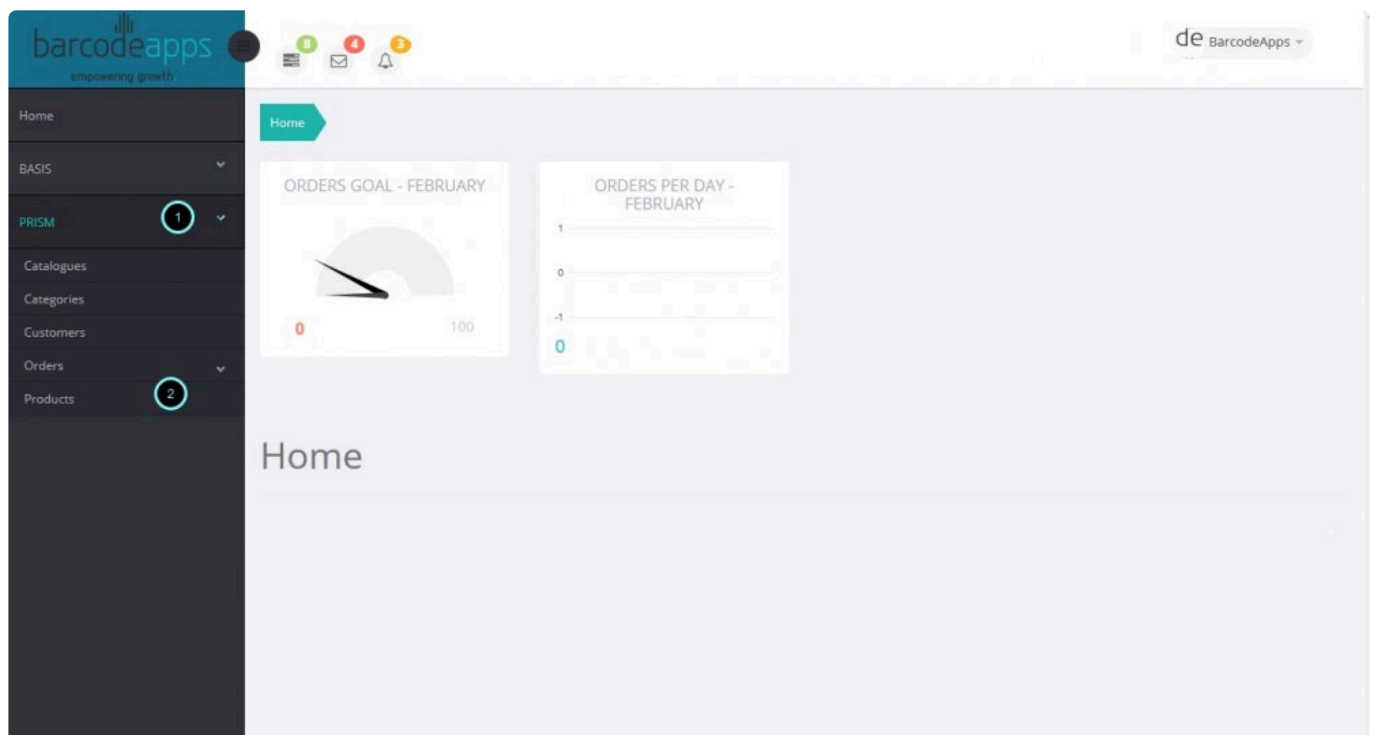
3.2. B. Product Management (New Portal)

3.2.1. I. How to add a new Item (New Portal)

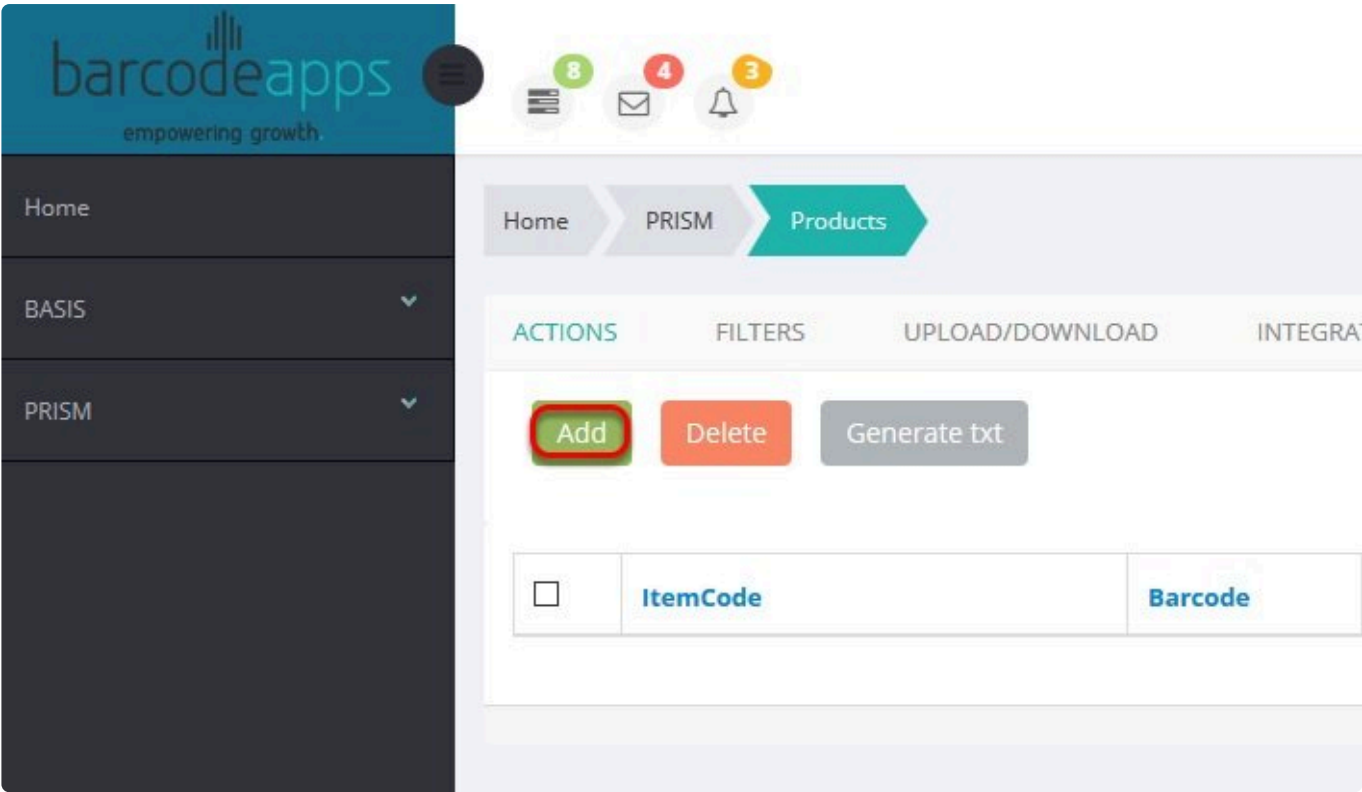
This knowledge base article will guide users to add a new item from to their product inventory on the [PRISM Joomla Website.](#)

ADDING NEW PRODUCT

To begin adding an item. from the Homepage. Click on PRISM and then Products



Click on Add



Fill out the information (see field definitions) needed on each tabs (Basic information, Numeric information and Other information)

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HomeBASISPRISM

843

HomePRISMProducts

Save & CloseClose

BasicNumericOther

ItemCode *

Barcode

Description

MinOrderQty

Comment

Casepack

Page 561 of 1305

The screenshot displays the BarcodeApps interface with three tabs: Basic, Numeric, and Other. The Basic tab is active, showing fields for ItemCode *, Barcode, Description, MinOrderQty, and Comment. The Numeric tab is also visible, showing fields for UnitPrice, PR2, PR3, and PR4. The Other tab is partially visible on the right, showing fields for Style, StyleColor, SuggestedOrder, and isParent.

Basic Tab Field Definitions

ItemCode: Mandatory: Holds the item code. (Characters up to 50). Each code must be unique.

Barcode: Optional: Holds the secondary code (or UPC) of the product. Although not required, it is recommended

that each barcode is unique. The majority of our apps, when searching or scanning will first look for the Item Code

then for the Barcode. Characters up to 50

+Description +: Mandatory: Holds the description of the product. Characters up to 80

MinOrderQty: Optional. Holds the minimum quantity a product is sold. If no minimum quantity is specified, most

apps in the Prism suite will default the minimum order qty to 1. Numeric, decimals allowed

Comment: Optional: Additional information concerning the product: Characters up to 50

CasePack: Optional: Specifies the case quantity a product is sold for (e.g. case of 10). Numeric, decimals allowed

Catalog: Optional: Specifies the Main Category the product belongs to (e.g. Kitchen, Summer, etc.). Characters

up to 50

DueDate: Optional: Expected date if not in stock. Characters up to 20

Exp1: Optional: Specifies if the product is taxable for tax type 1 (1 for True and 0 for False)

Exp2: Optional: Specifies if the product is taxable for tax type 2 (1 for True and 0 for False)

WHSE: Optional: Specifies the warehouse the product belongs to. Characters up to 6

+TempOnHand +: Optional: Specifies the quantity available of the product in stock. Numeric, decimals allowed

UOM: Optional: Holds the unit of measure (primary) for the product. Characters up to 50

Numeric Information Field Definitions

UnitPrice: Mandatory: Holds the price (unit price/price level 1) for the product. Numeric, decimals allowed

PR2: Optional: Holds the price (price level 2) for the product. Numeric, decimals allowed

PR3: Optional: Holds the price (price level 3) for the product. Numeric, decimals allowed

+PR4: +Optional: Holds the price (price level 4) for the product. Numeric, decimals allowed

PR5: Optional: Holds the price (price level 5) for the product. Numeric, decimals allowed

PR6: Optional: Holds the price (price level 6) for the product. Numeric, decimals allowed

PR7: Optional: Holds the price (price level 7) for the product. Numeric, decimals allowed

PR8: Optional: Holds the price (price level 8) for the product. Numeric, decimals allowed

PR9: Optional: Holds the price (price level 9) for the product. Numeric, decimals allowed

PR10: Optional: Holds the price (price level 10) for the product. Numeric, decimals allowed

PR11: Optional: Holds the price (price level 11) for the product. Numeric, decimals allowed

PR12: Optional: Holds the price (price level 12) for the product. Numeric, decimals allowed

PR13: Optional: Holds the price (price level 13) for the product. Numeric, decimals allowed

PR14: Optional: Holds the price (price level 14) for the product. Numeric, decimals allowed

PR15: Optional: Holds the price (price level 15) for the product. Numeric, decimals allowed

ADDING NEW ITEM – 4 BarcodeA pps © 2016

PR16: Optional: Holds the price (price level 16) for the product. Numeric, decimals allowed

PR17: Optional: Holds the price (price level 17) for the product. Numeric, decimals allowed

PR18: Optional: Holds the price (price level 18) for the product. Numeric, decimals allowed

PR19: Optional: Holds the price (price level 19) for the product. Numeric, decimals allowed

PR20: Optional: Holds the price (price level 20) for the product. Numeric, decimals allowed

Other Information Field Definition

Style: Optional. Holds the value of a style a product can belong to (one dimensional or two dimensional matrix's). Characters up to 20

SuggestedOrder: Optional: Holds the quantity that the manufacturer can specify as suggested ordering quantity.

Integer numbers NO decimals

StyleColor: Optional: Specifies an alternate image name for the product in case the ItemCode has some characters that Windows does not allow as file names (e.g. 100.001). Characters up to 50

isParent: Optional: Specifies if a product is a parent of a subset of products for the Parent/Child logic on

Prism

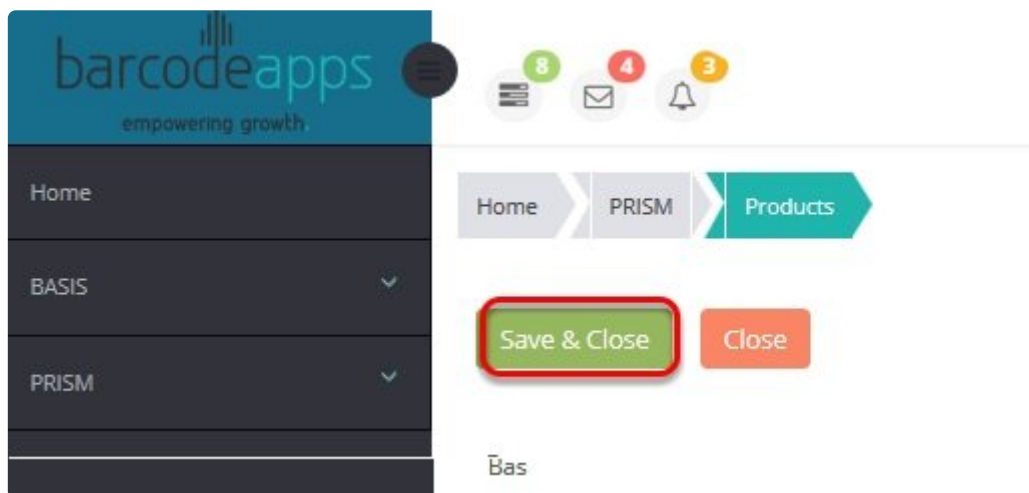
for iPad. Boolean (1 for TRUE/0 for FALSE) Only

ParentCategory: Optional: Specifies the subcategory a product can belong to. Used for the auto category creation

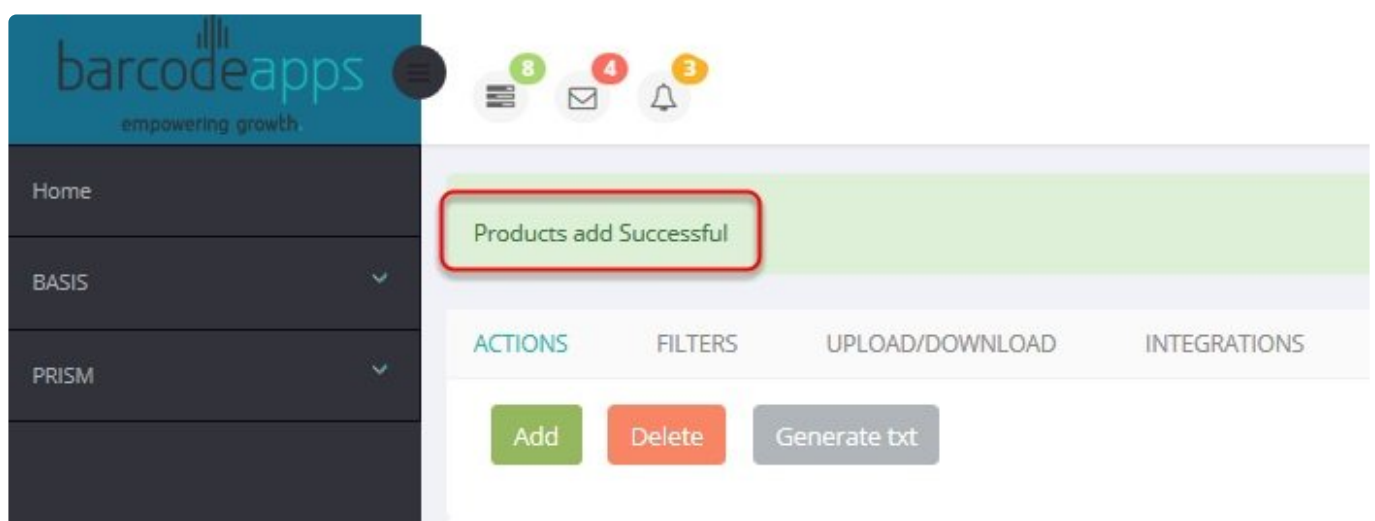
logic in Prism desktop. Characters up to 100

isProduct: Mandatory: Specifies if a product is an actual product (True) or if it part of the Size/Frame functionality(False or Null) logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

Once done with the details click on Save and Close.

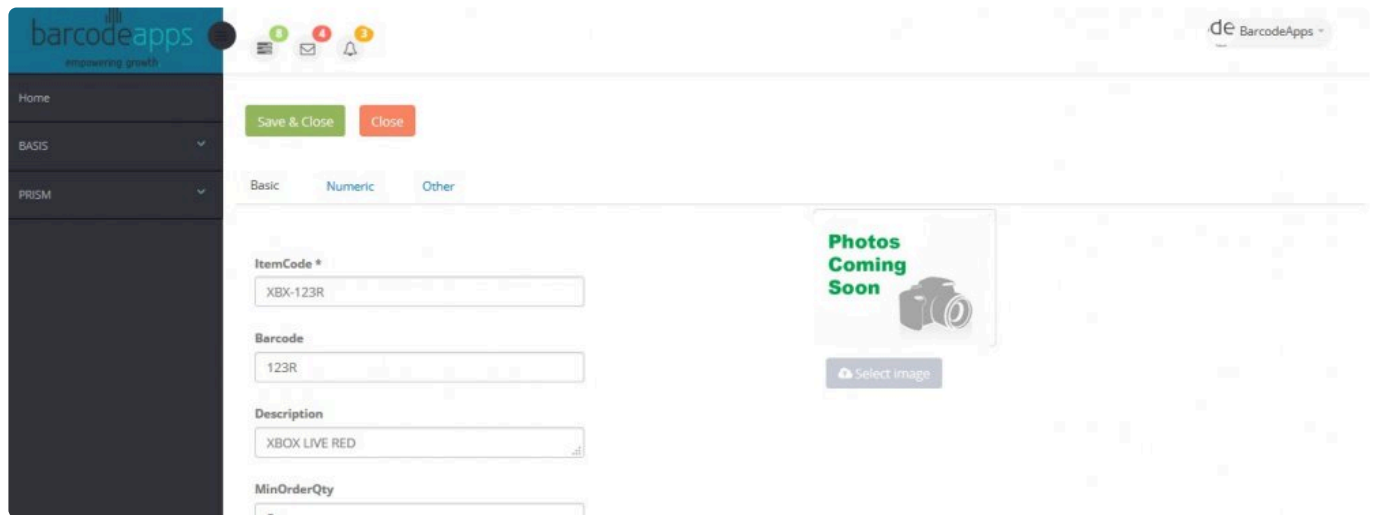


A notification will show once an item is successfully added



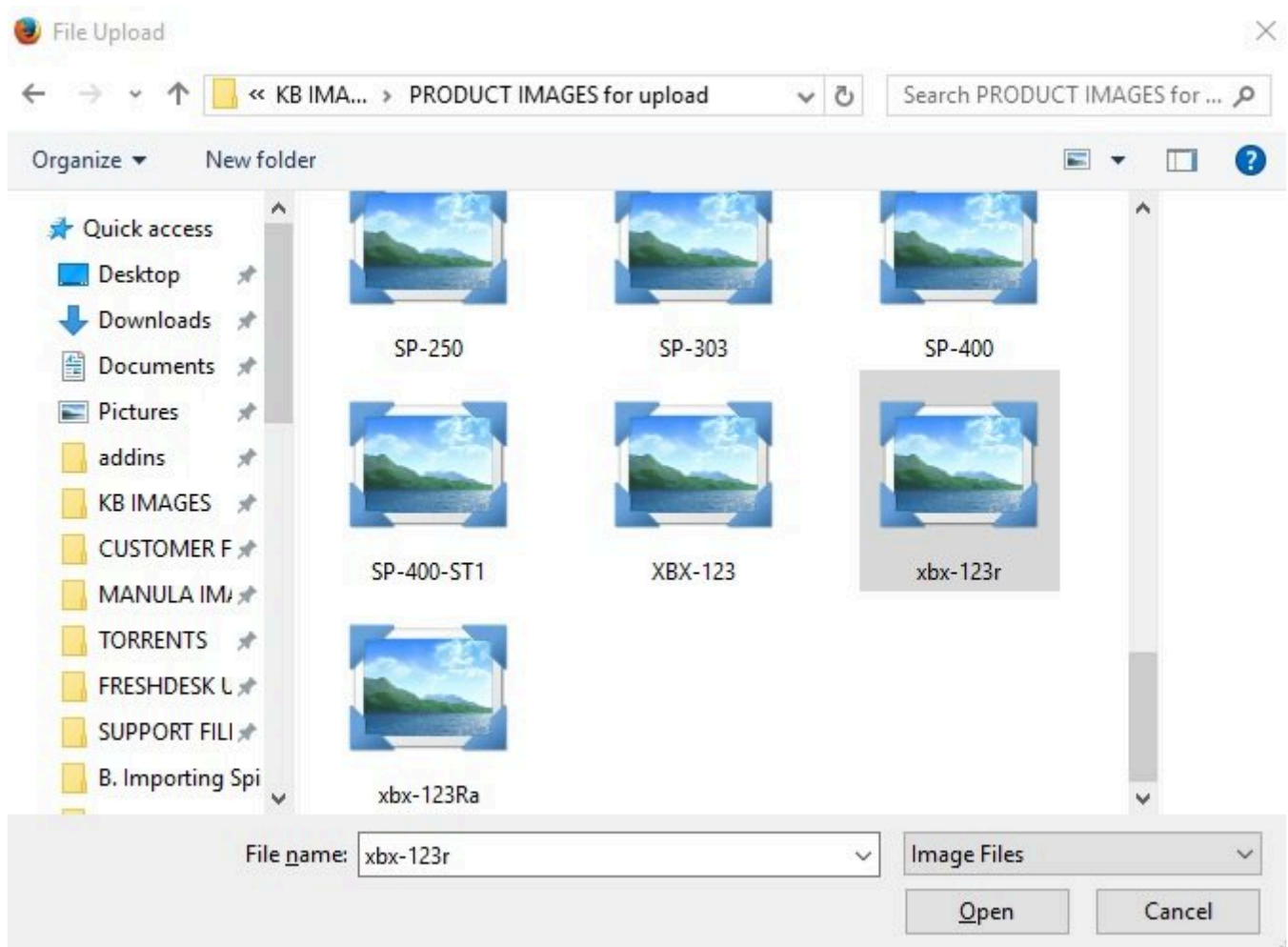
ADDING IMAGE

To add an image, click on the select image button



The screenshot shows the BarcodeApps web application interface. On the left is a dark sidebar with the 'barcodeapps' logo and navigation links: 'Home', 'BASIS', and 'PRISM'. The main content area has a top bar with 'Save & Close' and 'Close' buttons, and tabs for 'Basic', 'Numeric', and 'Other'. The 'Basic' tab is active, displaying form fields for 'ItemCode *' (containing 'XBX-123R'), 'Barcode' (containing '123R'), 'Description' (containing 'XBOX LIVE RED'), and 'MinOrderQty'. To the right of these fields is a placeholder box with the text 'Photos Coming Soon' and a camera icon, with a 'Select image' button below it. The top right corner shows a user profile icon and the text 'BarcodeApps'.

Locate the image of the item and then click on Open.



Click on Save and Close to finish adding the image.

Save & Close

Close

Basic

Numeric

Other

ItemCode *

XBX-123R


Barcode

123R

Description

XBOX LIVE RED

MinOrderQty



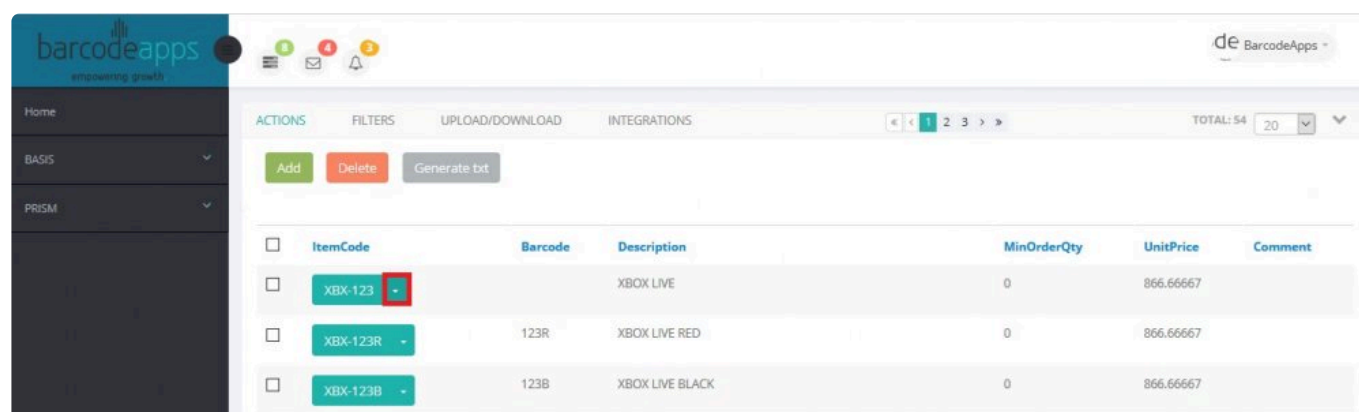
Select image

3.2.2. II. How to Edit an Item (New Portal)

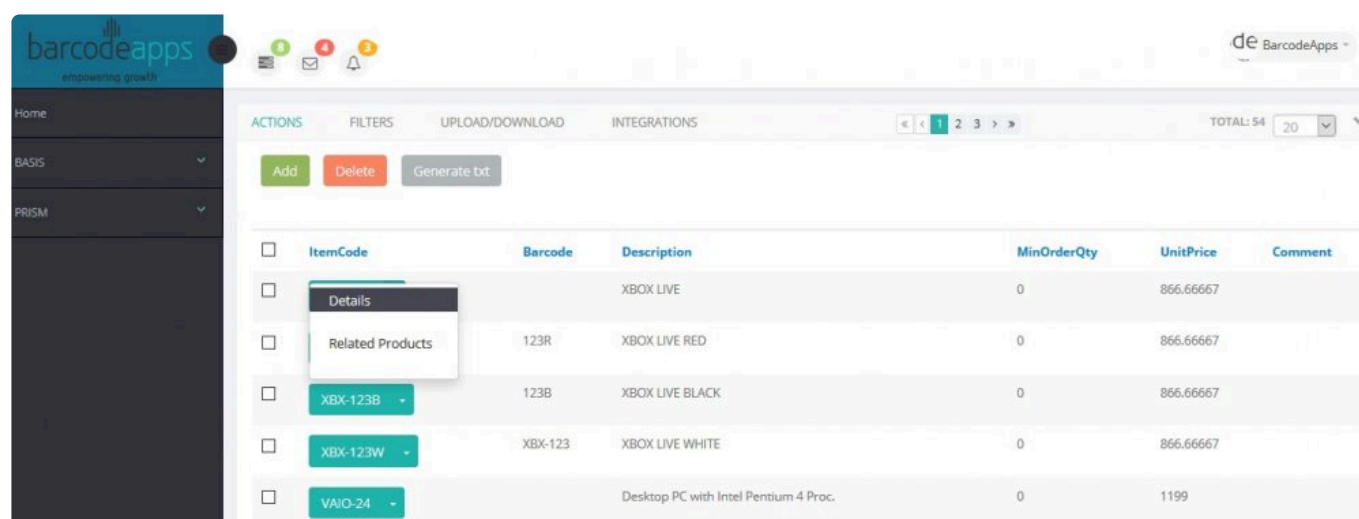
This knowledge base article will guide users to edit their product information in the [PRISM Joomla Website](#).

HOW TO EDIT AN ITEM

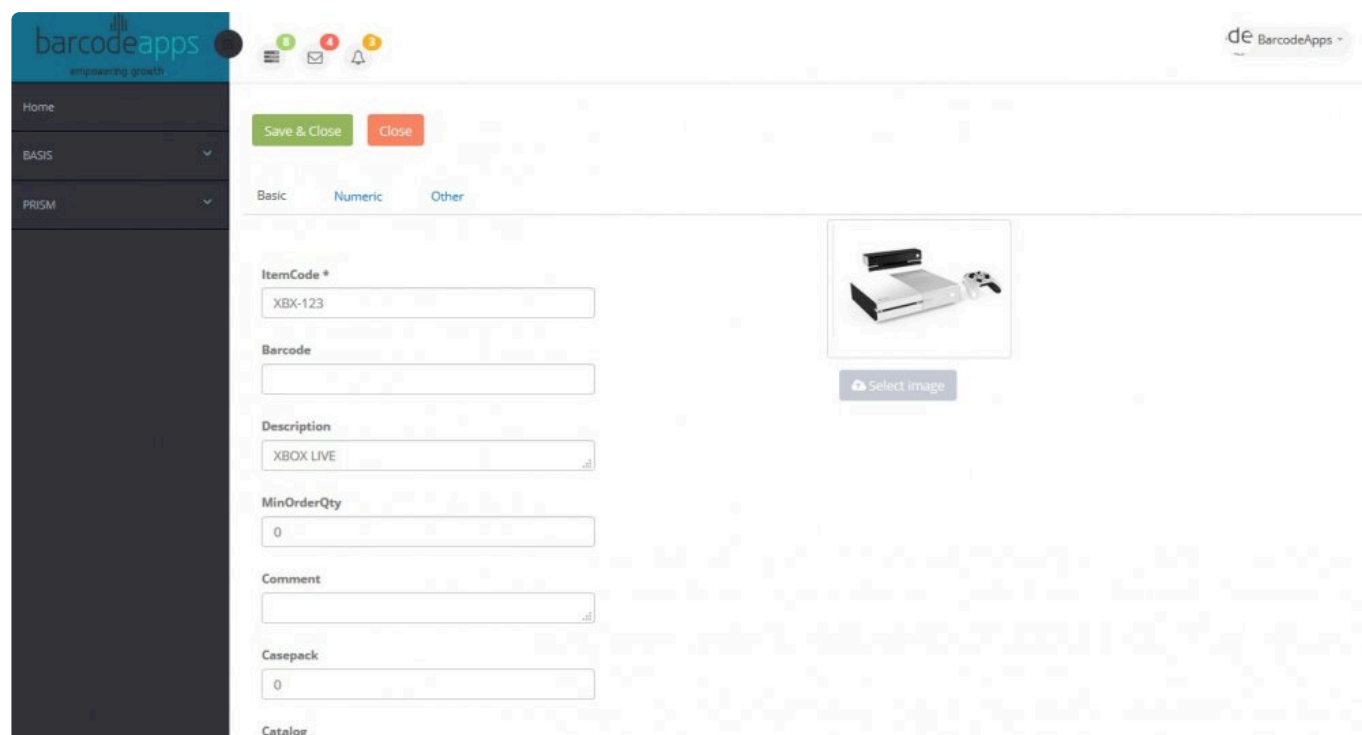
To edit a product, click on the drop down arrow just beside the item code.



Click on Details

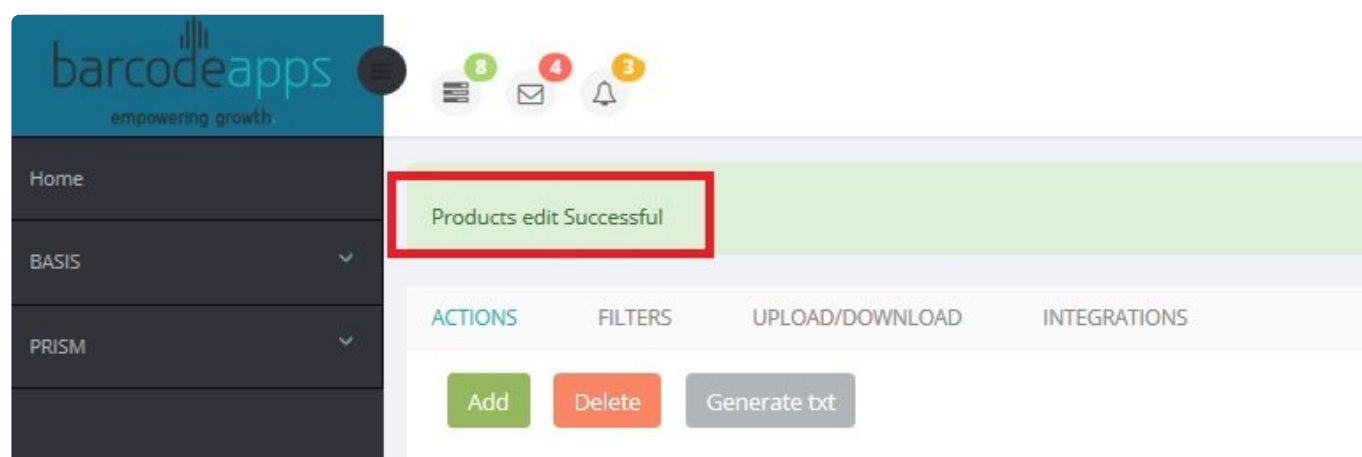


Another way to edit a product is to click on the down arrow just after the item code, select the option Edit Product, and then after making some changes click on Save and Close.



The screenshot shows the BarcodeApps web interface for editing a product. The left sidebar contains navigation links: Home, BASIS, and PRISM. The top header features the BarcodeApps logo and a notification bell icon. The main content area has a 'Save & Close' button and a 'Close' button. Below these are tabs for 'Basic', 'Numeric', and 'Other'. The 'Basic' tab is active, showing a form with the following fields: 'ItemCode *' (containing 'XBX-123'), 'Barcode', 'Description' (containing 'XBOX LIVE'), 'MinOrderQty' (containing '0'), 'Comment', 'Casepack' (containing '0'), and 'Catalog'. To the right of the form is a placeholder image of an Xbox console with a 'Select image' button below it.

To sync the changes to the PRISM app (iOS and Android), tap on Generate txt.



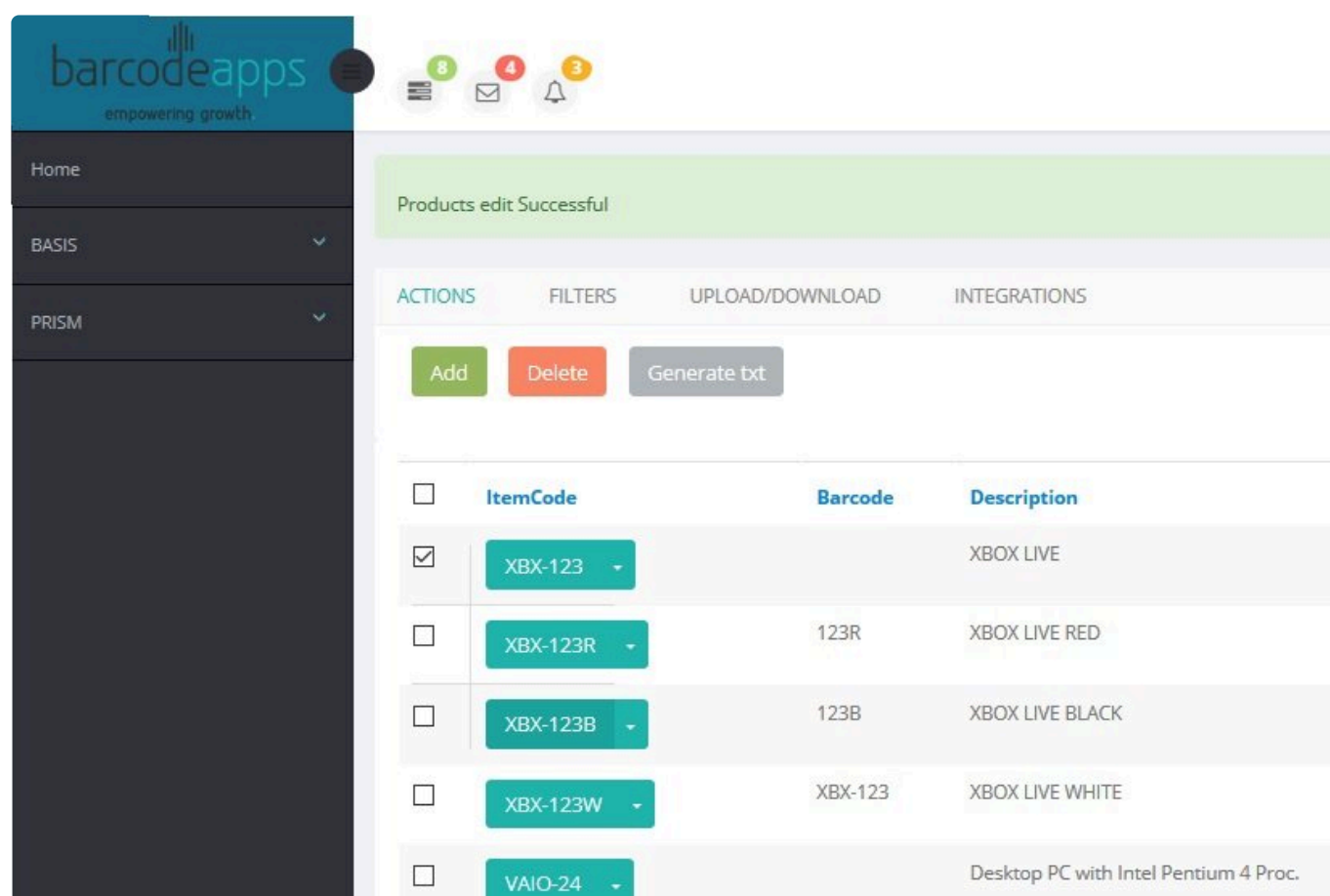
The screenshot shows the BarcodeApps web interface after a successful product edit. A green banner at the top of the main content area displays the message 'Products edit Successful', which is highlighted with a red rectangle. Below the banner are tabs for 'ACTIONS', 'FILTERS', 'UPLOAD/DOWNLOAD', and 'INTEGRATIONS'. Under the 'ACTIONS' tab, there are three buttons: 'Add', 'Delete', and 'Generate txt'.

3.2.3. III. Deleting an Item (New Portal)

This knowledge base article will guide users to delete a product item from the [PRISM Joomla Website](#).

DELETING AN ITEM

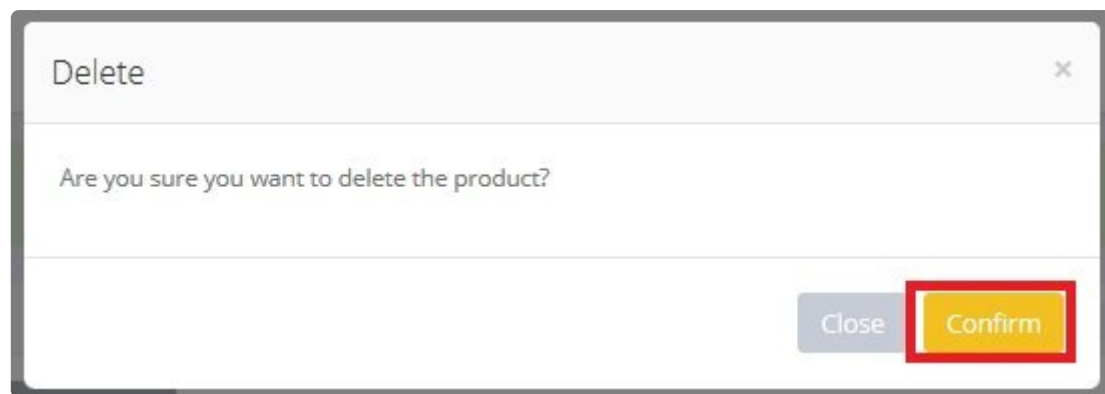
To delete a product item, select a product by ticking on the box just before the item code (you can make multiple selections),and then click on Delete.



The screenshot shows the BarcodeApps PRISM Joomla interface. A green banner at the top indicates 'Products edit Successful'. Below this, there are tabs for 'ACTIONS', 'FILTERS', 'UPLOAD/DOWNLOAD', and 'INTEGRATIONS'. Under the 'ACTIONS' tab, there are three buttons: 'Add' (green), 'Delete' (orange), and 'Generate bxt' (grey). Below the buttons is a table with columns for 'ItemCode', 'Barcode', and 'Description'. The first row is selected, indicated by a checked checkbox in the 'ItemCode' column.

	ItemCode	Barcode	Description
<input checked="" type="checkbox"/>	XBX-123		XBOX LIVE
<input type="checkbox"/>	XBX-123R	123R	XBOX LIVE RED
<input type="checkbox"/>	XBX-123B	123B	XBOX LIVE BLACK
<input type="checkbox"/>	XBX-123W	XBX-123	XBOX LIVE WHITE
<input type="checkbox"/>	VAIO-24		Desktop PC with Intel Pentium 4 Proc.

Just click on Confirm to delete.

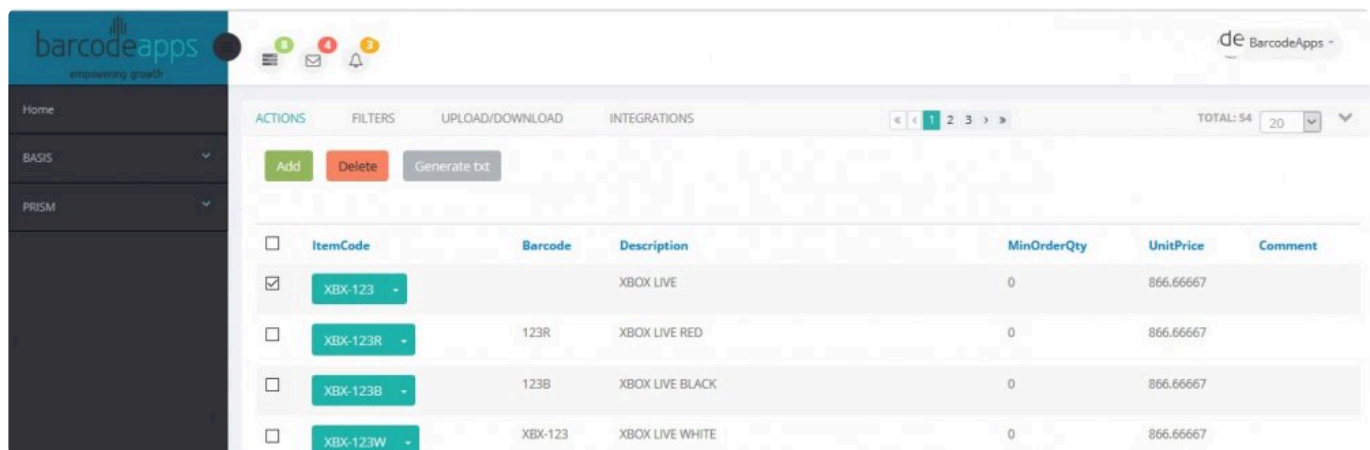


3.2.4. iv. Product Details (New Portal)

This knowledge base article will guide users on how to check product details inside the [PRISM Joomla Website](#).

Checking Product Details

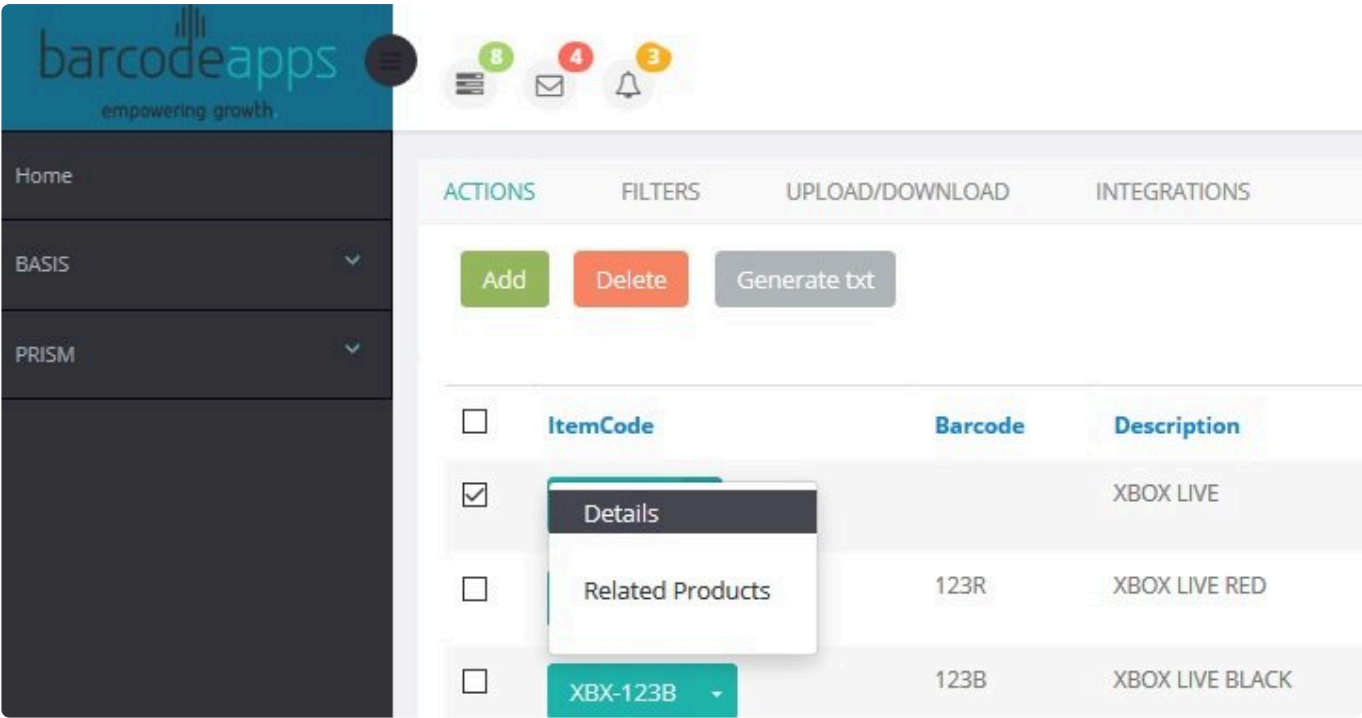
To see the details of a product just click on the drop down arrow just after the product code



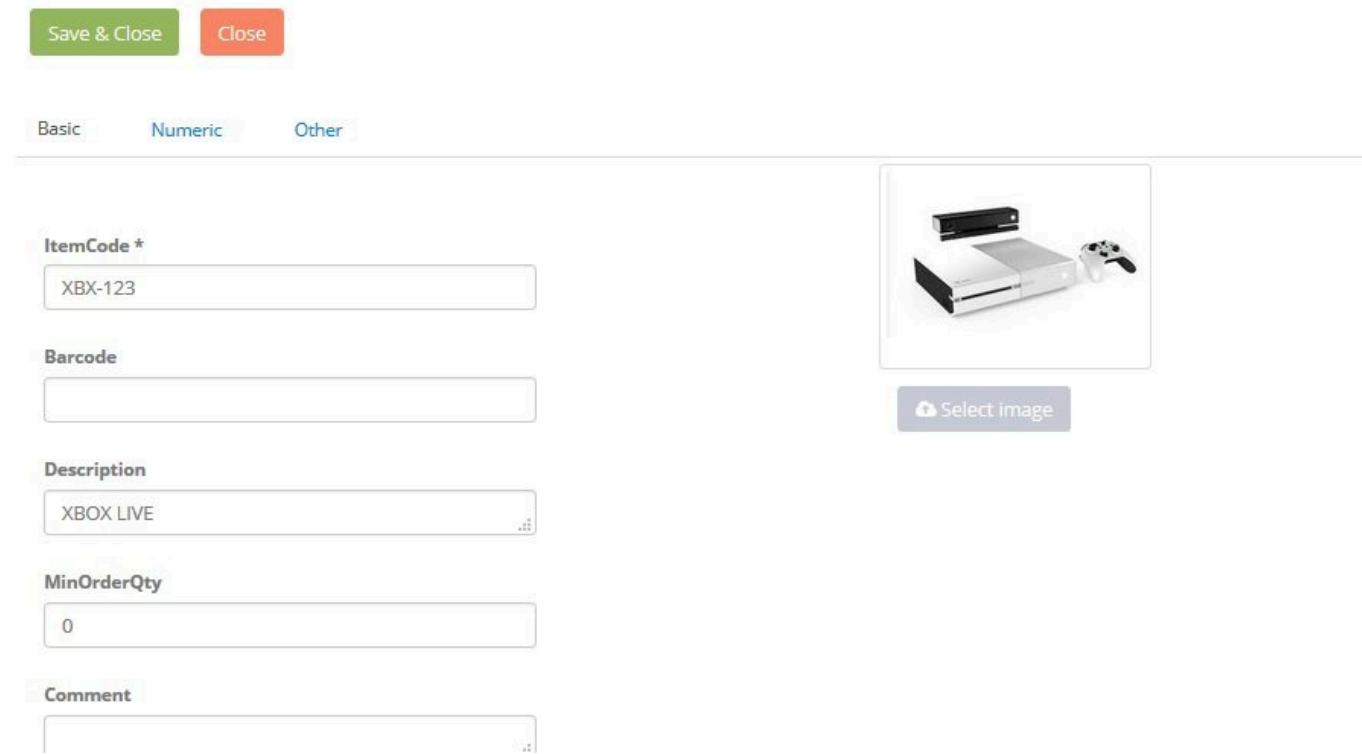
The screenshot shows the BarcodeApps Joomla! PRISM portal. On the left is a dark sidebar with the 'barcodeapps' logo and navigation links: Home, BASIS, and PRISM. The main content area has a top navigation bar with tabs: ACTIONS, FILTERS, UPLOAD/DOWNLOAD, and INTEGRATIONS. Below this are buttons for 'Add', 'Delete', and 'Generate txt'. A table lists products with columns: ItemCode, Barcode, Description, MinOrderQty, UnitPrice, and Comment. The first row is selected, showing 'XBX-123' for ItemCode, '123R' for Barcode, 'XBOX LIVE' for Description, '0' for MinOrderQty, and '866.66667' for UnitPrice. The other rows show variations: 'XBX-123R' (123R, XBOX LIVE RED), 'XBX-123B' (123B, XBOX LIVE BLACK), and 'XBX-123W' (XBX-123, XBOX LIVE WHITE). All have a MinOrderQty of 0 and UnitPrice of 866.66667. A pagination bar at the top right shows 'TOTAL: 54' and a dropdown menu.

<input type="checkbox"/>	ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment
<input checked="" type="checkbox"/>	XBX-123		XBOX LIVE	0	866.66667	
<input type="checkbox"/>	XBX-123R	123R	XBOX LIVE RED	0	866.66667	
<input type="checkbox"/>	XBX-123B	123B	XBOX LIVE BLACK	0	866.66667	
<input type="checkbox"/>	XBX-123W	XBX-123	XBOX LIVE WHITE	0	866.66667	

Click on Details



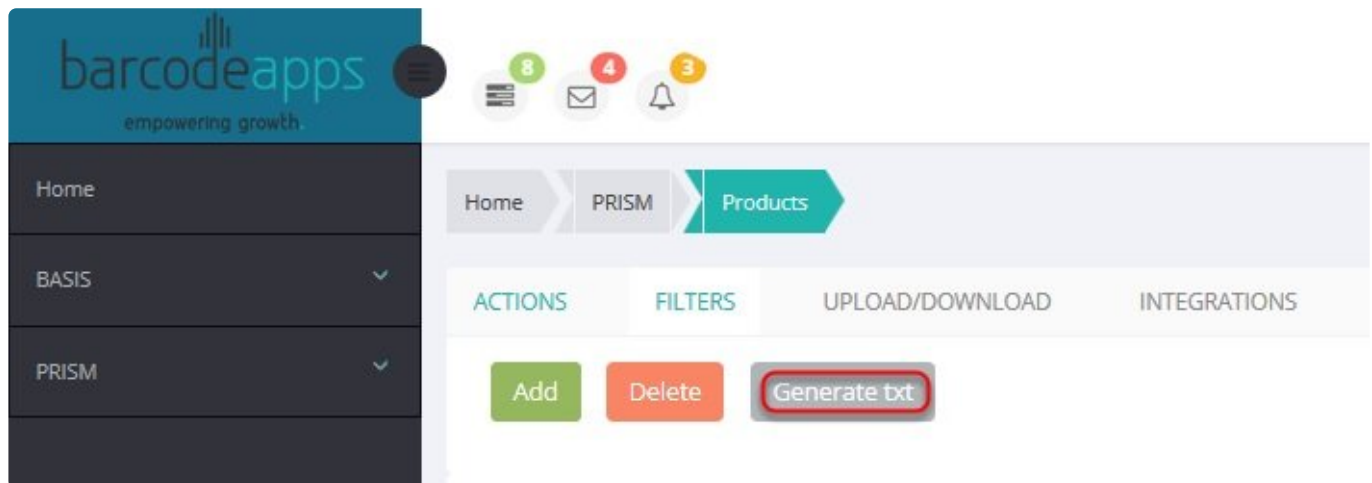
From here we can review the product details.



3.2.5. v. Generate Text (New Portal)

GENERATE TEXT (SYNC DATA)

The Generate txt button syncs all data (Product items, Categories, , Images) from the PRISM Joomla Portal going to the Mobile devices(IOS/ ANDROID) and the PRISM Web Store.



✿ It's a best practice to use this option whenever you make changes inside the joomla portal

3.2.6. vi. Download Excel Products (New Portal)

This knowledge base article will guide users on how to download Excel Products form from the textileRef:8810875695ea75f520116c:linkStartMarker:"PRISM Joomla Website":http://basmax1.dyndns.biz/basportal/administrator/index.php.

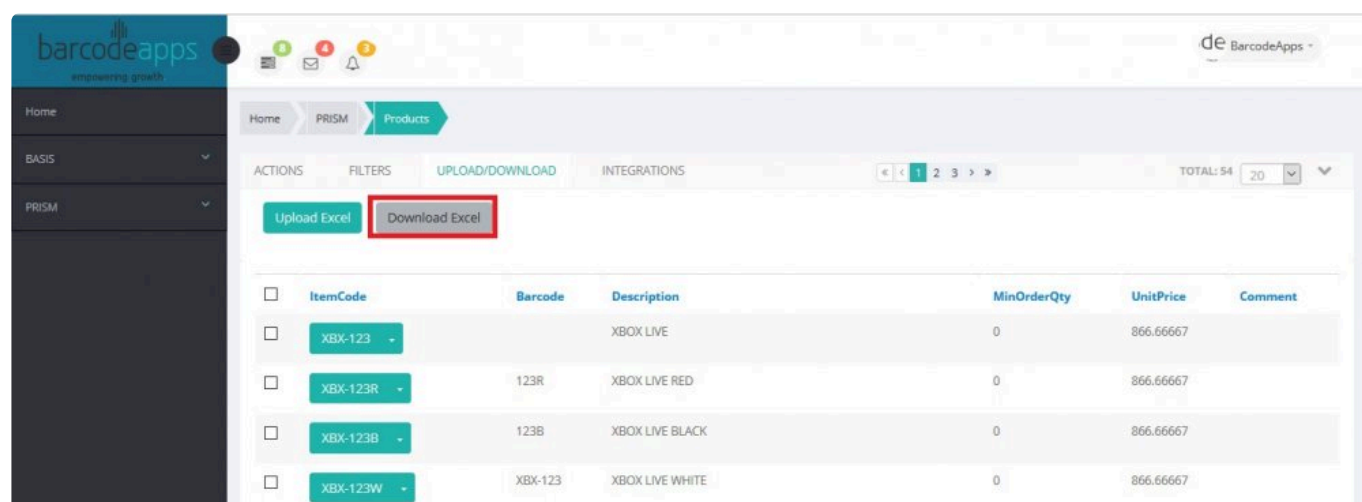
DOWNLOADING PRODUCTS FORM.

To download the products form, click on UPLOAD/DOWNLOAD.

The screenshot shows the BarcodeApps interface for managing products. The top navigation bar includes 'Barcode', 'System', 'Content', 'Manufacturers', 'PRISM', and 'BASIS'. The main header displays 'barcodeapps Products (20)'. Below the header, there is a toolbar with buttons: 'New', 'Edit', 'Delete', 'Details Products', 'Generate Barcode', 'Assign Categories', 'Generate tit', 'Download Excel' (highlighted with a red circle), and 'Upload Excel'. On the left, there is a 'Filter: Product Status' section with a dropdown menu set to 'Active'. Below this, there is a 'Search BY' section with checkboxes for 'ItemCode', 'Barcode', and 'Description'. A 'Search criteria' dropdown and a search input field are also present. The main table lists products with columns: 'ItemCode', 'Barcode', 'Description', 'MinOrderQty', 'UnitPrice', and 'Comment'. The table contains six rows of product data.

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment
GE-2121		GE Ultra HD 55" smart TV	1	1000	ULTRA HD SMART TV
SP-500		Speakers - Home Theatre Package	0	765.4	
SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7	
SPW-14G		14 Gauge Speaker Wire	0	2.3	
ST-10		Stand - for mini speakers	0	199	
ST-25		Stand - 24" Speaker	0	53.6	

Click on Download Excel



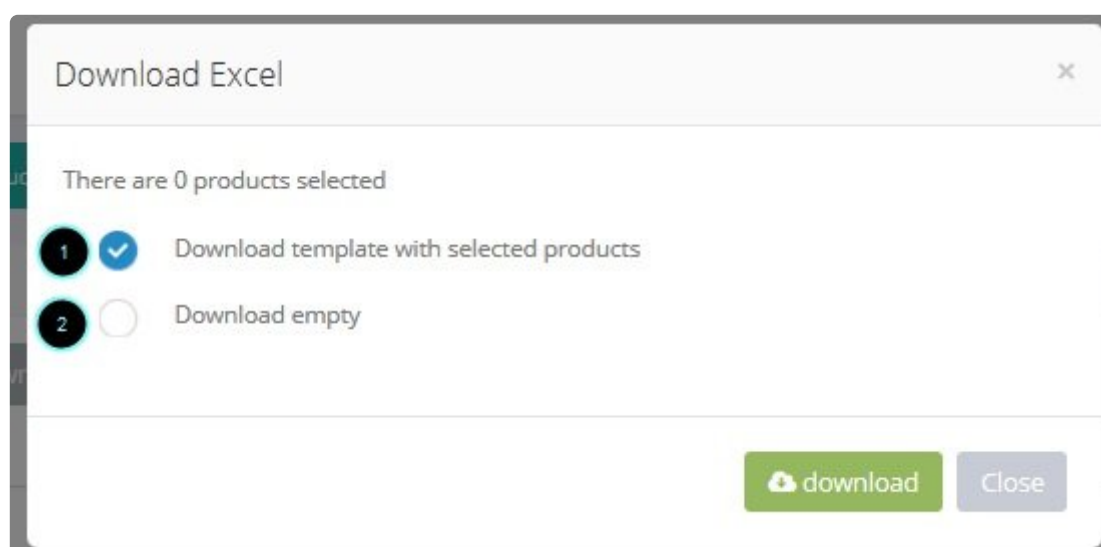
Download Options

1. **Download Template with selected products** – This will download the product form with preselected products

from the PRISM Joomla Website.

2. **Download Empty** – This will download a blank product form. Typically used by new customers to upload their product items on the PRISM Joomla Website.

Save the form on your computer. Now you can start to fill out the form to add your product items (see field definitions).



Product Field Definitions

	A	B	C	D	E	F	G	H	I	J	K
	ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment	CasePack	Catalog	PR2	PR3	PR4
2	VAJO-24		Desktop PC with Intel Pentium 4 Proc.	0	1199		0 CMP		0	0	0
3	V1-4A		Hi-fi Stereo 4 Head VCR	0	473.9		0 DVD		459.3	435.1	413.3
4	V1-2A		Digital-VHS VCR with HDTV-Recording	0	193.5		0 DVD		187.4	177.7	168.7
5	UAC-300		Recoton Universal AC Adapter	0	9.99		0 SWT		0	0	0
6	TV-5200		52" Dolby Pro Logic Surround Sound TV	0	658.9		0 TV		638.4	604.9	574.5
7	TV-3600		36" DBX Stereo Color Television	0	468.1		0 TV		453.5	429.7	408.2
8	TV-2100		20" TV with Flat Picture Tube	0	336.7		0 TV		326.3	309.1	293.6
9	TP-560		Toshiba Progressive-Scan DVD/DVD-R/CD-RW	0	581.7		0 DVD		563.6	533.9	507.2
10	TP-350		DVD Player/Hi-Fi VCR Combo	0	359.7		0 DVD		348.5	330.2	313.7
11	SY-MINI		Sony MiniDisc Walkman Player/Recorder	0	199		0 PMD		0	0	0
12	STS-02		Surround Sound Home Theater System	0	2805		0 HOM		2728.6	2601.6	2557.5
13	STS-01MAN		Instruction Manual STS-01 Sound System	0	29.95		0 MAN		0	0	0
14	STS-01		Home Sound System with MP3 Decoder	0	2194.5		0 HOM		2101	2041.1	2002.3
15	ST-40		Stand - Universal Cube Speaker	0	65.8		0 SPK		63.7	60.4	57.3
16	ST-30		Stand - 30" Speaker	0	63.6		0 SPK		61.6	58.3	55.4
17	ST-25		Stand - 24" Speaker	0	53.6		0 SPK		51.9	49.2	46.6
18	ST-10		Stand - for mini speakers	0	199		0 SPK		190	187	179.2
19	SPW-14G		14 Gauge Speaker Wire	0	2.3		0 CPL		2.2	2.1	2
20	SPW-12G		12-Gauge Micro Flat Speaker Wire	0	3.7		0 CPL		3.6	3.5	3.3
21	SP-500		Speakers - Home Theatre Package	0	765.4		0 HOM		741.6	702.6	667.5
22											

(nc)

ItemCode: Mandatory: Holds the item code. (Characters up to 50). Each code must be unique.

Barcode: Optional: Holds the secondary code (or UPC) of the product. Although not required, it is recommended that each barcode is unique. The majority of our apps, when searching or scanning will first look for

the Item Code then for the Barcode. Characters up to 50

Description: Mandatory: Holds the description of the product. Characters up to 80

MinOrderQty: Optional. Holds the minimum quantity a product is sold. If no minimum quantity is specified, most

apps in the Prism suite will default the minimum order qty to 1. Numeric, decimals allowed

UnitPrice: Mandatory: Holds the price (unit price/price level 1) for the product. Numeric, decimals allowed

Comment: Optional: Additional information concerning the product: Characters up to 50

CasePack: Optional: Specifies the case quantity a product is sold for (e.g. case of 10). Numeric, decimals allowed

Catalog: Optional: Specifies the Main Category the product belongs to (e.g. Kitchen, Summer, etc.). Characters

upto 50

PR2: Optional: Holds the price (price level 2) for the product. Numeric, decimals allowed

PR3: Optional: Holds the price (price level 3) for the product. Numeric, decimals allowed

PR4: Optional: Holds the price (price level 4) for the product. Numeric, decimals allowed

Download Excel (Products Form) – 4 BarcodeA pps © 2016

PR5: Optional: Holds the price (price level 5) for the product. Numeric, decimals allowed

PR6: Optional: Holds the price (price level 6) for the product. Numeric, decimals allowed

PR7: Optional: Holds the price (price level 7) for the product. Numeric, decimals allowed

PR8: Optional: Holds the price (price level 8) for the product. Numeric, decimals allowed

PR9: Optional: Holds the price (price level 9) for the product. Numeric, decimals allowed

PriceOther1: Optional: Price for a case. Numeric, decimals allowed

Download Excel Form – 4 BarcodeA pps © 2016

DueDate: Optional: Expected date if not in stock. Characters up to 20

Exp1: Optional: Specifies if the product is taxable for tax type 1 (1 for True and 0 for False)

Exp2: Optional: Specifies if the product is taxable for tax type 2 (1 for True and 0 for False)

WHSE: Optional: Specifies the warehouse the product belongs to. Characters up to 6

TempOnHand: Optional: Specifies the quantity available of the product in stock. Numeric, decimals allowed

PR10: Optional: Holds the price (price level 10) for the product. Numeric, decimals allowed

PR11: Optional: Holds the price (price level 11) for the product. Numeric, decimals allowed

PR12: Optional: Holds the price (price level 12) for the product. Numeric, decimals allowed

PR13: Optional: Holds the price (price level 13) for the product. Numeric, decimals allowed

PR14: Optional: Holds the price (price level 14) for the product. Numeric, decimals allowed

PR15: Optional: Holds the price (price level 15) for the product. Numeric, decimals allowed

PR16: Optional: Holds the price (price level 16) for the product. Numeric, decimals allowed

PR17: Optional: Holds the price (price level 17) for the product. Numeric, decimals allowed

PR18: Optional: Holds the price (price level 18) for the product. Numeric, decimals allowed

PR19: Optional: Holds the price (price level 19) for the product. Numeric, decimals allowed

PR20: Optional: Holds the price (price level 20) for the product. Numeric, decimals allowed

UOM: Optional: Holds the unit of measure (primary) for the product. Characters up to 50

Style: Optional. Holds the value of a style a product can belong to (one dimensional or two dimensional matrixes).

Characters up to 20

SuggestedOrder: Optional: Holds the quantity that the manufacturer can specify as suggested ordering quantity. Integer numbers NO decimals

StyleColor: Optional: Specifies an alternate image name for the product in case the ItemCode has some characters that Windows does not allow as file names (e.g. 100.001). Characters up to 50

isParent: Optional: Specifies if a product is a parent of a subset of products for the Parent/Child logic on Prism

for iPad. Boolean (1 for TRUE/0 for FALSE) Only

ParentCategory: Optional: Specifies the subcategory a product can belong to. Used for the auto category

creation logic in Prism desktop. Characters up to 100

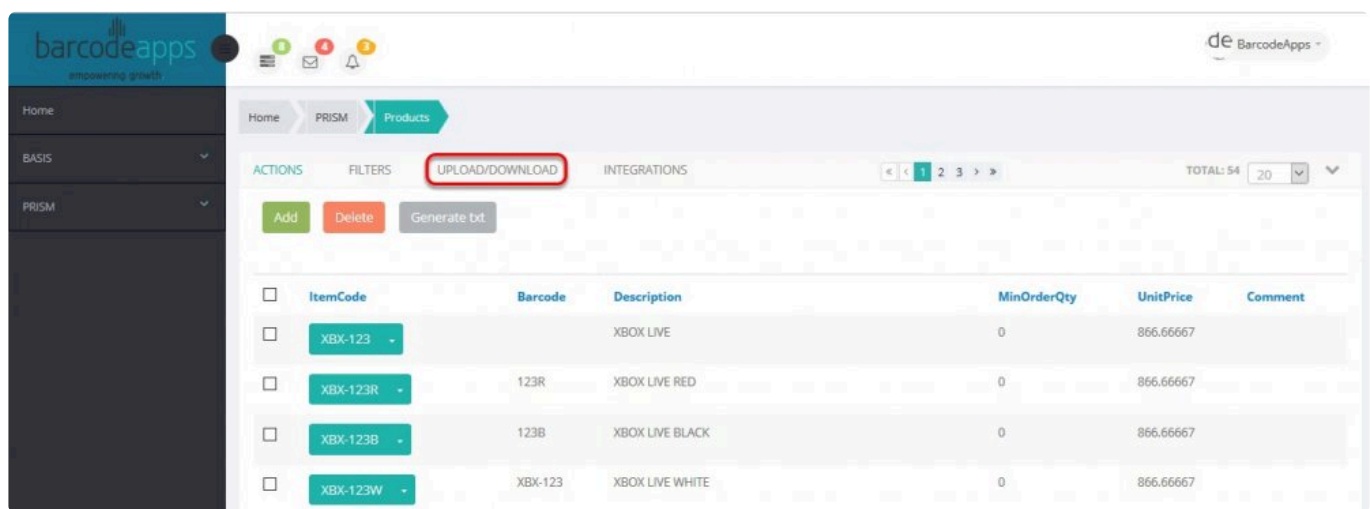
isProduct: Mandatory: Specifies if a product is an actual product (True) or if it part of the Size/Frame functionality (False or Null) logic on Prism for iPad. Boolean (1 for TRUE/0 for FALSE) Only

3.2.7. vii. Upload Excel Products (New Portal)

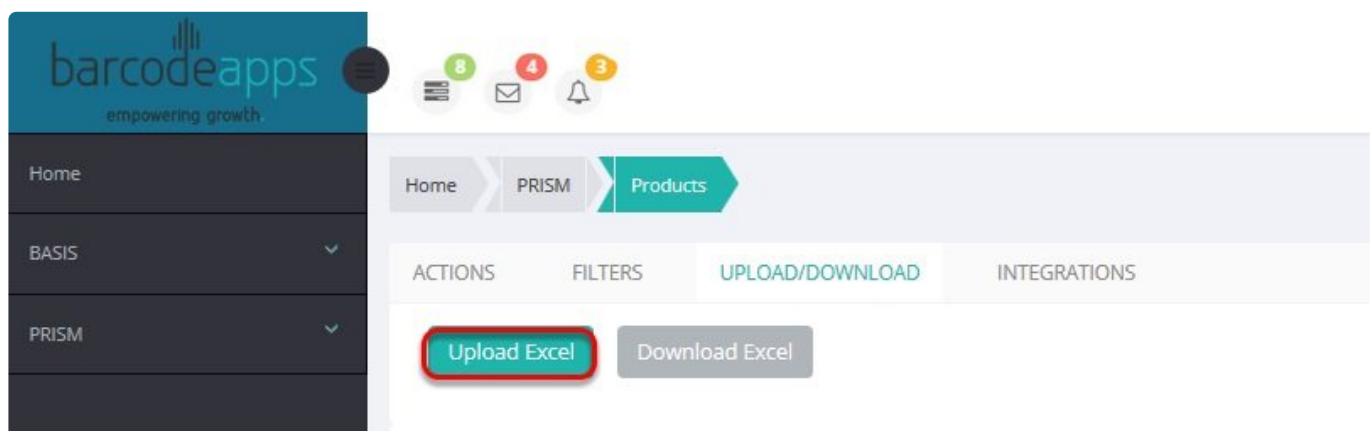
This knowledge base article will guide users on how they can upload their products in the [PRISM Joomla Website](#).

UPLOADING PRODUCTS FORM

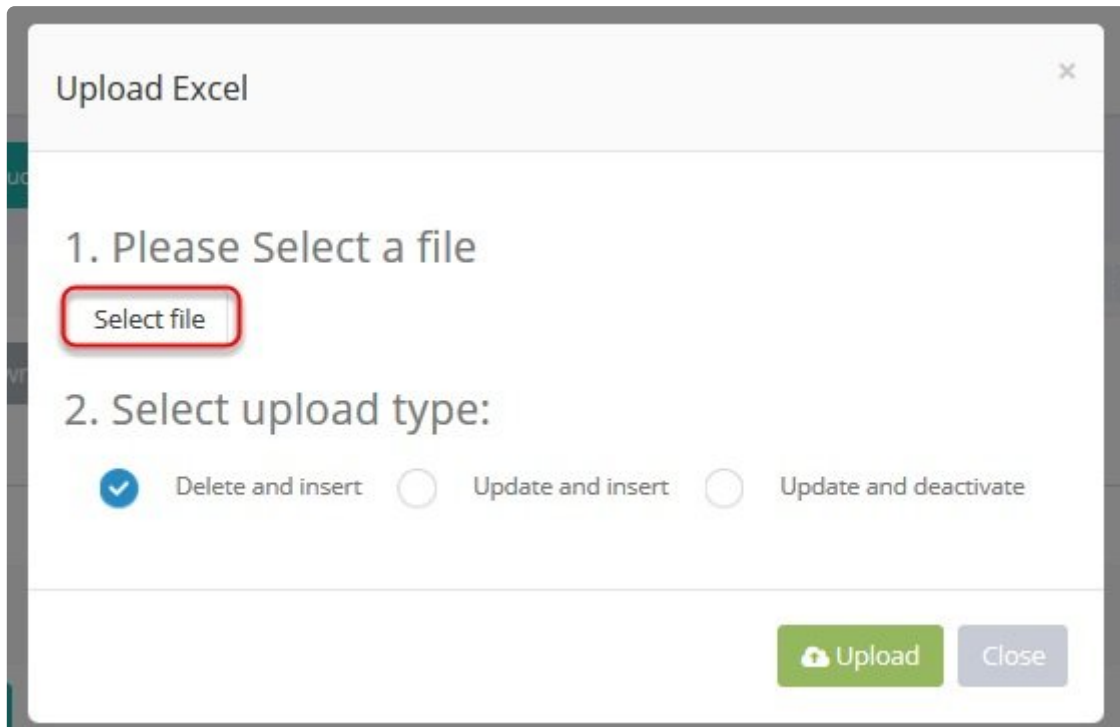
To upload the products form, click on Upload/Download



Click on Upload Excel



Click on Select File

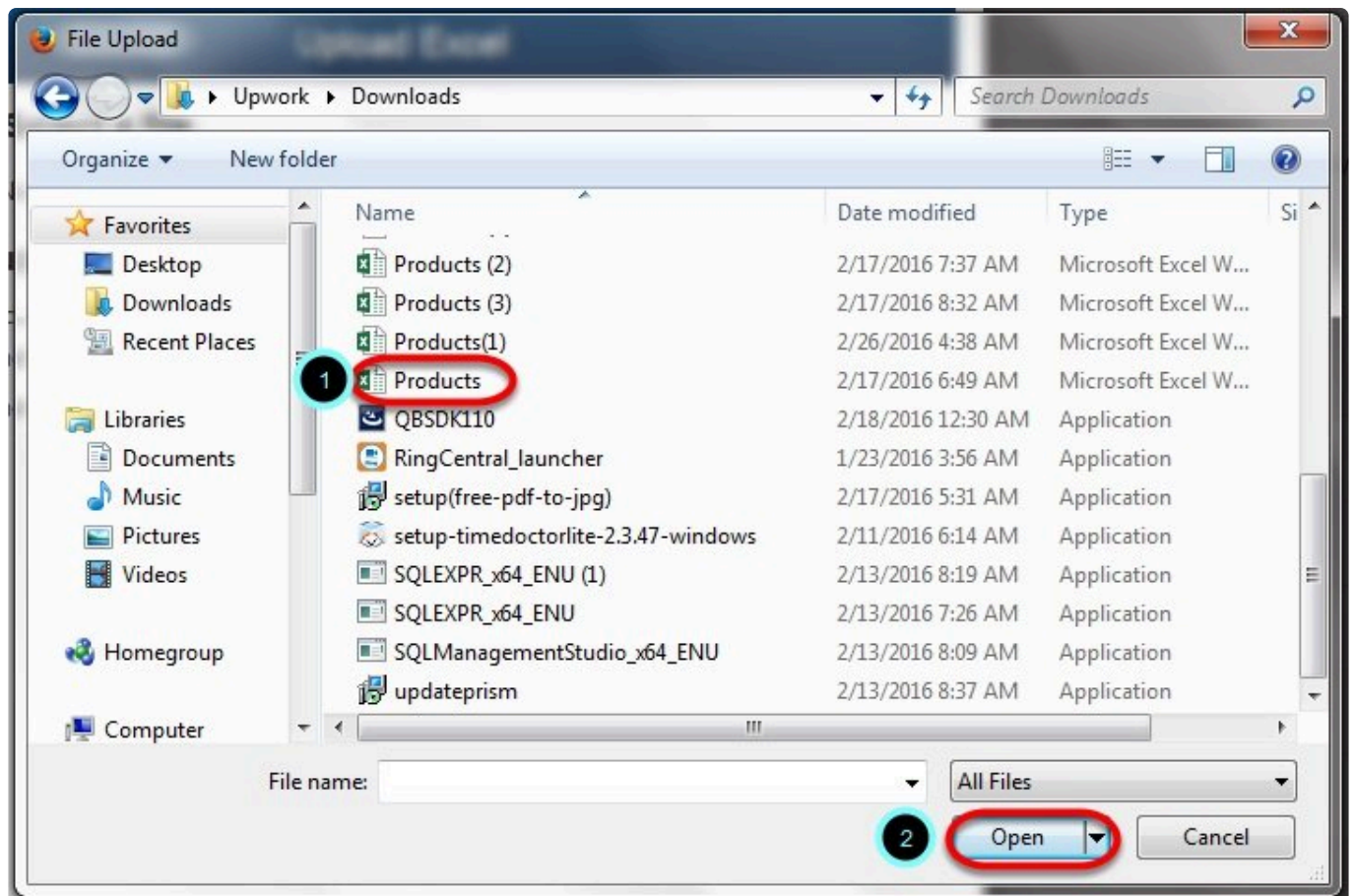


The screenshot shows a modal dialog box titled "Upload Excel" with a close button (X) in the top right corner. The dialog contains two main steps:

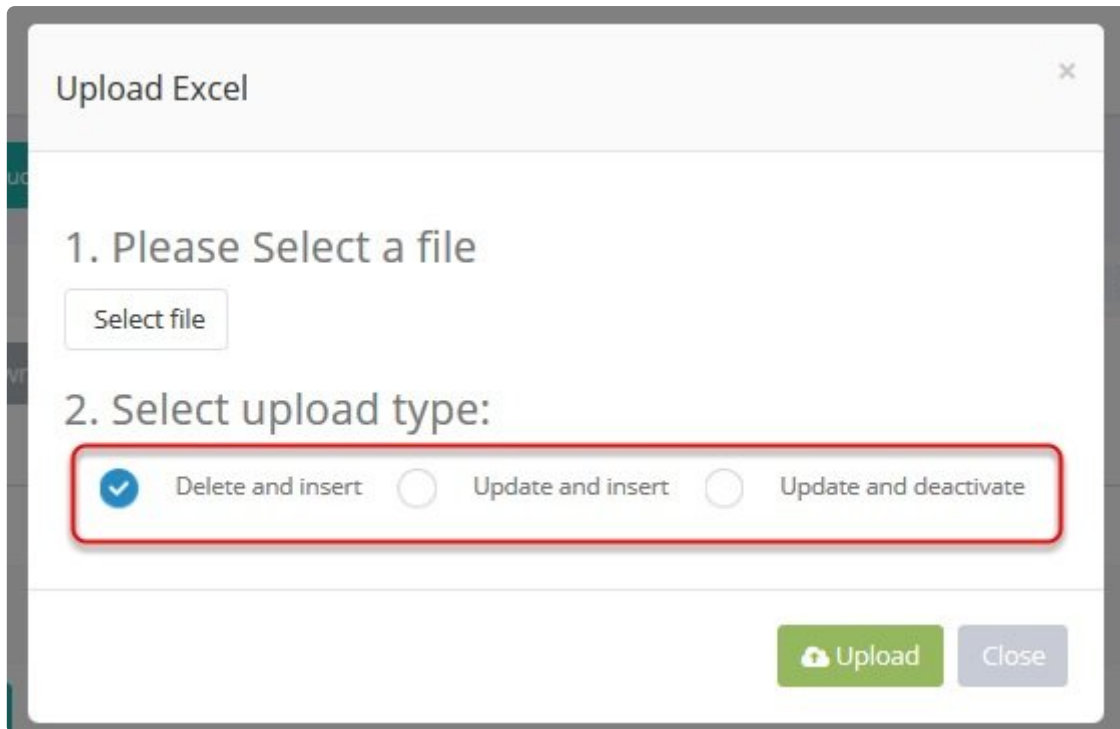
- 1. Please Select a file**
A button labeled "Select file" is highlighted with a red rectangular border.
- 2. Select upload type:**
Three radio button options are listed:
 - ☒ Delete and insert
 - ☐ Update and insert
 - ☐ Update and deactivate

At the bottom right of the dialog, there are two buttons: a green "Upload" button with a cloud icon and a grey "Close" button.

Locate the Products Form and click on Open.



select the upload type and then click on Upload.



Upload Excel

1. Please Select a file

Select file

2. Select upload type:

☒ Delete and insert ☐ Update and insert ☐ Update and deactivate

Upload Close

Upload Type

1. **Delete and Insert** – this option will delete all entries and insert new products.
2. **Update and Insert** – this option will update your product list.
3. **Update and Deactivate** -

Product Items are now loaded on the website.

3.3. C. Order Management (New Portal)

3.3.1. i. Processed Order (New Portal)

This knowledge base article is a review of the processed orders window inside the [PRISM Joomla Website](#).

PROCESSED ORDERS WINDOW

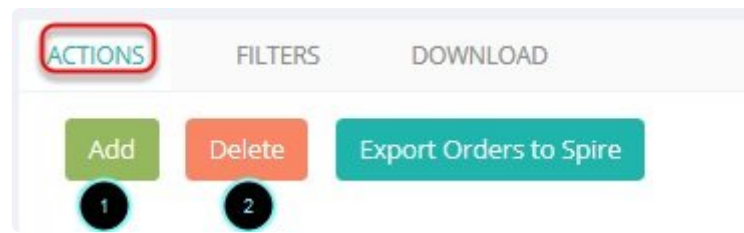
The processed orders window will show all orders that are processed for fulfillment.

Order Number	Order Source	Customer Code	Customer Name	Order Date	RepCode	Total
91	S	1210		2017-01-22 18:55	BAR01-001	\$84.02
90	S	1210		2017-01-22 18:44	BAR01-001	\$84.02
9	S	BCAUDI	British Columbia Audio	2016-03-02 13:44	BAR01-002	\$1,347.10
89	S	1500		2017-01-14 17:08	BAR01-001	\$0.73
88	S	1100		2017-01-14 16:53	BAR01-001	\$77.77
87	S	1100		2017-01-14 16:51	BAR01-001	\$77.77
86	S	1100		2017-01-14 16:48	BAR01-001	\$77.77
85	S	1500		2017-01-14 16:47	BAR01-001	\$0.73
	S	1100		2017-01-14 16:45	BAR01-001	\$77.77

NOTE: All orders under this window cannot be edited.

PROCESSED ORDERS WINDOW NAVIGATION

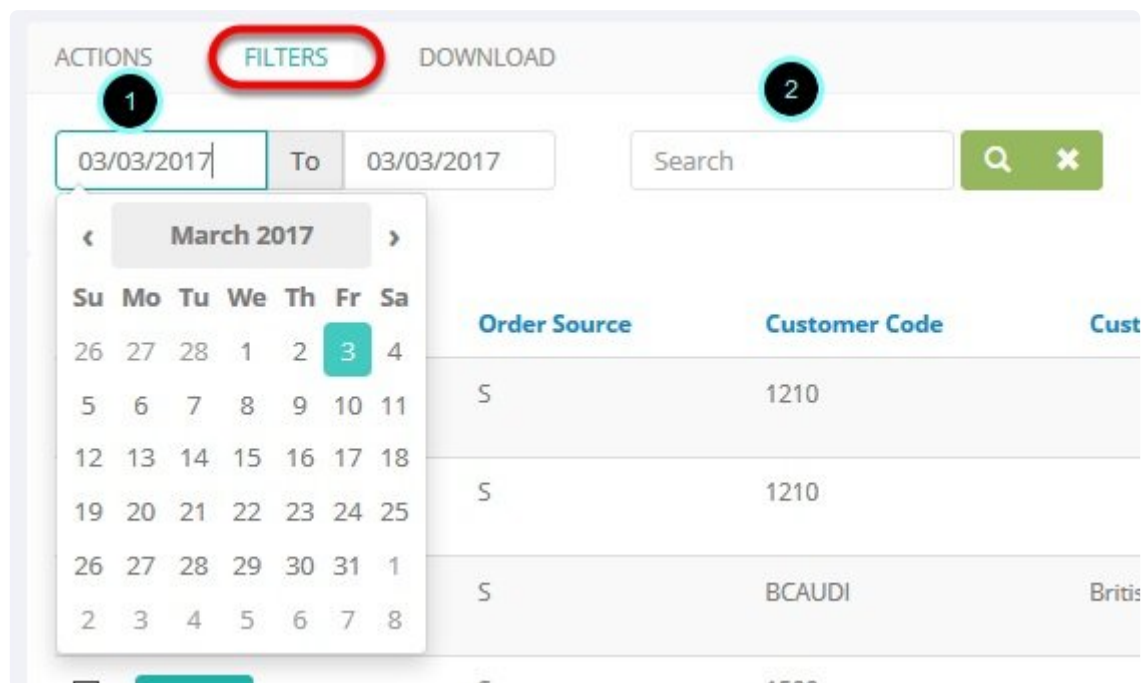
ACTIONS RIBBON



1. **Add** – this button will let the users create a manual order.

2. **Delete** – this button will let the users delete an order.

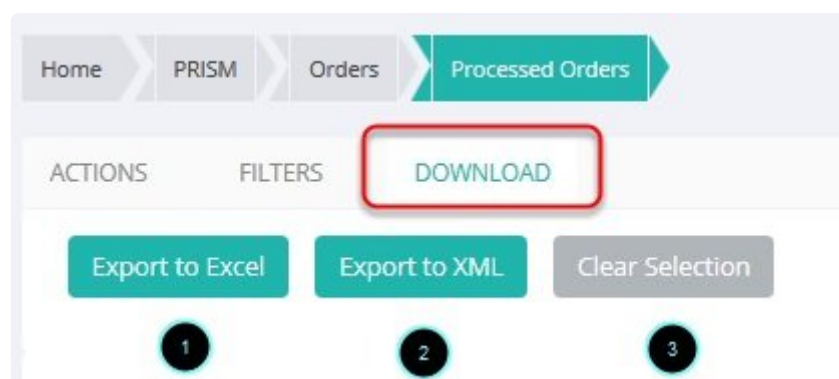
FILTERS RIBBON



1. **Data Range Field** – this shows the number of orders that are currently in the bucket.

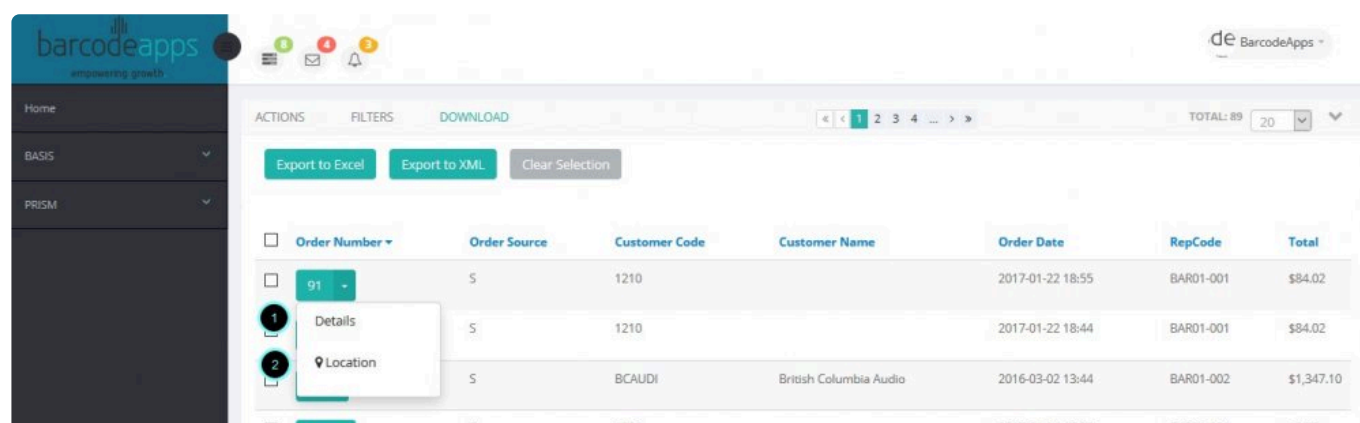
2. **Search Field** – this button will let the users modify an order entry

DOWNLOAD RIBBON



1. **Export Excel** – this option will allow the user's to upload the orders in an Excel Format.
2. **Export XML** – this option will allow users to upload the orders in a XML format.
3. **Clear selection button** – this will reset the selection.

OTHER FUNCTIONS



DETAILS – This option will show the details of an order

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HomeBASISPRISM

HomePRISMOrdersProcessed Orders

Cancel

Order Summary

Order Number: 91Order Date: 2017-01-22 18:55:16.000Customer Name: 1210Total: 84.02

Order Details

Item Code	Description	Quantity	Price	Comment
A11030		1	\$77.77	
A11050		1	\$6.25	

LOCATIONS – this will show the location of the transaction.

Location: 91

MapSatellite

Close

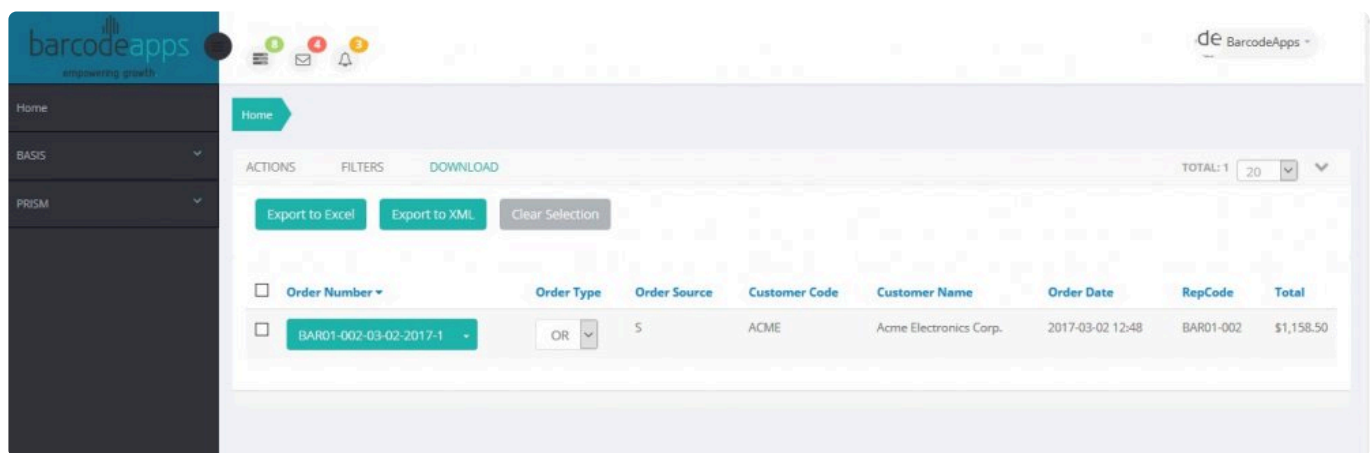
NOTE: Locations function should be active on the iOS/Android

3.3.2. ii. Unprocessed Orders (New Portal)

This knowledge base article will guide users on how the unprocessed orders window functions inside the [PRISM Joomla Website](#).

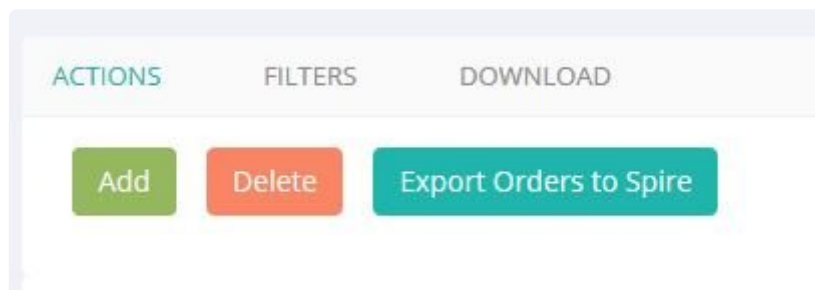
UNPROCESSED ORDERS WINDOW

The unprocessed order window is a repository of unprocessed orders from the supplier's part. This is basically where all the orders that are sent out from the PRISM APP and PRISM WEB STORE are stored for review.



UNPROCESSED ORDER WINDOW NAVIGATION

ACTIONS FILTER

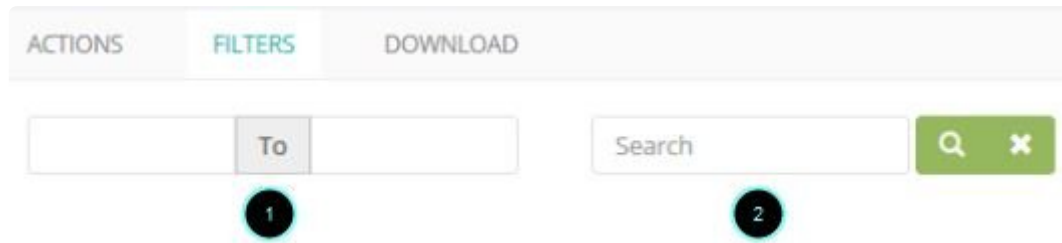


ADD – add orders manually

DELETE – delete orders manually

EXPORT ORDERS TO SPIRE – export order to spire (SPIRE user's only)

FILTERS SECTION



1. **Data Range Field** – this shows the number of orders that are currently in the bucket.

2. **Search Field** – this button will let the users modify an order entry

DOWNLOAD SECTION



1. **Export Excel** – this option will allow the user's to upload the orders in an Excel Format.

2. **Export XML** – this option will allow users tio upload the orders in a XML format.

3. Clear selection button – this will reset the selection.

BarcodeApps © 2017

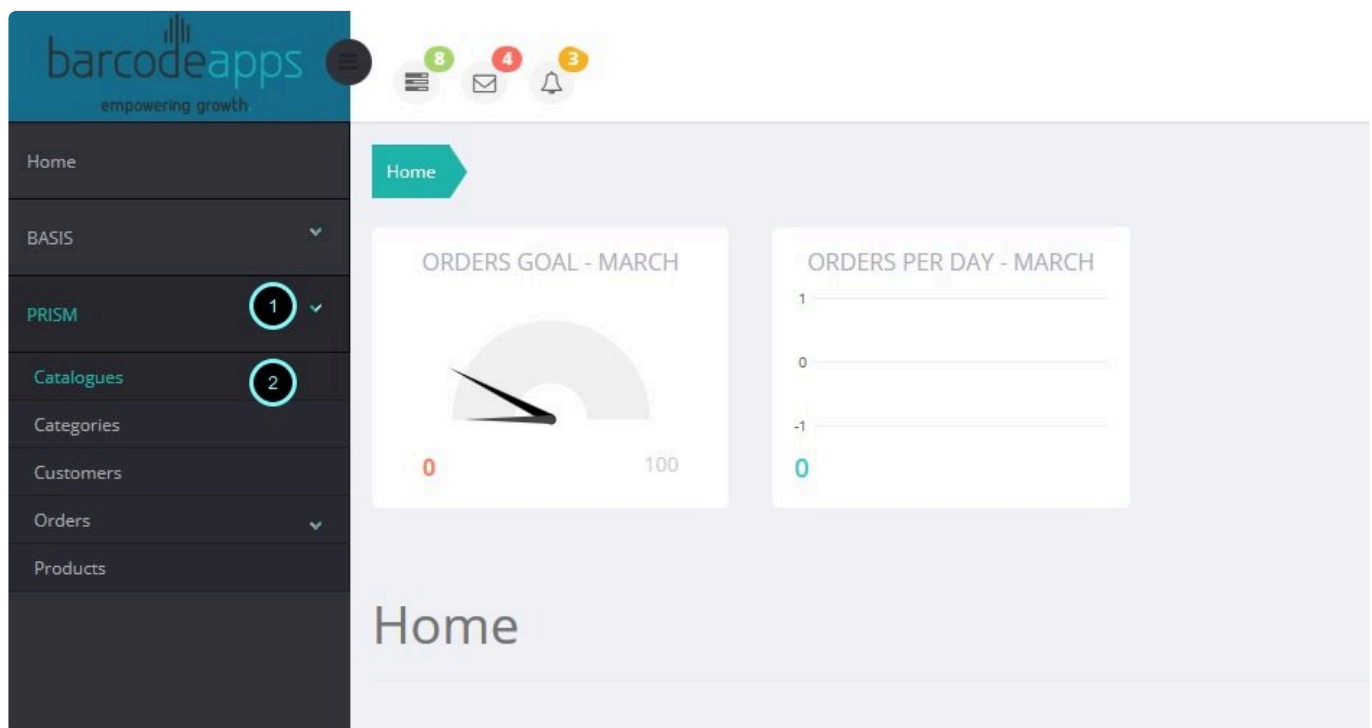
3.4. D. Catalog Management (New Portal)

3.4.1. i. Add Catalog (New Portal)

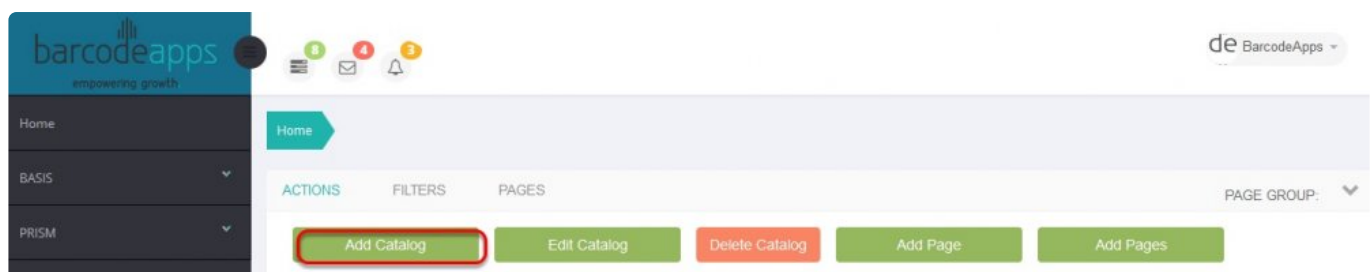
This knowledge base article will guide users to create a catalog using the [PRISM Joomla Website](#).

ADDING A CATALOG

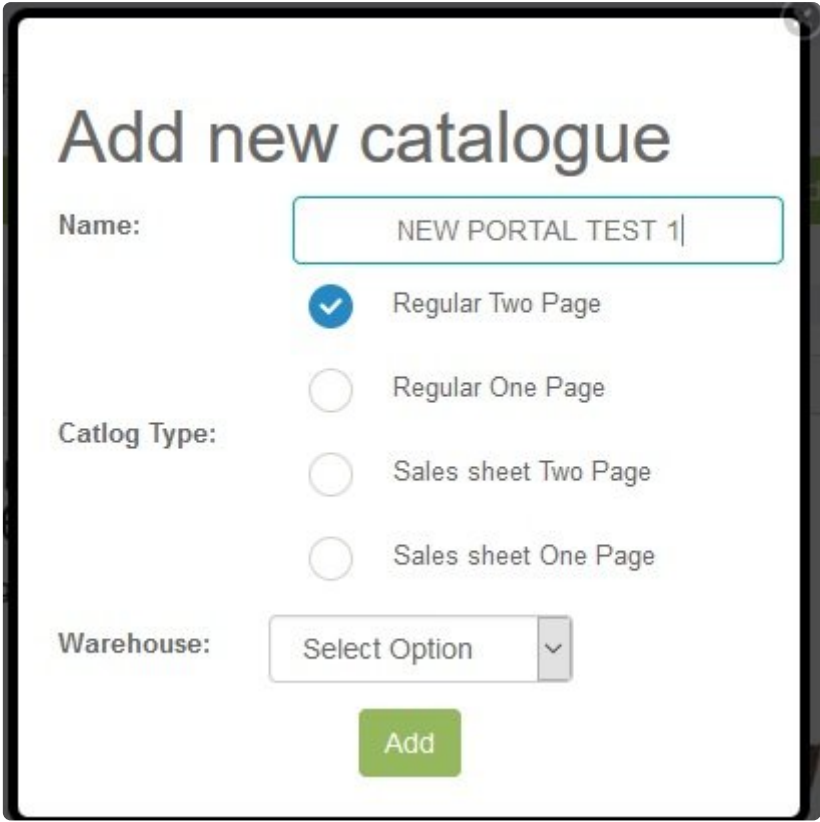
To access the catalog navigation window. On the homepage click on PRISM and then Catalogues



To add a catalog, click on Add Catalog.



Name the catalog, select the catalog type, then select the warehouse location (optional), and then click on Add.

A screenshot of a web form titled "Add new catalogue". The form has three main sections: "Name:", "Catlog Type:", and "Warehouse:". The "Name:" section has a text input field containing "NEW PORTAL TEST 1". The "Catlog Type:" section has four radio button options: "Regular Two Page" (selected), "Regular One Page", "Sales sheet Two Page", and "Sales sheet One Page". The "Warehouse:" section has a dropdown menu with "Select Option" and a downward arrow. Below these sections is a green "Add" button.

Add new catalogue

Name:

Catlog Type:

- ☒ Regular Two Page
- ☐ Regular One Page
- ☐ Sales sheet Two Page
- ☐ Sales sheet One Page

Warehouse: ▼

Add

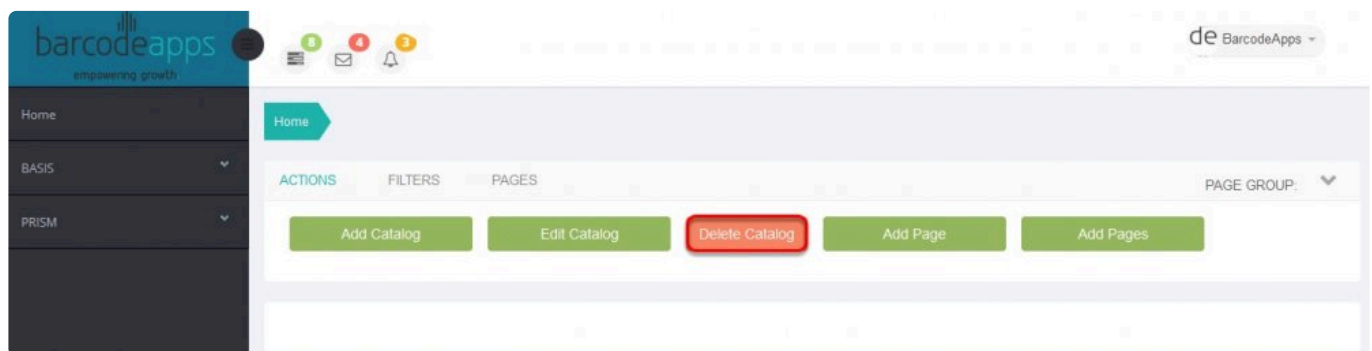
A notification should show once the new catalog has been created. Now you can start adding pages to your catalog.

3.4.2. iii. Delete Catalog (New Portal)

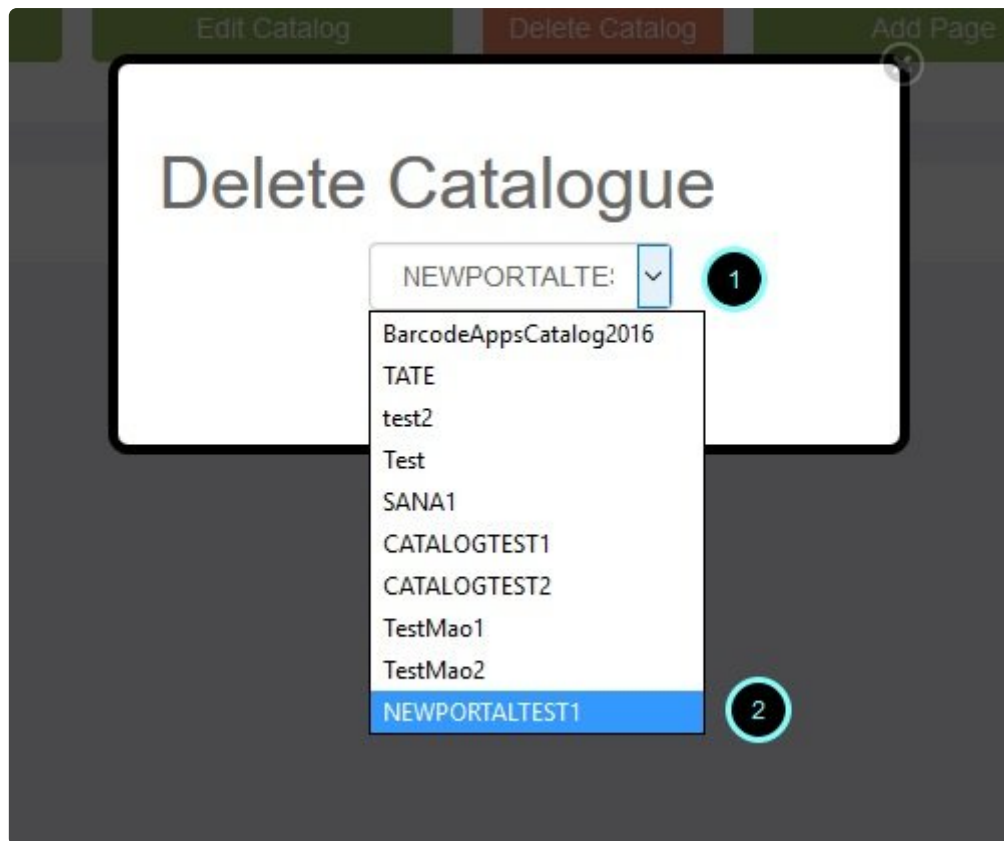
This knowledge base article will guide users to delete a catalog on the PRISM Joomla Website.

DELETING A CATALOG

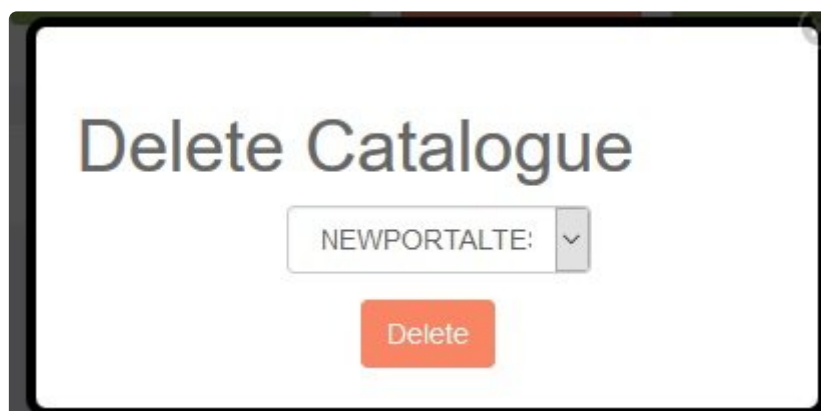
To delete a catalog, click on Delete Catalog



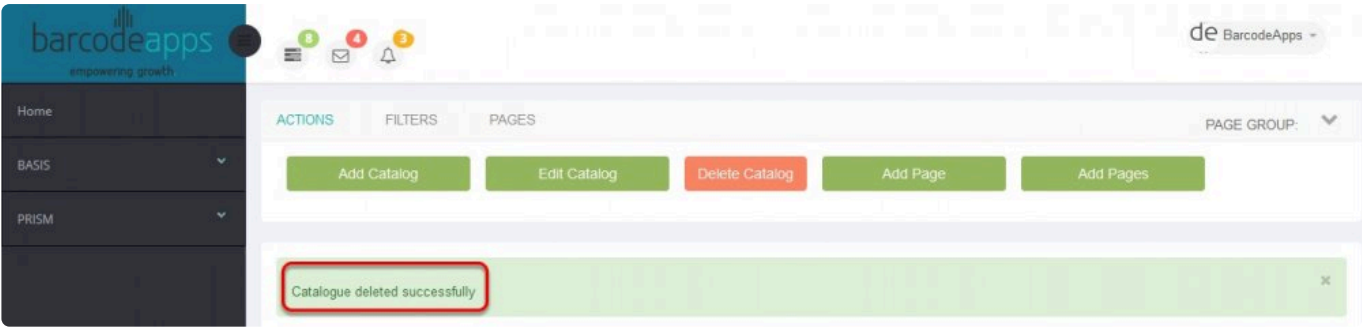
Click on the drop down. and then select the catalog that has to be deleted



On the confirmation box, click on delete again.



A message will show once the request has been completed.



3.4.3. iv. Add Page (New Catalog)

This knowledge base article will guide users on how they can add a page on their catalog.

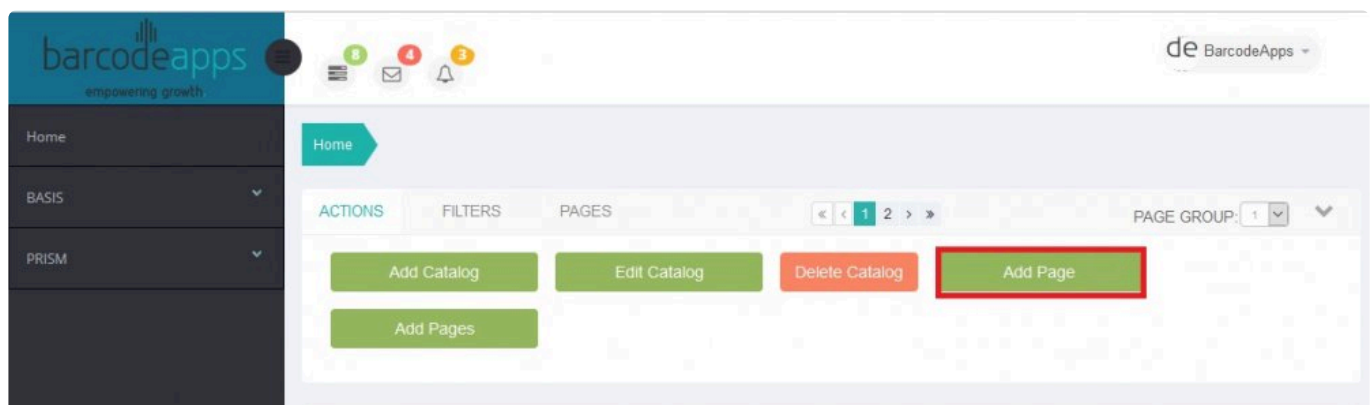
ADDING A PAGE ON A CATALOG

Before adding a page to your catalog there are two requirements.

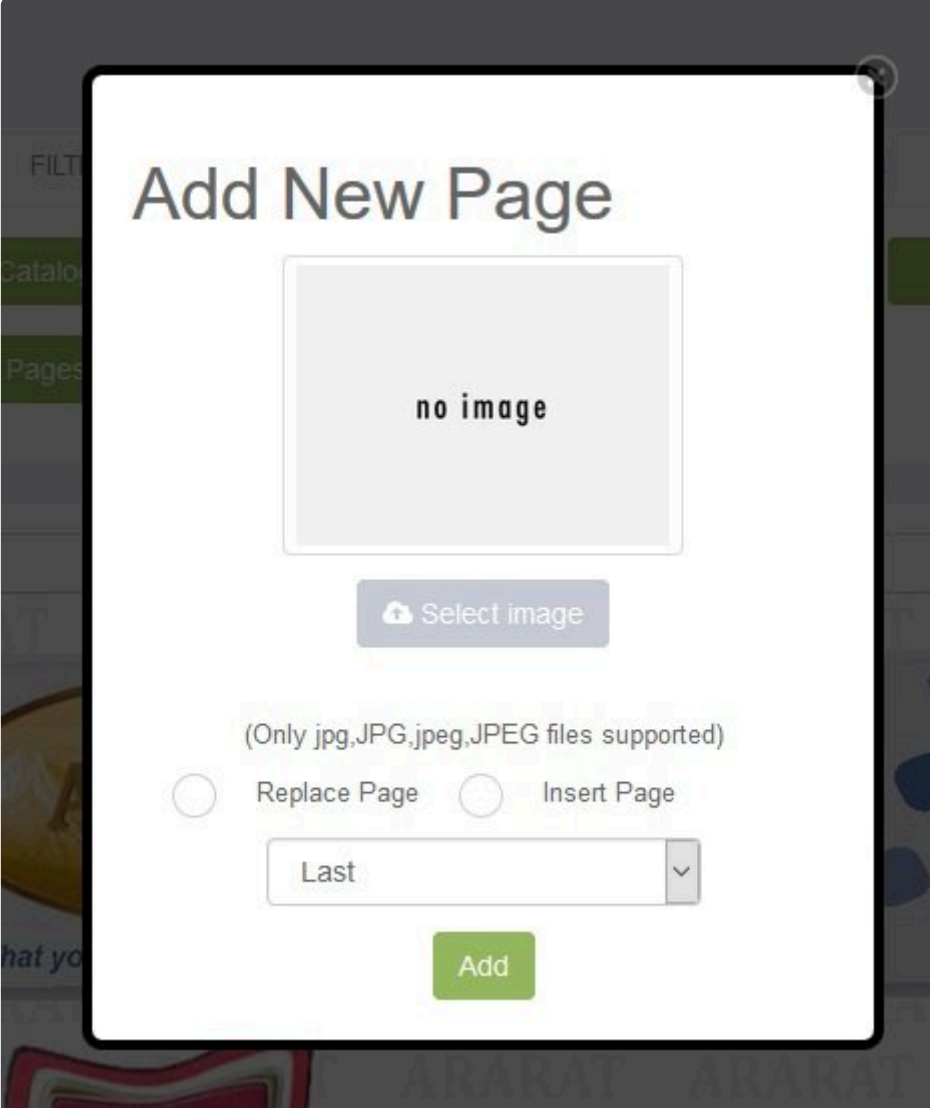
1. Images should be on JPEG format.
2. The dimension of the image should be 893 × 1263 for two page catalog set up and 1786 × 1283 for one page catalog set up

In most cases catalogs are in PDF format, a PDF file must be converted first to a JPEG file and after that, the dimension must be adjusted to 893 × 1263 for two page catalog or 1786 × 1283 for one page catalog. This can be obtained by using third party software. We recommend a free software like BOXOFT (for converting PDF to JPEG) and BIMPLITE (for adjusting the dimensions).

To add a page to your catalog, click on Add page.



Select the option select image.



Add New Page

no image

Select image

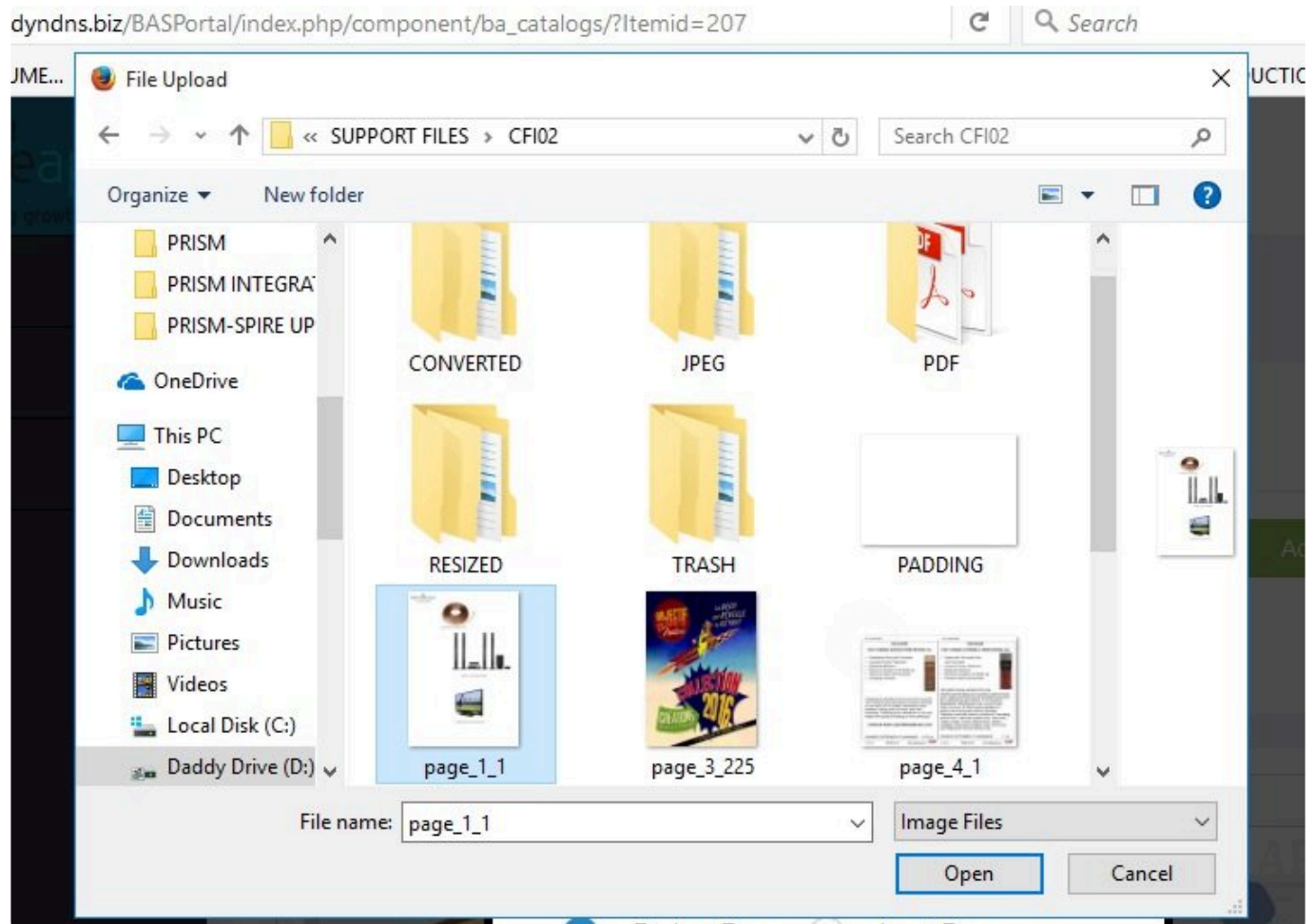
(Only jpg,JPG,jpeg,JPEG files supported)

☒ Replace Page ☐ Insert Page

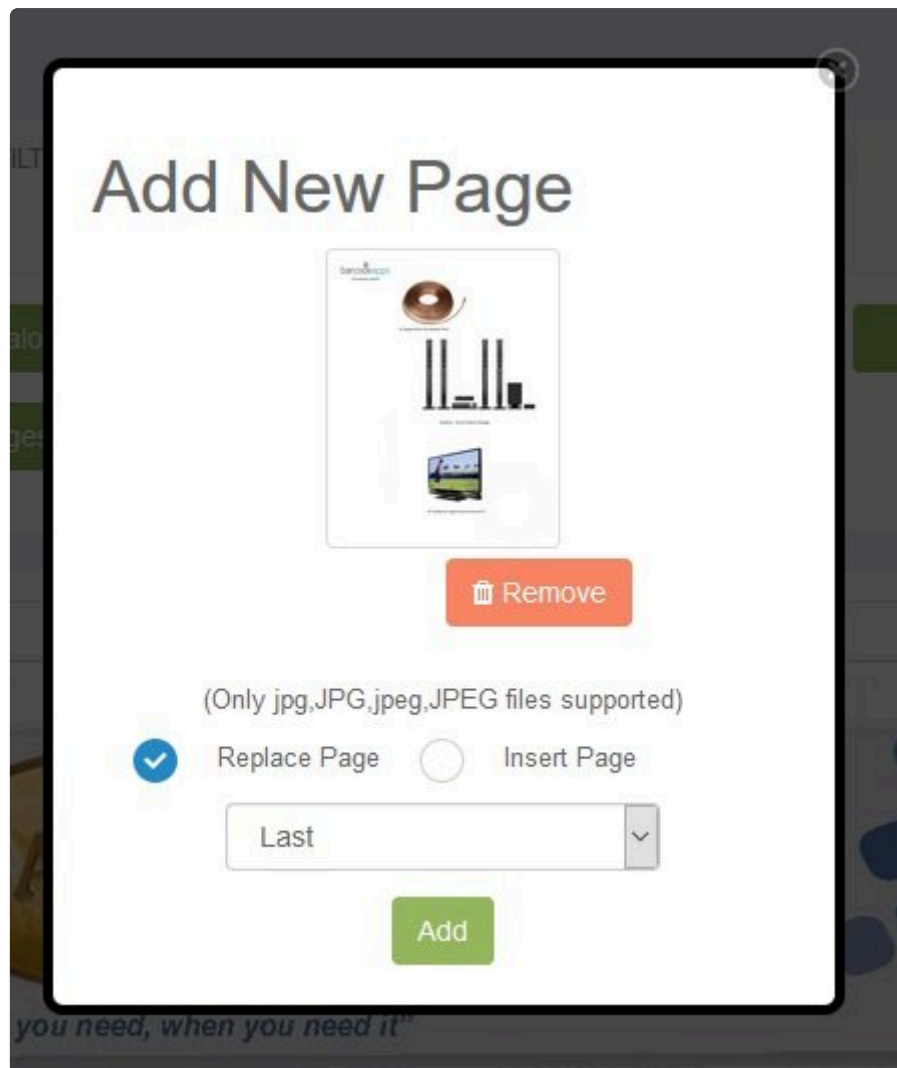
Last

Add

select the file and then click on open



select the add page option and then click on add



1. Replace Page
2. Insert Page

We have now an image uploaded.



BarcodeApps © 2016

3.4.4. v. Add Pages (New Portal)

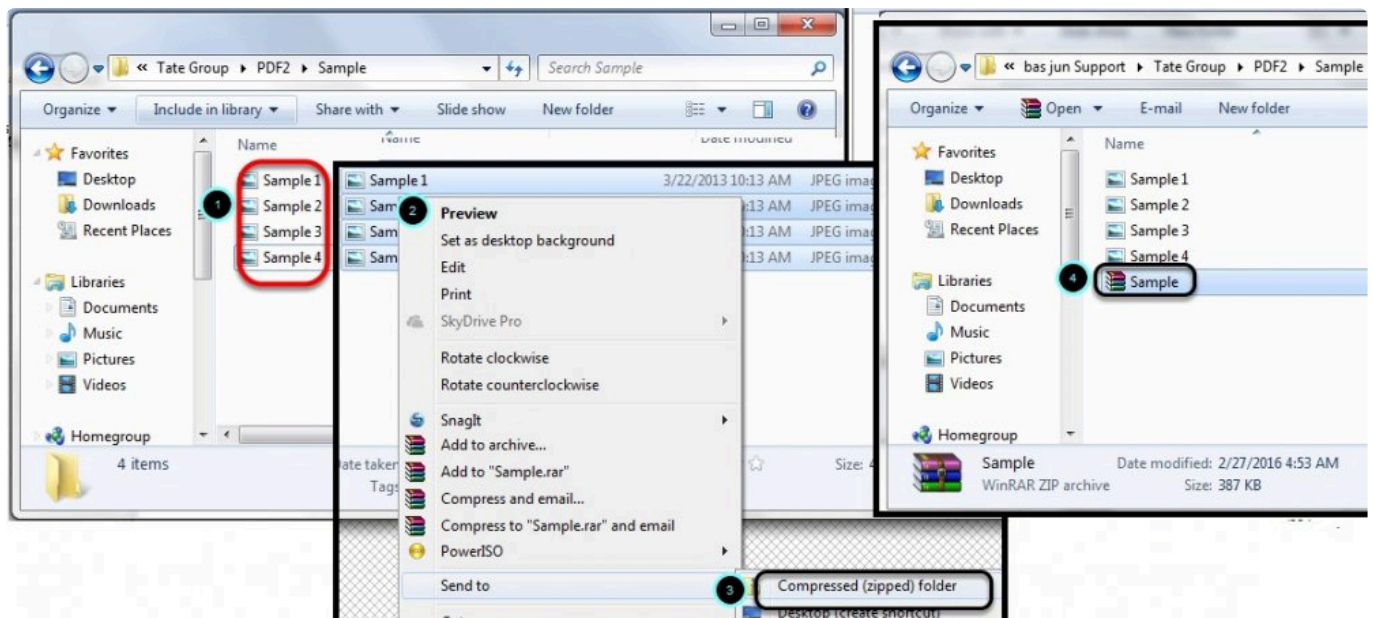
This knowledge base article will guide users to add pages on their catalog.

ADDING MULTIPLE PAGE ON A CATALOG

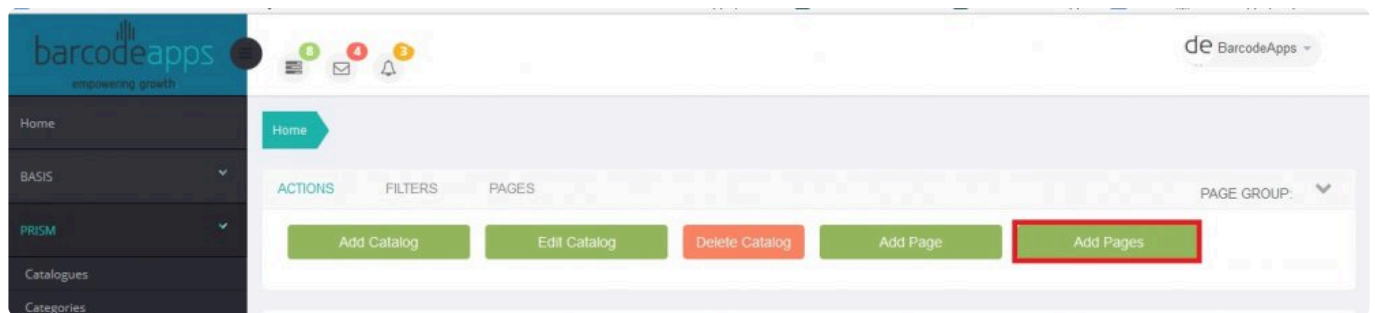
Before adding multiple pages to your catalogue there are two requirements.

1. Images should be on JPEG format.
2. The dimension of the image should be 893 × 1263.

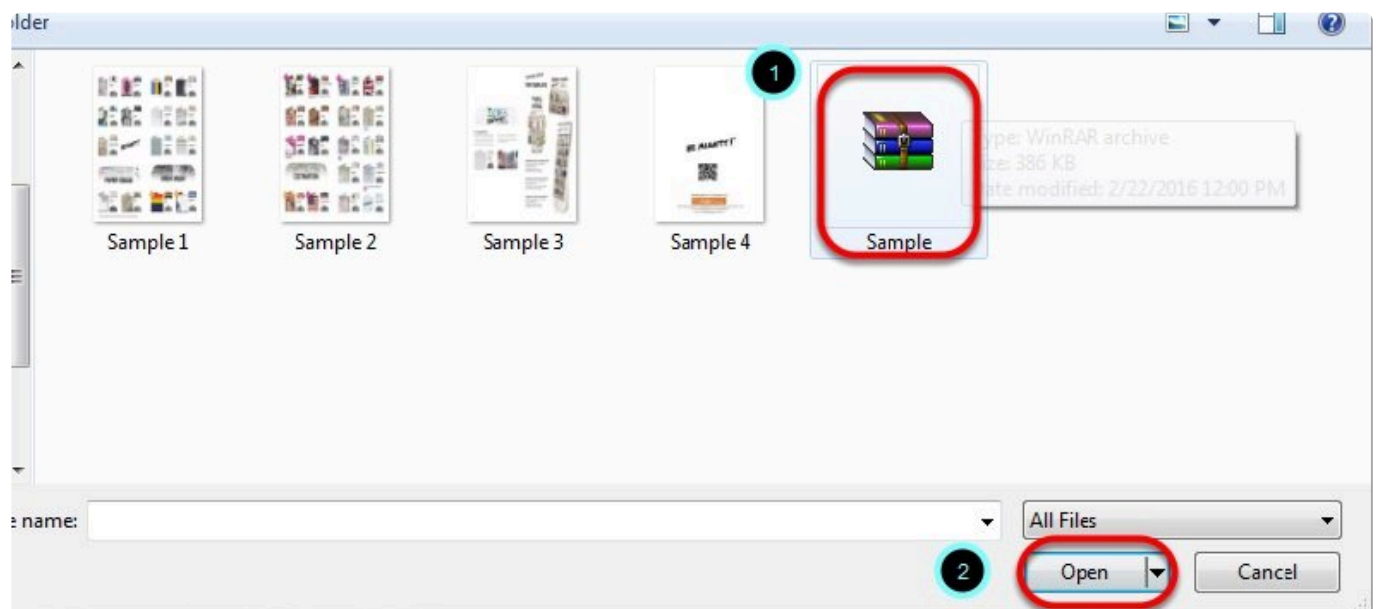
In most cases catalogs are in PDF format, a PDF file must be converted first to a JPEG file and after that, the dimension must be adjusted to 893 × 1263. This can be obtained by using third party software. We recommend free software like BOXOFT (for converting PDF to JPEG) and BIMPLITE (for adjusting the dimensions). To upload multiple pages, you must compress the images first by selecting all the images, right click on the selected images, and then select the option send to > compressed (zipped) folder. Now you have your compressed file ready for to be uploaded.



To add multiple paged catalog, select add pages

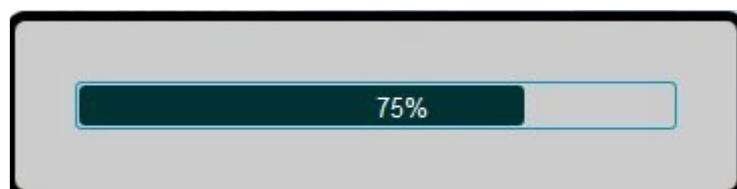


Locate the compressed file, and then click on Open.



(nc)

Wait for the Images to load.



Multiple pages are now uploaded just by using a single compress file.

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8

4

3

Home

BASIS


PRISM

ACTIONS

FILTERS


PAGES

Pg1




X | CO (1)

Pg2



X | CO (2)

Pg3



X | CO (3)

3.4.5. viii. Catalog Digitization

3.5. E. Categories Management (New Portal)

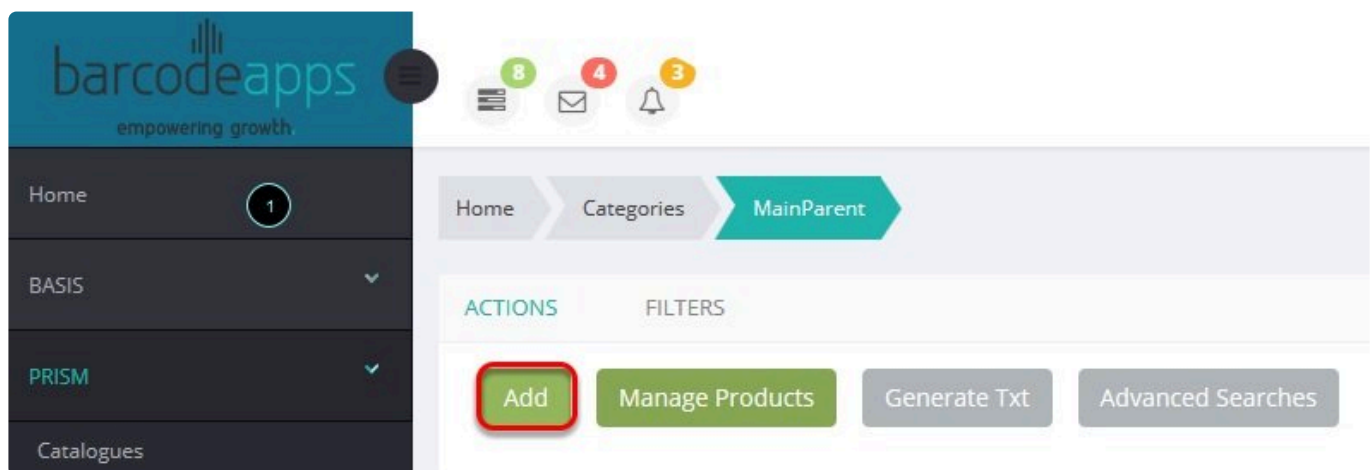
3.5.1. i. Adding New Category and Sub Category(New Portal)

ADDING NEW CATEGORY

This knowledge base article will guide users on how to add a new category on the PRISM Joomla Website.

ADDING CATEGORY

To add a category click on Add



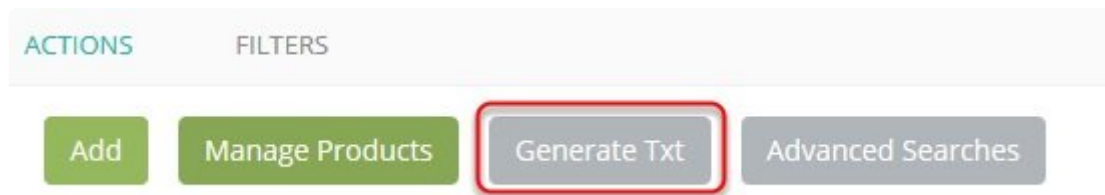
On the New Category window, Type in the name of the new category and then click on Save and Close.

The image shows the BarcodeApps web interface. On the left is a dark sidebar with the logo 'barcodeapps' and the tagline 'empowering growth.' Below the logo are menu items: 'Home', 'BASIS' (with a dropdown arrow), and 'PRISM' (with a dropdown arrow). The main content area has a top navigation bar with three notification icons: a list icon with '8', an envelope icon with '4', and a bell icon with '3'. Below this are two buttons: 'Save & Close' (green) and 'Close' (orange). The 'Basic Information' section contains a 'Category Name *' field with the text 'SMART TV' and a 'Set Index *' dropdown menu currently showing '11'.

A message should show that a new category has been added successfully.

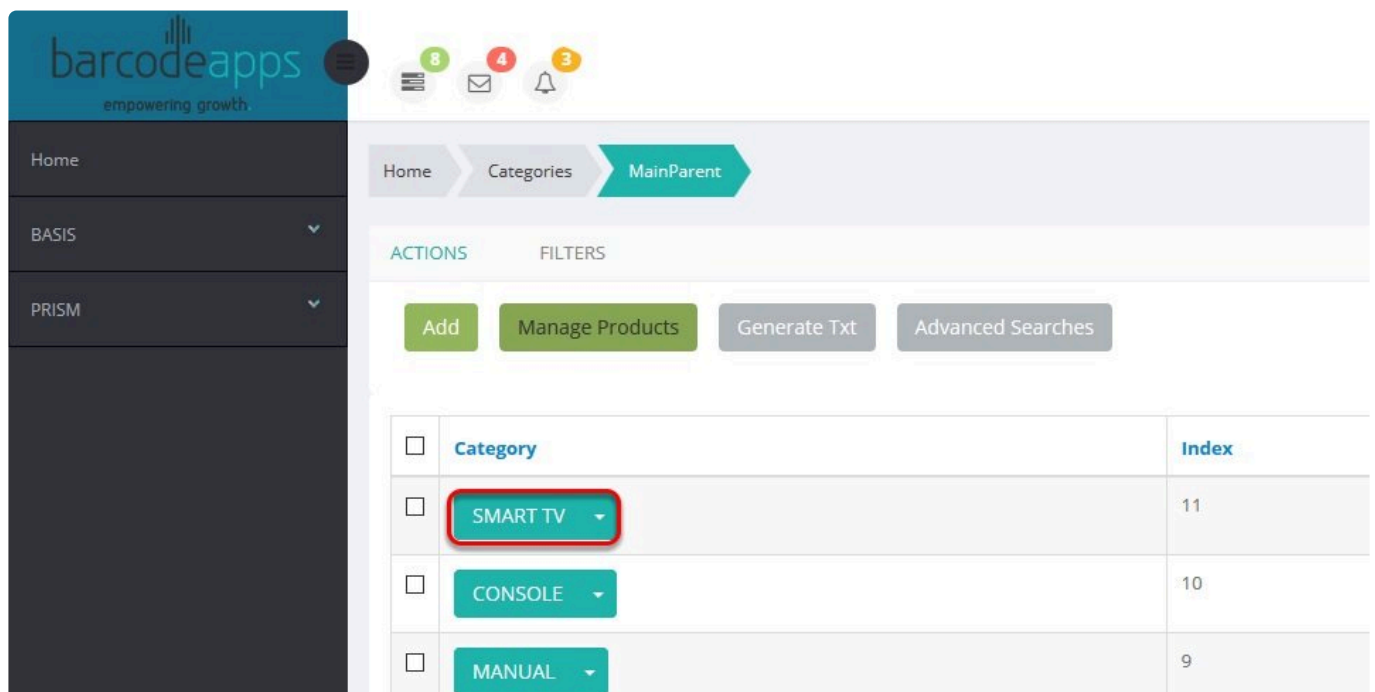
Category saved Successfully

To sync the new category with the PRISM app(iOS/Android), click on Generate Txt.

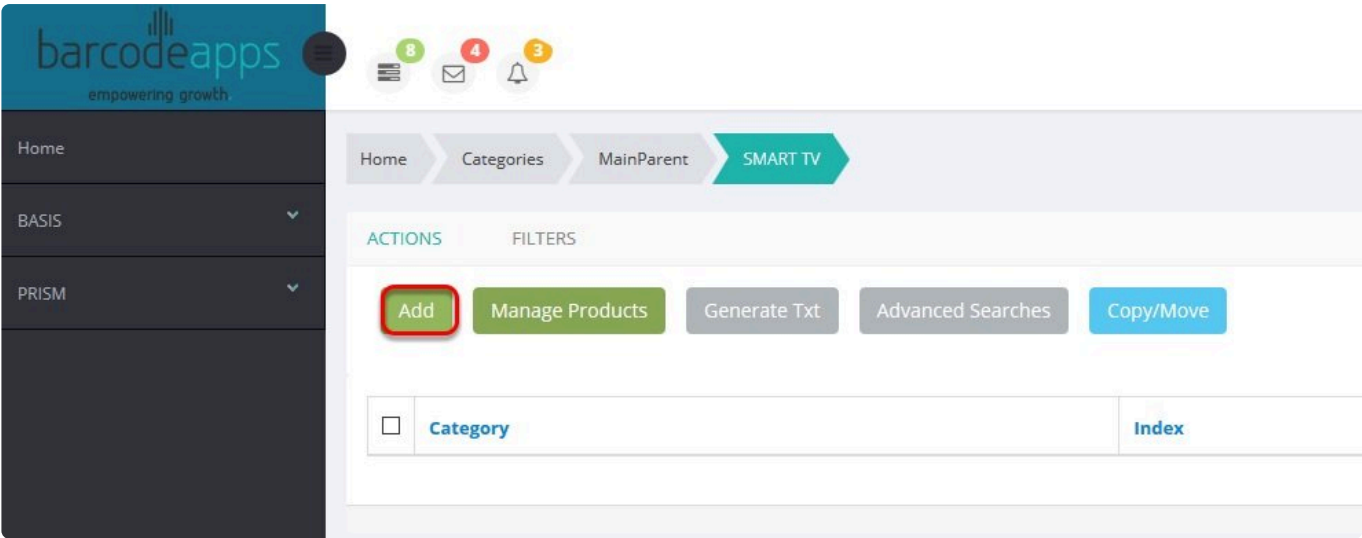


SUB CATEGORY

To create a sub category. Select a parent category



On the next page, select Add.



Define the name of the sub category , set the index and then click on save and close

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Home BASIS PRISM

Home PRISM Categories

Save & Close Close

Basic Information

Category Name *

1 65 "

Set Index *

2 1

3

A message should show once complete. To complete the sync with the PRISM App. Just click on Generate Text.

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Home

BASIS

PRISM

843

HomeCategoriesMainParentSMART TV


ACTIONS FILTERS

AddManage ProductsGenerate TxtAdvanced SearchesCopy/Move


Category saved Successfully

	Category	Index
<input type="checkbox"/>	32" ▾	5
<input type="checkbox"/>	42" ▾	4
<input type="checkbox"/>	48" ▾	3
<input type="checkbox"/>	55" ▾	2
<input type="checkbox"/>	65 " ▾	1

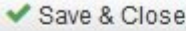
✿ NOTE: For users who uses WEB STORE. We have to make sure that Show sub categories is enabled under PRISM SETTINGS.

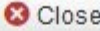
Barcode 

System Menus Content PRISM Extensions Help



Edit





Basic Information

Prism Settings

Basis Settings

General Settings

Active Offers	<div>Disable</div>
Hide All Prices	<div>Disable</div>
Advanced Categories	<div>Enable</div>
Warehouse Settings	<div>Disable</div>
Order Categories	<div>DESC</div>
Show subcategories	<div>Enable</div>
Hide Search Left	<div>Disable</div>
Verify On Hand	<div>Disable</div>
No Truncate Products Description	<div>Disable</div>
Hide Quick Add	<div>Disable</div>
Hide Footer Login	<div>Disable</div>

3.5.2. ii. Manage Products (New Portal)

This knowledge base article will guide users to manage their product categories on the PRISM Joomla Website.

MANAGING PRODUCTS CATEGORY

To add a product item on a category, click on a category where you wish to add the product item.

The screenshot displays the BarcodeApps PRISM Joomla Website interface. On the left is a dark sidebar with the BarcodeApps logo and navigation links: Home, BASIS, and PRISM. The main content area has a top navigation bar with 'Home', 'Categories', and 'MainParent'. Below this is a section titled 'ACTIONS' and 'FILTERS' with buttons for 'Add', 'Manage Products', 'Generate Txt', and 'Advanced Searches'. A table lists product categories with columns for 'Category' and 'Index'. The 'TELEVISION' category is highlighted with a red box.

Category	Index
SMART TV	11
CONSOLE	10
MANUAL	9
DVD PLAYERS	8
PORTABLE DEVICE	7
POWER SUPPLY	6
TELEVISION	5

In our example. We will add an item under TELEVISION

Home > Categories > MainParent > **TELEVISION**

ACTIONS FILTERS

Add **Manage Products** **Generate Txt** **Advanced Searches** **Copy/Move**

<input type="checkbox"/>	Category	Index
<input type="checkbox"/>	TV-5200	0
<input type="checkbox"/>	TV-5200	0

To add an item, Make sure you are inside the correct category (HOME/CATEGORIES/MAIN PARENT/TELEVISION) and then click on Manage products.

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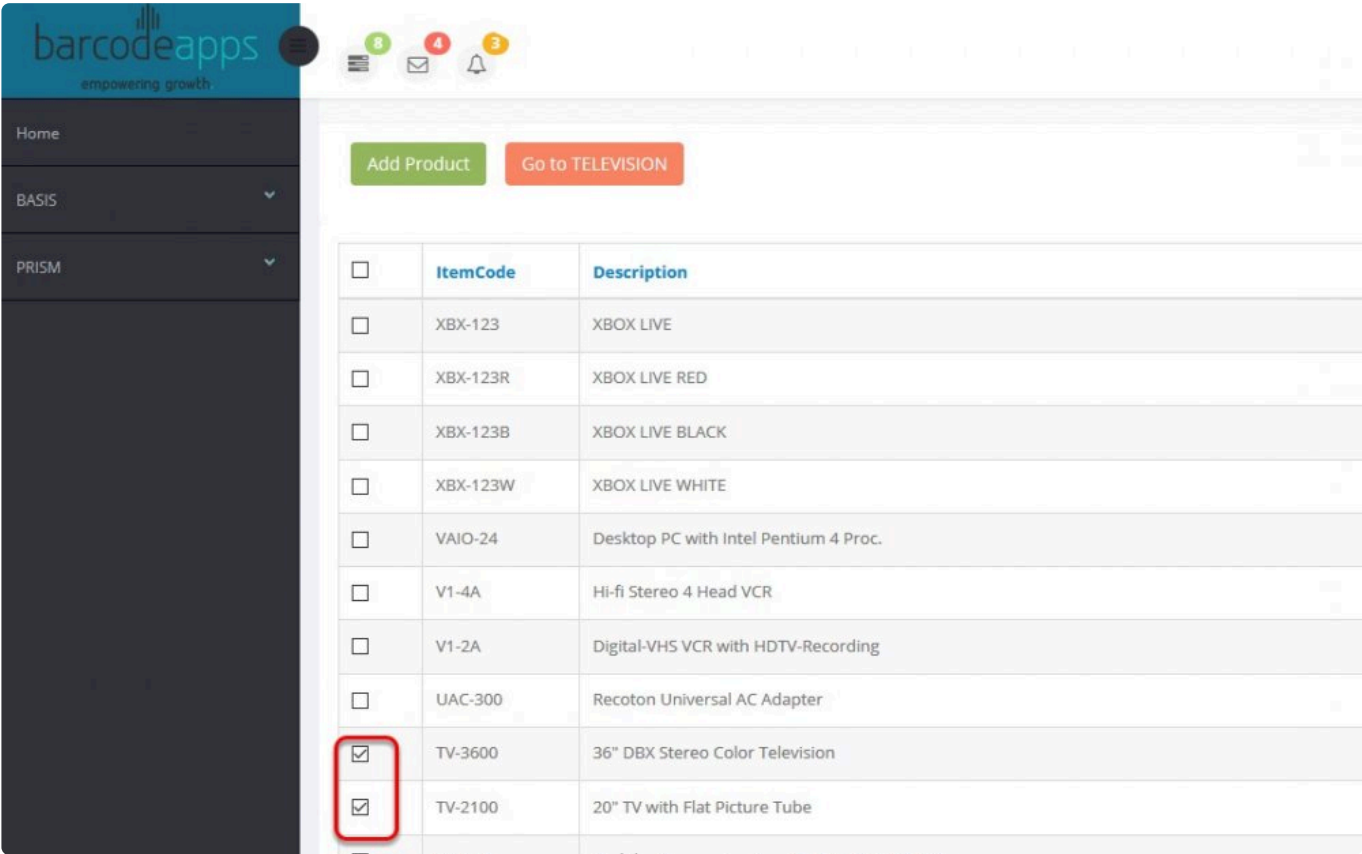
Home > Categories > MainParent > **TELEVISION**

ACTIONS FILTERS

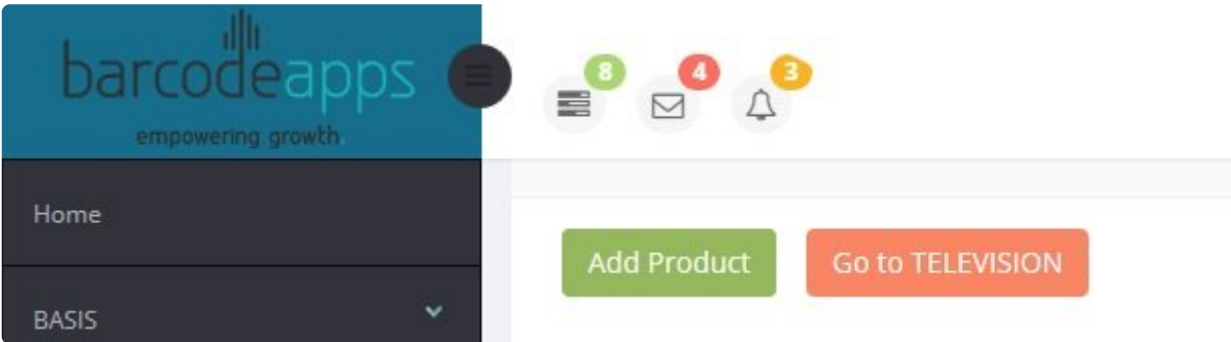
Add **Manage Products** **Generate Txt** **Advanced Searches** **Copy/Move**

<input type="checkbox"/>	Category	Index
<input type="checkbox"/>	TV-5200	0
<input type="checkbox"/>	TV-5200	0

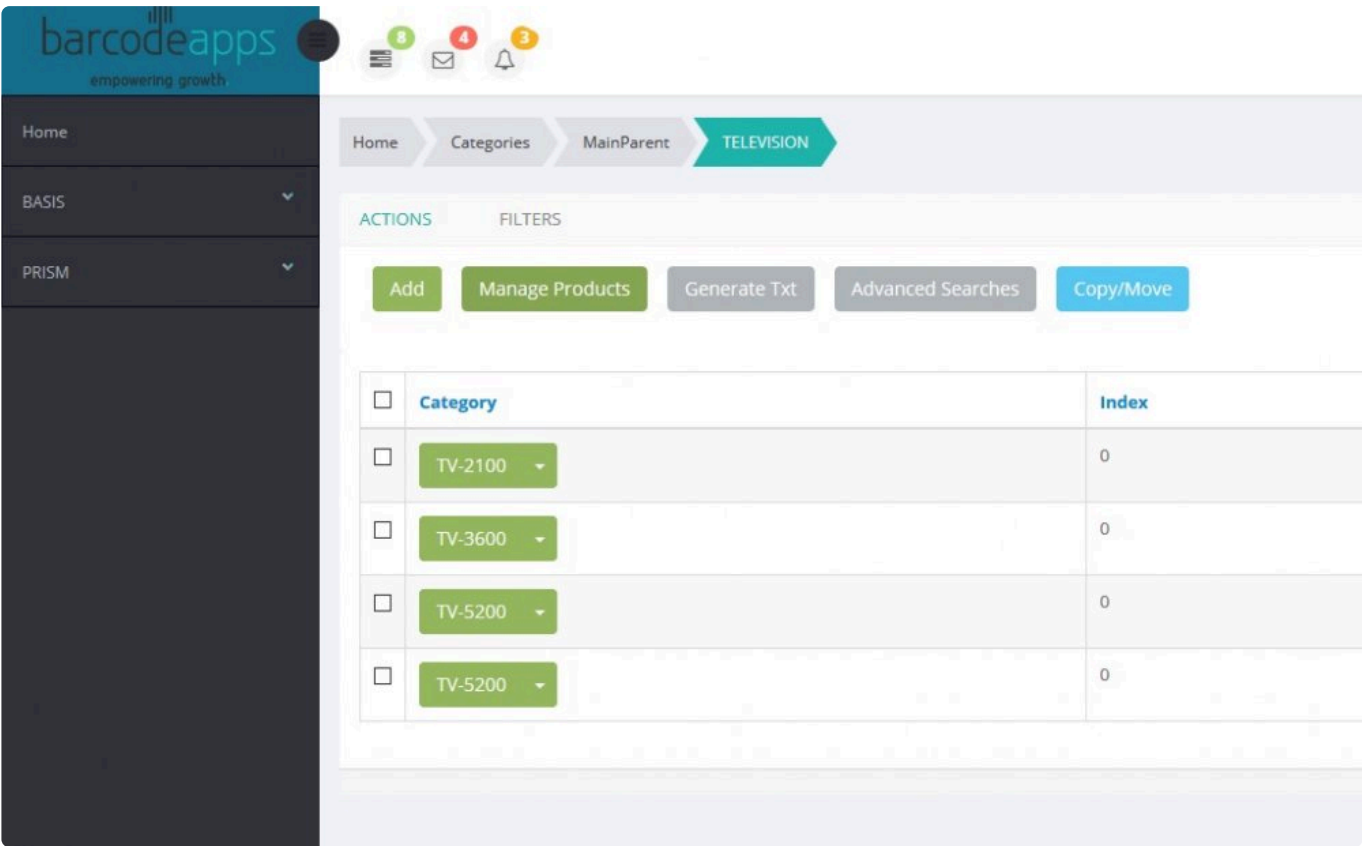
Put a check mark on the item that needs to be added (Multiple selection can be done), and then click on Add Product.



Now click on **Go to Television** to go back to the Television category and check if the Item has been added.



Product update success. Item TV2100 and is now under TELEVISION



When all done on setting the category of your items, click on Generate Txt to sync the new update with the PRISM App (iOS/Android).



3.5.3. iii. Generate Text (New Portal)

The Generate txt button syncs all data (Product items, Categories, , Images) from the PRISM Joomla Portal going to the Mobile devices(IOS/ ANDROID) and the PRISM Web Store.

GENERATE TEXT (SYNC DATA)



It's a best practice to use this option whenever you make changes inside the joomla portal

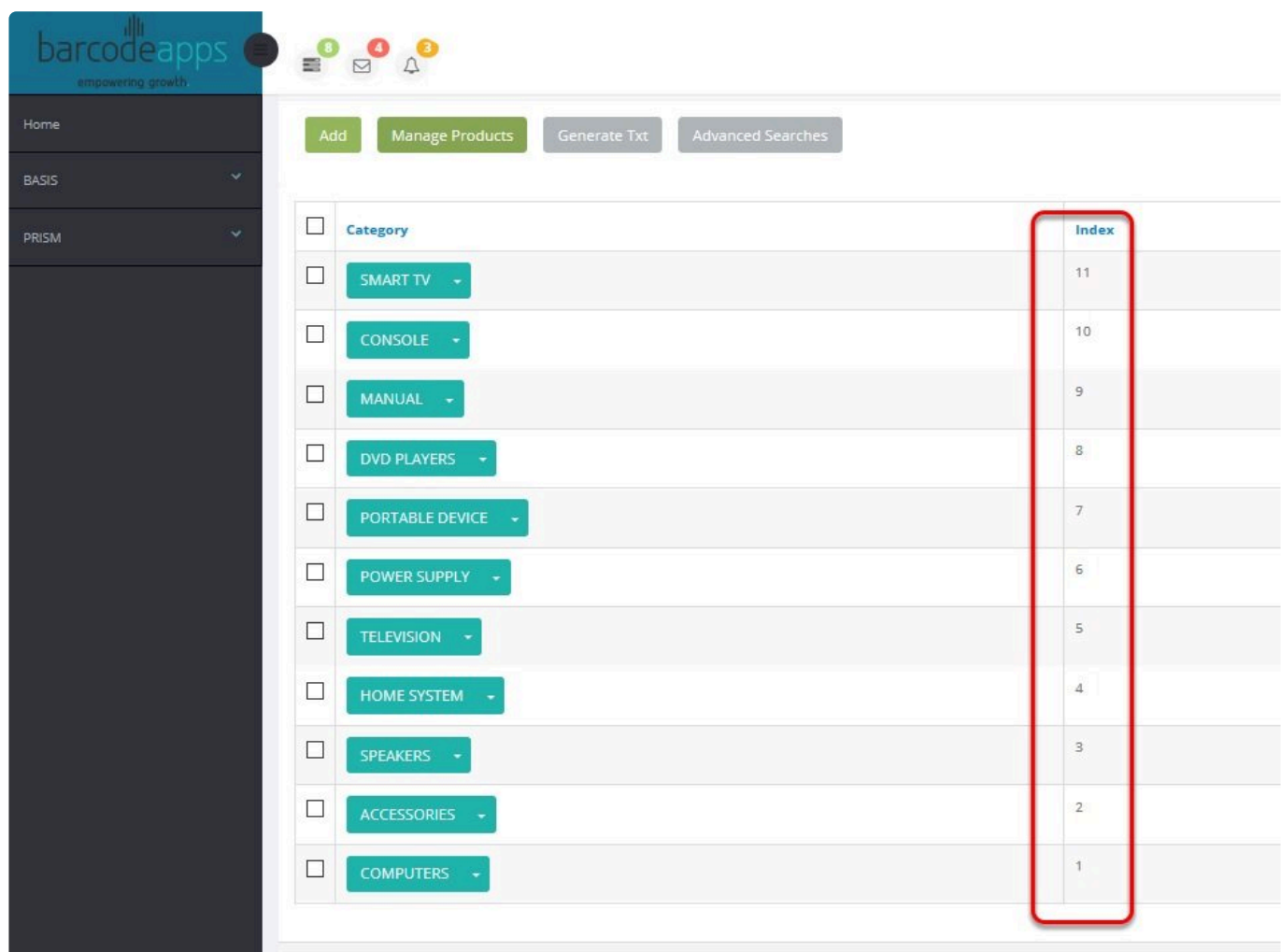
3.5.4. iv. Category Indexing (New Portal)

INDEXING CATEGORIES

We can index categories inside the PRISM Joomla Website to make searches more manageable and organize

inside the PRISM WEB STORE.

By default all categories that are created will be indexed automatically.



Category	Index
SMART TV	11
CONSOLE	10
MANUAL	9
DVD PLAYERS	8
PORTABLE DEVICE	7
POWER SUPPLY	6
TELEVISION	5
HOME SYSTEM	4
SPEAKERS	3
ACCESSORIES	2
COMPUTERS	1

AUTO INDEXING

Since indexing is done automatically, the arrangement of the categories inside the PRISM WEB STORE

will be done

in hierarchy where the most recent category added will show on top.

11

COMPUTERS

- DESKTOP
- LAPTOP

10

ACCESSORIES

9

SPEAKERS

- STANDS
- SPEAKER BOX
- MID RANGE SPK

8

HOME SYSTEM

7

TELEVISION

6

POWER SUPPLY

5

PORTABLE DEVICE

- ACCESSORIES

4

DVD PLAYERS

3

MANUAL

2

CONSOLE

- PLAY STATION

1

SMART TV

- 65"
- 55"
- 48"
- 42"
- 32"

Select a customer from the list below to start an order

Show 72 Page 1 of 1 1

CODE	NAME ▲	ADDRESS	TELEPHONE #
ACTECH	Access Technologies	380 St. Catherines St. Unit 15 Montreal	5143648080
ACE	Ace Electronics	1785 Rexway Ave. Suite 8 Toronto	4164982381
ACME	Acme Electronics Corp.	13444 Mockingbird Drive, Unit 35A King City	9055953343
BCAUDI	British Columbia Audio	1433 West Georgia Street Vancouver	6046851212
CANSPK	Canadian Speakers Limited	888 Progress Rd. Suite 400 Scarborough	4166563300
CZYARN	Crazy Arnold s Stereo Inc.	623 York Street Building 3 Toronto	4166243333
CREAUD	Creative Audio	6105 Lange Drive Unit 6 Winnipeg	2045846601
DSNDM	Davidson Sound Machine	2466 rue Grande Quebec City	5143919293
DAVIS	Davis Electronics	231 Brixton Way Unit 9 Saskatoon	3064952713
DOWNTN	Downtown Stereo Mart Ltd.	1250 Yonge Street Toronto	4163662900
EESND	East End Audio Inc.	3720 Kingston Road Scarborough	4164453434
ENTCTR	Entertainment Centre	42 Penn Street Unit 6 Markham	9057348122
FLRAD	Florence Radio Systems	1891 Main Street Unit 3 Hull	5145867660
FRRAD	Freemont Radio Corp.	444 Barrington Street, Suite 200 Halifax	9028856500
GAHIFI	Georgian Hi-fidelity Corp.	1835 Cliff Valley Huntsville	7052521616
HARDIN	Harding TV Repairs	252 Gladstone Boulevard Suite 6 Willowdale	9055559696
HARCOM	Hardy Computer Associates	1200 Lester Pearson Pkwy Unit 10 Malton	9055559700
HARMON	Harmons Home Theatre Systems	283 Jane Street Calgary	6045554321
HARNEW	Harris Newland Inc.	1197 Bartley Bull Plaza Unit 14 Brampton	9055551438
INTSYS	Integrated Sound Solutions	1402 West Street Suite 200 Lethbridge	2048224901
JACSN	Jackson Electronics	600 Niagara Way Niagara Falls	9056589445
LBSTER	Long Brothers Stereo Inc.	8041 Newman Avenue Yarmouth	9024249787
MASTER	Masters Computer Systems	104 Griffin Road North High Court Building Windsor	5197223654
NYAUDI	North York Audio Specialists	823 Griffin Way North York	4165394575
ONTSND	Ontario Sound Emporium Inc.	1460 Lakeshore Boulevard Toronto	4165556262
RADLND	Radio Land	103 MacArthur Drive Suite 459 Willowdale	9052547699
SEHIFI	Smith Evans Hi-Fi Design Inc.	412 River Street Brockville	7052726339
SNDMCH	Sound Machine	1137 West Park Drive Mississauga	4168835656
TERSEA	Terrace Sound Effects	78 Christopher Avenue Toronto	4162222323
TORRAD	Toronto Radio Limited	2316 Avenue Road Toronto	4166655400
WHDIST	West Heights Distributors Inc.	5550 Independence Avenue Winnipeg	2049275540
WESTEC	Western Electronics	1265 Madison Street Vancouver	6046224900

MANUAL INDEXING

Manual indexing is also possible if you wish to arrange the categories

To Manually index the categories, on the categories main parent window, select a category, click on the drop

down arrow (after the category name) and then select Details.

barcodeapps
empowering growth

Home

BASIS

PRISM

8

4

3

Add

Manage Products

Generate Txt

Advanced Searches

<input type="checkbox"/> Category	Index
<input type="checkbox"/> SMART TV	11
<input type="checkbox"/> CONSOLE	10
<input type="checkbox"/> MANUAL	9
<input type="checkbox"/> DVD PLAYERS	8
<input type="checkbox"/> PORTABLE DEVICE	7
<input type="checkbox"/> POWER SUPPLY	6
<input type="checkbox"/> TELEVISION	5
<input type="checkbox"/> COMPUTERS	4
<input type="checkbox"/> SPEAKERS	3
<input type="checkbox"/> ACCESSORIES	2
<input type="checkbox"/> HOME SYSTEM	1

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empowering growth.

Home

BASIS

PRISM

843

AddManage ProductsGenerate TxtAdvanced Searches

Category	Index
SMART TV	11
CONSOLE	10
MANUAL	9
DVD PLAYERS	8
Details	7
Delete Category	6
TELEVISION	5
COMPUTERS	4
SPEAKERS	3
ACCESSORIES	2
HOME SYSTEM	1

Set the index number and then hit on save and close.

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2

Home

BASIS

PRISM

8

4

3

Save & Close

Close

Basic Information

Category Name *

PORTABLE DEVICE

Set Index *

7

1

2

3

4

5

6

7

8

9

10

11

1

Repeat the same procedure until the desired arrangement are met.

* NOTE: The results can always be viewed by accessing the PRISM WEB STORE.



✿ Indexing can also be applied to sub categories.

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Home

BASIS

PRISM

Home

Categories

MainParent

SMART TV

ACTIONS

FILTERS

Add

Manage Products

Generate Txt

Advanced Searches

Copy/Move

SUB CATEGORY

Category	Index
32"	5
42"	4
48"	3
55"	2
65 "	1

3.6. F. Other Features

3.6.1. i. Segregation of Products and Catalogues

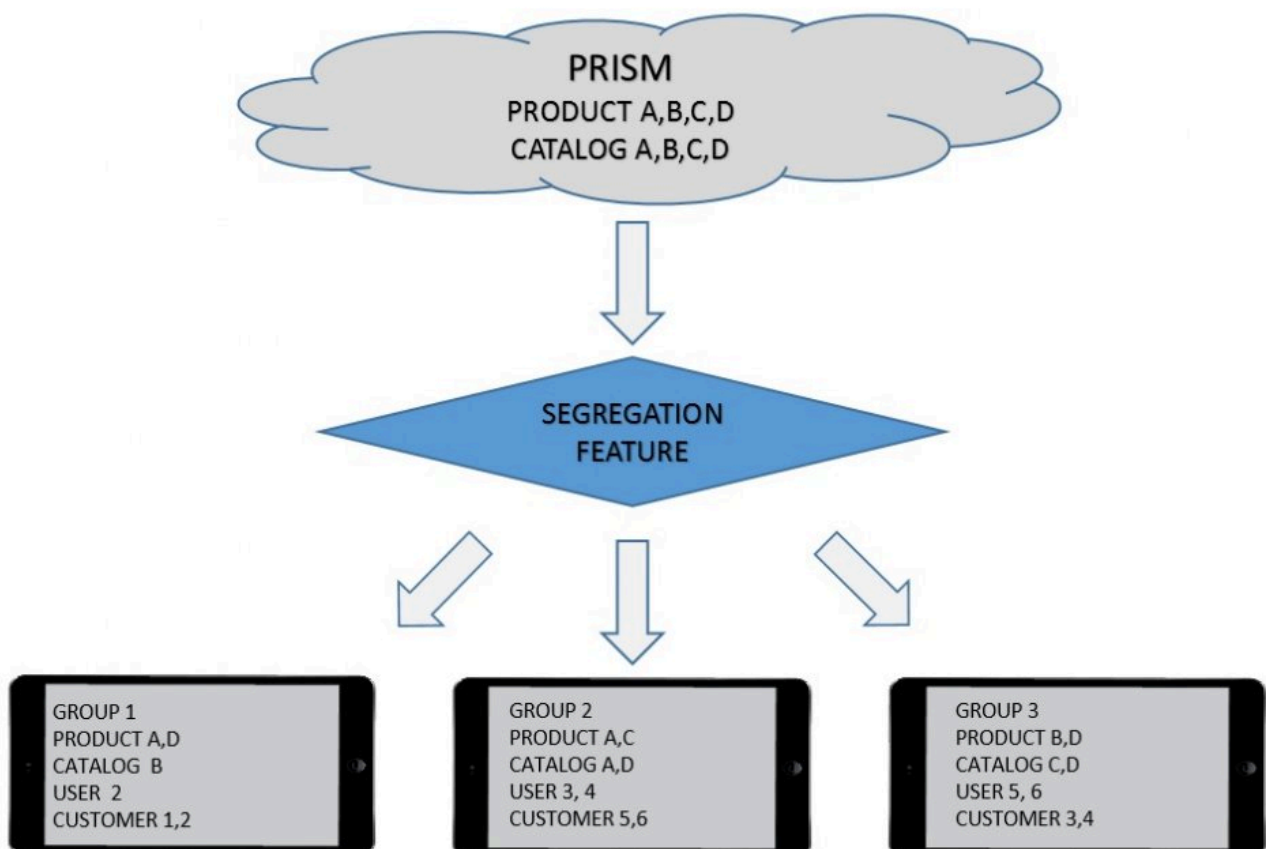
This knowledge base article will guide user on how to segregate their products and catalogues.

PRISM SEGREGATION OVERVIEW

PRISM SEGREGATION is the ability of PRISM to send predefined catalogs and Products to predefined users and customers.

With this feature you can set a **group** of users and customers to see only items and catalogues that you've chosen whenever they are accessing PRISM (mobile and web store)

one example on the image below shows USER2, CUSTOMER1 and CUSTOMER 2 that belongs to **GROUP 1** can only access PRODUCT A,D and CATALOG B.

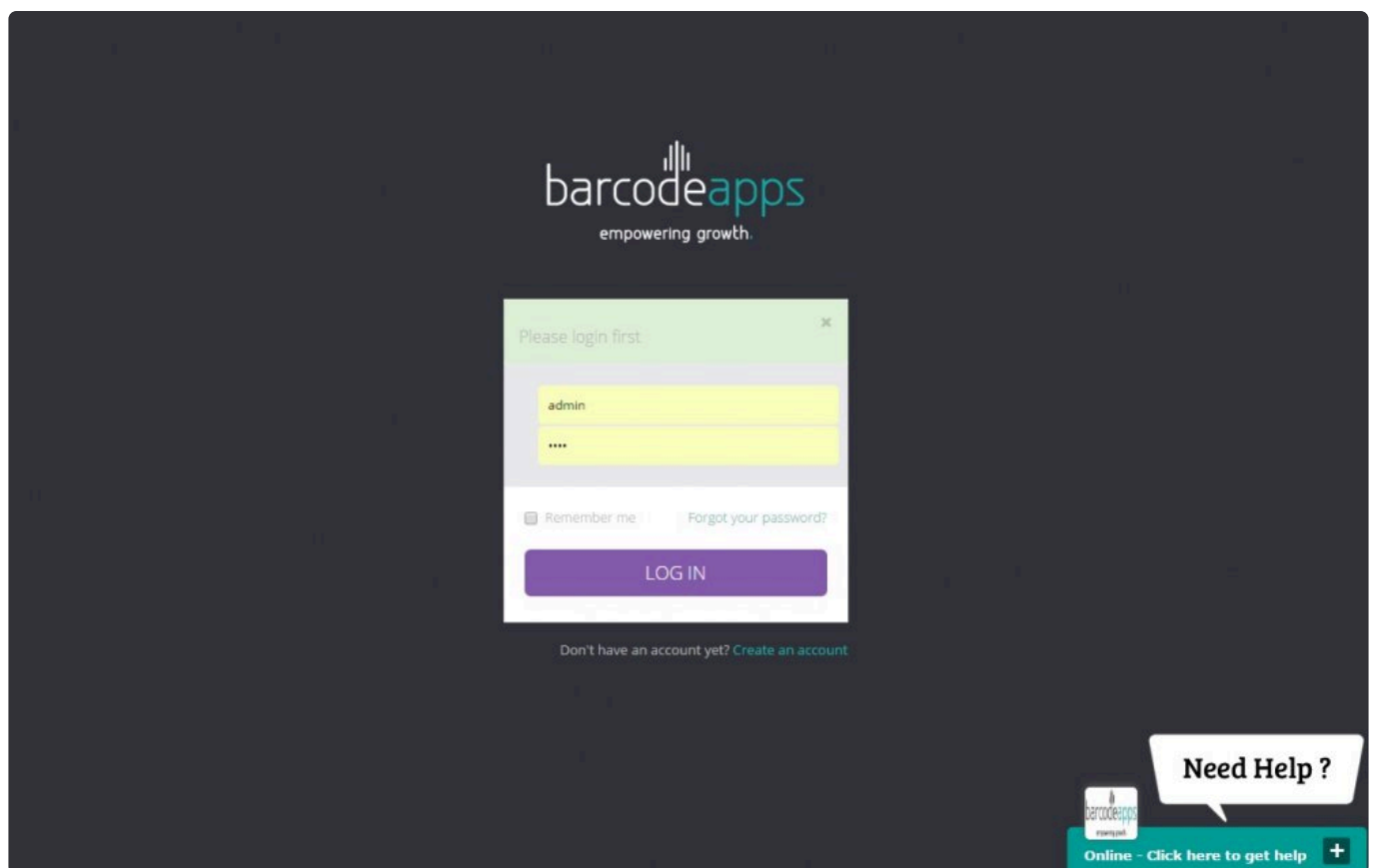


KEY STEPS FOR SEGREGATION

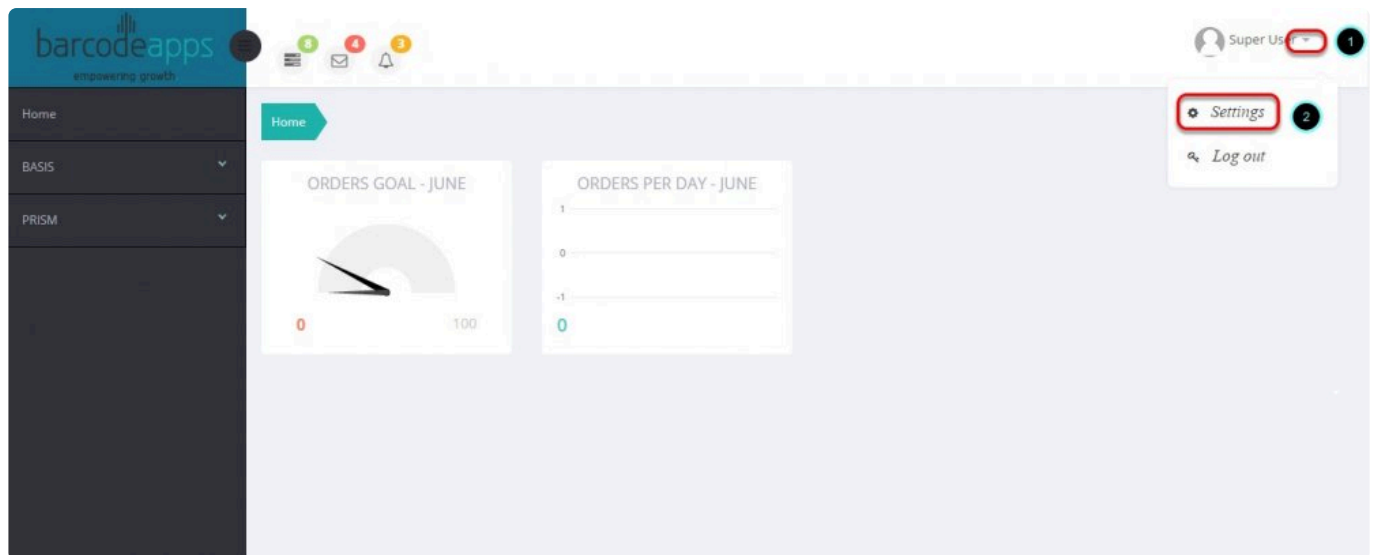
1. Create a Group
2. Manage the Group
3. Sync the Changes

I. CREATING A GROUP

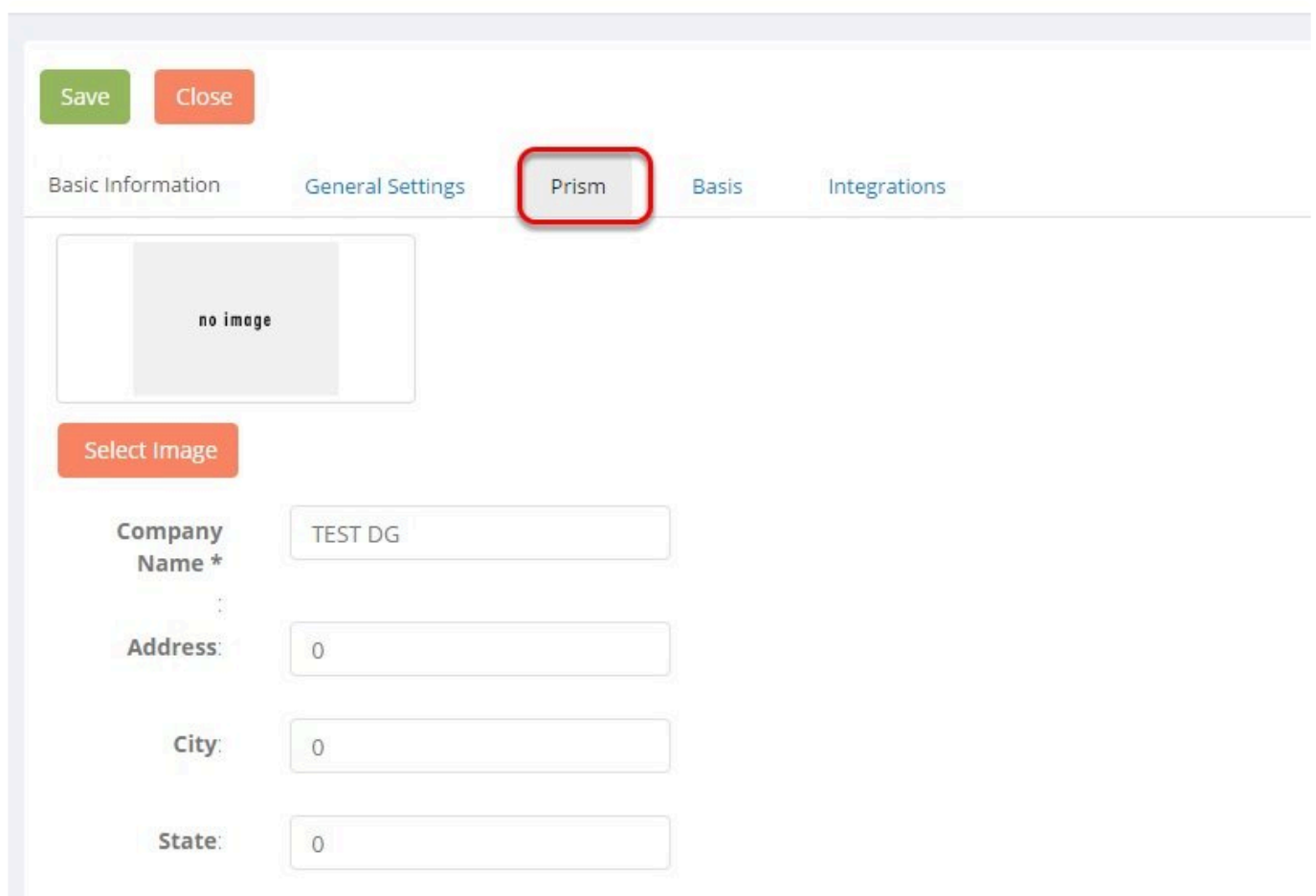
. Login to the [PRISM self service website](#) using an admin credential.



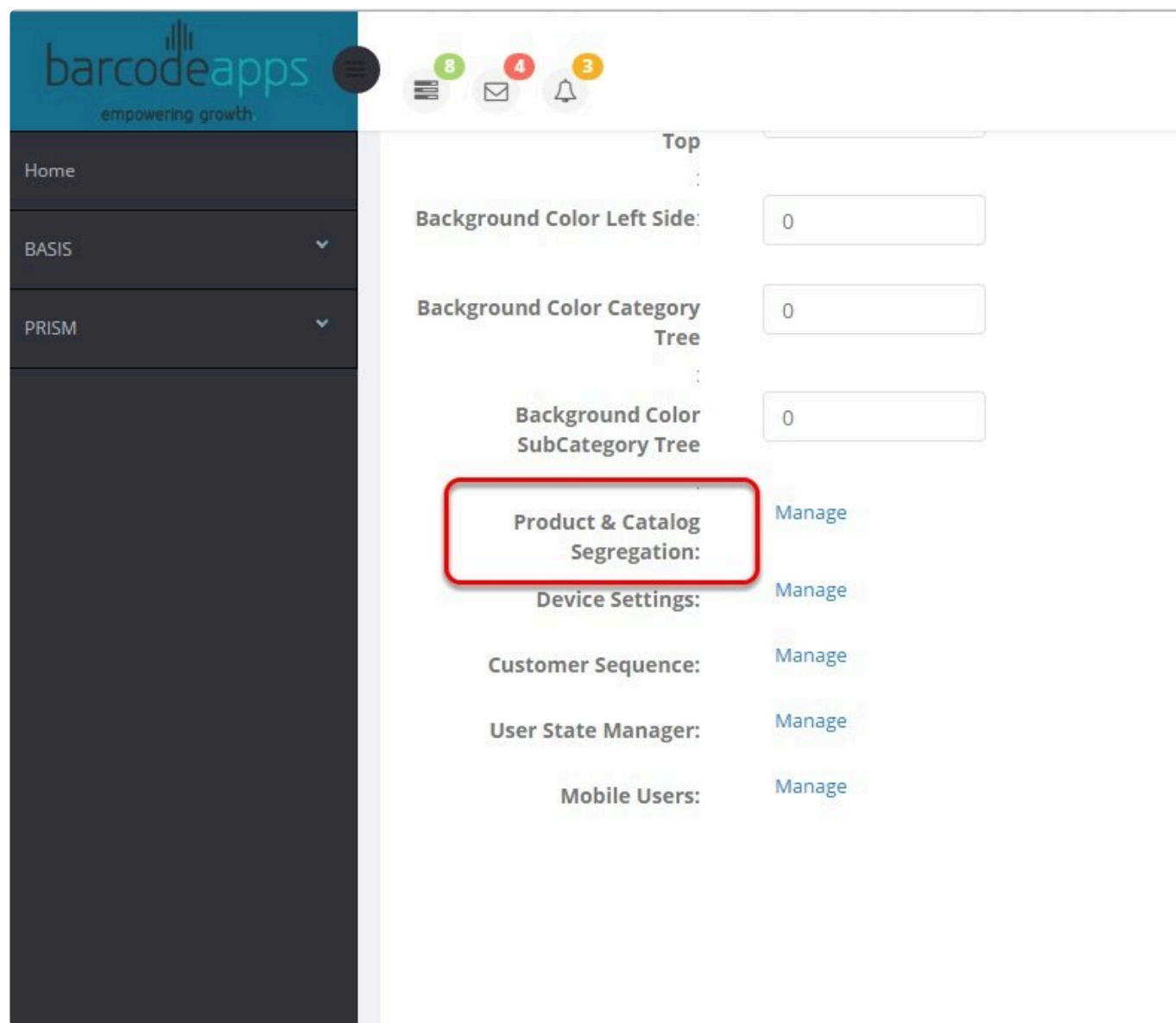
Click on the drop down arrow on the top right corner and then click on settings



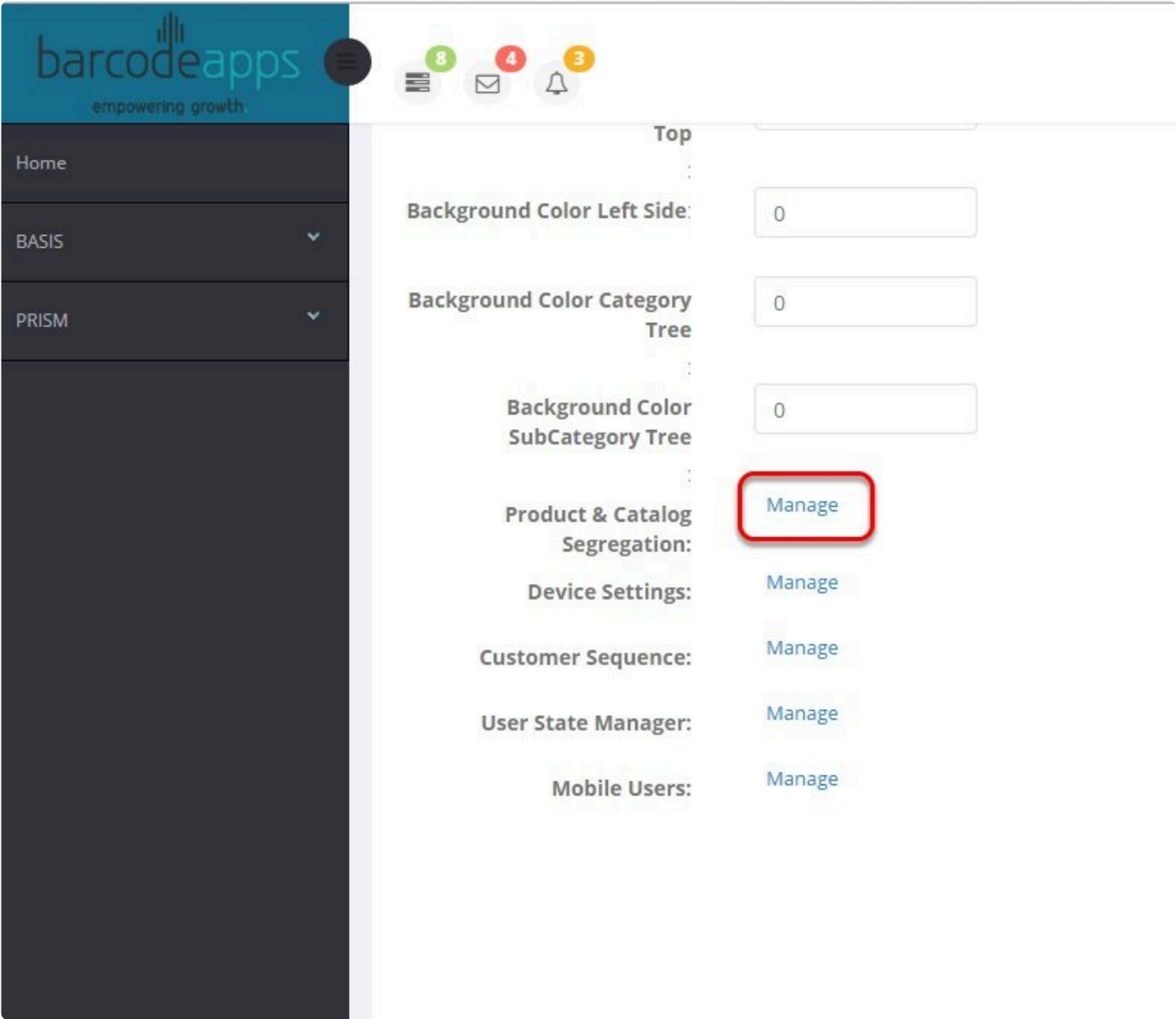
Click on the PRISM Tab

A screenshot of the BarcodeApps Prism settings form. The form has a header with 'Save' and 'Close' buttons. Below the header are tabs for 'Basic Information', 'General Settings', 'Prism', 'Basis', and 'Integrations'. The 'Prism' tab is selected and highlighted with a red box. The form contains a 'no image' placeholder, a 'Select Image' button, and input fields for 'Company Name *' (TEST DG), 'Address' (0), 'City' (0), and 'State' (0).

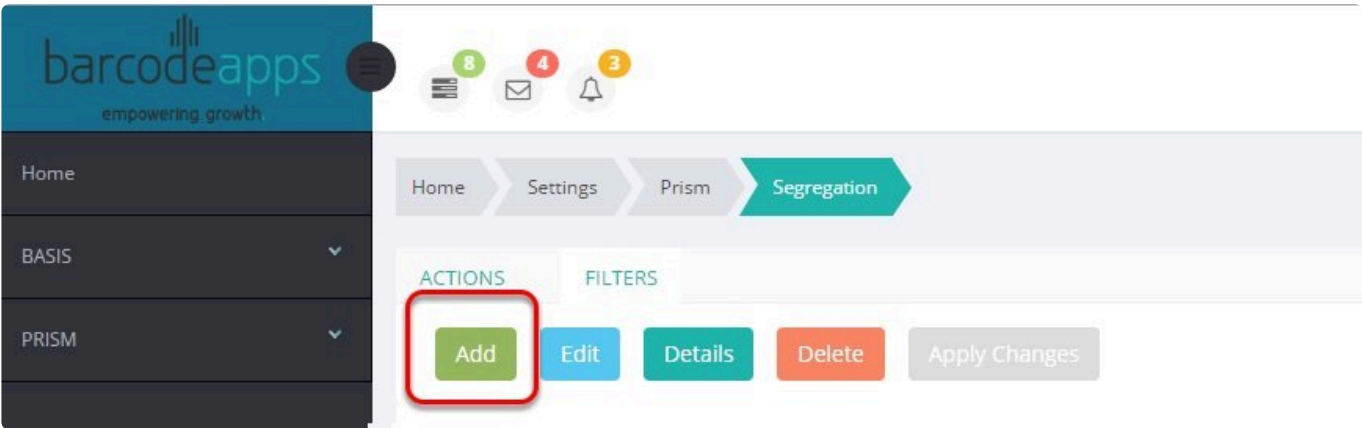
Scroll all the way to the bottom and search for the option product and catalog segregation.



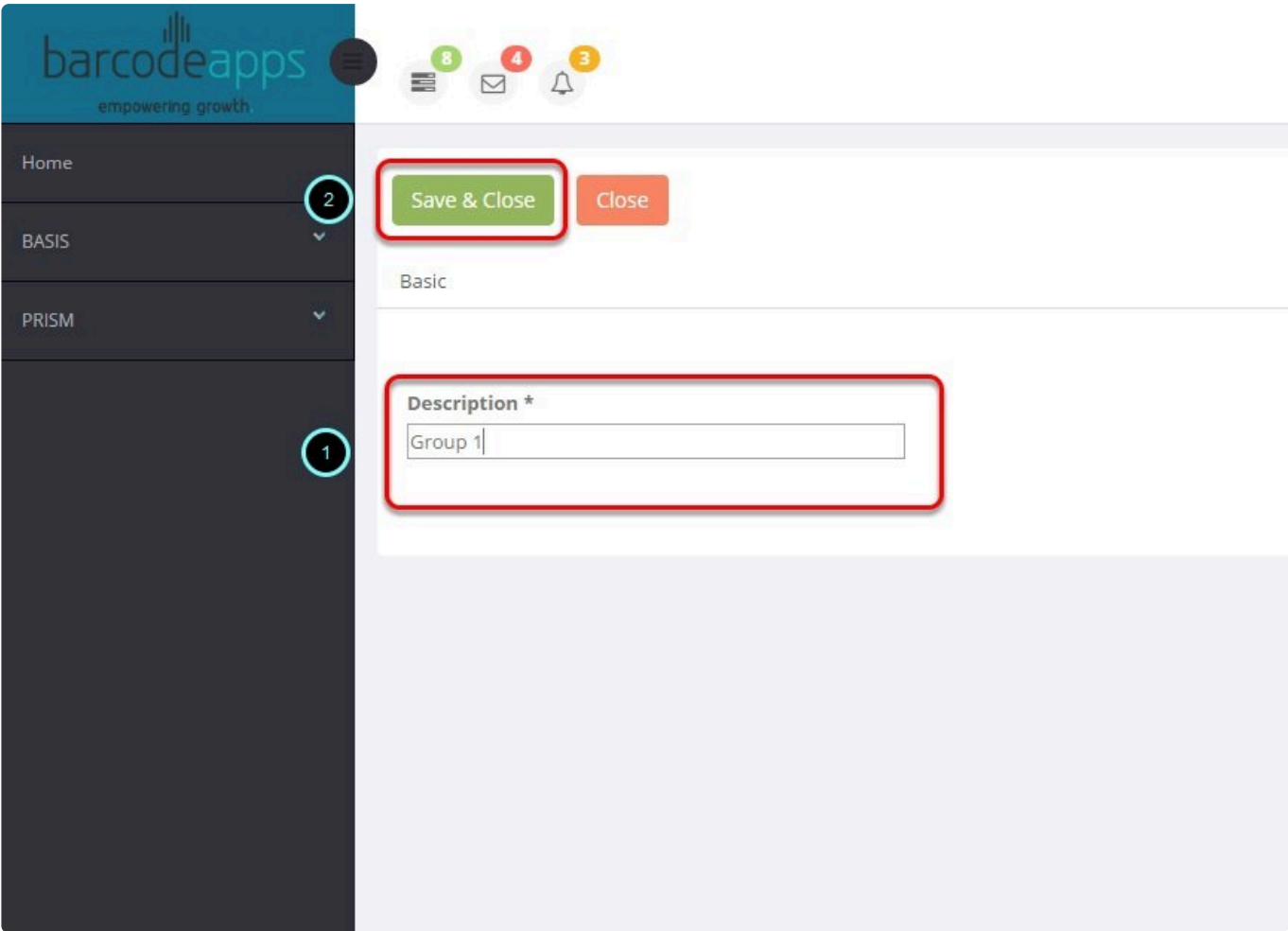
click on manage.



On the Segregation window, click on Add



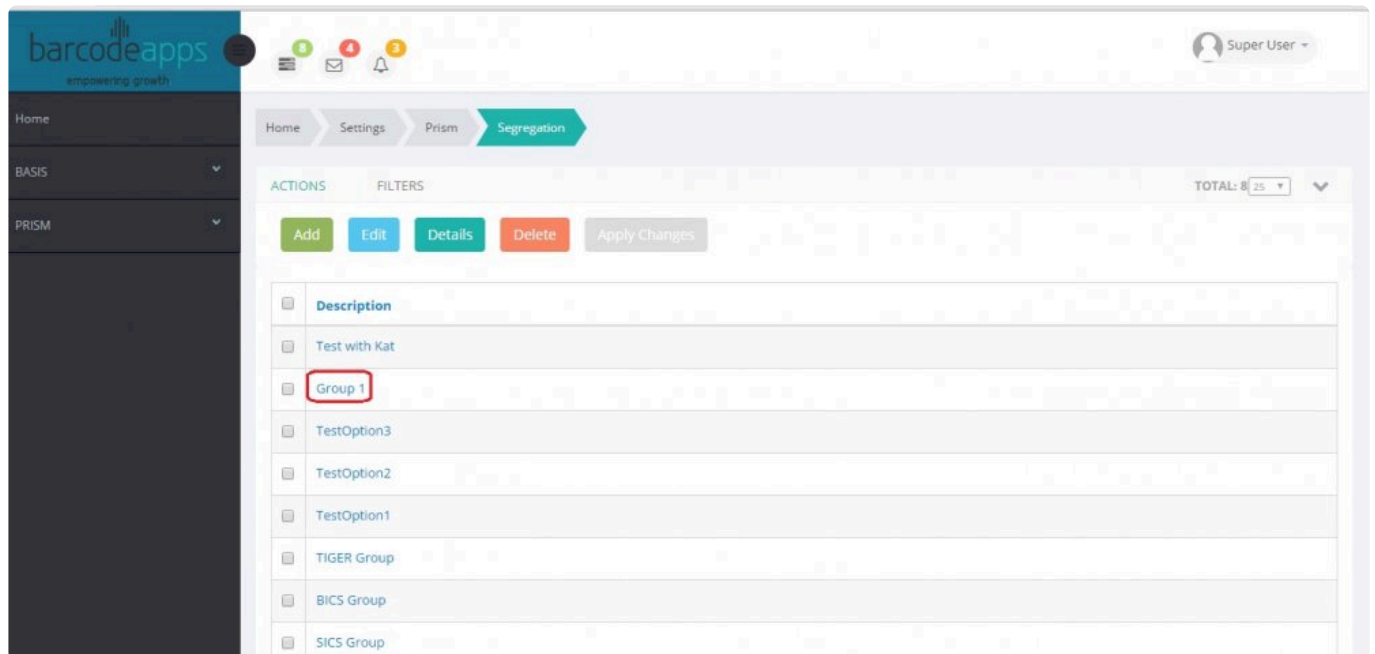
Define the name of the group and then click on Save and Close



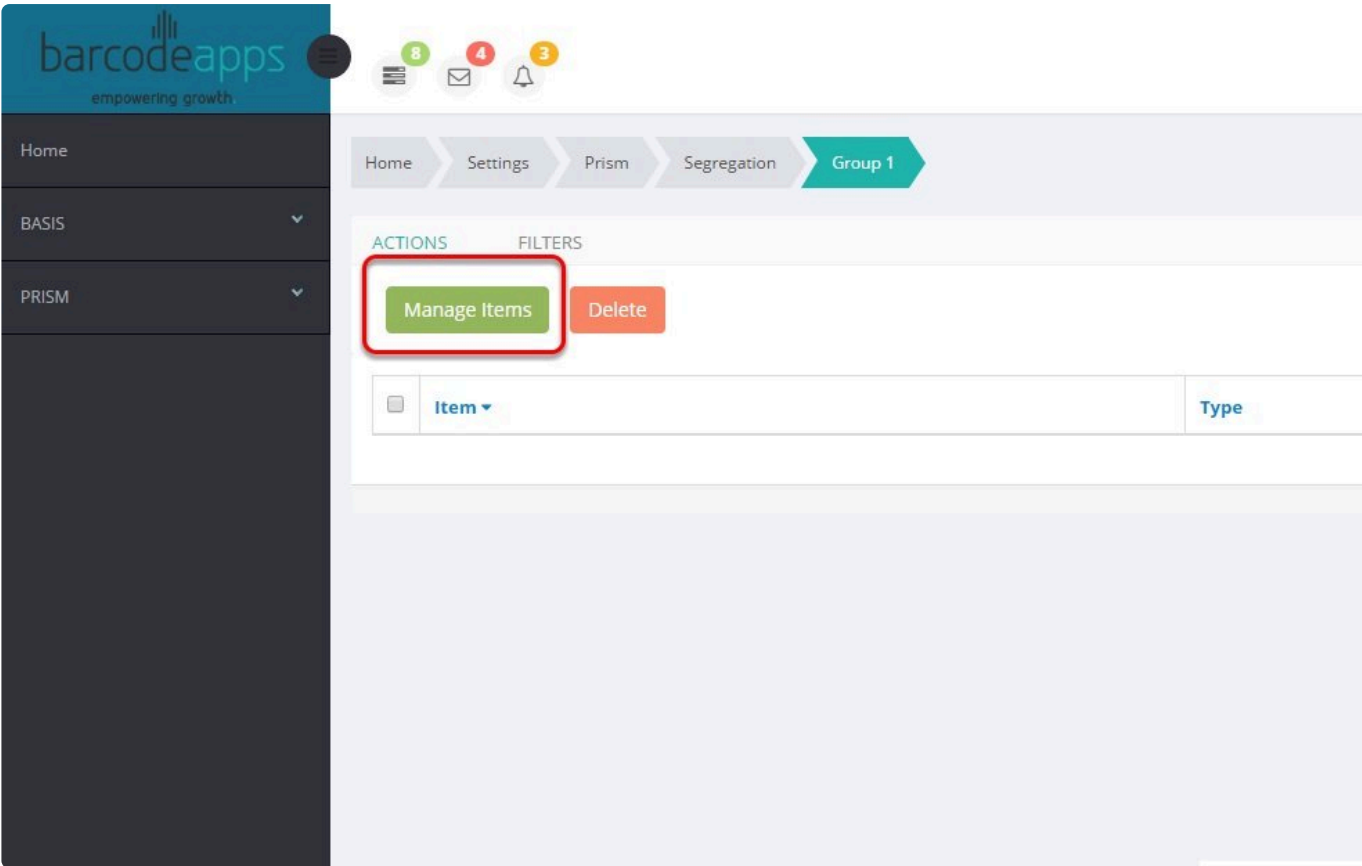
Now we can start managing the group

II. MANAGING A GROUP

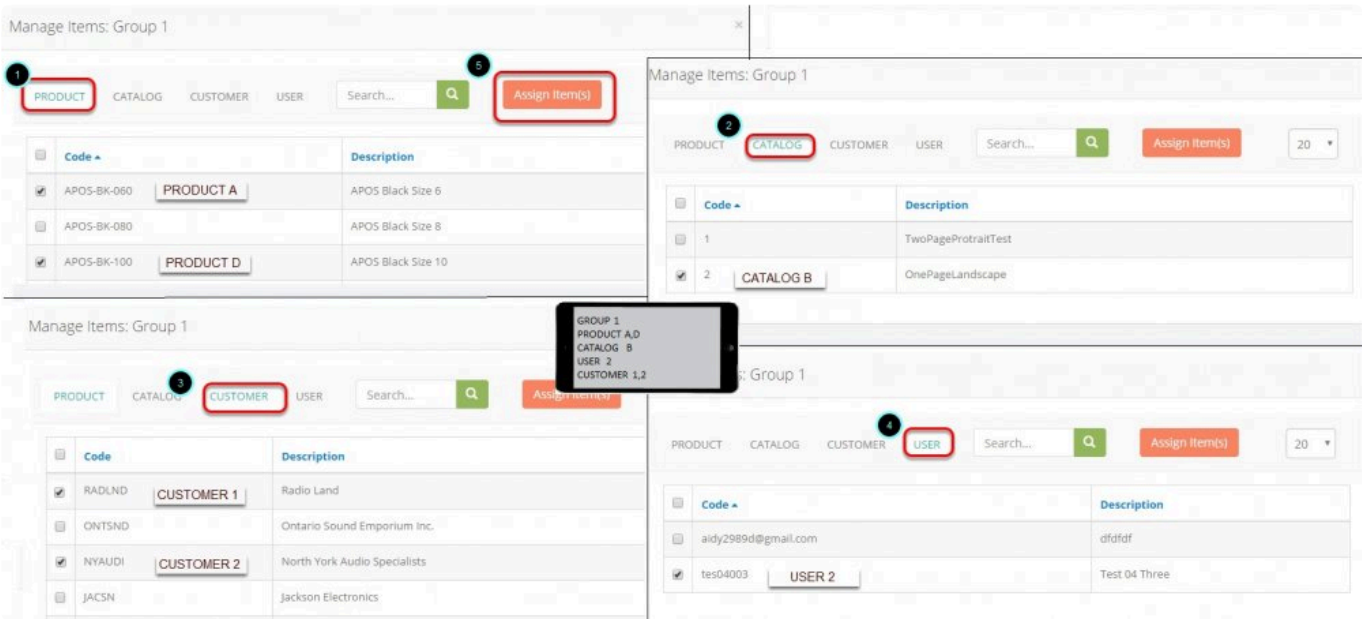
To manage a group, click on the group that has to be modified. (e.g. Group 1)



click on manage items to open the Manage items window.



On the manage items window. We can now start adding the products,catalogs,users and customers



TIPS

* The total number of items will be displayed on the total field.

Manage Items: Group 1

Search...

Assign Item(s) selected

TOTAL: 204 20

Product	Catalog	Customer	User
<input type="checkbox"/>	Code ▲	Description	
<input type="checkbox"/>	1512352	best bag	
<input type="checkbox"/>	AAAA	Chair	
<input type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN	
<input type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN	

<<

<

1

2

3

4

...

6

7

8

9

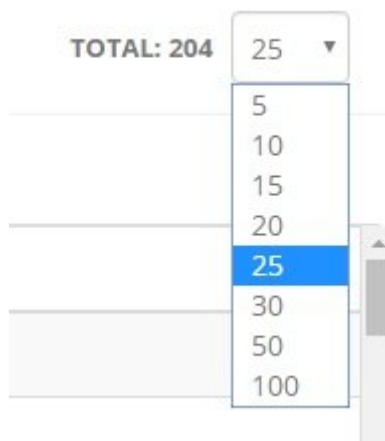
10

>

>>

Close

* Items view can be manage by clicking on the option on the top right corner and then select the numbers of items that can be displayed (25 up to 100 items).



ADDING AN ITEM


There are multiple ways to add an item (Products,Catalog,Customers,and Sales Person (User))

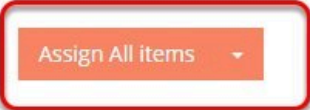
- **Assign item(s) selected** – this option will add the selected items only.
- **Assign all items** – this option will add all items on the list.
- **Assign all except selected** – this will assign all except selected.

A. Assign item(s) selected

To use this option just put a check mark on the item that has to be added and then click on Assign Items Selected when done.

Manage Items: Group 1 ×

Search... 

2 

TOTAL: 204 100 ▾

1

Product Catalog Customer User

<input type="checkbox"/>	Code ▲	Description
<input checked="" type="checkbox"/>	1512352	best bag
<input checked="" type="checkbox"/>	AAAA	Chair
<input checked="" type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN
<input type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN

« < 1 2 3 > »

Close

B. Assign all items

To add all items. Just check on the total number of items (verify if it matches the count on your masterlist) and then select the Assign All items option from the drop down menu.

Manage Items: Group 1

Search...

Q

Assign All items

1

TOTAL: 204

100

Product

Catalog

Customer

User

3

Assign Item(s) selected

Assign All items

Assign All except selected


<input type="checkbox"/>	Code ▲	Description
<input type="checkbox"/>	1512352	best bag
<input type="checkbox"/>	AAAA	Chair
<input type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN
<input type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN

« < 1 2 3 > »

Close

Then click on Assign All Items to initiate. This will add the total of 204 items in the Group (Group1).

Manage Items: Group 1 ×



Assign All items ▾

TOTAL: 204 100 ▾

Product Catalog Customer User

<input type="checkbox"/>	Code ▲	Description
<input type="checkbox"/>	1512352	best bag
<input type="checkbox"/>	AAAA	Chair
<input type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN
<input type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN

« < 1 2 3 > »

Close

C. Assign all except selected

To use this option just select the item that has to be exempted and then select the Assign All except selected option from the drop down menu

Manage Items: Group 1

Search...

Assign All items

TOTAL: 204 100

Product	Catalog	Customer	User
<input type="checkbox"/>	Code ▲	Description	
<input checked="" type="checkbox"/>	1512352	best bag	
<input checked="" type="checkbox"/>	AAAA	Chair	
<input checked="" type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN	
<input checked="" type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN	

Assign Item(s) selected

Assign All items

Assign All except selected

«

<

1

2

3

>

»

Close

Then click on Assign All Items except selected to initiate.

Manage Items: Group 1 ✕

Q

Assign All items ▼

TOTAL: 204 100 ▼

Product Catalog Customer User

<input type="checkbox"/>	Code ▲	Description
<input checked="" type="checkbox"/>	1512352	best bag
<input checked="" type="checkbox"/>	AAAA	Chair
<input checked="" type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN
<input checked="" type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN

« < 1 2 3 > »

Close

ADDING ITEM FROM A SEARCH

To add an item(s) from a search, Type in the keyword that has to be searched and the press enter or click on the magnifying glass.

Manage Items: Group 1

1 2

Candle

Assign Item(s) selected

TOTAL: 204 100

Product	Catalog	Customer	User
<input type="checkbox"/>	Code ▲	Description	
<input type="checkbox"/>	1512352	best bag	
<input type="checkbox"/>	AAAA	Chair	
<input type="checkbox"/>	AB69384	D7.3x19.5" Vase 2EA/CTN	
<input type="checkbox"/>	AB69385	T/S D7.2x13.6" Vase 2EA/CTN	

« < 1 2 3 > »

The total search results will show on the top right corner. Now you can start adding the searched items in your group using the Assign items option.

Manage Items: Group 1

Candle

Assign Item(s) selected

TOTAL: 7 100

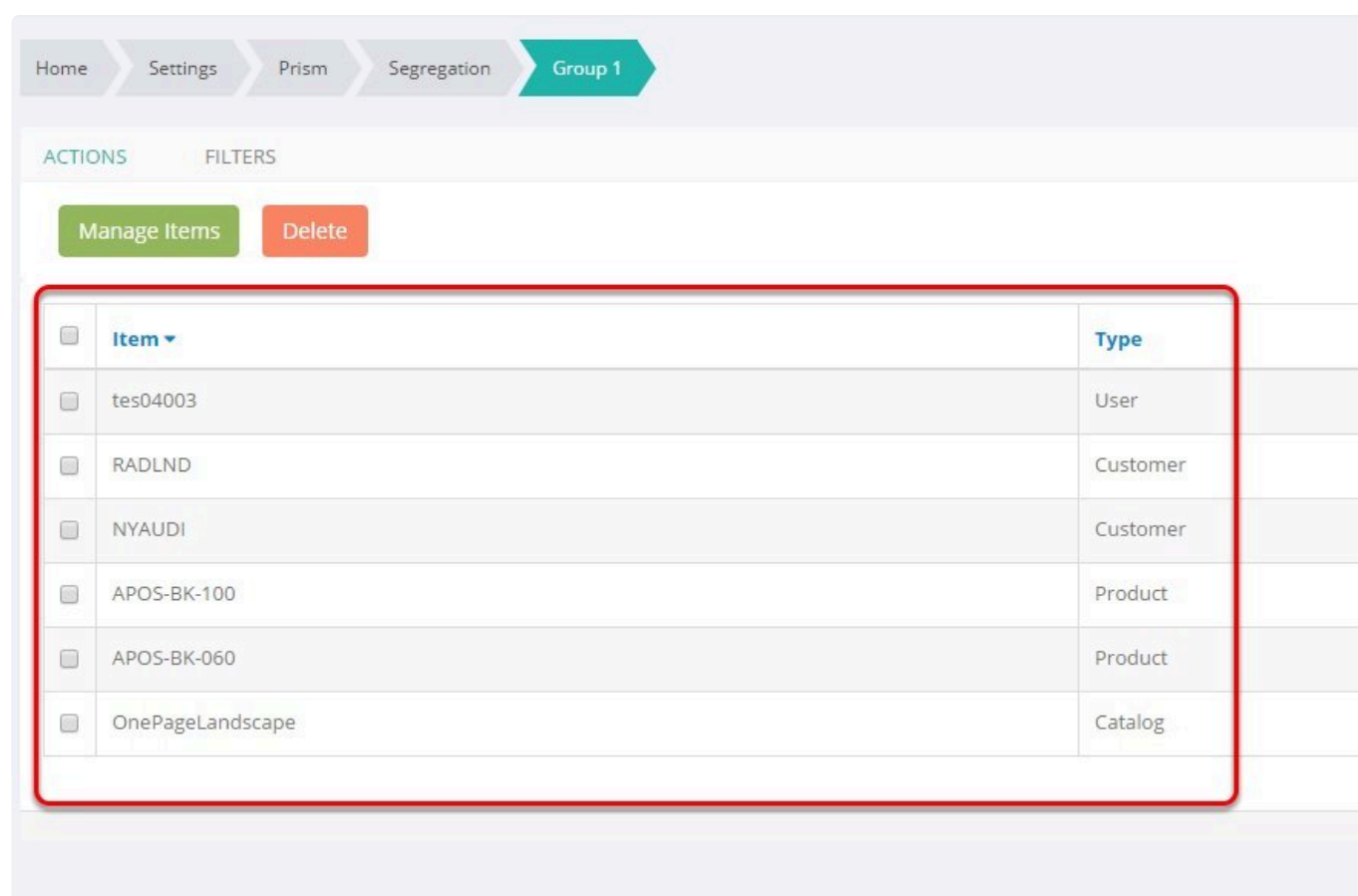
Product	Catalog	Customer	User
<input type="checkbox"/>	Code ▲	Description	
<input type="checkbox"/>	AB69455	D5x6" Candle Holder 12EA/CTN	
<input type="checkbox"/>	AB69456	T/S D4.3x3" Candle Holder 16EA/CTN	
<input type="checkbox"/>	AB69474	T/S D8x6.5" Candle Holder 6EA/CTN	
<input type="checkbox"/>	AB69475	T/S D5.7x4.6" Candle Holder 6EA/CTN	

Once all items (products, catalogues, customers and users) are added. The group summary can be verified when you select the group from the group list.

ADDING CATALOG

To add catalogs using the same process as adding an item just click on the catalog tab and select the Catalog that you wish to add.

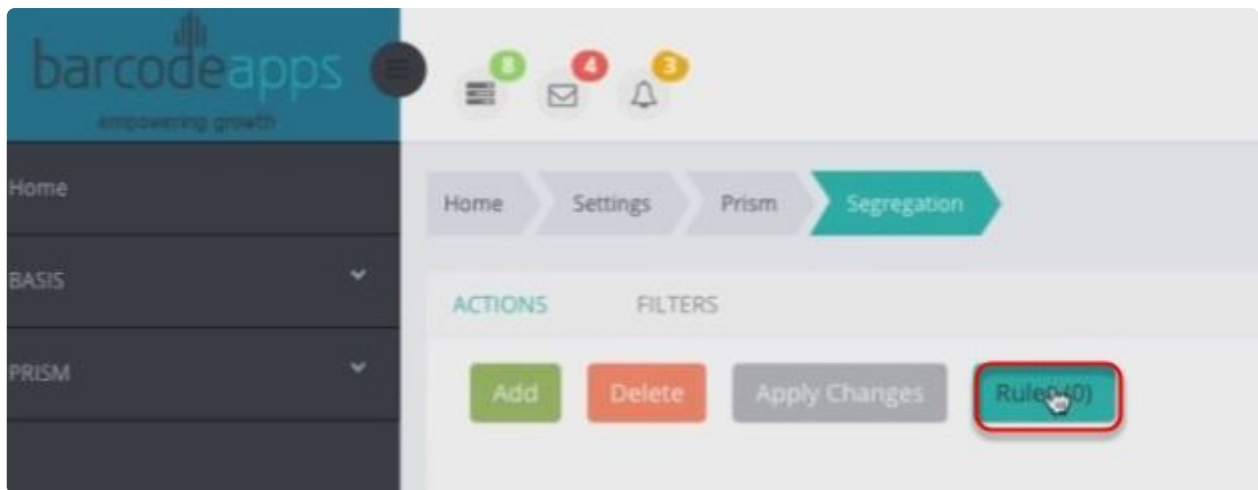
ADDING USER (SALES PERSON)



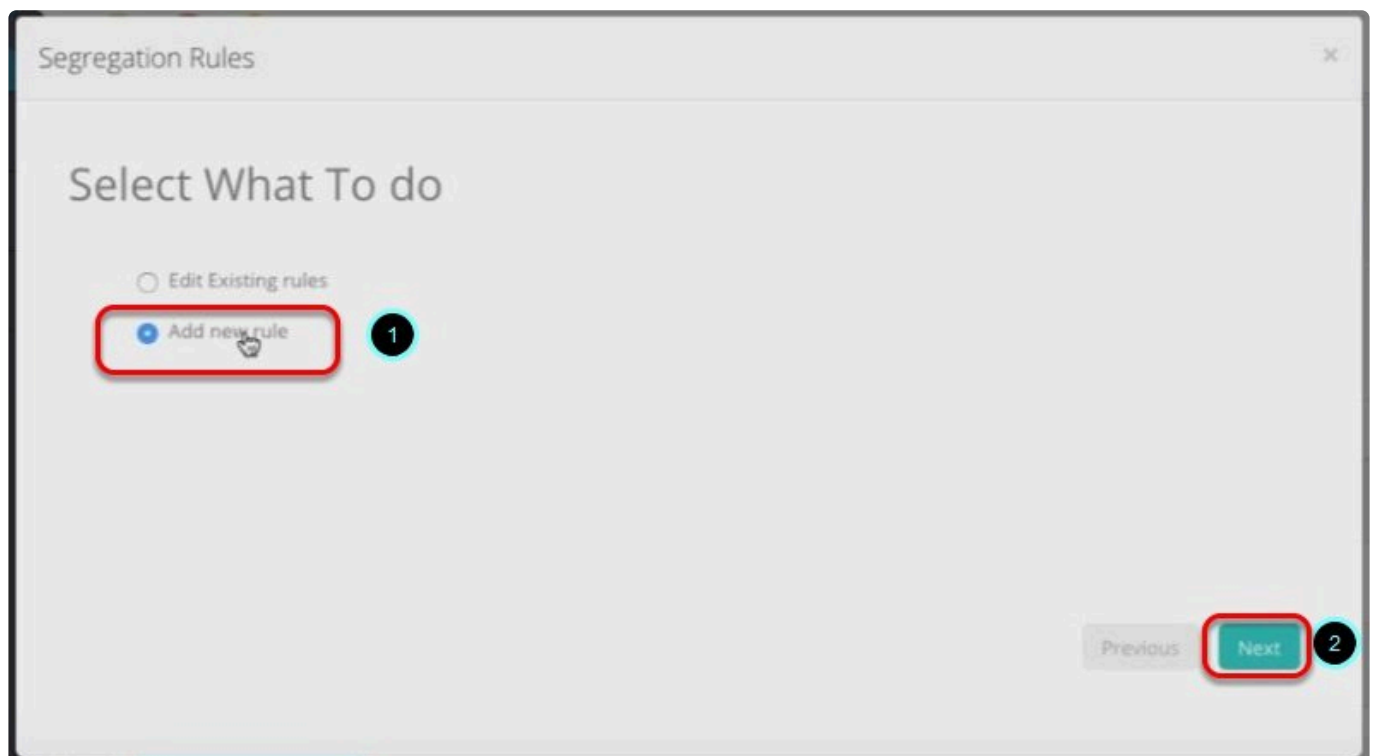
Item	Type
tes04003	User
RADLND	Customer
NYAUDI	Customer
APOS-BK-100	Product
APOS-BK-060	Product
OnePageLandscape	Catalog

ADDING PRODUCTS VIA RULES

Items can also be added using the rules feature. To add a rule, click on rules



Click on add new rule and then click on next



Click on Products (Note: Other item will be added soon (Customer,Catalogs and Users)) and then Next

Segregation Rules

1. Select Type

☒ Product 1

Previous Next 2

Select the filter, type in the search word and then click on next

Segregation Rules

3. Select rule type for Item Code

1 ☒ Starts with
☐ Ends with
☐ Contains

Keyword 2

Previous Next 3

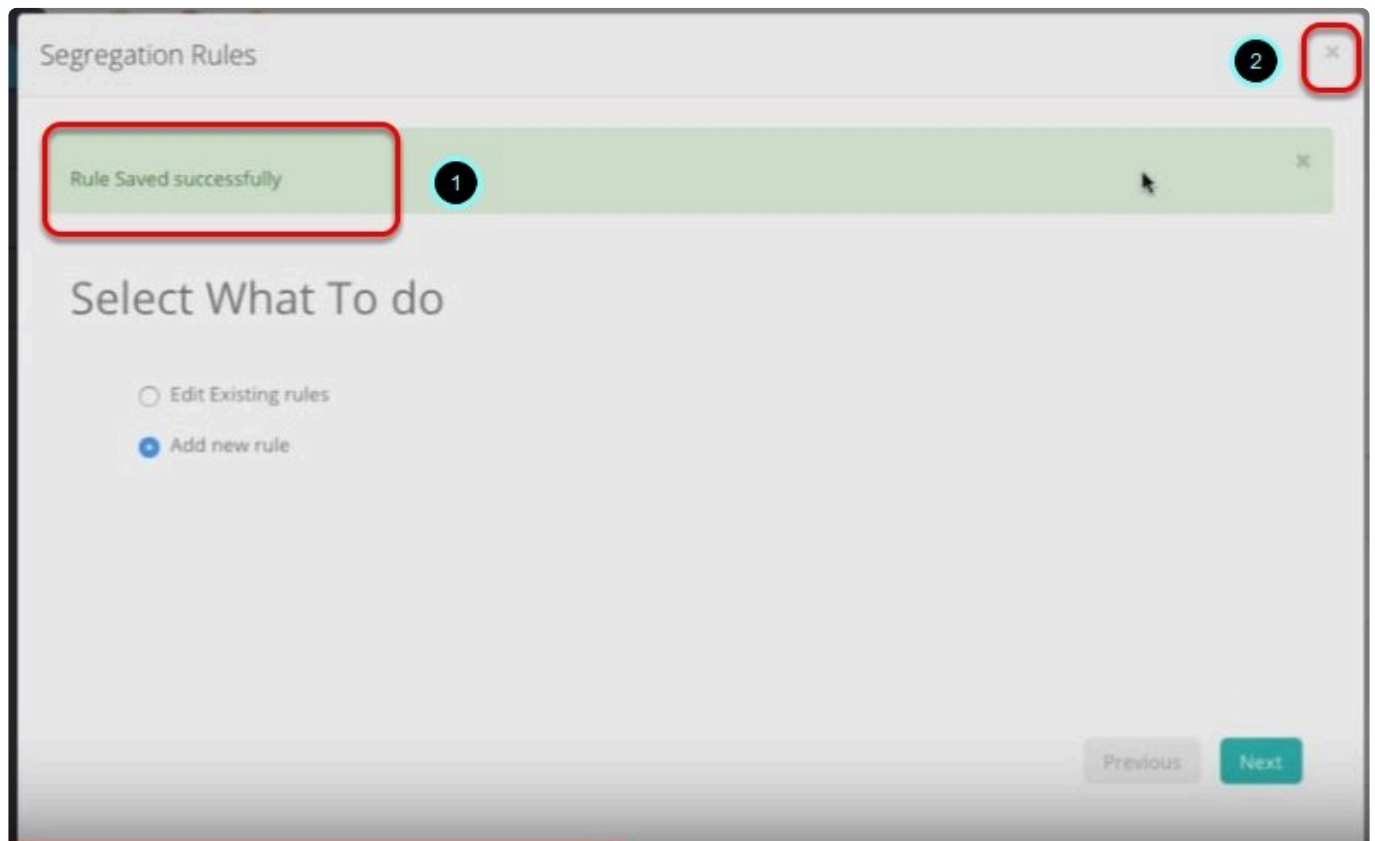
Select the group that will use the rule and then click on Next

The screenshot shows a dialog box titled "Segregation Rules" with a close button (X) in the top right corner. The main heading is "4. Select Groups to include". Below this, there is a list of four options, each with an unchecked checkbox: "No rules", "Ontario Midwest Pacific", "Ontario", and "Midwest Pacific". The "Ontario Midwest Pacific" option is highlighted with a red rectangular border, and a black circle with the number "1" is placed next to it. At the bottom right, there are two buttons: "Prev" and "Next". The "Next" button is highlighted with a red rectangular border, and a black circle with the number "2" is placed next to it.

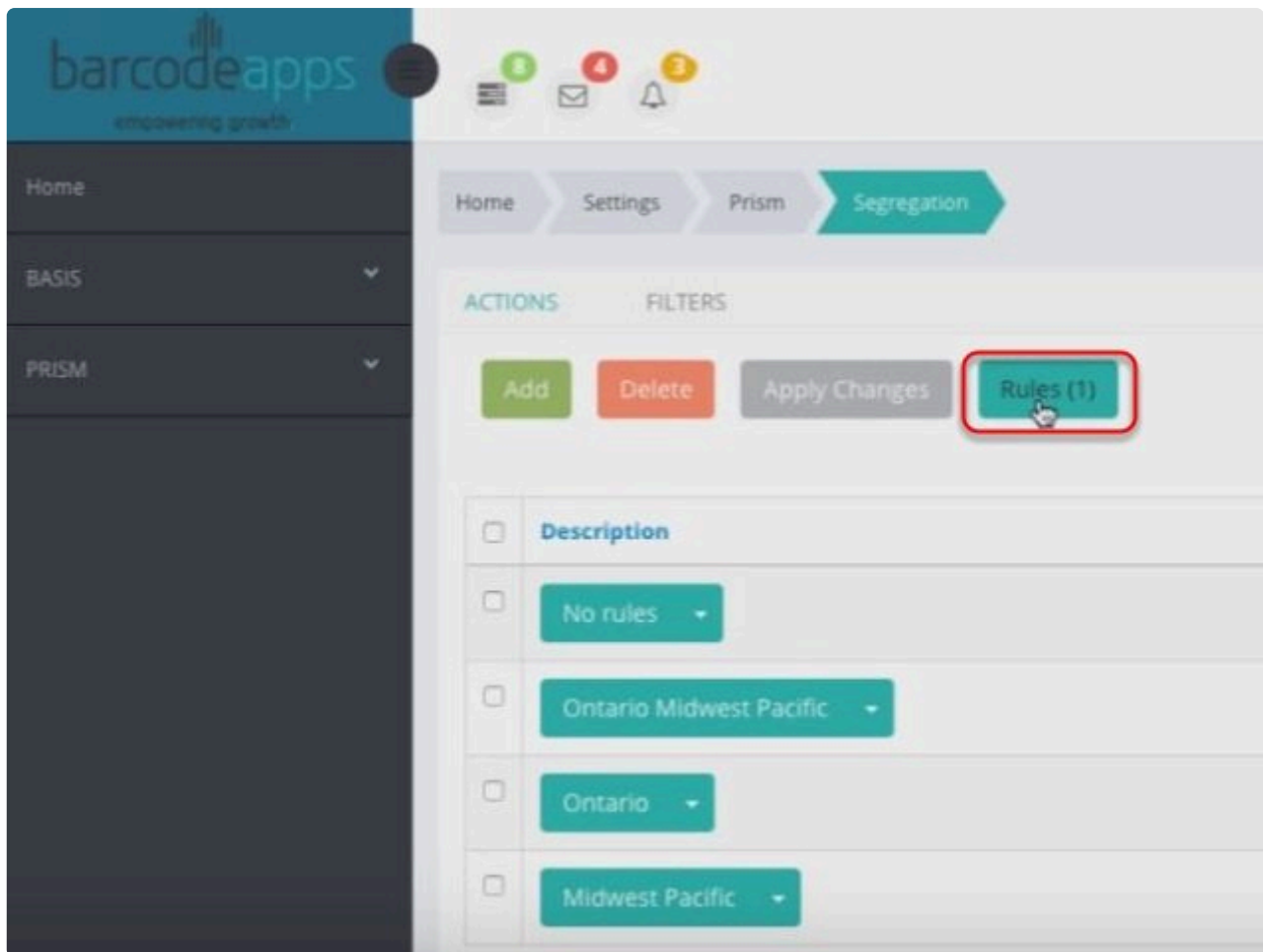
Define the rule name and then click on Finish

The screenshot shows a dialog box titled "Segregation Rules" with a close button (X) in the top right corner. The main heading is "5. Name the Rule". Below this, there is a label "Rule Name" next to a text input field. The input field contains the text "PPB on OntMidWestPac" and is highlighted with a red rectangular border. A black circle with the number "1" is placed next to the "Rule Name" label. At the bottom right, there are two buttons: "Previous" and "Finish". The "Finish" button is highlighted with a red rectangular border, and a black circle with the number "2" is placed next to it.

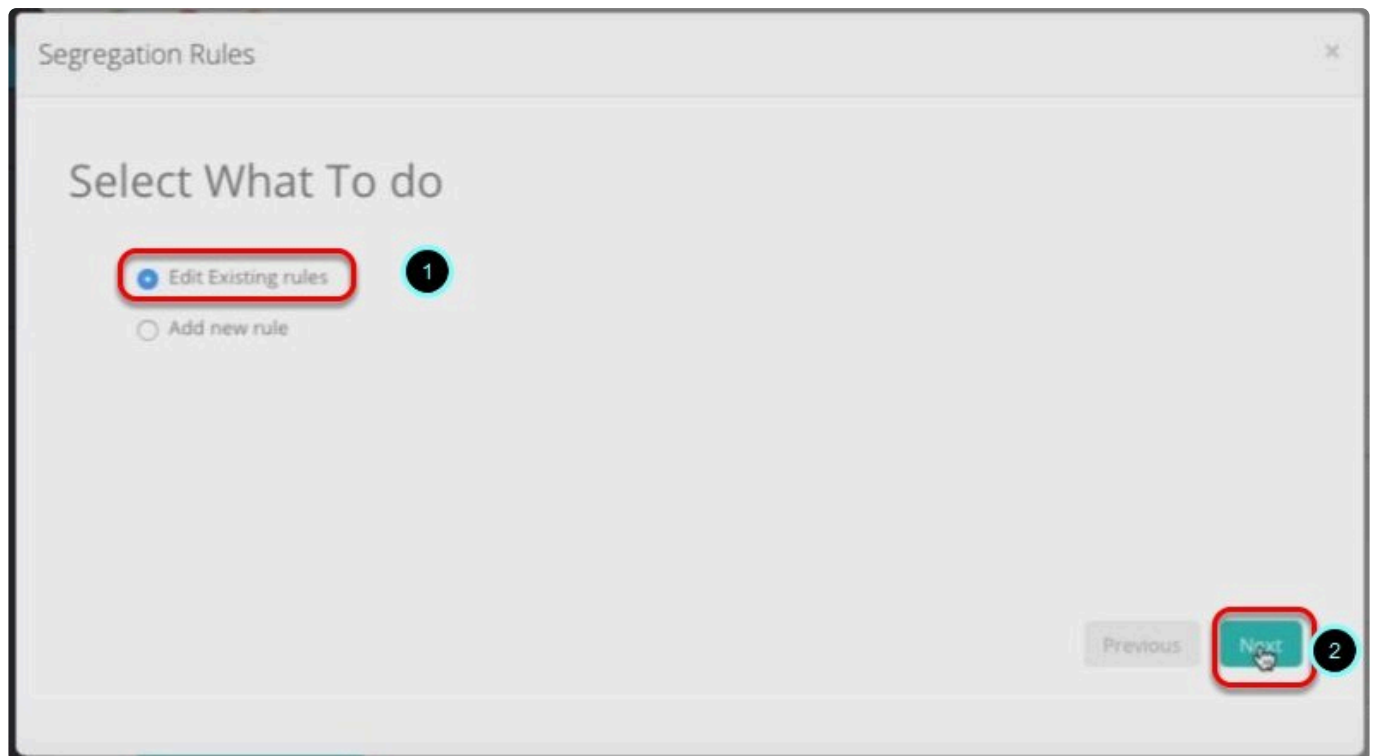
Wait for the prompt then click on close.



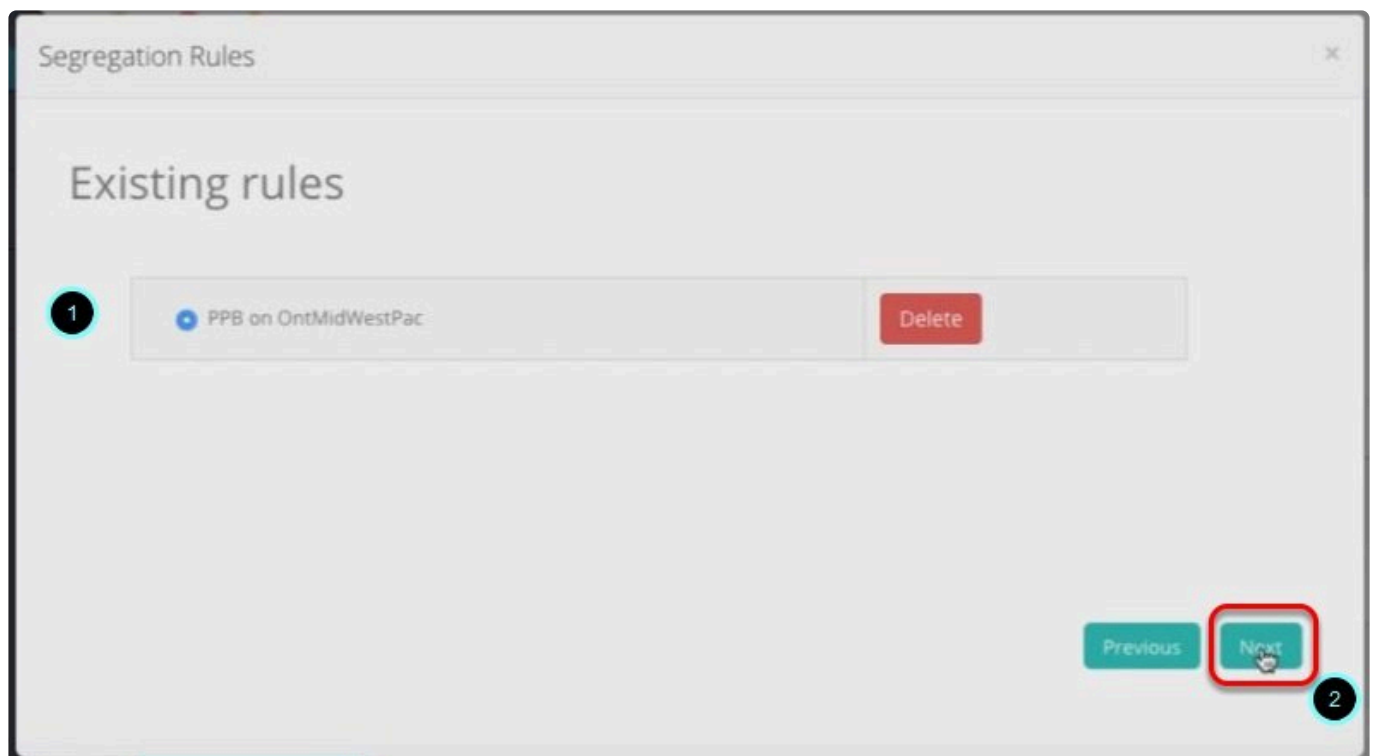
To check or modify the rule. Just click on Rules



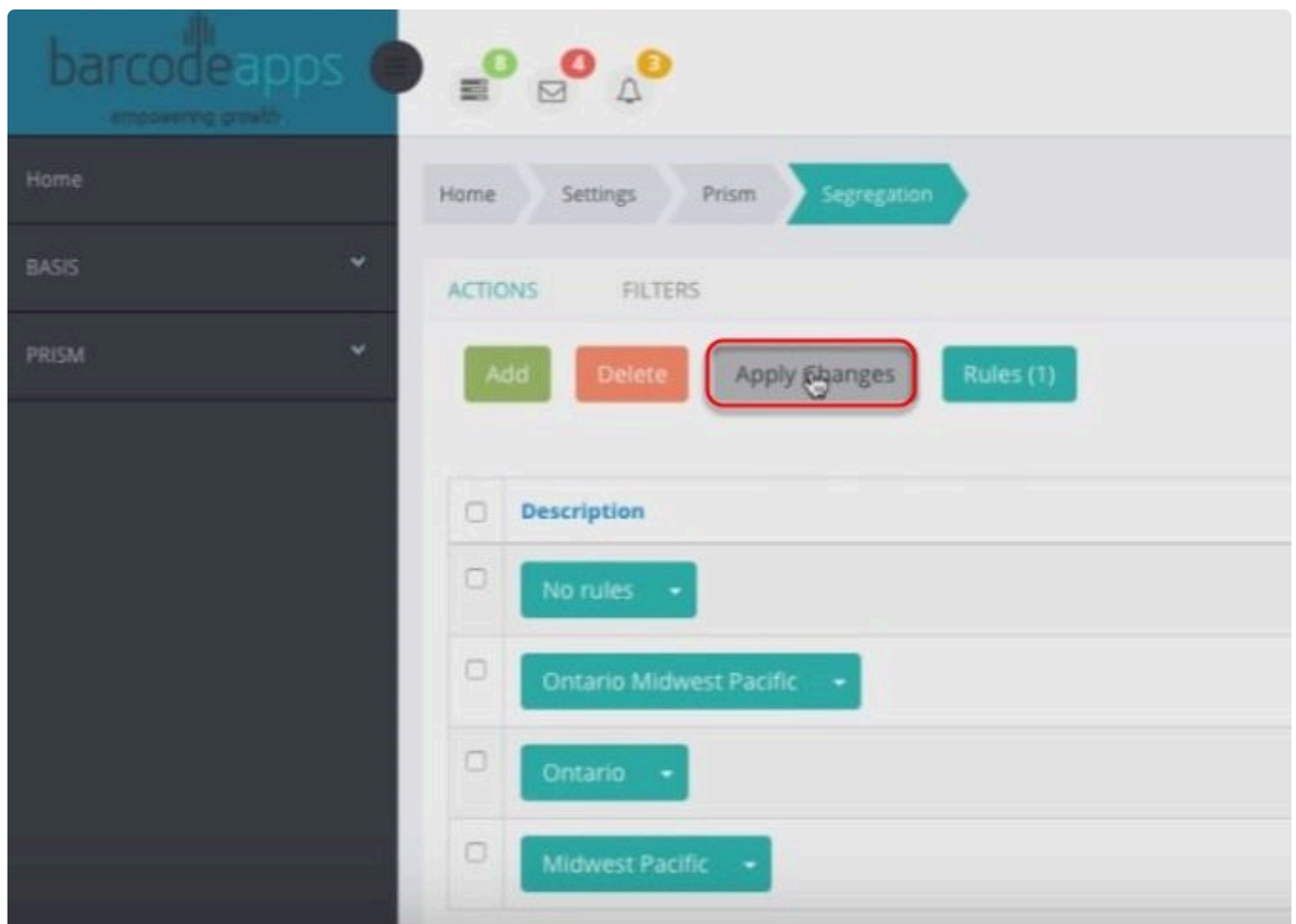
Select edit existing rules and then click on Next



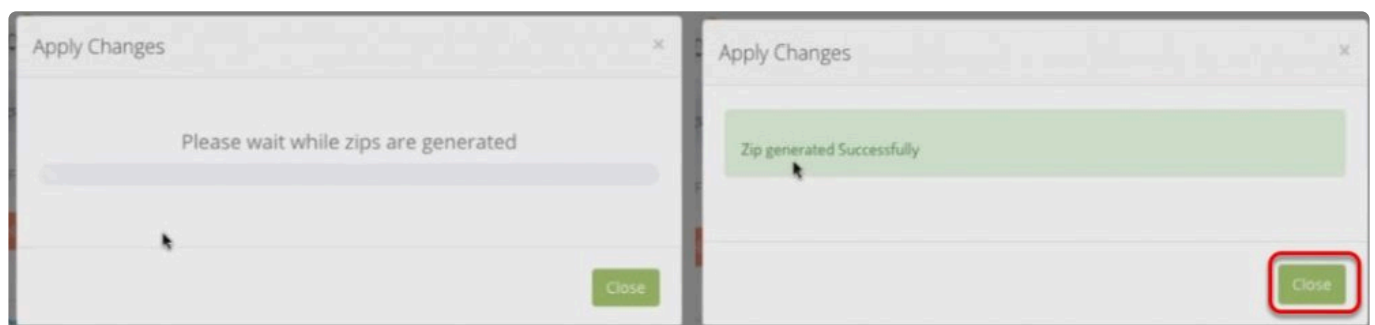
On this window, we can see all rules and available and from here we can edit or delete all available rules. Once finish click on next



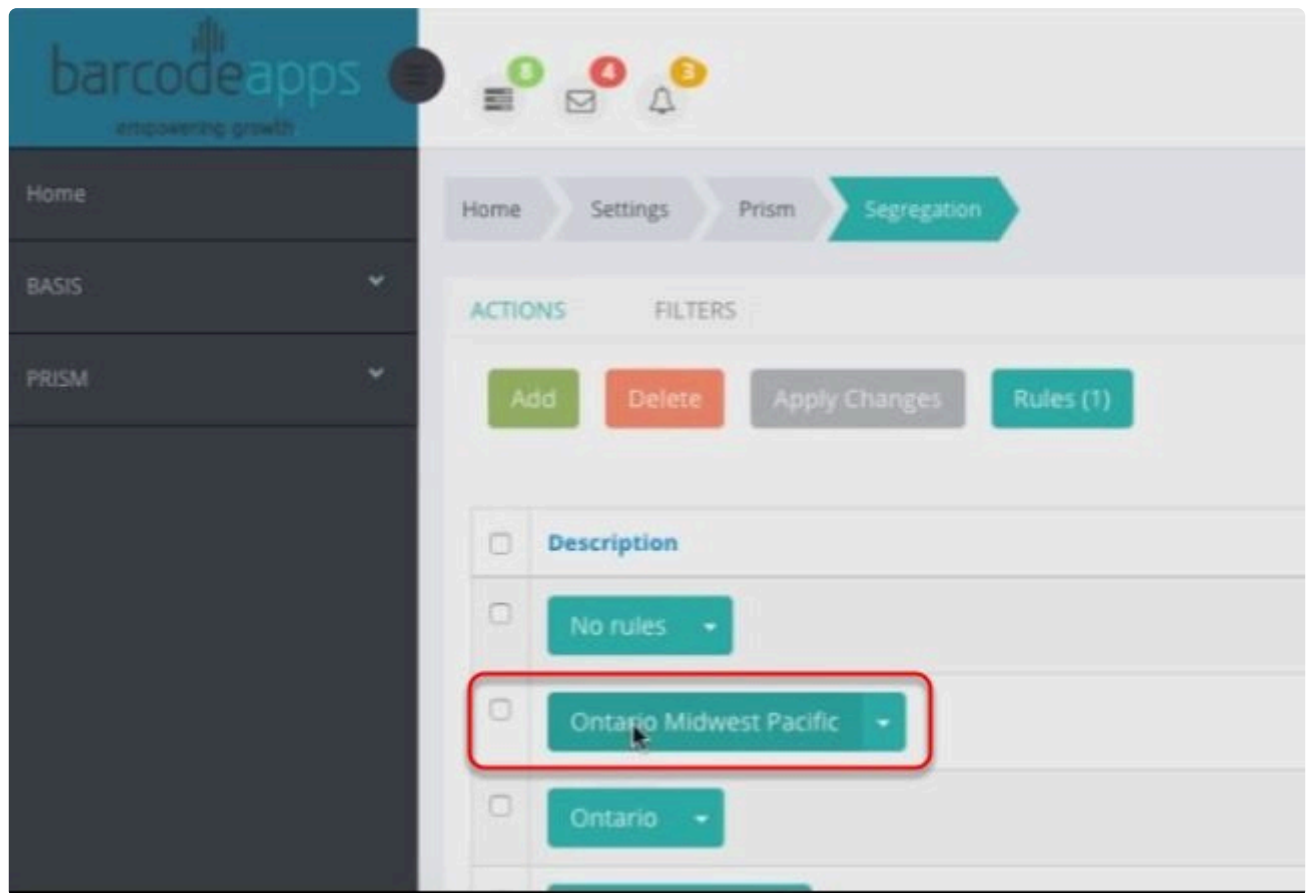
To save the changes. Click on apply changes



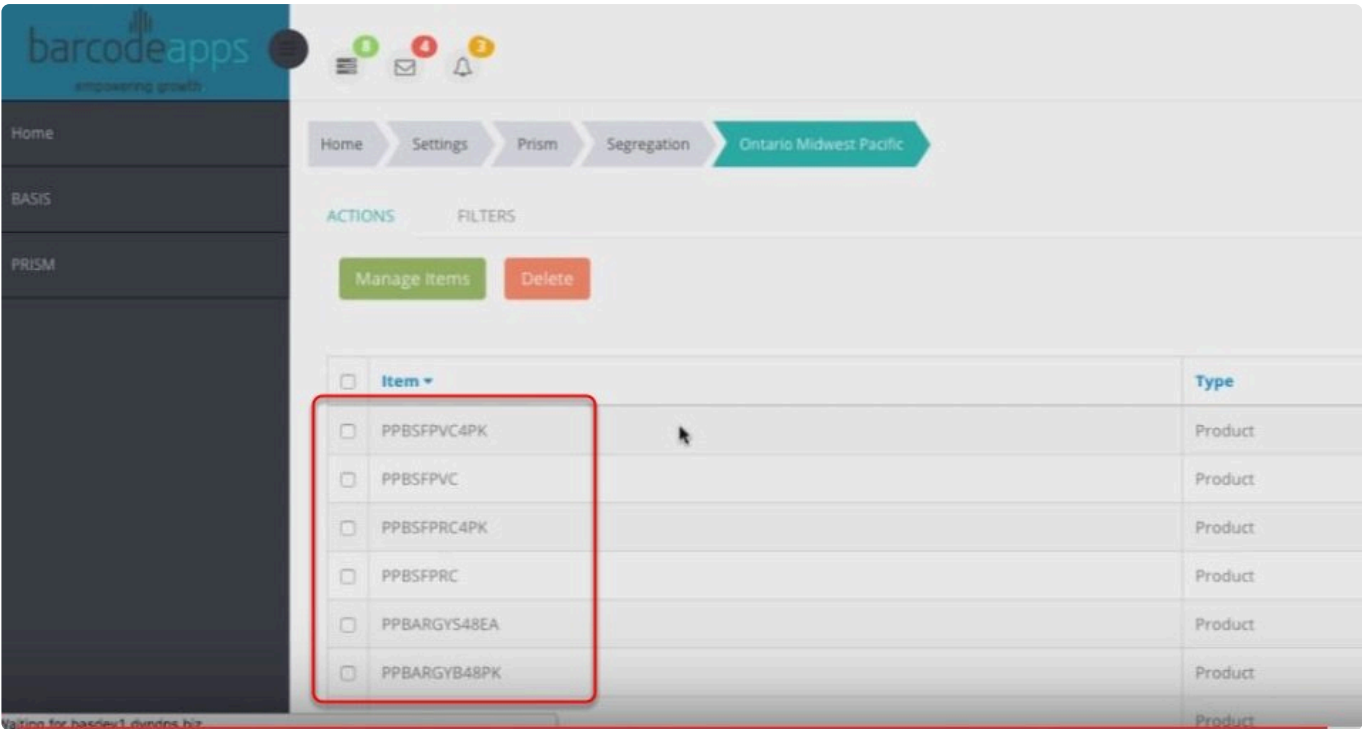
Wait for the zip to generate and then click on close when finish



To check the changes just click on the group



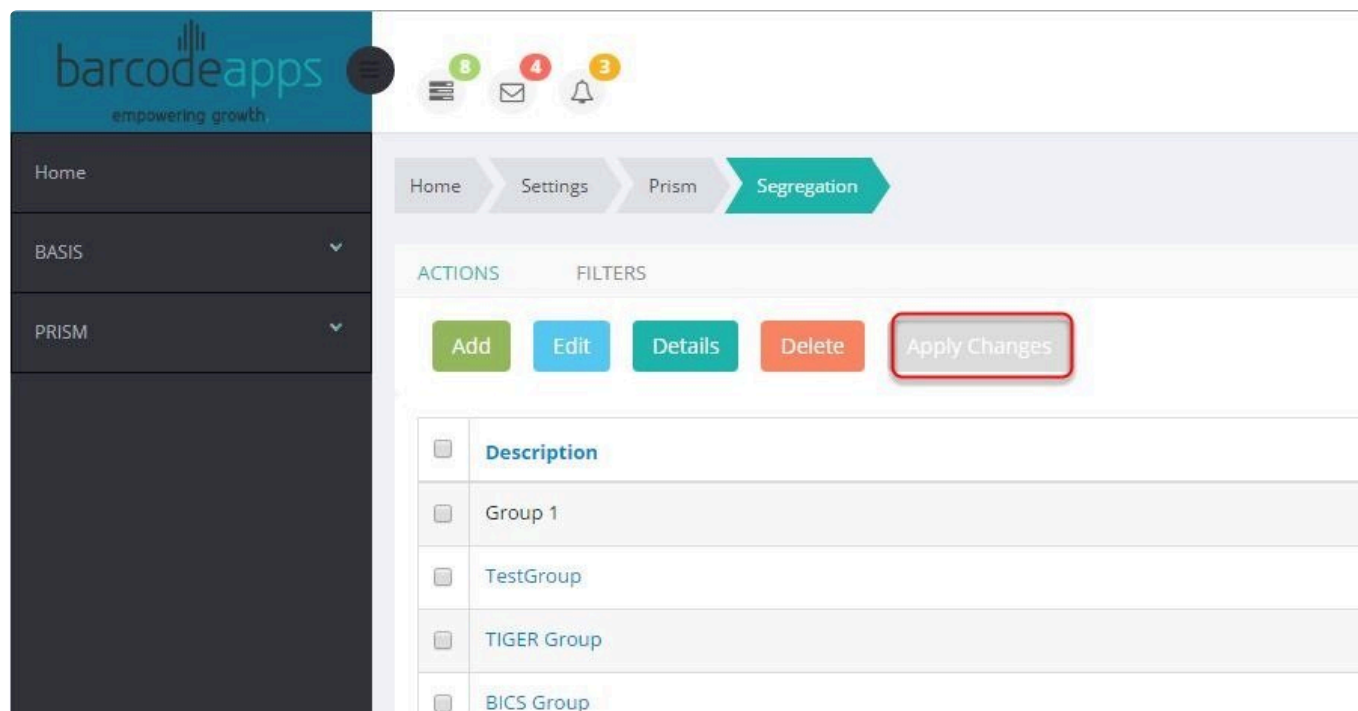
and see if the rules are applied



In our example all items that begins with PPB are now part of the group (Orlando Midwest Pacific)

SYNC CHANGES

To sync the new group with the mobile devices(PRISM App iOS,iPhone, and Android) and the PRISM Web Store, click on Apply Changes



Just wait for the prompt to close and you can test on the PRISM App using a [customer login](#) a [sales rep login](#)



* Note: Before testing on the PRISM App we have to make sure that we do a [manufacturer sync](#) for the changes to take place

3.6.2. ii. PRISM Sanitation Process

This knowledge base article will guide users on how to optimize the images inside an order confirmation mail using the PRISM Self Service Website.

Sanitation of Products and Images.

Sanitation is a feature from PRISM that optimizes the images on the cloud

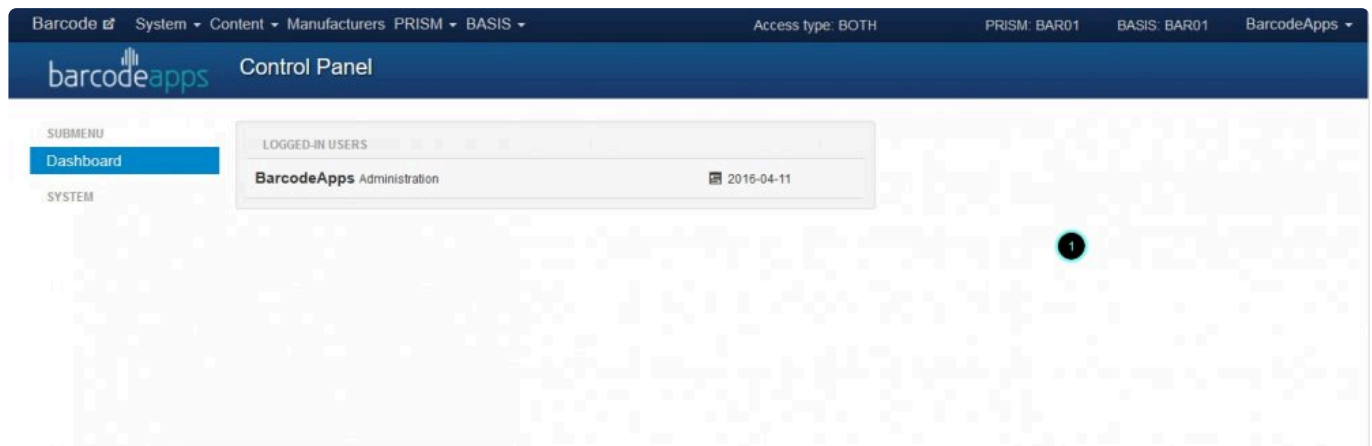
This process is applicable on the following scenario

1. Images inside the order confirmation mail are loading slowly.
2. Images inside the order confirmation mail are not loading at all.

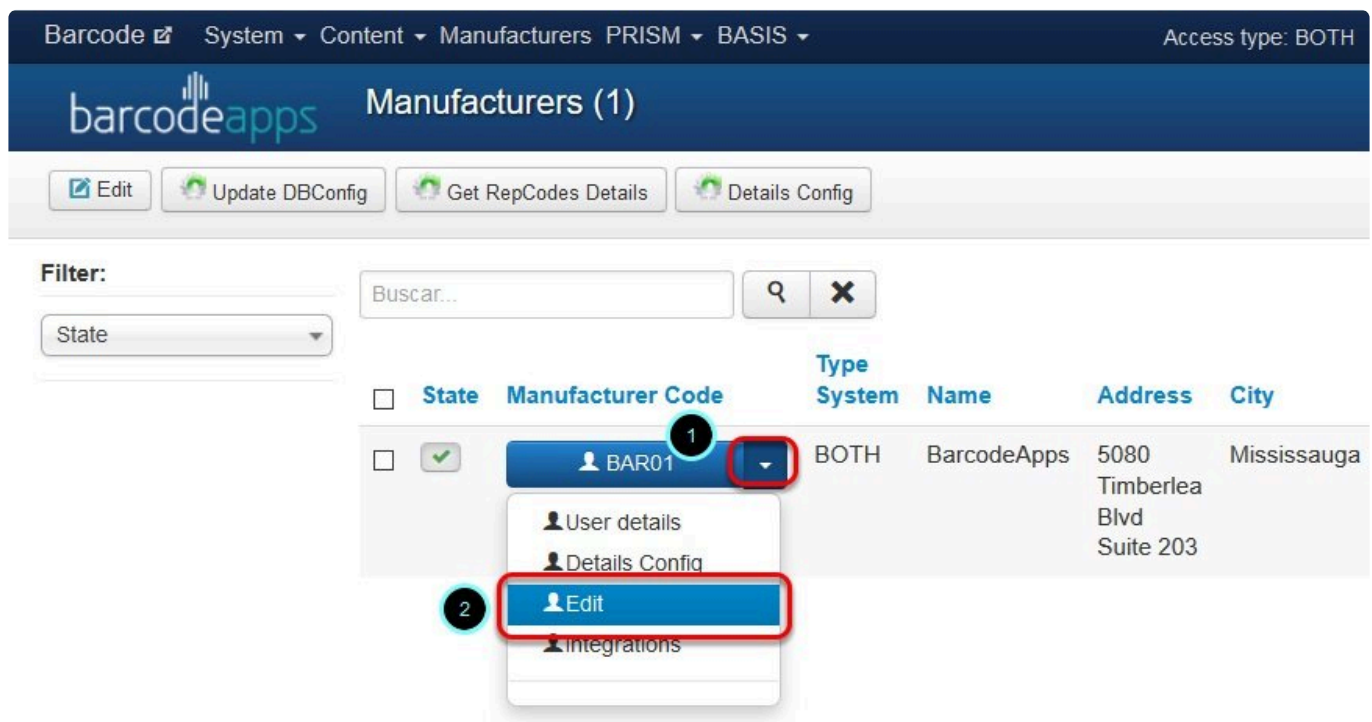
To enable the feature. Login to the PRISM Self Service Website using an admin credential.



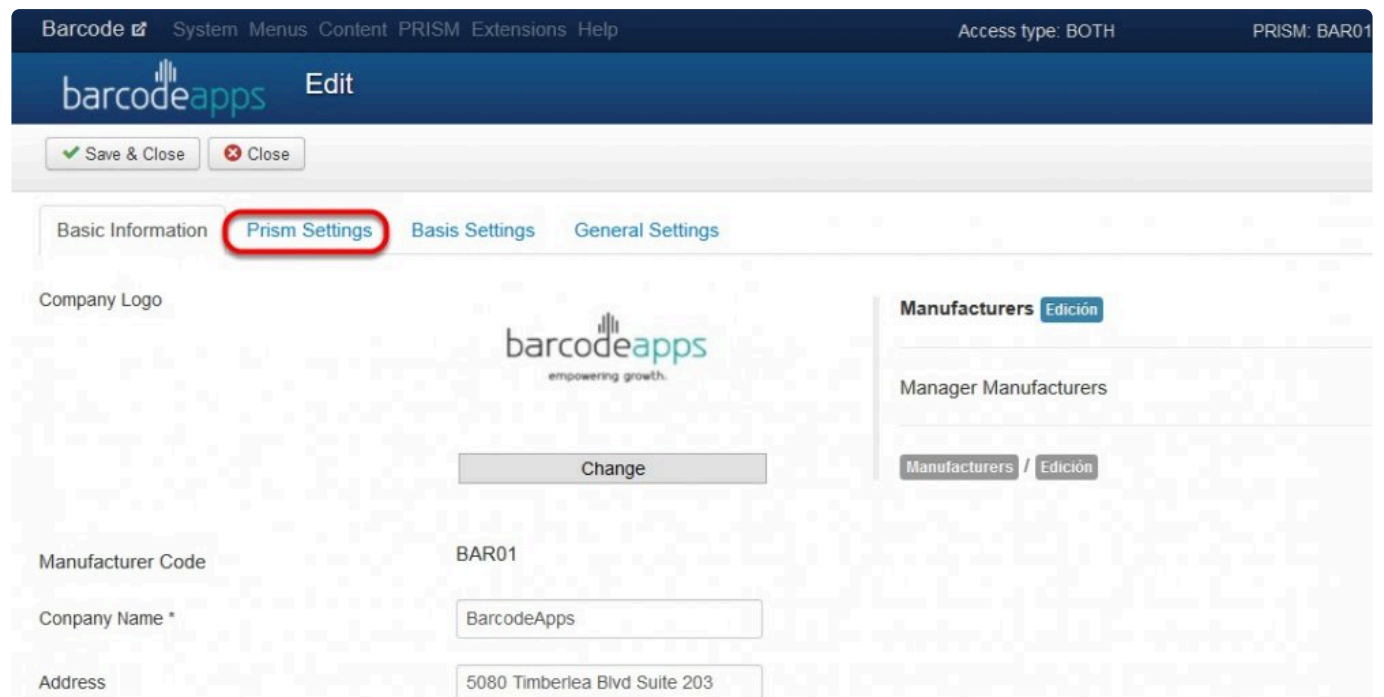
Click on Manufacturers.



Click on the drop down arrow just before the manufacturer code and then click on edit.



Click on PRISM Settings.



BarcodeApps System Menus Content PRISM Extensions Help Access type: BOTH PRISM: BAR01

barcodeapps Edit

Save & Close Close

Basic Information **Prism Settings** Basis Settings General Settings

Company Logo

barcodeapps
empowering growth.

Change

Manufacturer Code BAR01

Company Name * BarcodeApps


Address 5080 Timberlea Blvd Suite 203


Manufacturers Edición


Manager Manufacturers





Manufacturers / Edición

Scroll all the way down and then enable the option Sanitation of Product and Images.

Barcode  [System](#) [Menus](#) [Content](#) [PRISM](#) [Extensions](#) [Help](#)

 Save & Close

 Close

Reciprocal Affinities	<div>Disable</div>
Canadian Spelling	<div>Disable</div>
Hide CancelDate	<div>Disable</div>
Items Pagination	<div>12</div>
Branch Email Confirmation	<div>Disable</div>
Background Color Banner Top	<div> #37b816</div>
Background Color Left Side	<div> #37b816</div>
Background Color Category Tree	<div> #37b816</div>
Background Color SubCategory Tree	<div> #37b816</div>
Sanitation of Products and Images	<div><div>1</div><div><div>2</div><div>Disable</div><div>Enable</div></div></div>

Click on Save and Close to finish.

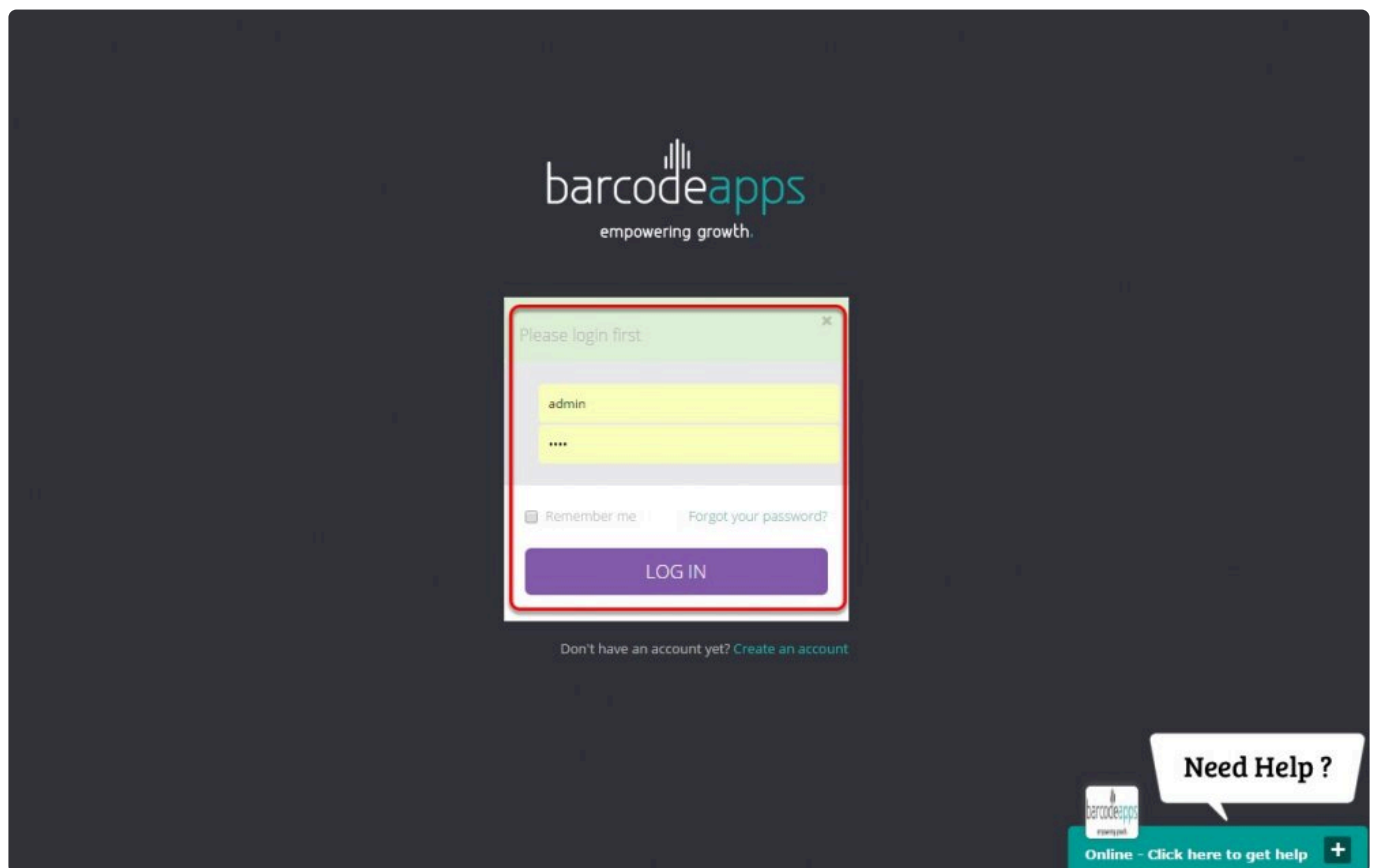
<div>✓ Save & Close</div> <div>✕ Close</div>	
Reciprocal Affinities	Disable
Canadian Spelling	Disable
Hide CancelDate	Disable
Items Pagination	12
Branch Email Confirmation	Disable
Background Color Banner Top	<div><div></div>#37b816</div>
Background Color Left Side	<div><div></div>#37b816</div>
Background Color Category Tree	<div><div></div>#37b816</div>
Background Color SubCategory Tree	<div><div></div>#37b816</div>
Sanitation of Products and Images	Enable

3.6.3. iii. PRISM Mobile Settings on Front End Portal

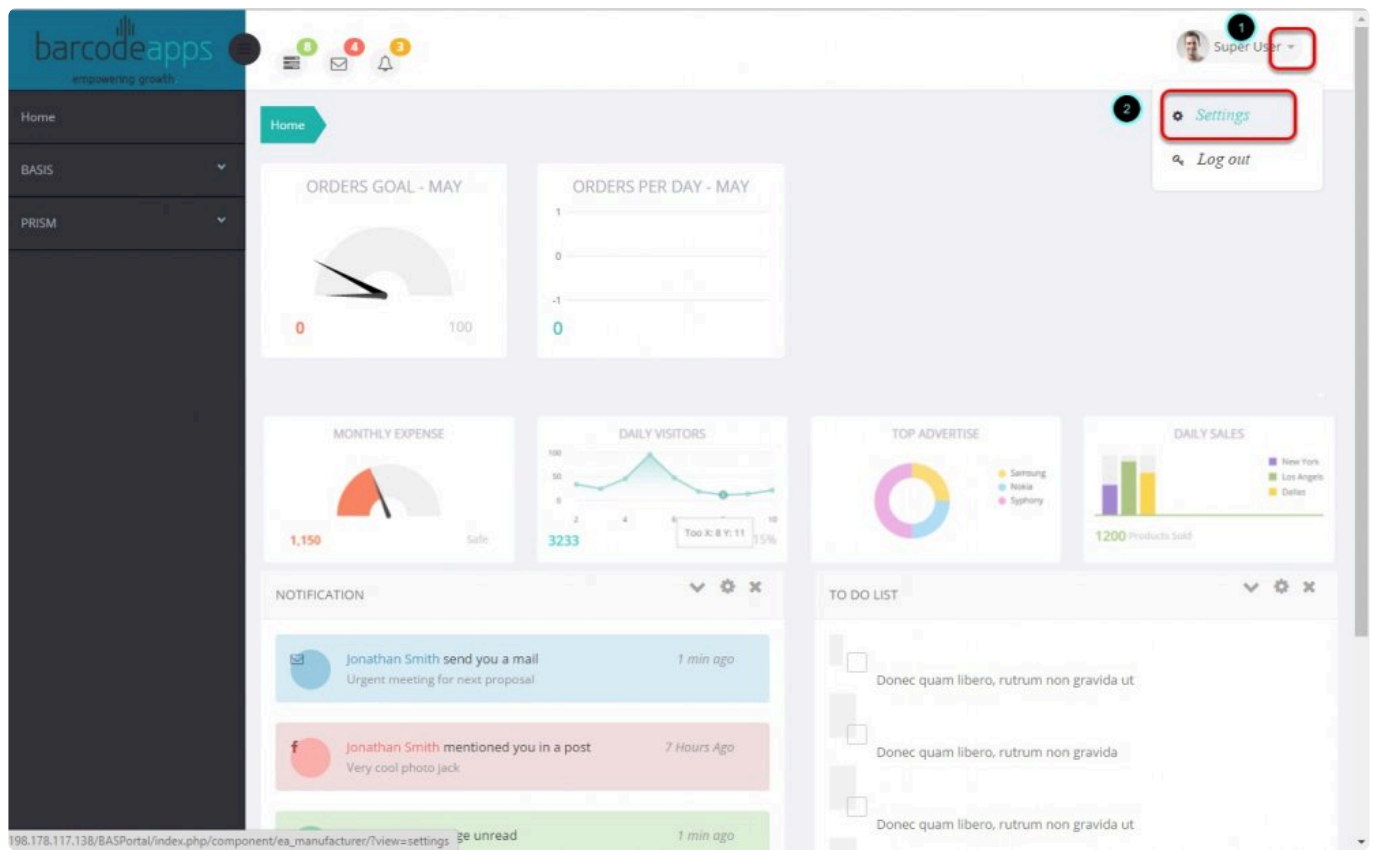
This knowledge base will guide users on how they can manage their mobile device settings through the PRISM Self Service Portal.

CONFIGURING MOBILE SETTINGS

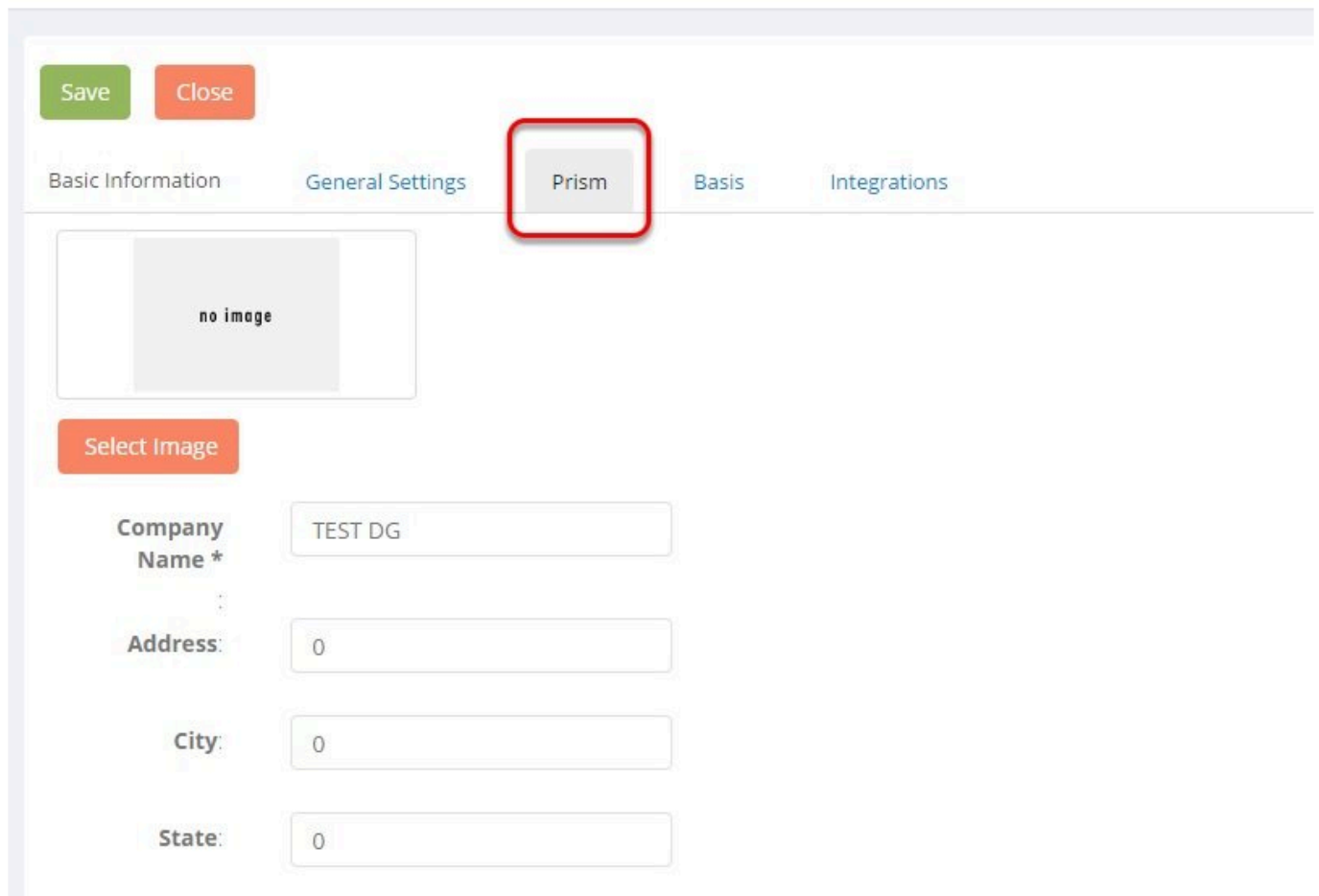
To manage device settings. Login to the PRISM self service website ([PRISM JOOMLA](#)) using the admin credentials provided.



Click on the drop down arrow on the top right corner and then click on settings.



Click on the PRISM Tab.



Save Close

Basic Information General Settings **Prism** Basis Integrations

no image

Select Image

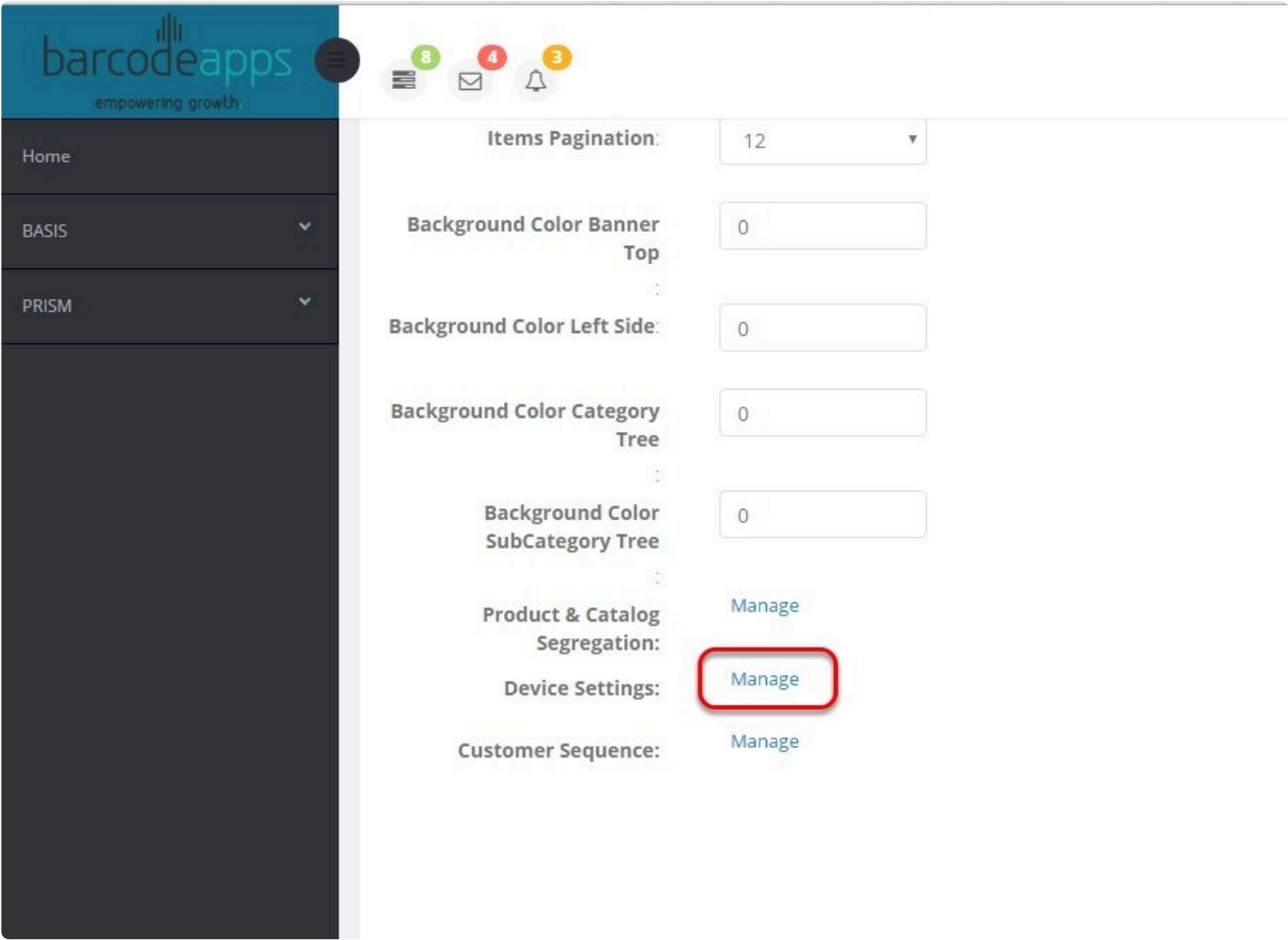
Company Name * TEST DG

Address: 0

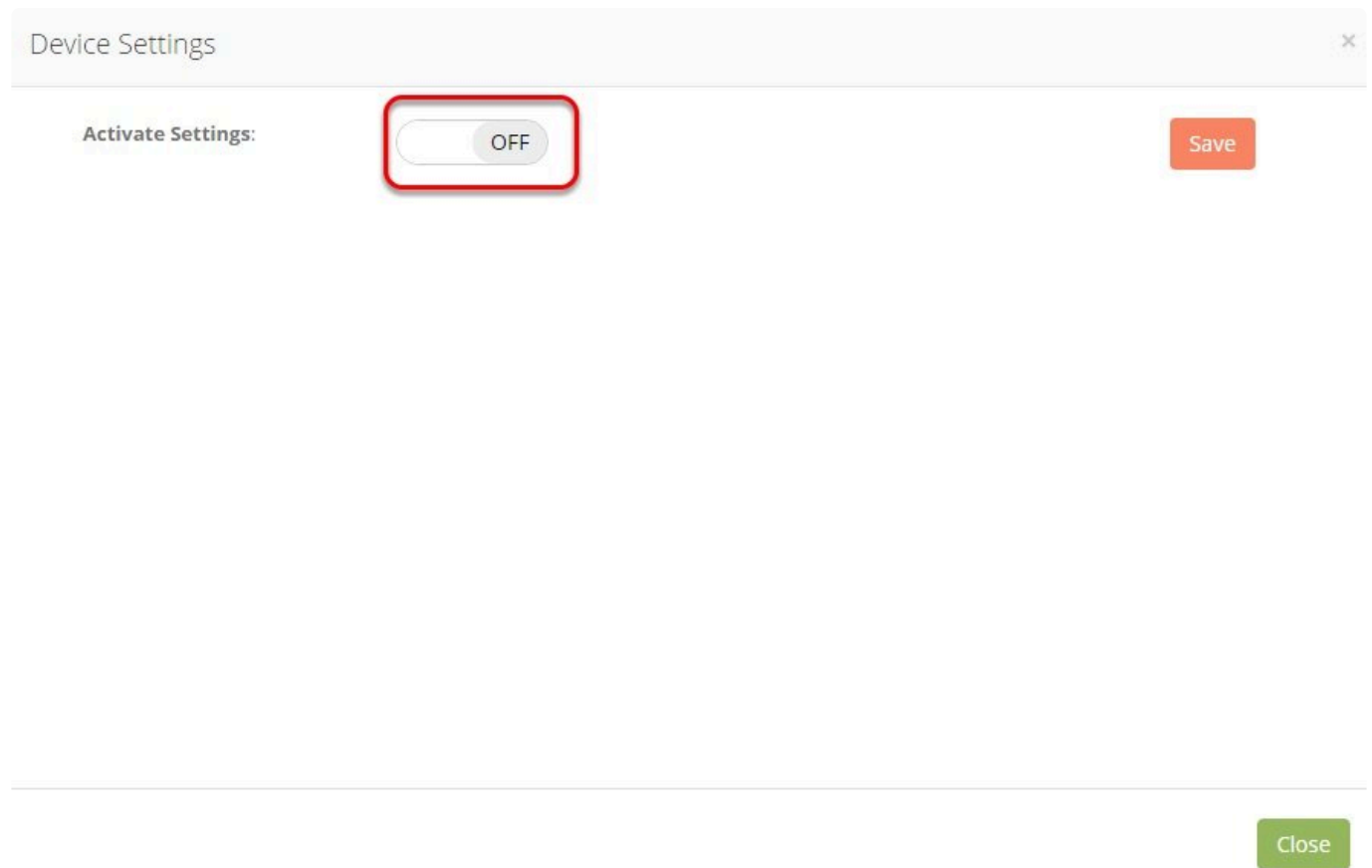
City: 0

State: 0

Scroll all the way to the bottom and search for the option device settings and then click on Manage.



Click on Activate Settings to enable the feature.



Once the feature is enabled, the device settings window will show all options (Scanning, Rules and Behavior, Formatting and Display and General Policies) that are available on the PRISM App that can be configured. Just click on the slider to TURN ON or TURN OFF a feature.

Device Settings

Activate Settings:

ON

Save

Scanning

Rules and Behaviour

Formatting and Display

General Policies

Use Bluetooth Scanner:

OFF

Scanner Type:

ON

Scanner Feedback:

OFF

Auto Add to Order Mode:

OFF

Play Sound for Auto Mode:

ON

Close

To save the changes. Click on the Save button and wait for the confirmation.

Device Settings

2

Item successfully saved

Activate Settings:

ON

1

Save

✿ To sync the new settings with the mobile devices. We just need to do a [manufacturer sync](#) on the PRISM App to synchronize the settings.

4. PRISM APP Android



4.1. A. How To Install And Setup PRISM App Android

This knowledge base will guide users on how to install the Android PRISM app on their mobile device.

INSTALLING PRISM ANDROID App

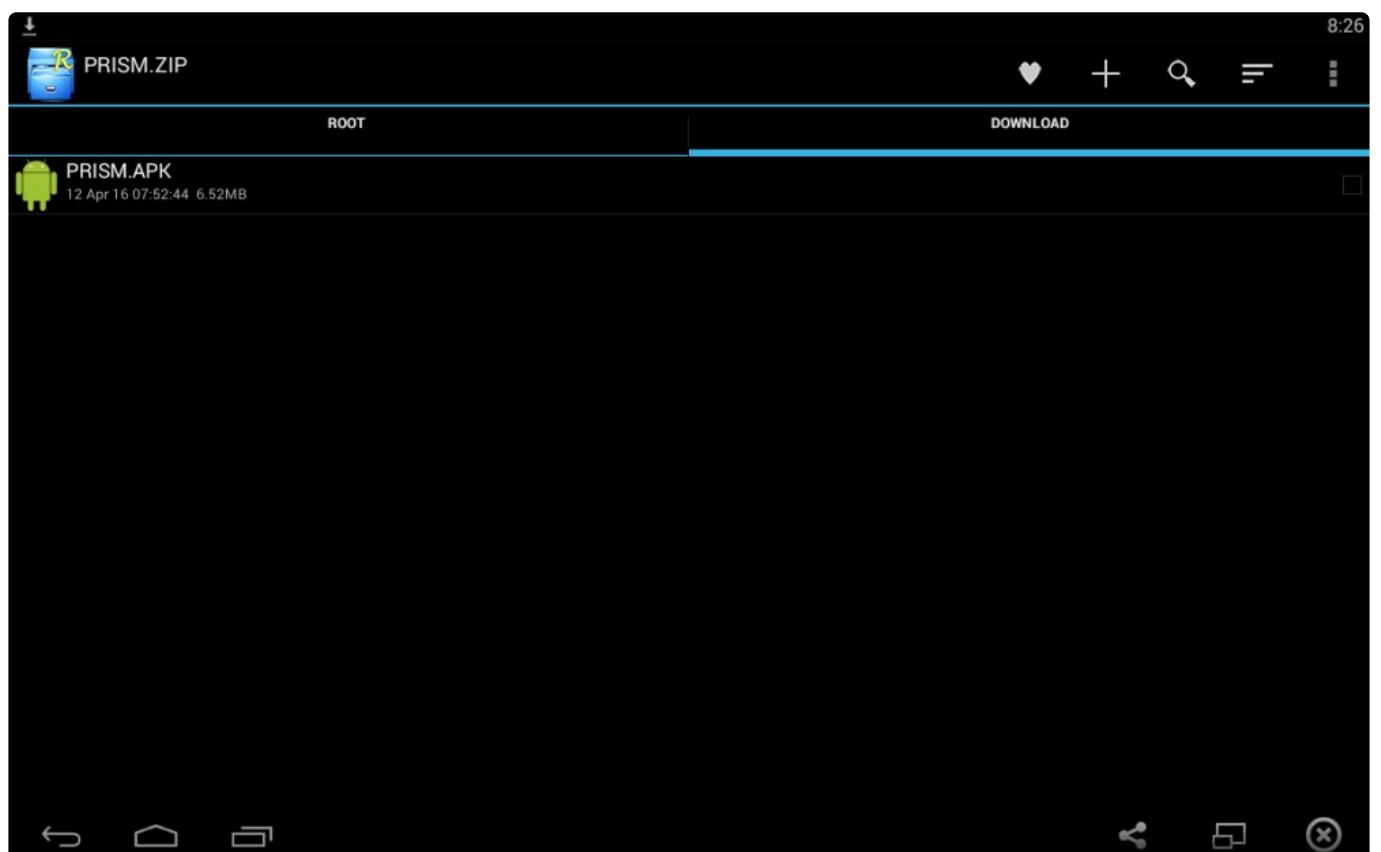


To download the PRISM app apk, [click here](#)

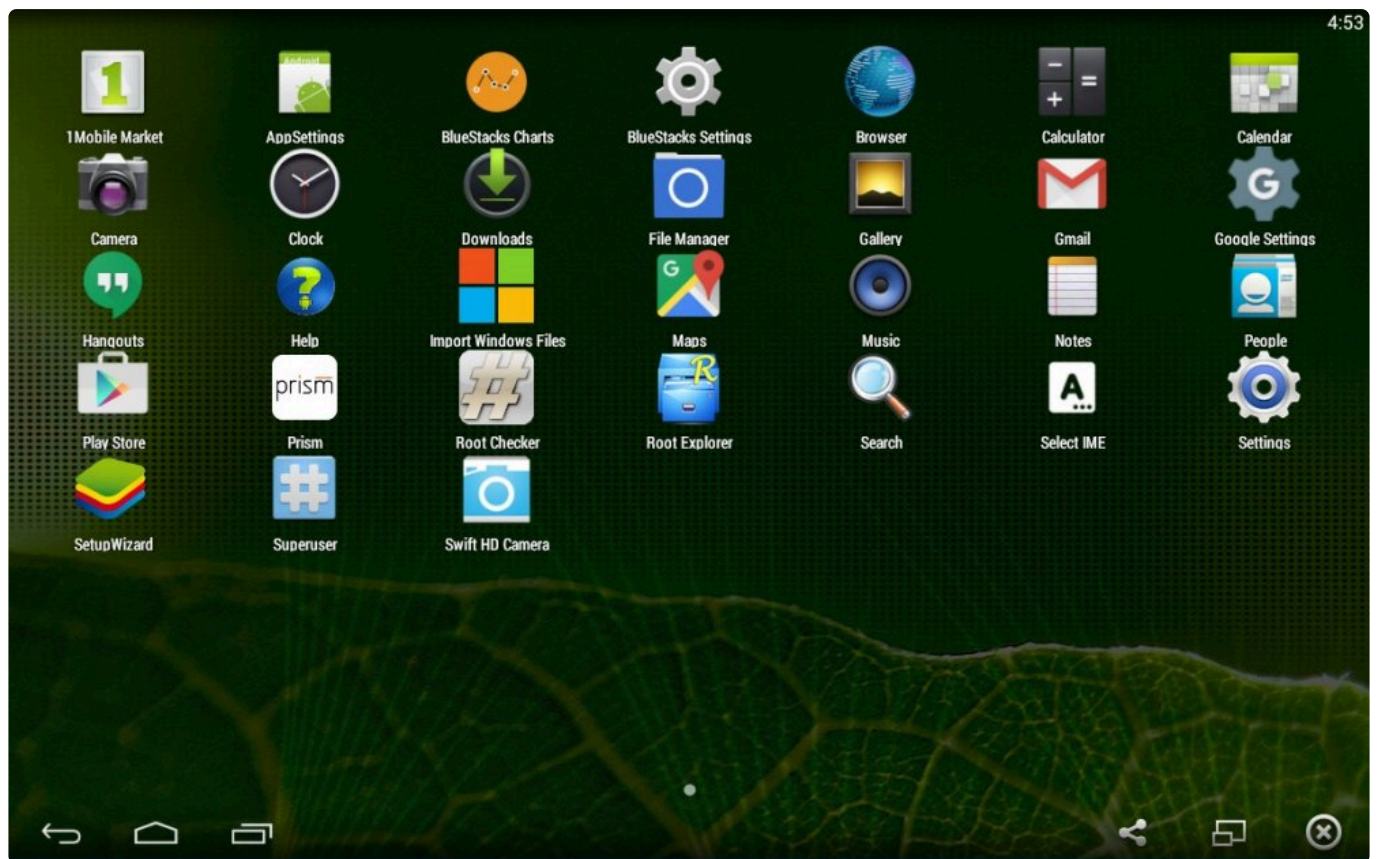


PRISM

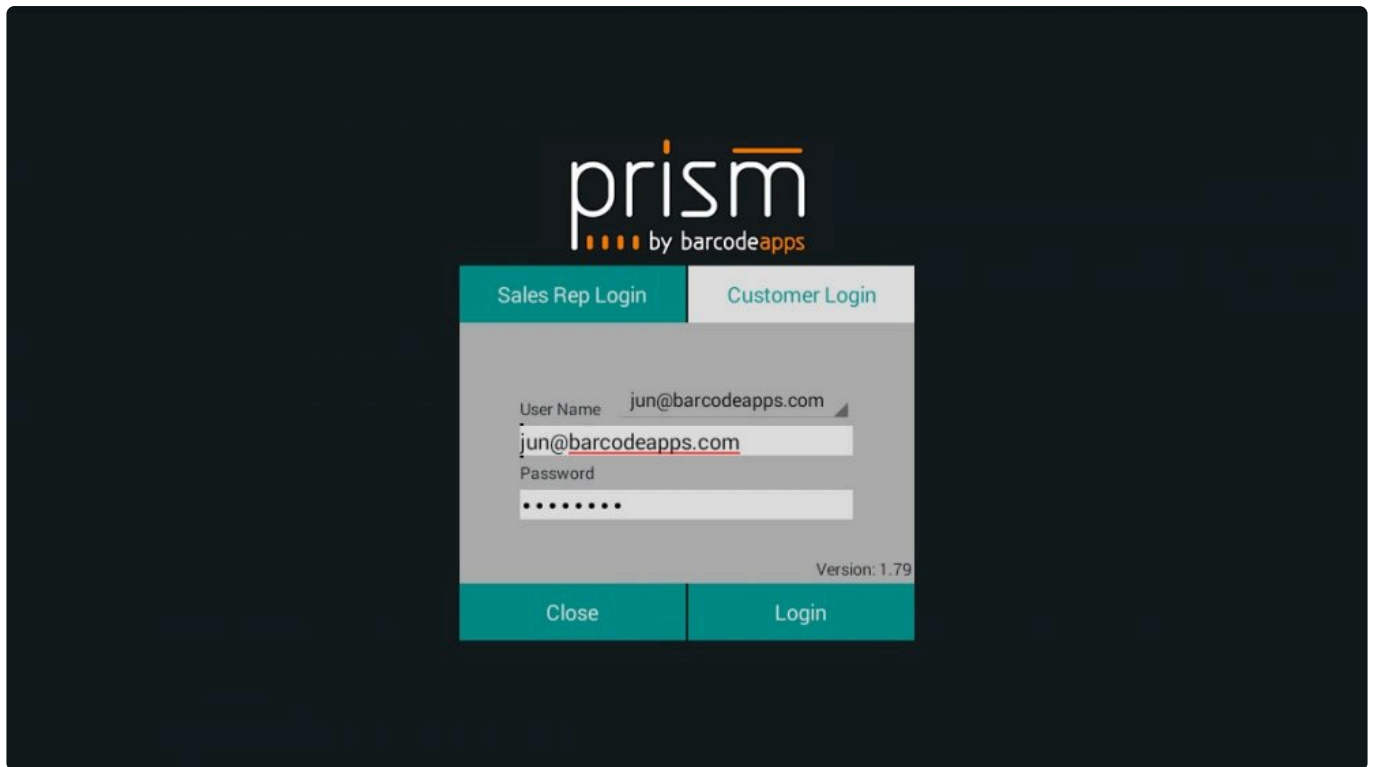
Locate and Install PRISM.APK, using the file manager installed on your android device.



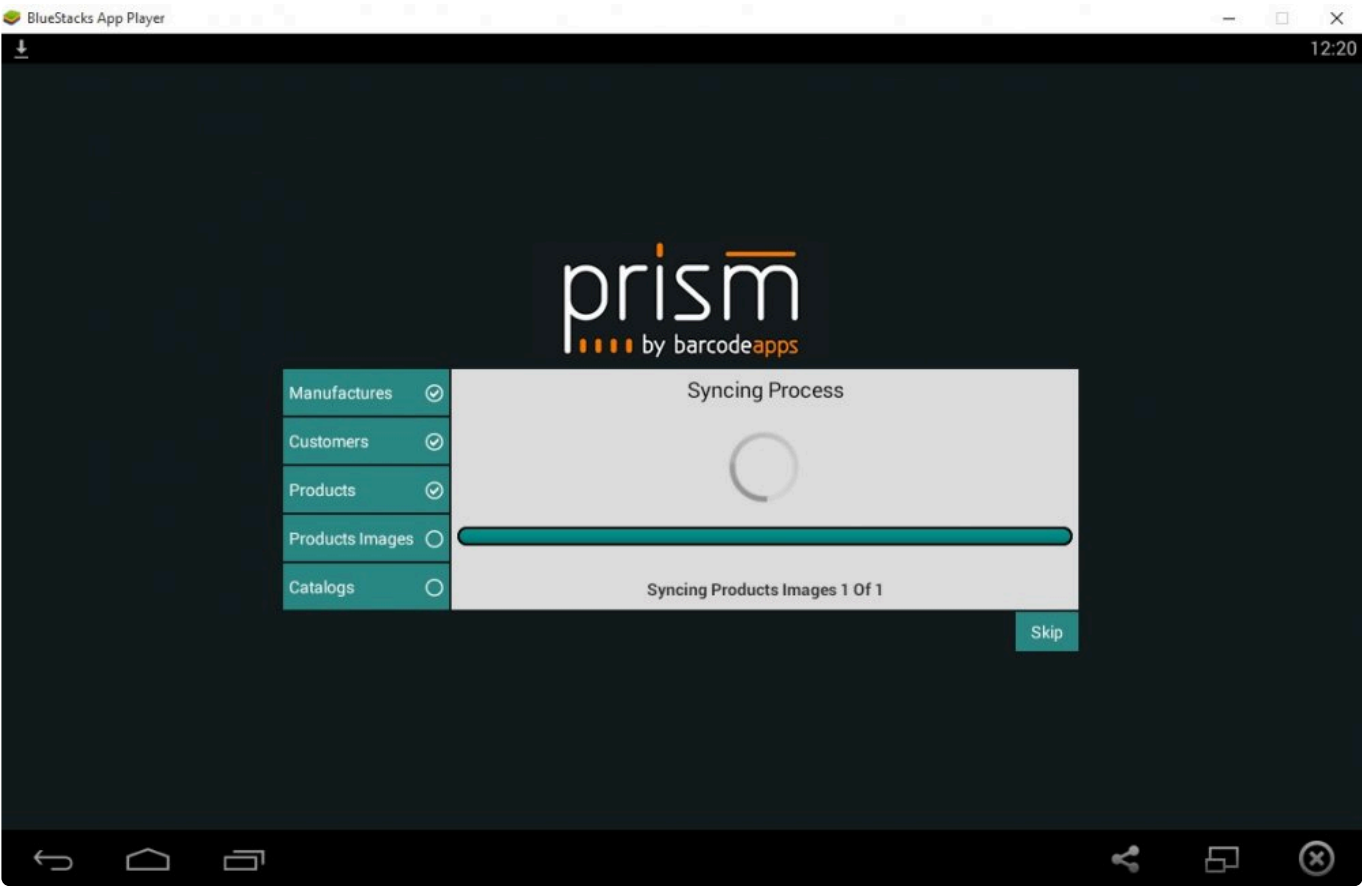
Open PRISM app



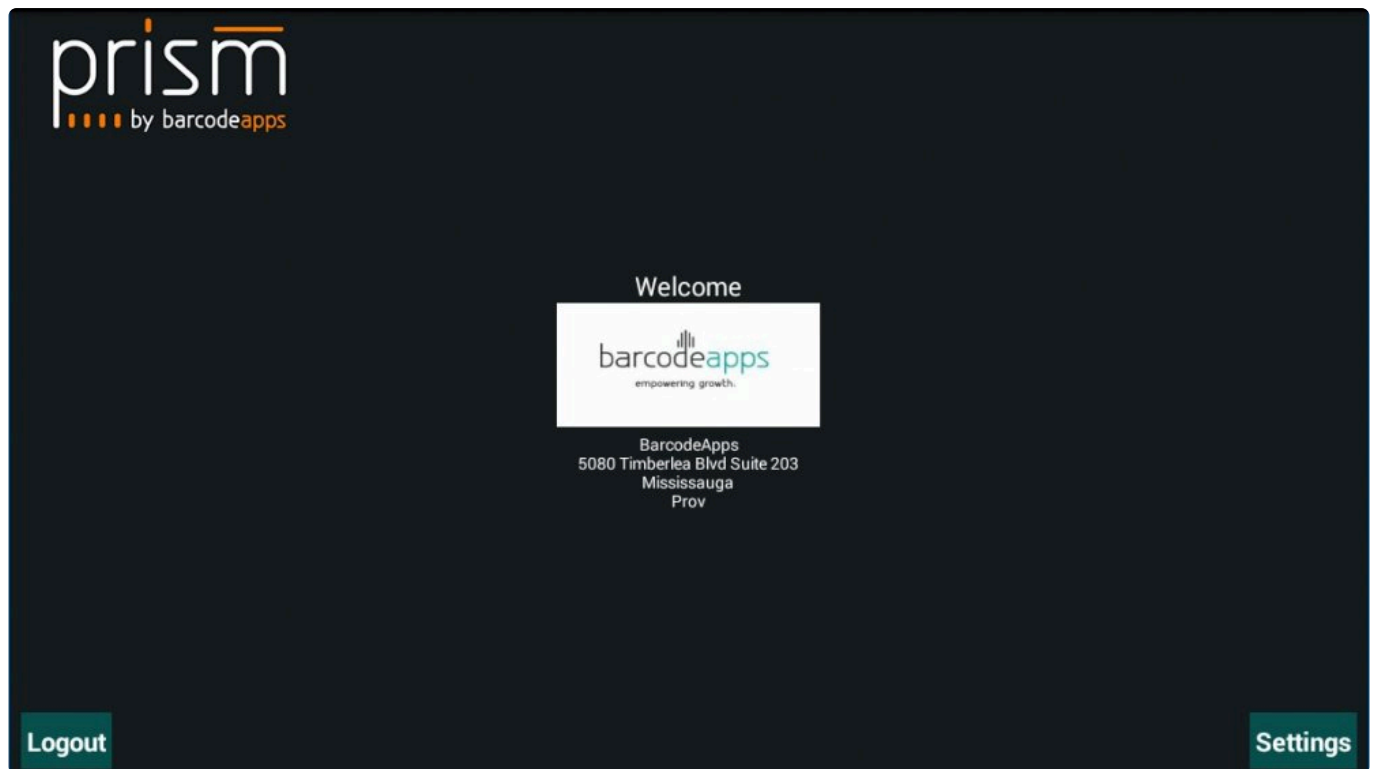
Login using your credentials.



Wait for the first time sync to finish.



Congratulations! PRISM App Android is now installed.

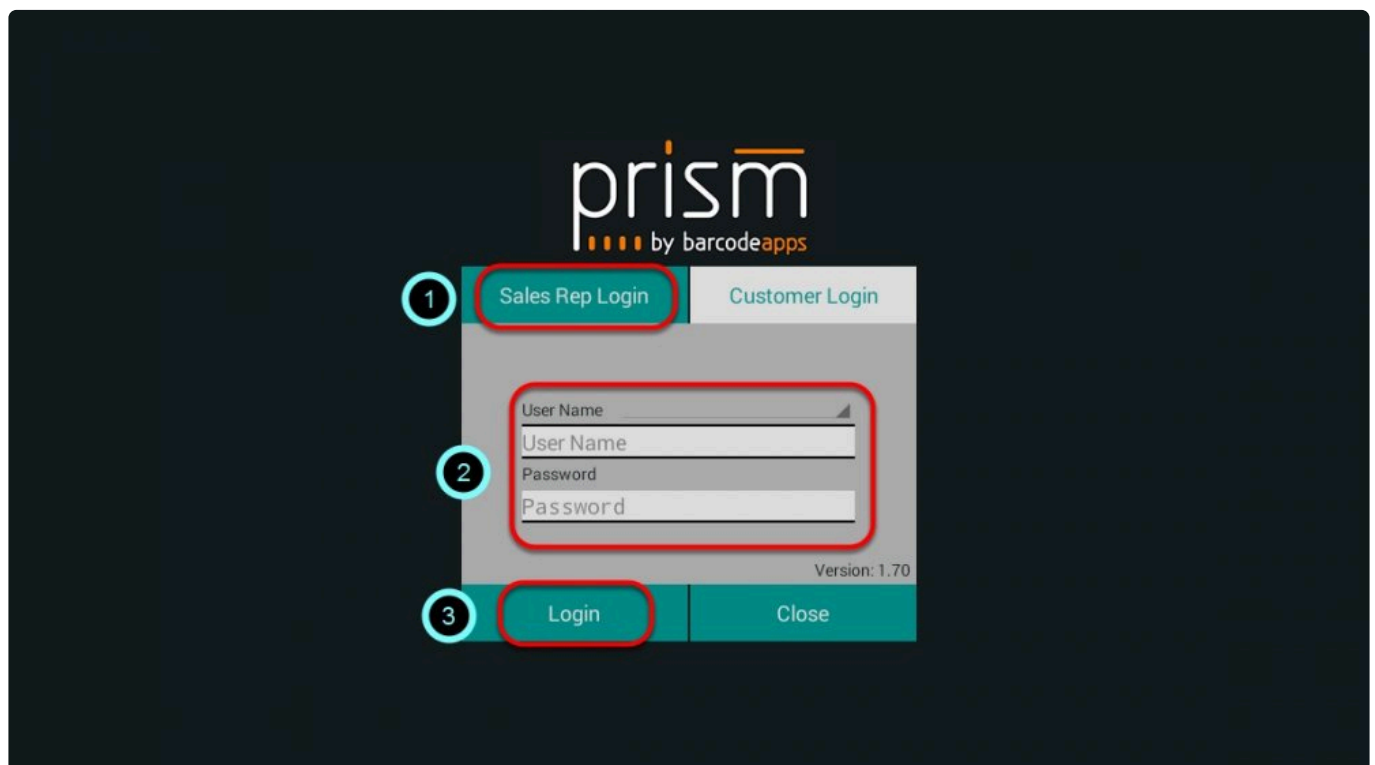


4.2. B. How To Login To PRISM App Android

This knowledge base article will guide users on how to login to PRISM App for Android.

A. FOR SALES PEOPLE

To login as a sales rep in PRISM App Android tap Sales Rep Login and type in your username and password. Then tap on Login.



B. FOR CUSTOMER

To login as a customer in PRISM App Android tap Customer Login and type in the manufacturer code. Then type in your username and password. Then tap on Login.

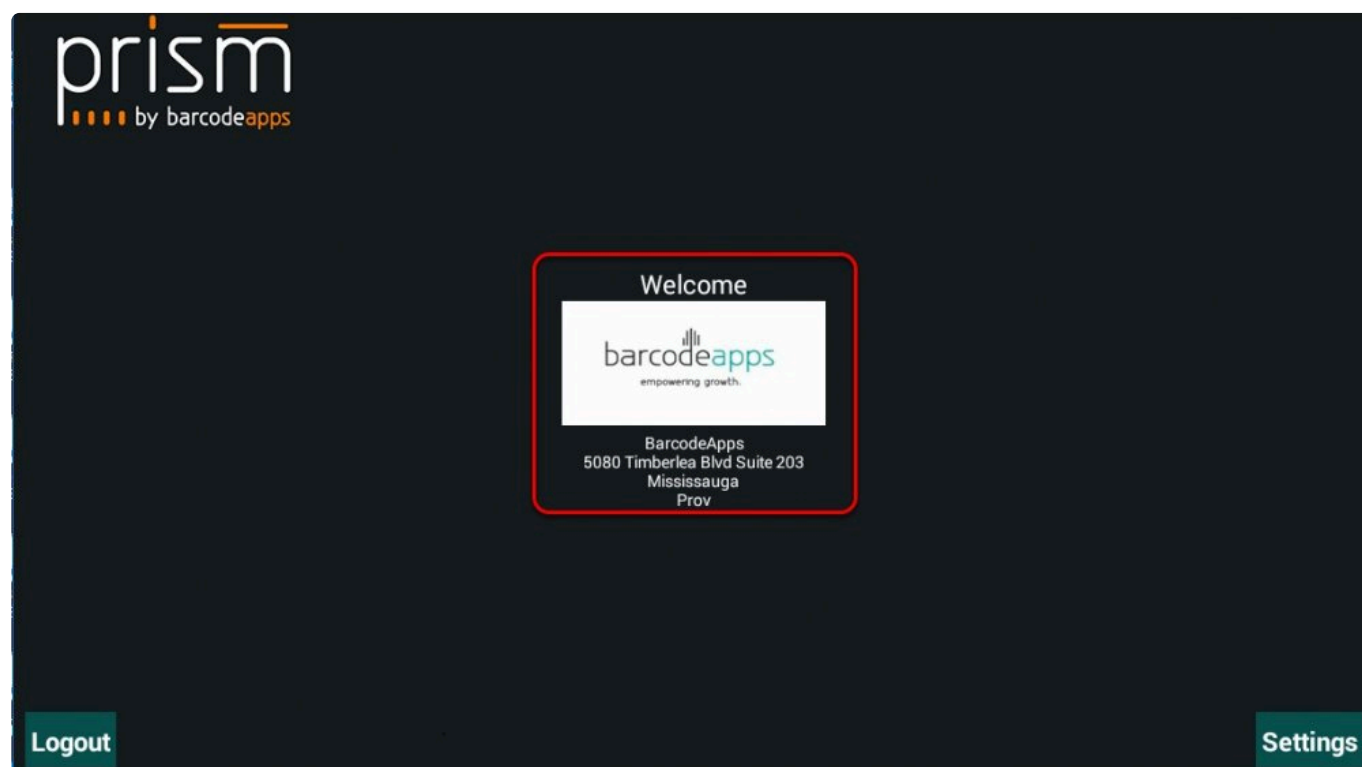


4.3. C. How To Create An Order (Android)

4.3.1. i. How To Search An Existing Customer

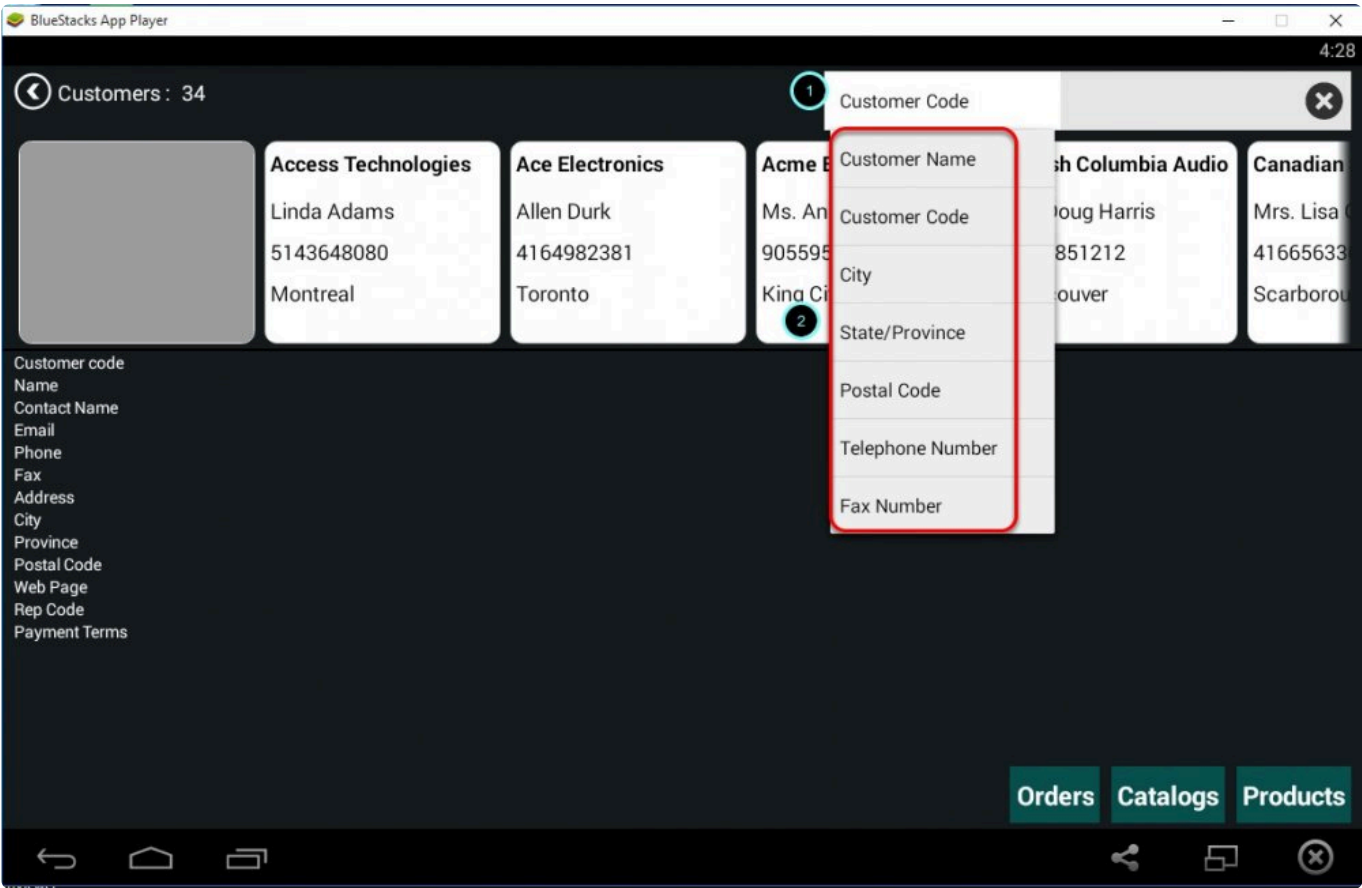
This knowledge base article will guide users on how they can search for a customer on their android devices.

To get started, tap on your manufacturer logo.

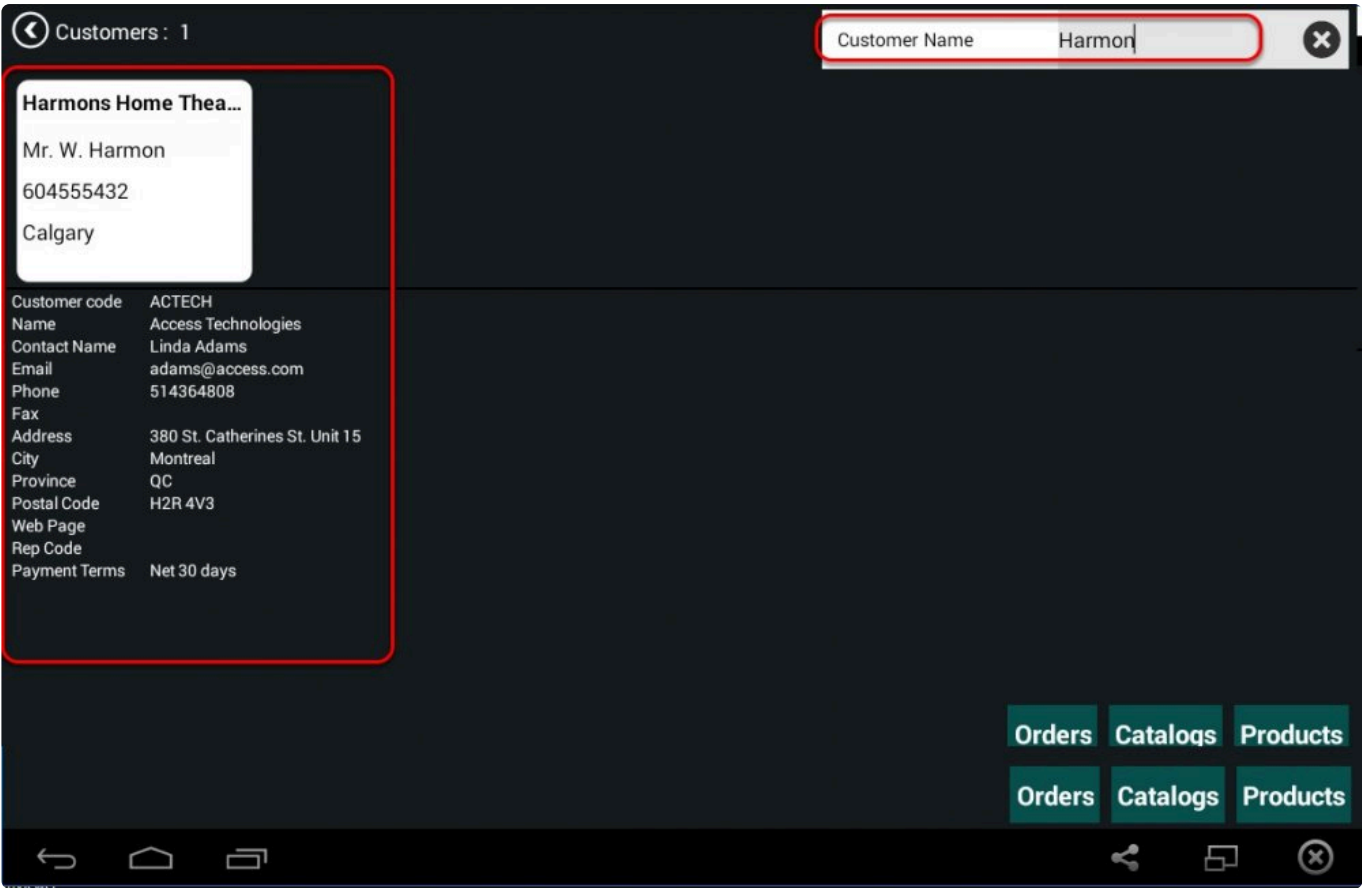


SEARCHING A CUSTOMER

In the customer screen, tap on the Customer Search Field and select the proper option to search for.

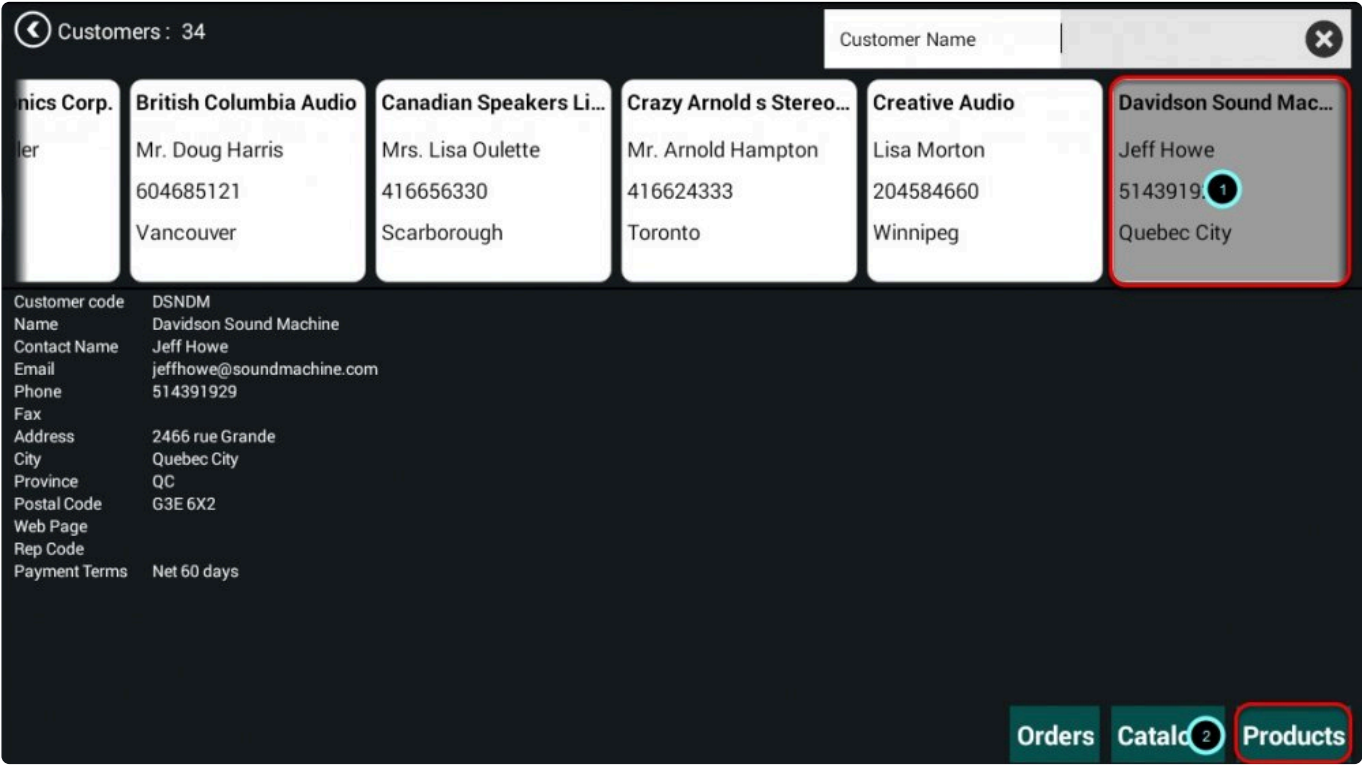


Type in e.g. customer name and the result should automatically populate below.

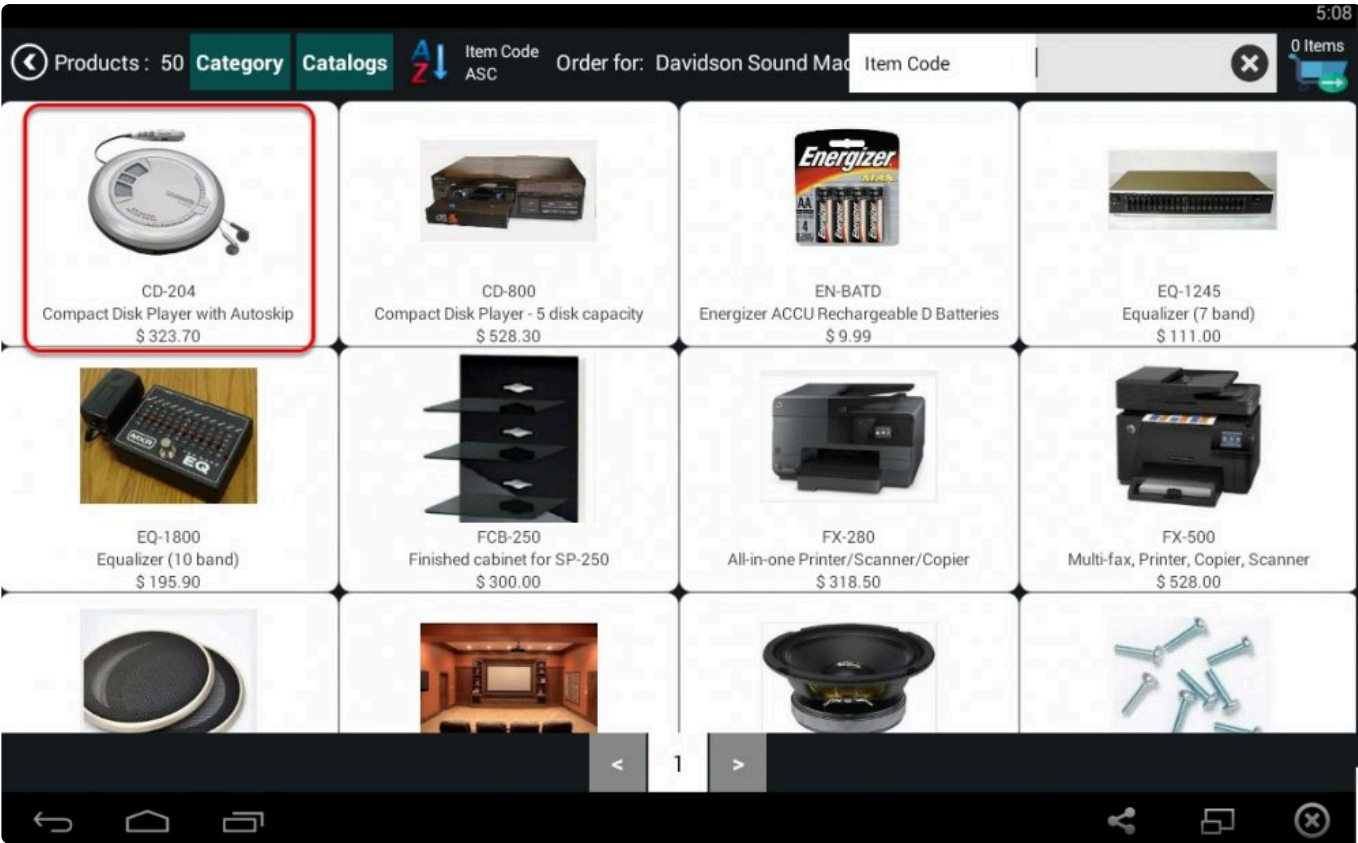


4.3.2. ii. Adding An Item From Products

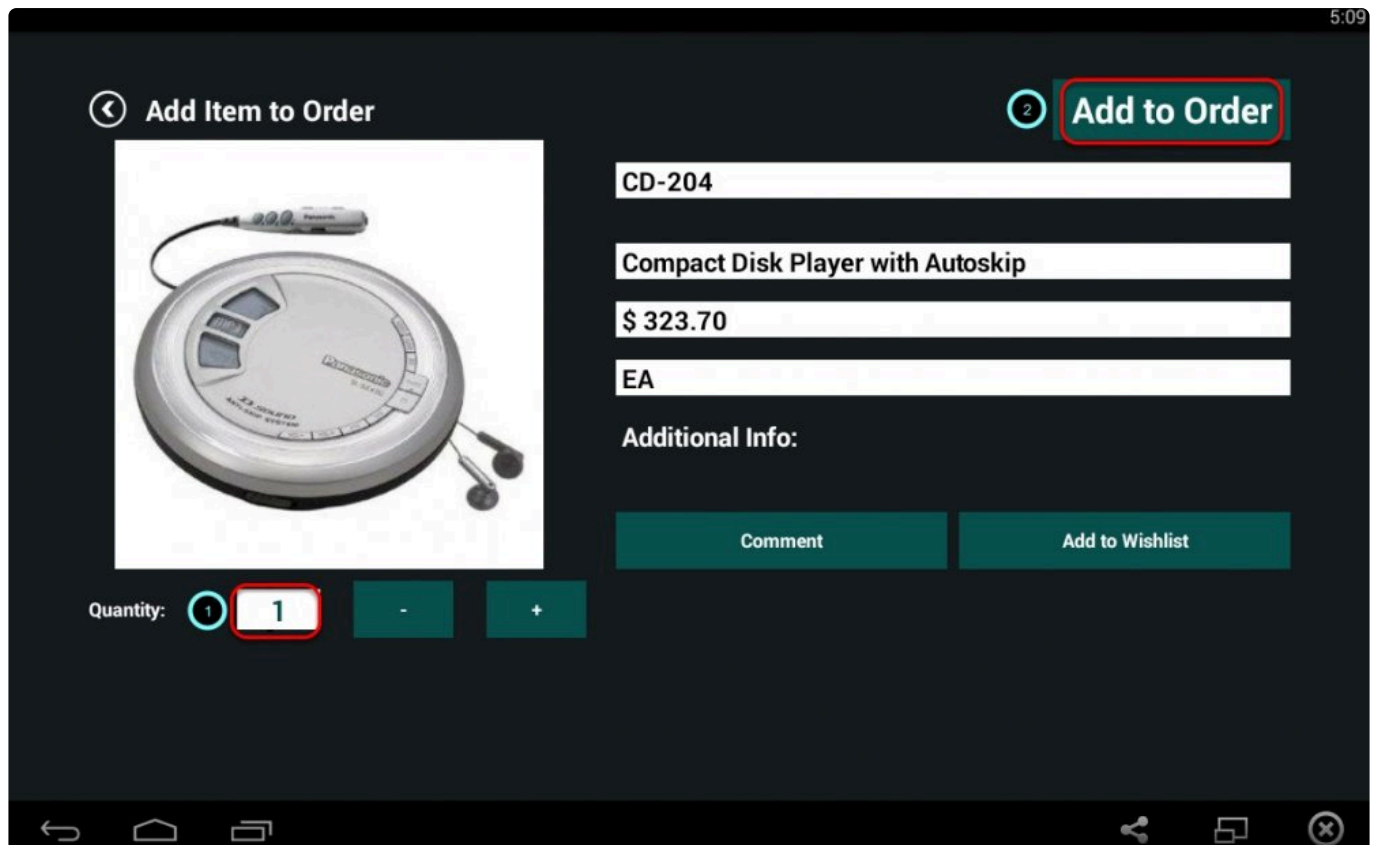
ADDING AN ITEM FROM PRODUCTS (Android)



Select a customer and tap on Products button.



Tap on the item you'd like to add.



Once the item or product has been added, you should see it added on your shopping cart (located on the upperright hand corner of your app).

5:11

Products : 50

Category













Catalogs

Item Code
ASC

Order for: Davidson Sound Mac

Item Code

1 Items

 <p>CD-204 Compact Disk Player with Autoskip \$ 323.70</p>	 <p>CD-800 Compact Disk Player - 5 disk capacity \$ 528.30</p>	 <p>EN-BATD Energizer ACCU Rechargeable D Batteries \$ 9.99</p>	 <p>EQ-1245 Equalizer (7 band) \$ 111.00</p>
 <p>EQ-1800 Equalizer (10 band) \$ 195.90</p>	 <p>FCB-250 Finished cabinet for SP-250 \$ 300.00</p>	 <p>FX-280 All-in-one Printer/Scanner/Copier \$ 318.50</p>	 <p>FX-500 Multi-fax, Printer, Copier, Scanner \$ 528.00</p>
 <p></p>	 <p></p>	 <p></p>	 <p></p>

<

1

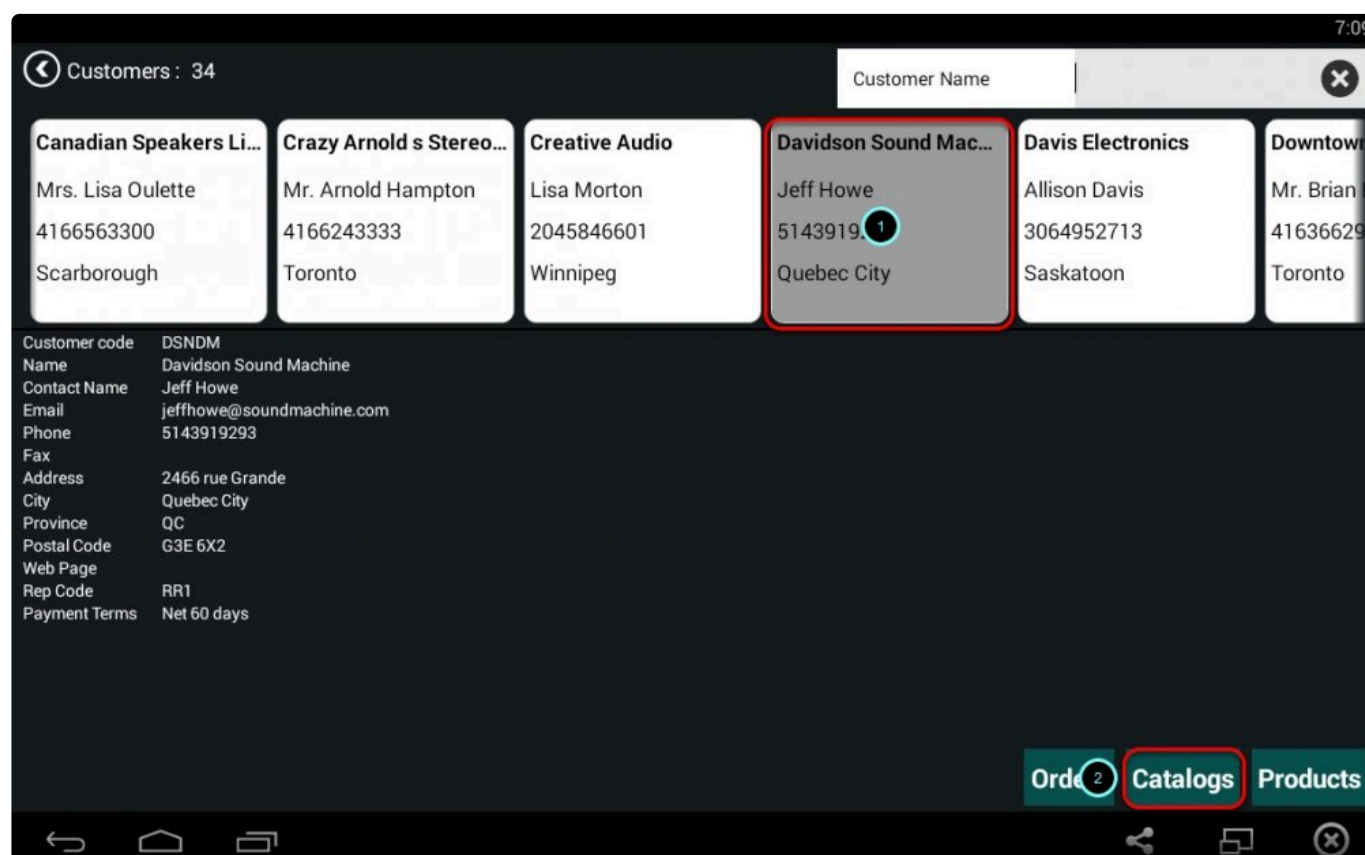
>

4.3.3. iii. Adding An Item From Catalogs

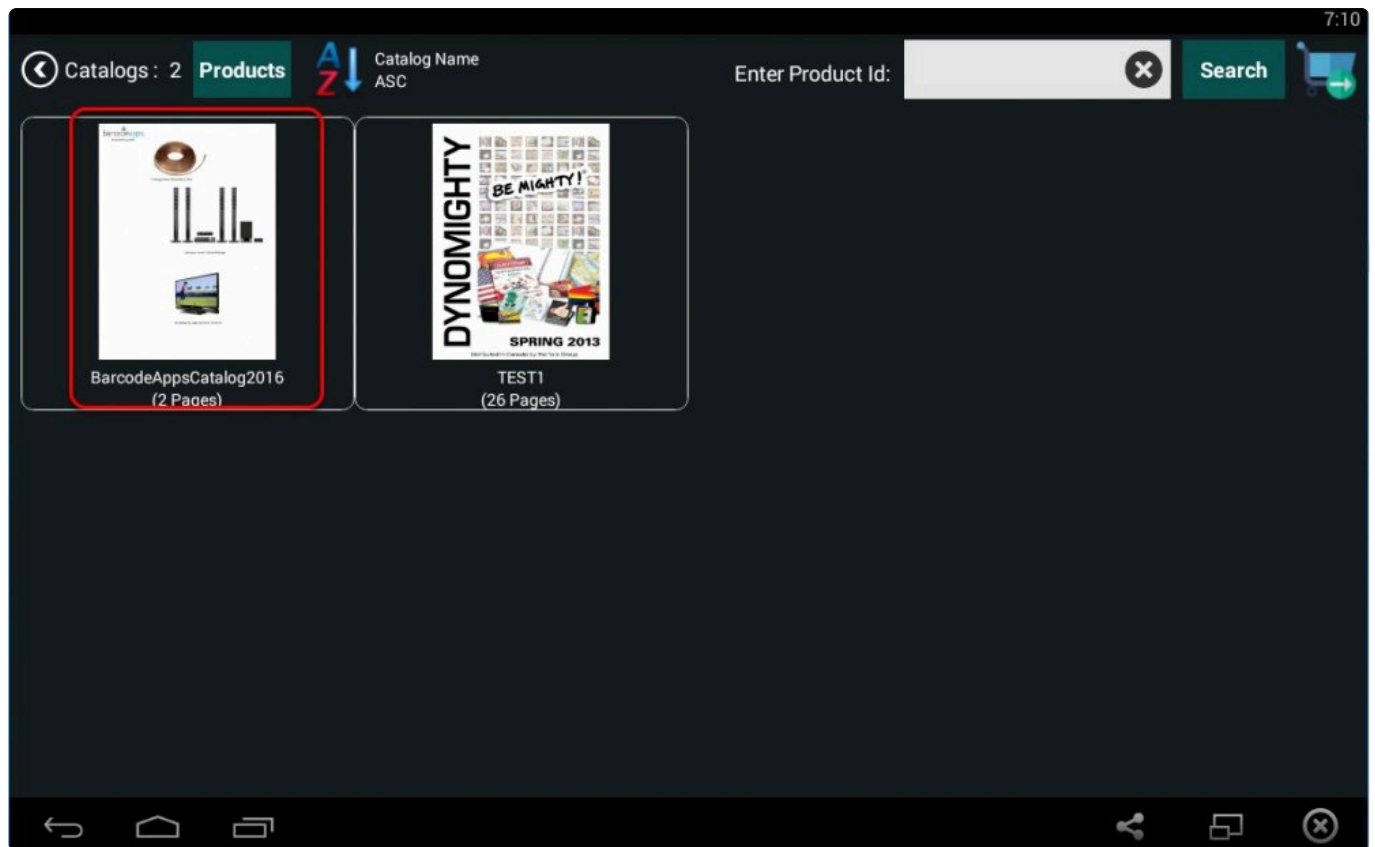
This knowledge base will guide users to add an item from catalogs view.

ADDING AN ITEM FROM CATALOGS (Android)

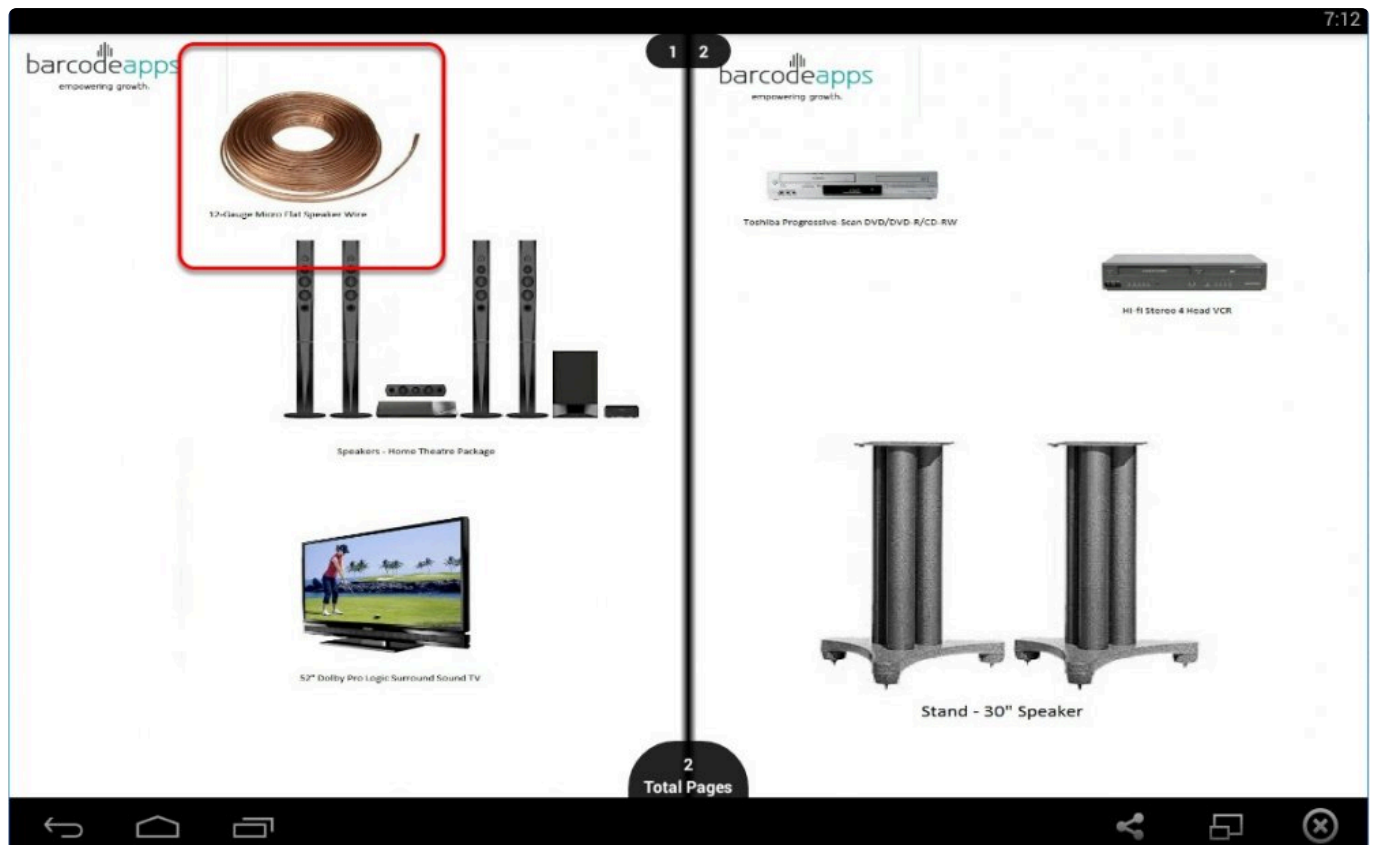
First select a customer and tap Catalogs button.



Select your catalog.




Tap on any item or product image to add to your order.



Specify a quantity and tap Add to Order.

7:13

⏪ Add Item to Order



Quantity:

1

-

+

2

Add to Order

SPW-12G

12-Gauge Micro Flat Speaker Wire

\$ 3.70

EA

Additional Info:

Comment

Add to Wishlist

⏪

🏠

📄

🔗

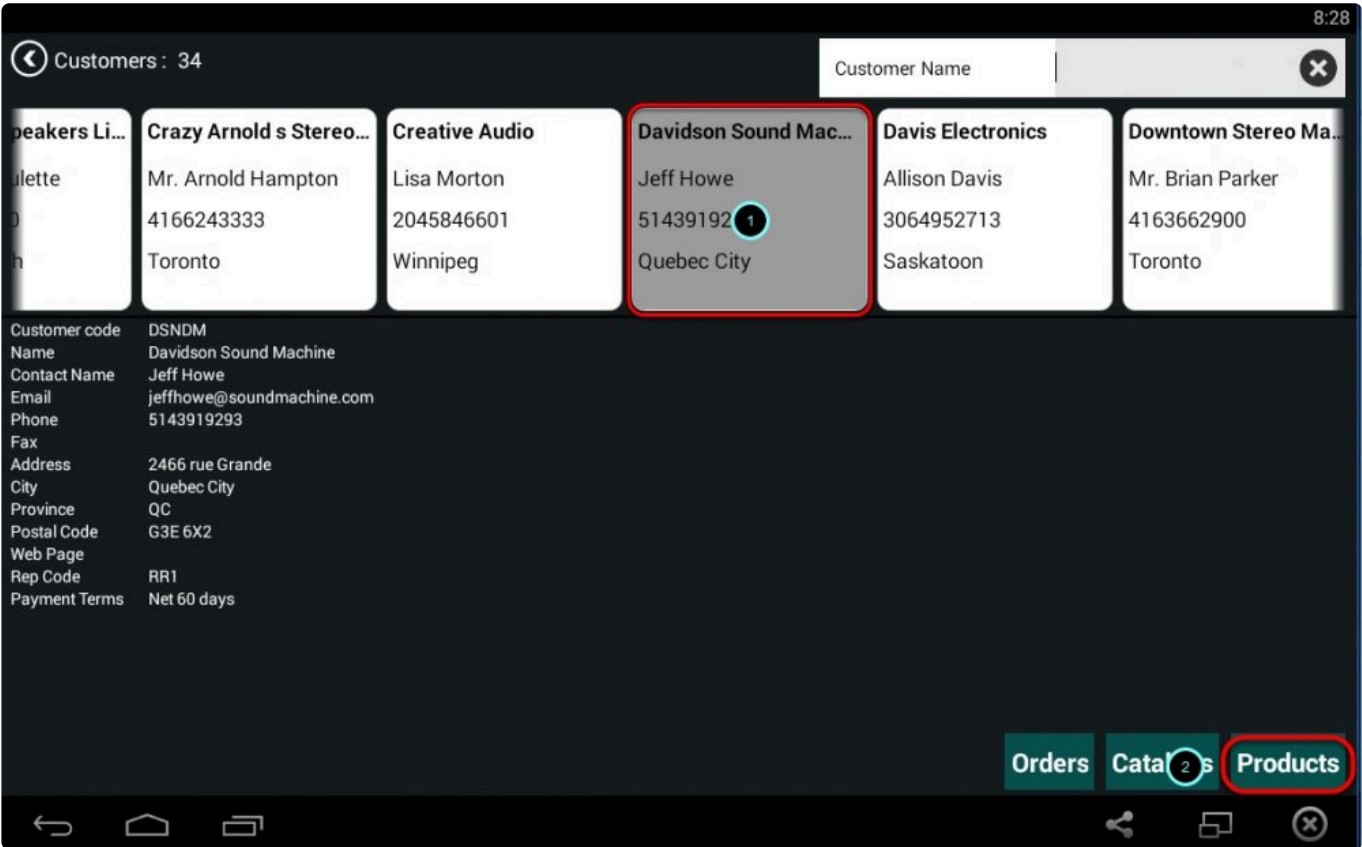
📄

⌂

4.3.4. iv. Adding An Item From Categories (Android)

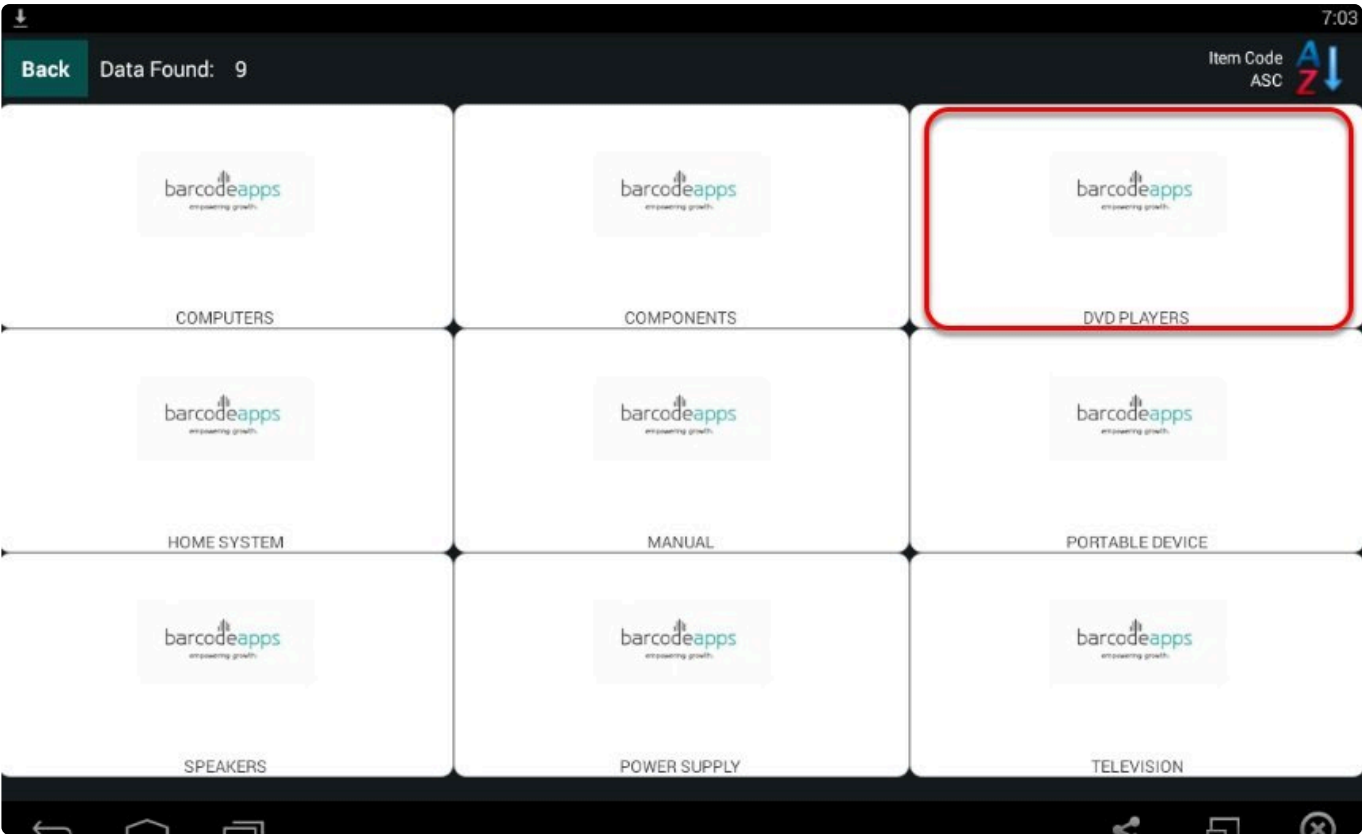
ADDING AN ITEM FROM CATEGORIES (Android)

First select a customer and tap Products button.

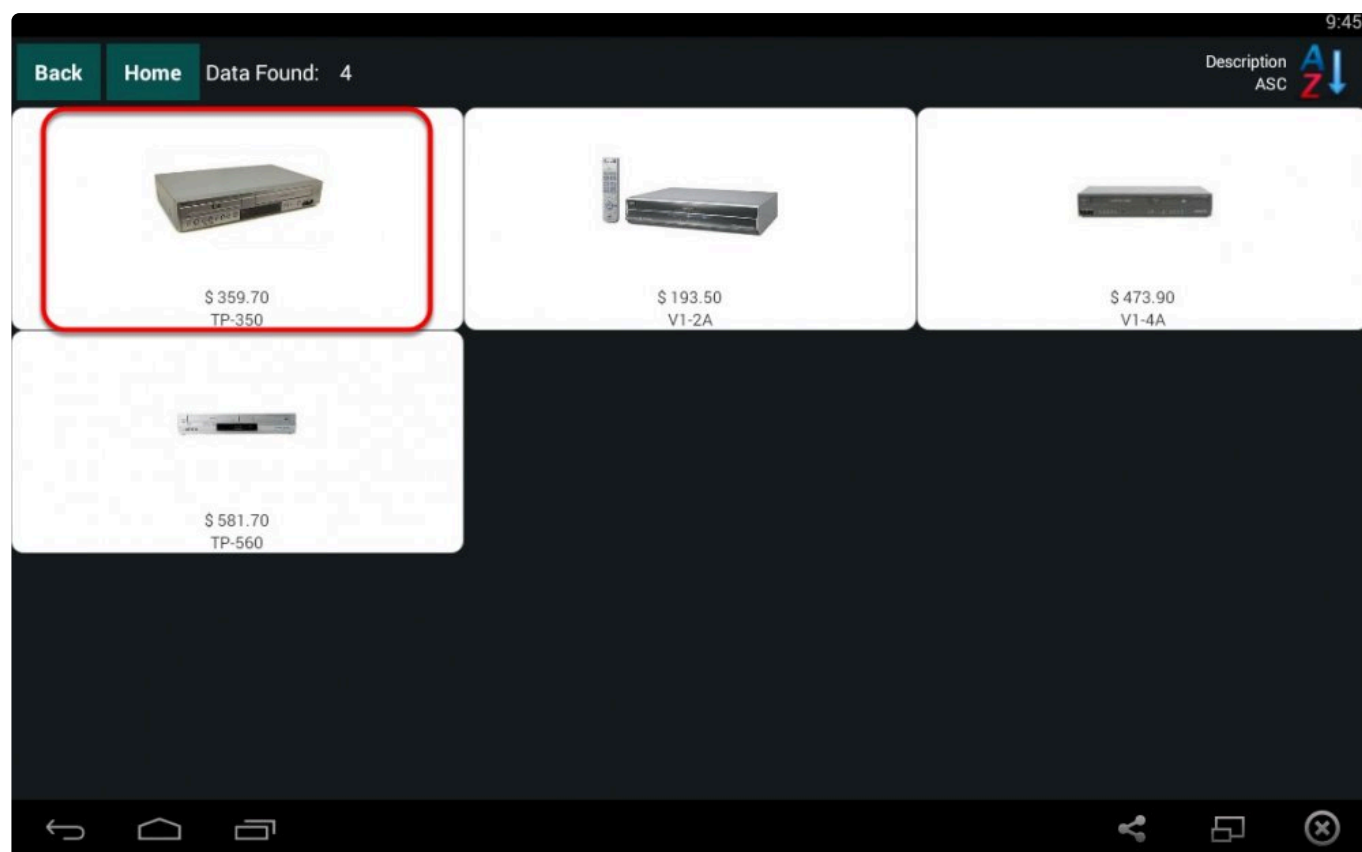


Tap on Category button.

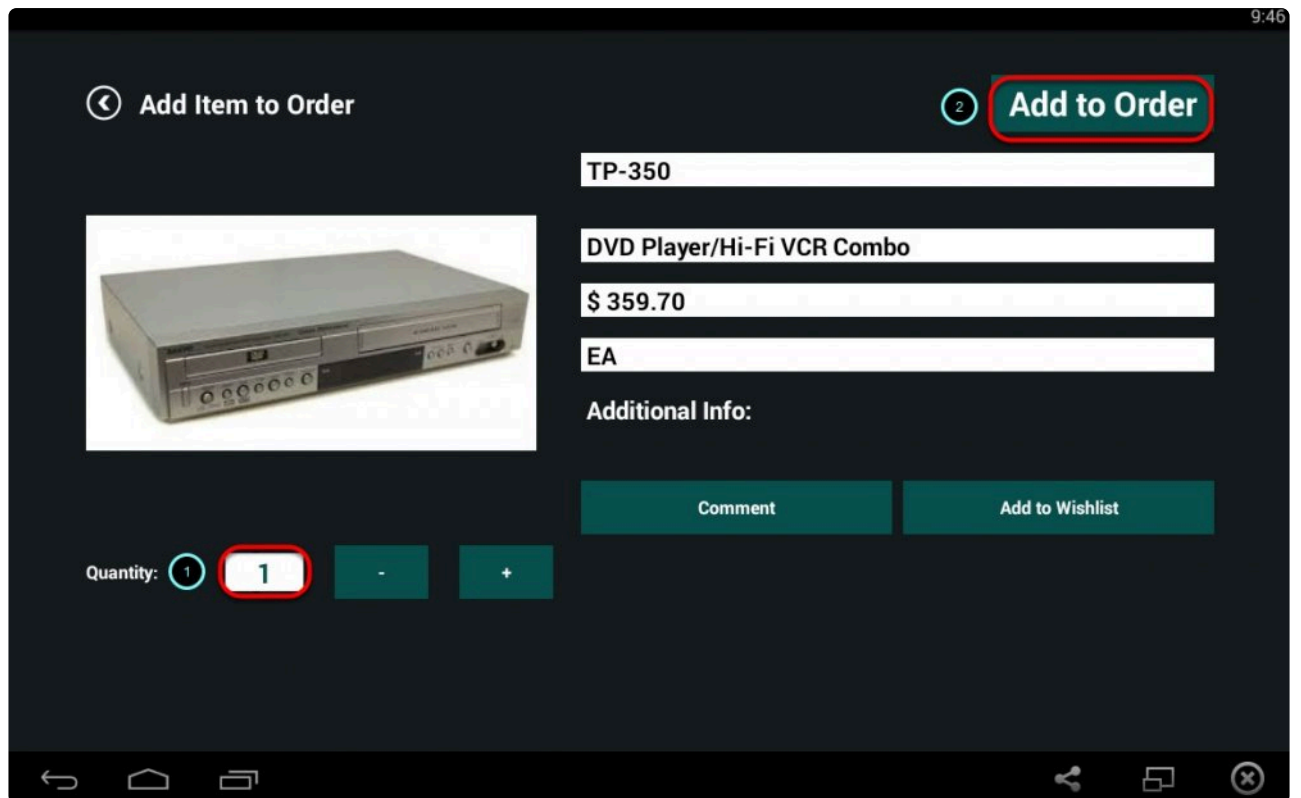
Select your category code.



Tap on the item or product image you'd like added to your order.



Specify a quantity then tap Add to Order.



4.3.5. v. Edit an Order

This knowledge base article will guide users to edit their orders using the PRISM app Android.

EDITING AN ORDER




To edit an order using the PRISM App android, Tap on the shopping cart



On the Order Summary screen, tap and hold on the item that needs to be edited.

Order Summary Screen:

Show All Products

Product Image	Product Code	Description	Quantity	Unit Price	Total
	MCB-250	Entertainment Center	3.0	\$ 3500.00	\$ 10500.00
	PS-2	Sony Playstation 2	5	\$ 199.00	\$ 995.00
	STS-01	Home Sound System with MP3 Decoder	5	\$ 2194.50	\$ 10972.50

Customer Name: Talbo Speakers

Total Number Of Items: 3

Order Number: BAR01-002-03-24-2016-2

Order Total: \$ 22467.50




Cancel Order

Complete

The App will show three options to choose from.

Order Summary Screen:

Show All Products

Product Image	Product Code	Description	Quantity	Unit Price	Total
	MCB-250	Entertainment Center	3.0	\$ 3500.00	\$ 10500.00
	PS-2	Sony Playstation 2	5	\$ 199.00	\$ 995.00
	STS-01	Home Sound System with MP3 Decoder	5	\$ 2194.50	\$ 10972.50

1 Delete

2 Edit Price

3 Edit Quantity

Customer Name: Talbo Speakers

Total Number Of Items: 3

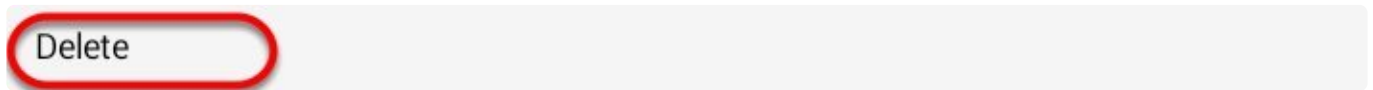
Order Number: BAR01-002-03-24-2016-2

Order Total: \$ 22467.50

Cancel Order

Complete

Delete – Tap on this option to delete the selected item.



Edit Price – Punch in the new price and then tap on Ok to change the price.






Edit Quantity – Punch in the new quantity and then tap on Ok to change the quantity.



After making the changes, tap on complete to finish the order.

Order Summary Screen:

Show All Products

Product Image	Product Code	Description	Quantity	Unit Price	Total
	MCB-250	Entertainment Center	5.0	\$ 3525.00	\$ 17625.00
	PS-2	Sony Playstation 2	5	\$ 199.00	\$ 995.00
	STS-01	Home Sound System with MP3 Decoder	5	\$ 2194.50	\$ 10972.50

Customer Name: Talbo Speakers

Total Number Of Items: 3

Order Number: BAR01-002-03-24-2016-2

Order Total: \$ 29592.50

Cancel Order

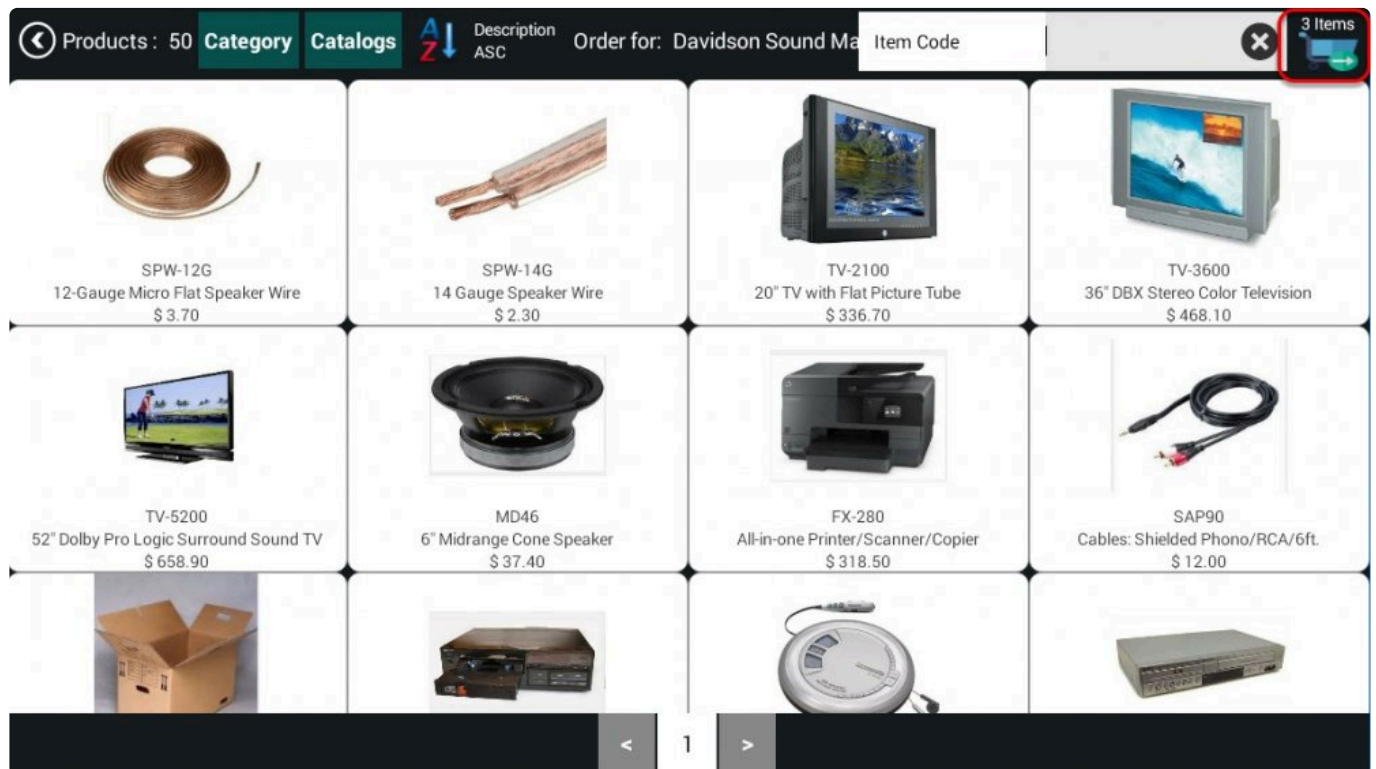
Complete

4.3.6. vi. Completing An Order

This knowledge base article will guide users to complete an order using the PRISM app Android.

COMPLETING AN ORDER




To complete an order on your PRISM App Android, once finish selecting your orders, tap on the shopping cart.



On the Order summary screen, tap on Complete.

Order Summary Screen:

Show All Products

Product Image	Product Code	Description	Quantity	Unit Price	Total
	SPW-12G	12-Gauge Micro Flat Speaker Wire	2.0	\$ 3.70	\$ 7.40
	FX-500	Multi-fax, Printer, Copier, Scanner	1	\$ 528.00	\$ 528.00
	STS-01	Home Sound System with MP3 Decoder	1	\$ 2194.50	\$ 2194.50

Customer Name: Davidson Sound Machine

Total Number Of Items: 3

Order Number: BAR01-002-03-24-2016-1

Order Total: \$2,729.90

Cancel Order

Complete

Fill out the information needed for the order and then tap on Confirm Order.

Order Confirmation

Order Date: 03-24-2016

Ship Date

Cancel Date

Terms

Terms

Written By

Notes

Customer Name: Davidson Sound Machine

No. of Items: 3

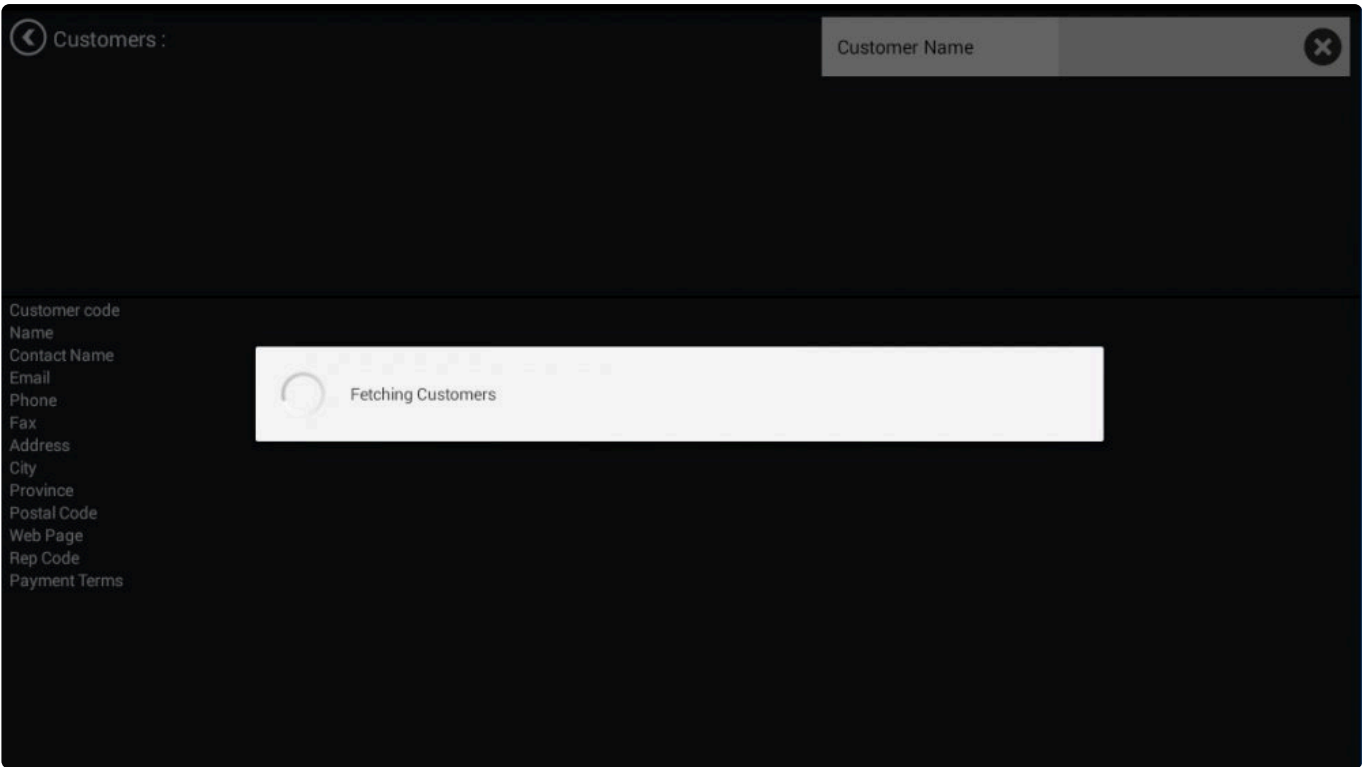
Back to Order

Confirm Order

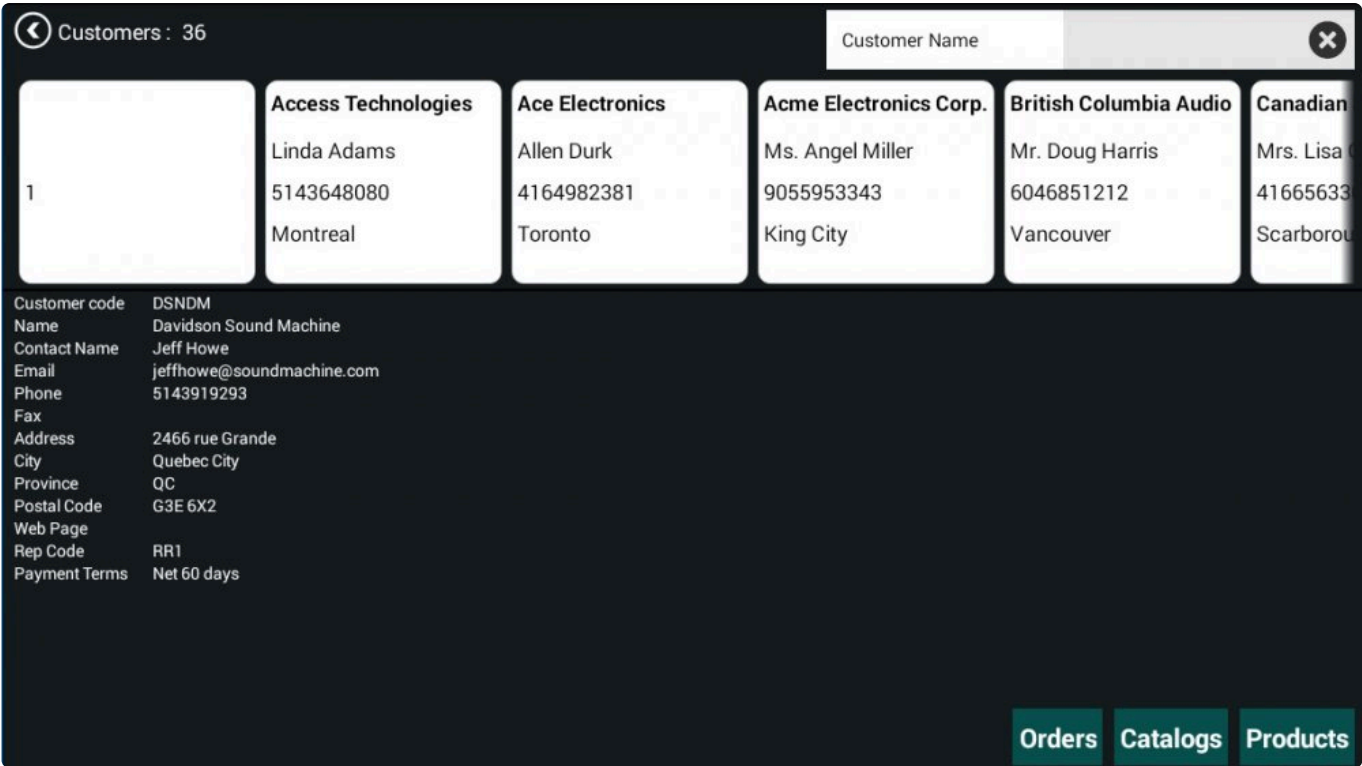
Tap on Sync Now.

The screenshot shows the 'Order Confirmation' screen. At the top left is a back arrow icon. The title 'Order Confirmation' is at the top. Below the title, there are two columns of form fields. The left column contains: 'Order Date:' with a value of '03-24-2016', 'Ship Date', 'Cancel Date', 'Terms', 'Terms', 'Written By', and 'Notes'. The right column contains: 'Customer Name:' with a value of 'Davidson Sound Machine', 'No. of Items:' with a value of '3', and two buttons: 'Back to Order' and 'Confirm Order'. A modal dialog is centered on the screen with the title 'Order Confirmed'. It has two buttons: 'Sync Now' (highlighted with a red border) and 'Sync Later'.

Wait for the sync to finish.



The Customer screen will show once the order is sent.



4.3.7. vii. Recovering An Order from Order History

This knowledge base will guide users on how to recovery their orders from Order History.

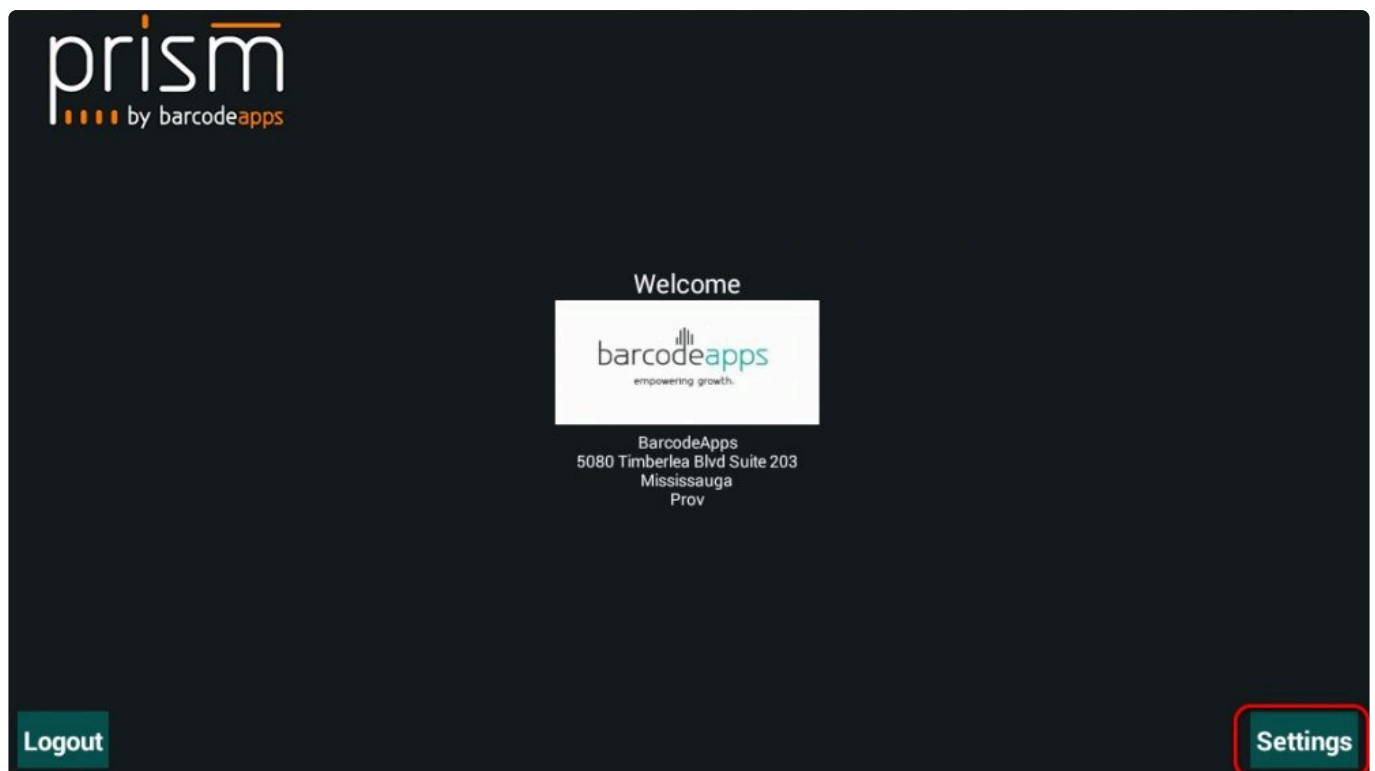
ORDER RECOVERY

In the case that PRISM App needs to be re-installed e.g. not syncing or crashing, all data or information such as pending orders and orders history will be deleted.

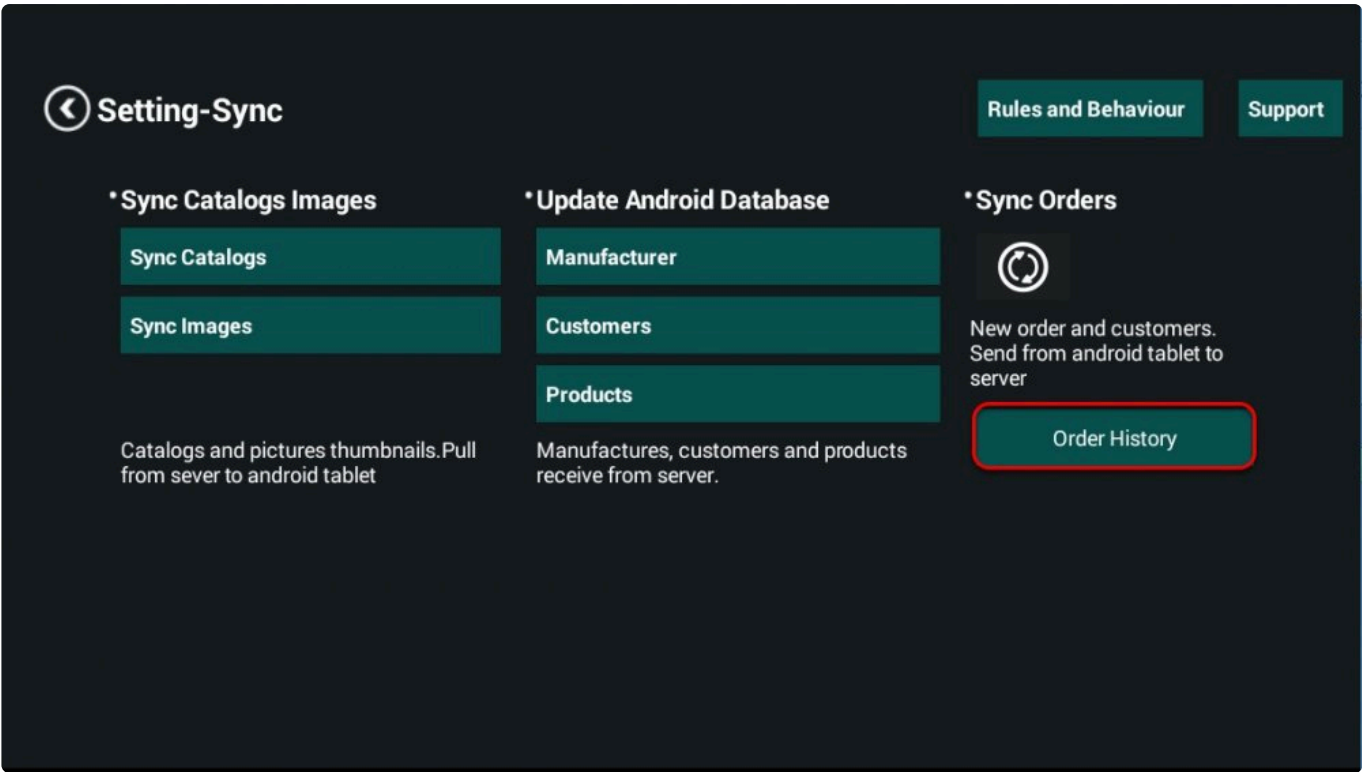
Please ensure all orders not sent (New or On Hold orders) on the iPad should be sent to cloud prior to doing a re-installation. However PRISM App has the functionality to recover order history.

! Important: Any orders unsent to cloud cannot be recovered.

To recover order history go to Settings.



Tap on Order History



Use the search field to find and filter the orders by customer code, customer name or rep code. Once you find the order you'd like to recover, select the order by putting a check mark on it and then tap Generate Zip.

Order History Load Orders

Orders History (32)

3 ☒ Generate Zip ☐ Clear Selection

1 Search

☐ Check All

2 ☒ 33

Order Date:	2016-03-21 16:51	Customer Code:	TS1	Customer Name:	Talbo Speakers	RepCode:	BAR01-002	Total:	\$538.29	
<input type="checkbox"/> 32 <input type="button" value="v"/>	Order Date:	2016-03-18 13:58	Customer Code:	INTSYS	Customer Name:	Integrated Sound Solutions	RepCode:	BAR01-002	Total:	\$2,214.40
<input type="checkbox"/> 31 <input type="button" value="v"/>	Order Date:	2016-03-18 13:20	Customer Code:	INTSYS	Customer Name:	Integrated Sound Solutions	RepCode:	BAR01-002	Total:	\$2,214.40
<input type="checkbox"/> 30 <input type="button" value="v"/>	Order Date:	2016-03-18 04:04	Customer Code:	ACME	Customer Name:	Acme Electronics Corp.	RepCode:	FS1	Total:	\$3.70

Once the zip file has been generated tap on Load Order option (located at the upper right hand corner of your screen).

The screenshot shows the 'Order History' screen. At the top, there is a 'Load Orders' button with a circled '2' next to it. Below the header, there is a 'Generate Zip' button. A green message bar at the top of the list area says 'Message Zip Generated' with a circled '1' next to it. Below the message bar, there is a search bar and a 'Check All' checkbox. The main content is a list of orders. Each order entry includes a checkbox, a user icon (e.g., 33, 32, 31), the 'Order Date', 'Customer Code', 'RepCode', 'Customer Name', and 'Total'.

Order Date	Customer Code	RepCode	Customer Name	Total
2016-03-21 16:51	TS1	BAR01-002	Talbo Speakers	\$538.29
2016-03-18 13:58	INTSYS	BAR01-002	Integrated Sound Solutions	\$2,214.40
2016-03-18 13:20	INTSYS	BAR01-002	Integrated Sound Solutions	\$2,214.40
	ACME		Acme Electronics Corp.	

Order successfully loaded message should pop up. Tap OK.

This screenshot shows the same 'Order History' screen as the previous one, but with a white dialog box overlaid in the center. The dialog box has the text 'Orders successfully loaded' and an 'OK' button at the bottom. The background is dimmed.

Next, check the orders if they have been re-imported to your PRISM App. Go to Orders.

← Customers : 36

Customer Name

×

1

Access Technologies

Linda Adams

5143648080

Montreal

Ace Electronics

Allen Durk

4164982381

Toronto

Acme Electronics Corp.

Ms. Angel Miller

9055953343

King City

British Columbia Audio

Mr. Doug Harris

6046851212

Vancouver

Canadian

Mrs. Lisa C

41665633

Scarborou

Customer code

TS1

Name

Talbo Speakers

Contact Name

(416) 624-3338

Email

TalboSpeakersInc@gmail.com

Phone

4166243338

Fax

Address

214 York Street Building 3

City

Toronto

Province

ON

Postal Code

M7T 4J8

Web Page

Rep Code

FS1

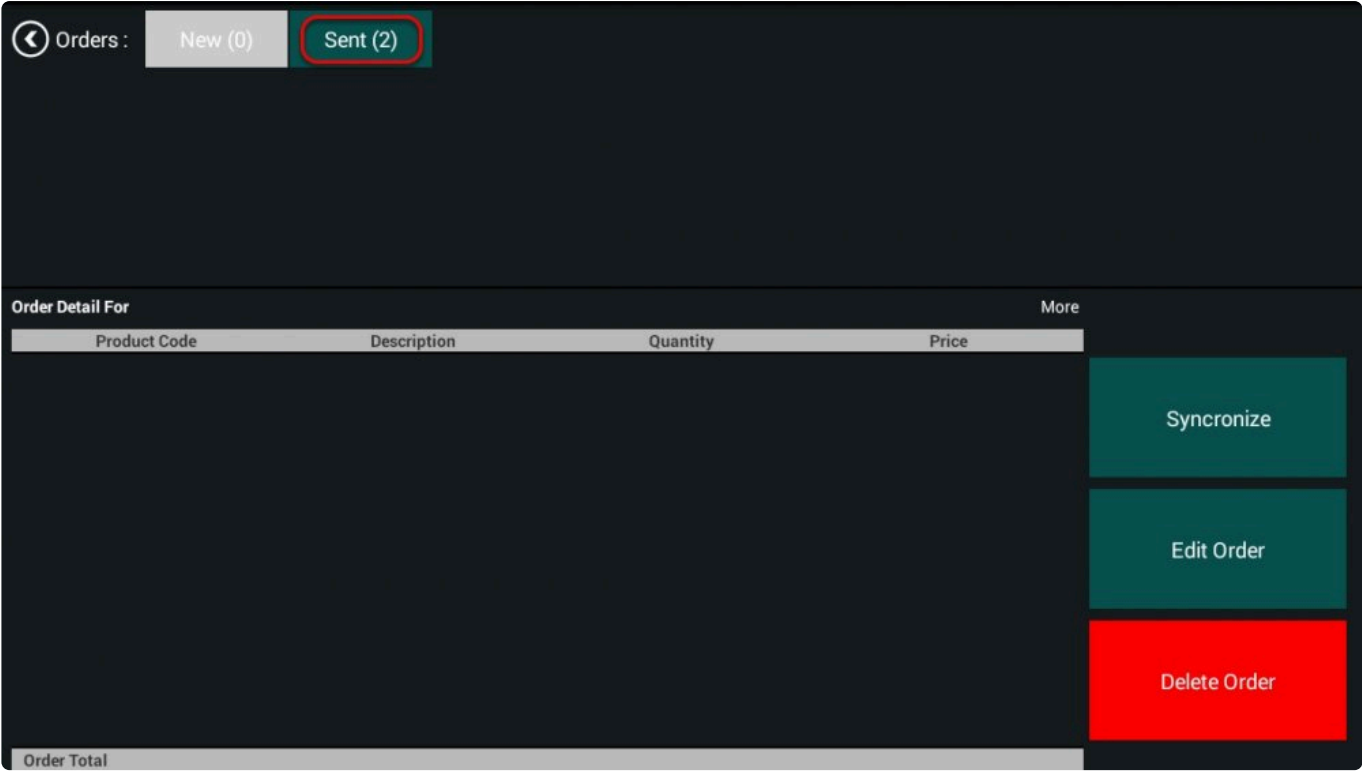
Payment Terms

Orders

Catalogs

Products

Tap on Sent.



Orders recovered should appear under the Sent Orders screen. Tap on the order to view the order details.

← Orders :

New (0)

Sent (2)

Davidson Sound Mac...

Talbo Speakers

Order # 1

Order # 2

03-24-2016

2016-03-21 16:51:48.0...

Order Total 2520.3999...

Order Total 538.29

Order Detail For

More

Product Code	Description	Quantity	Price
--------------	-------------	----------	-------

Synchronize

Copy Order

Delete Order

Order Total

Sample order recovered.

← Orders :

New (0)

Sent (2)

Davidson Sound Mac...

Talbo Speakers

Order # 1

Order # 2

03-24-2016

2016-03-21 16:51:48.0...

Order Total 2520.3999...

Order Total 538.29

Order Detail For

Talbo Speakers

More

Product Code	Description	Quantity	Price
CD-800	Compact Disk Player - 5 disk capacity	1	\$ 528.3
EN-BATD	Energizer ACCU Rechargeable D Batteries	1	\$ 9.99

Synchronize

Copy Order

Delete Order

Order Total

\$ 538.29

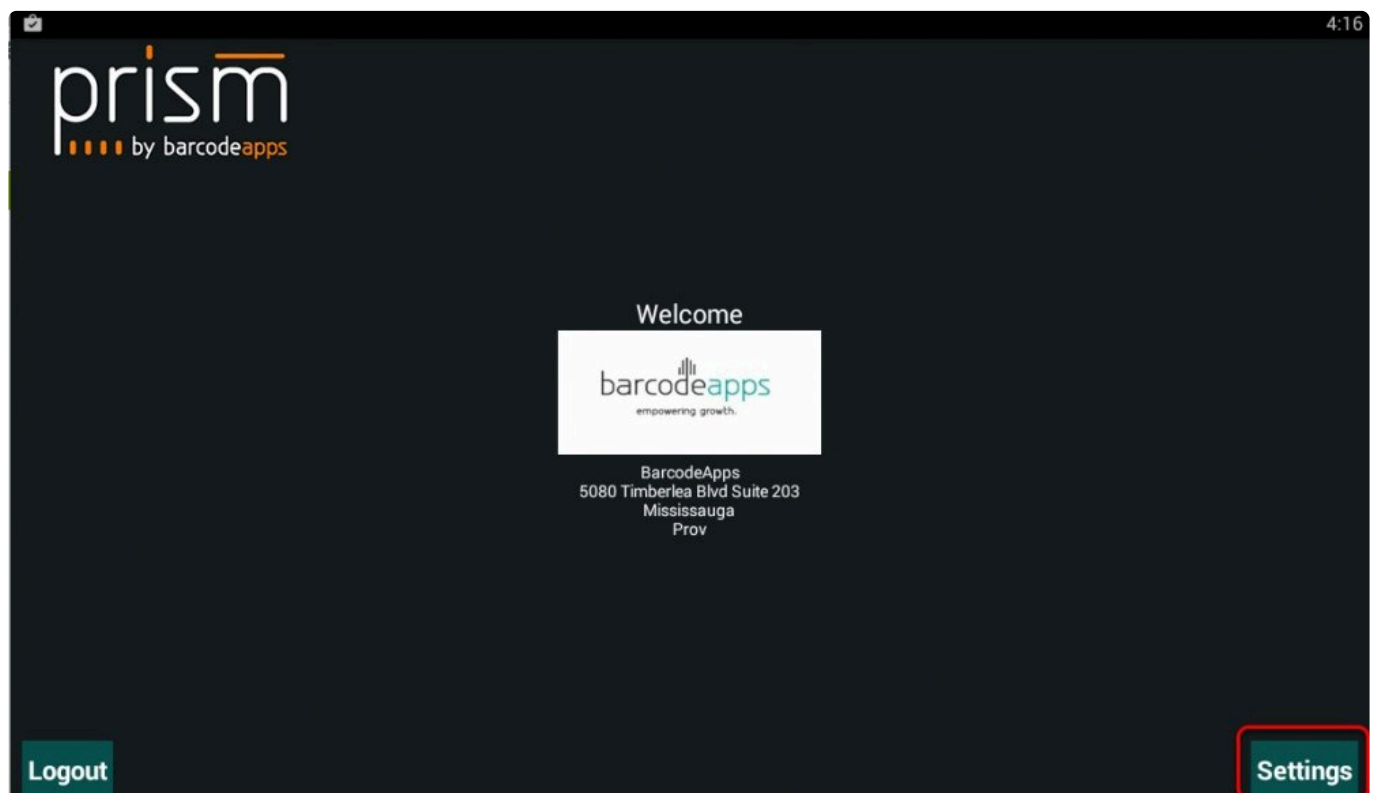
4.4. E. Settings (Android)

4.4.1. i. Sync Products

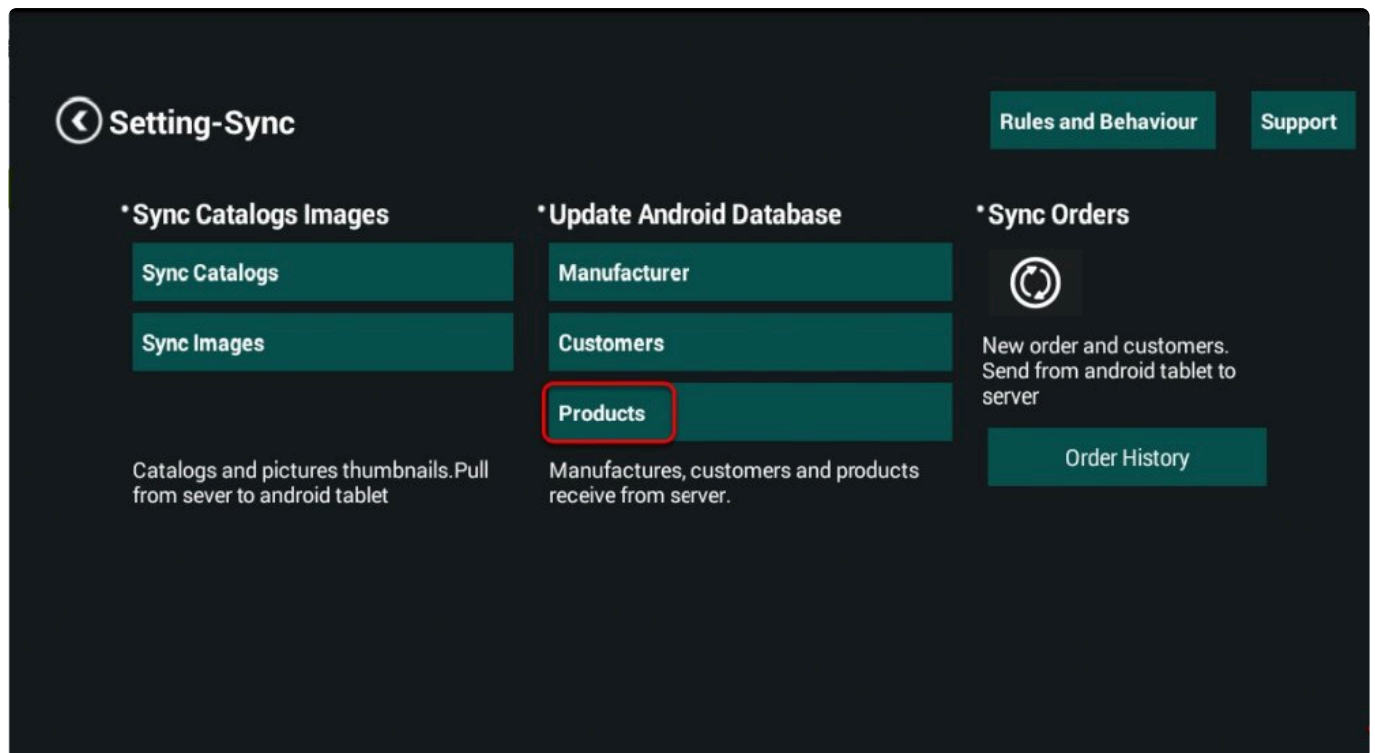
This knowledge base article will guide users to sync their products on their android devices.

SYNC PRODUCTS

To sync products on an android device, tap on settings on the main screen.



Tap on Products under Update Android Database.



This function will be applicable if;

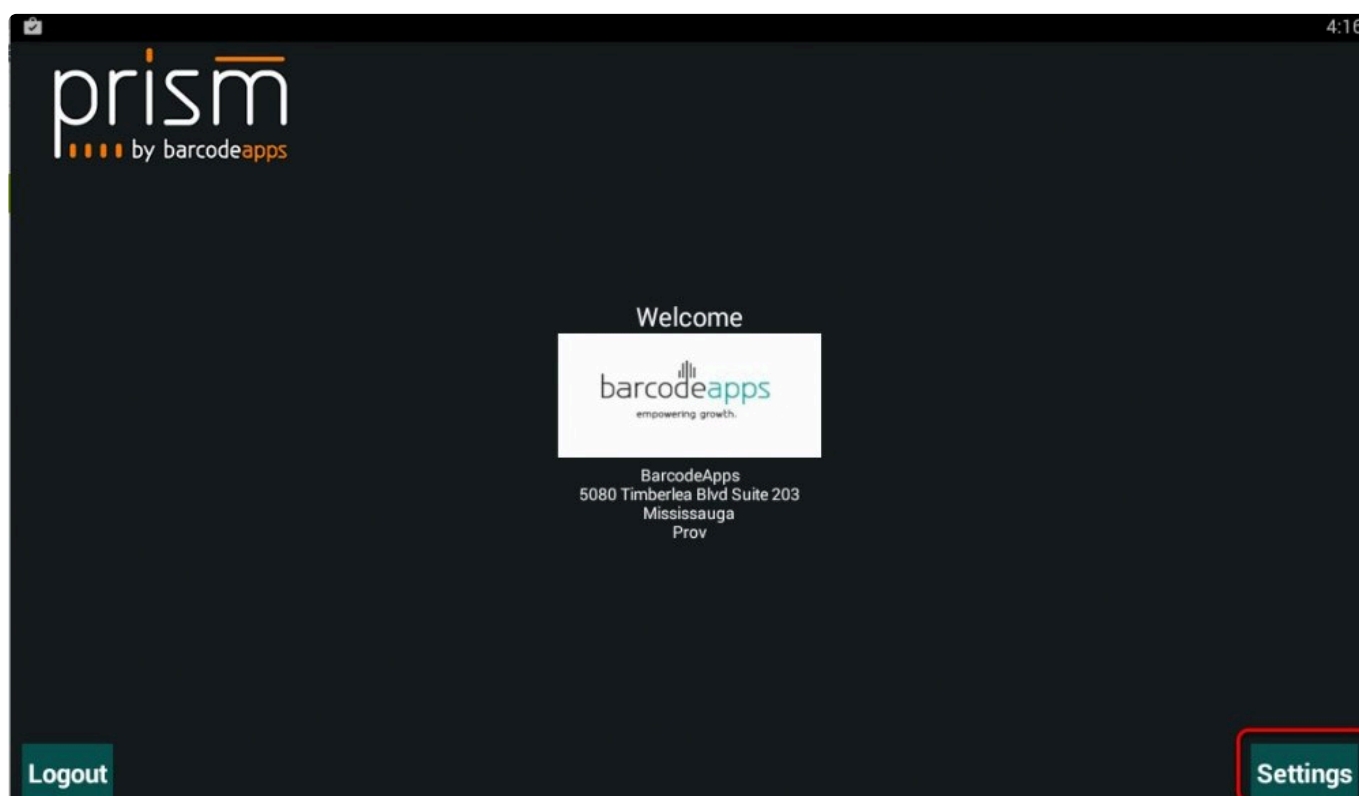
1. A product is missing.
2. Product item information has to updated.
3. New Product sync.

4.4.2. ii. Sync Images

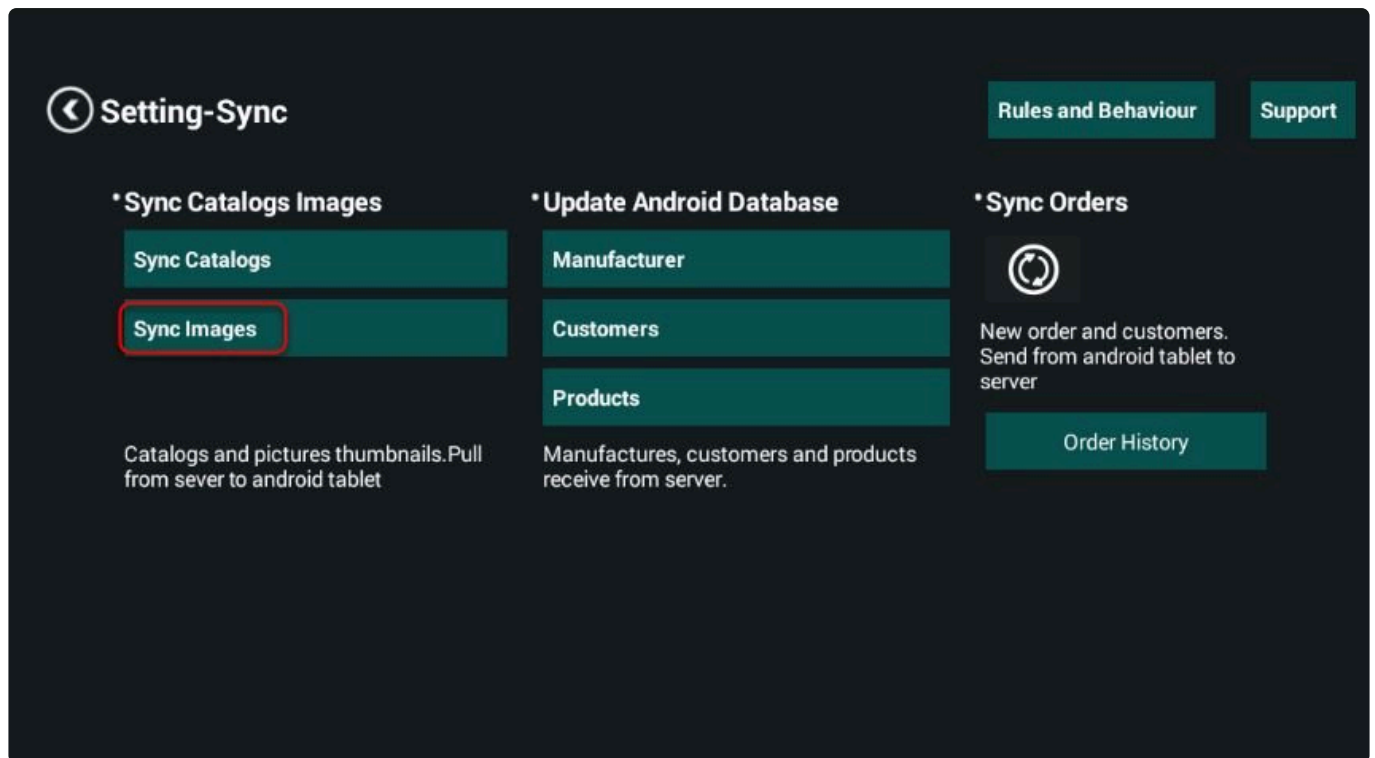
This knowledge base article will guide users on how to sync images on their android devices.

SYNCING IMAGES

To sync images on an android device, tap on settings on the main screen



and then tap on Sync Images under Sync Catalog Images.



This function is applicable if:

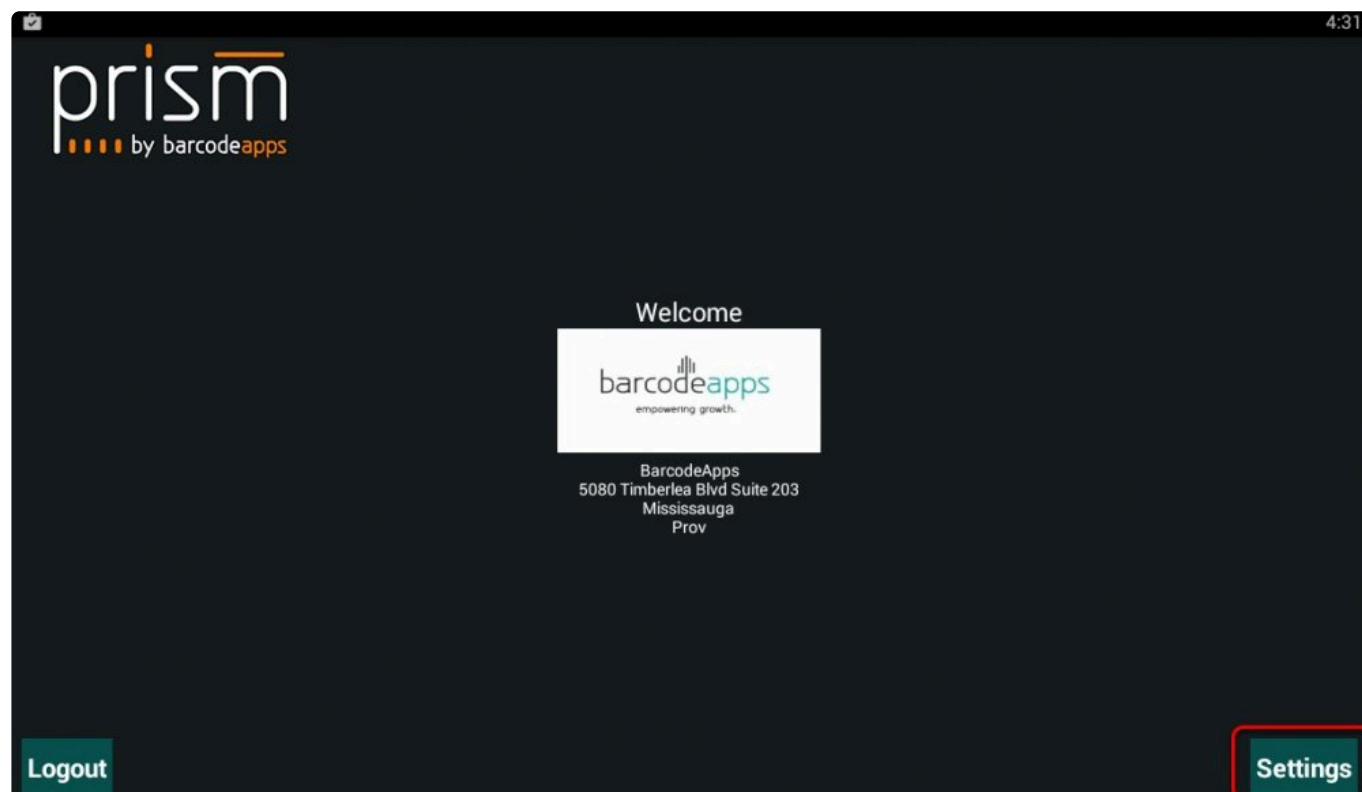
- An Image is missing.
- After a product image update.
- Syncing new product images.

4.4.3. iii. Sync Customers

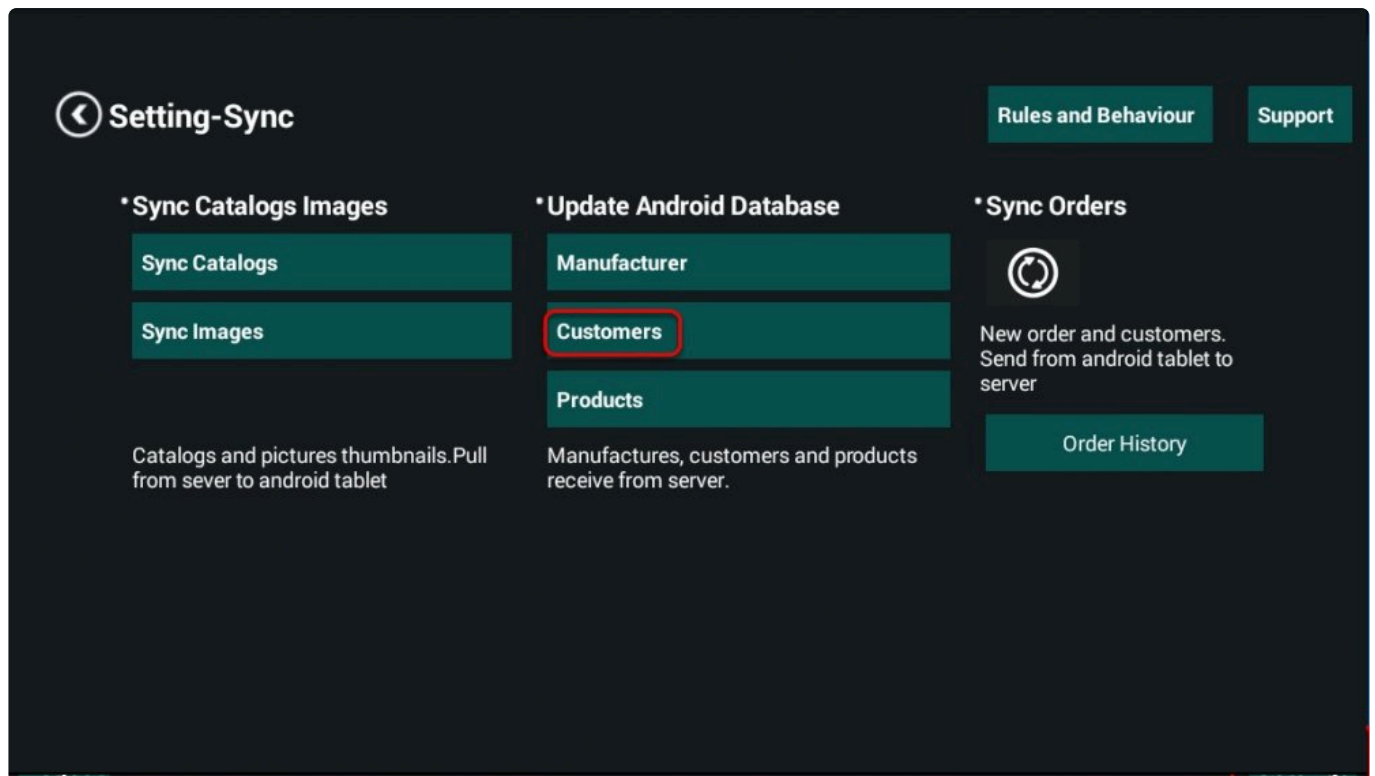
This knowledge base article will guide users on how to sync customers on their android devices.

SYNCING CUSTOMERS

To sync customer information on an android device, tap on settings on the main screen



and then tap on Customers under Update Android Database.



This function will be applicable if;

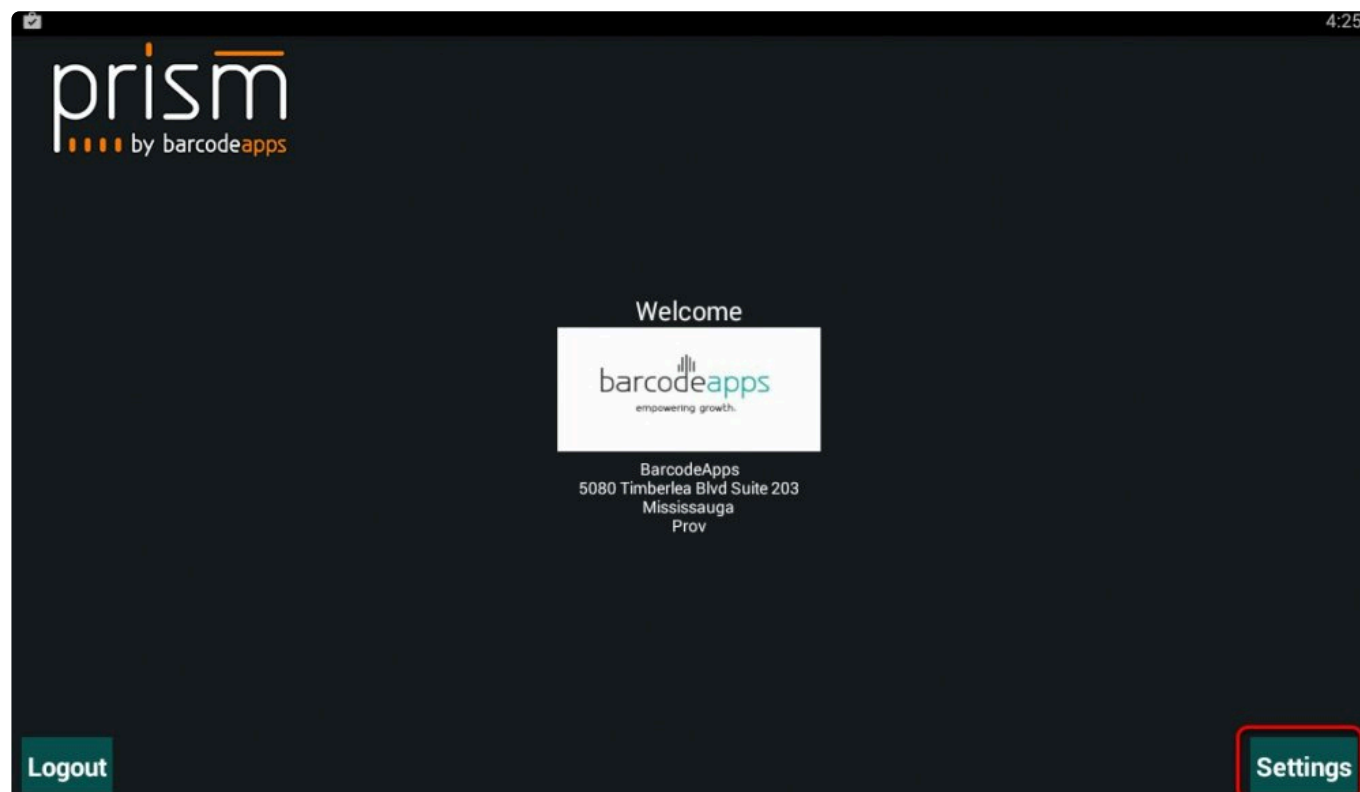
1. A customer is missing.
2. A customer information has to be updated.
3. New customer sync.

4.4.4. iv. Sync Catalogs

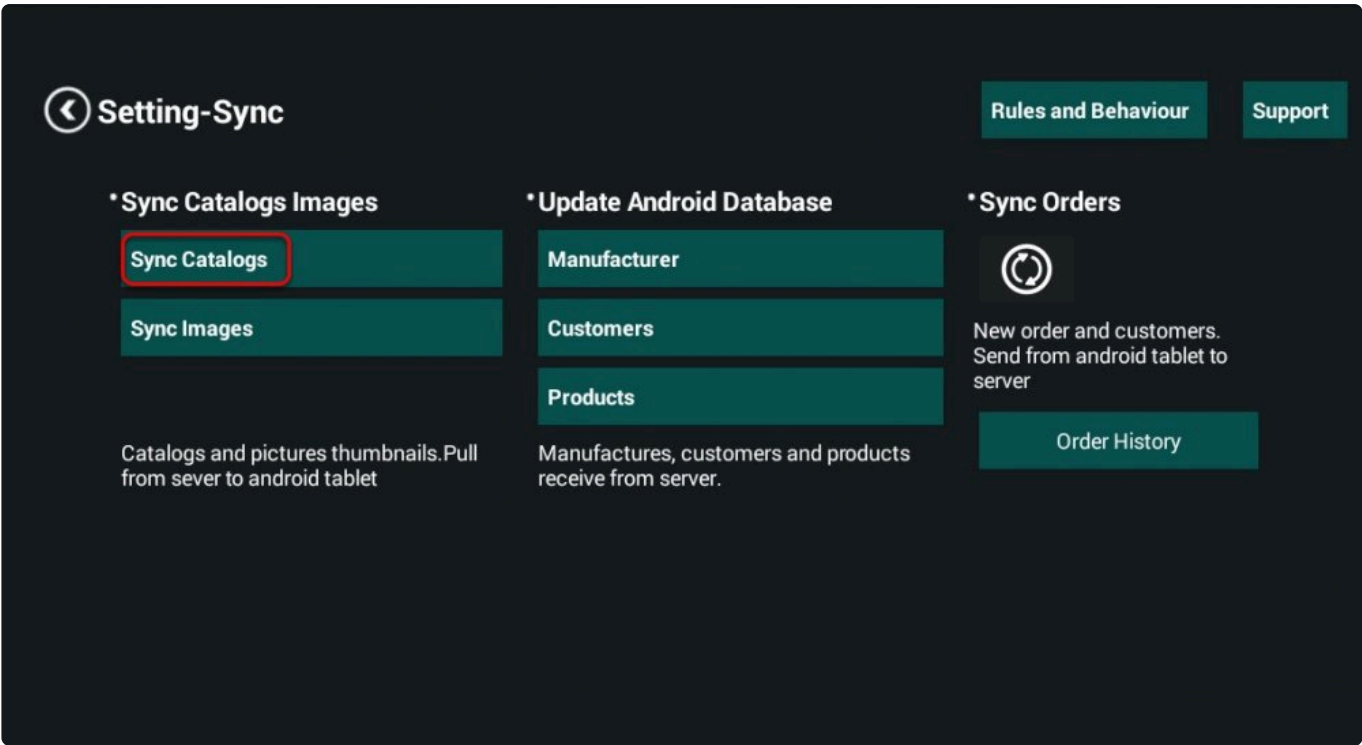
This knowledge base article will guide user to sync their catalogs using their android devices

SYNCING CATALOGS

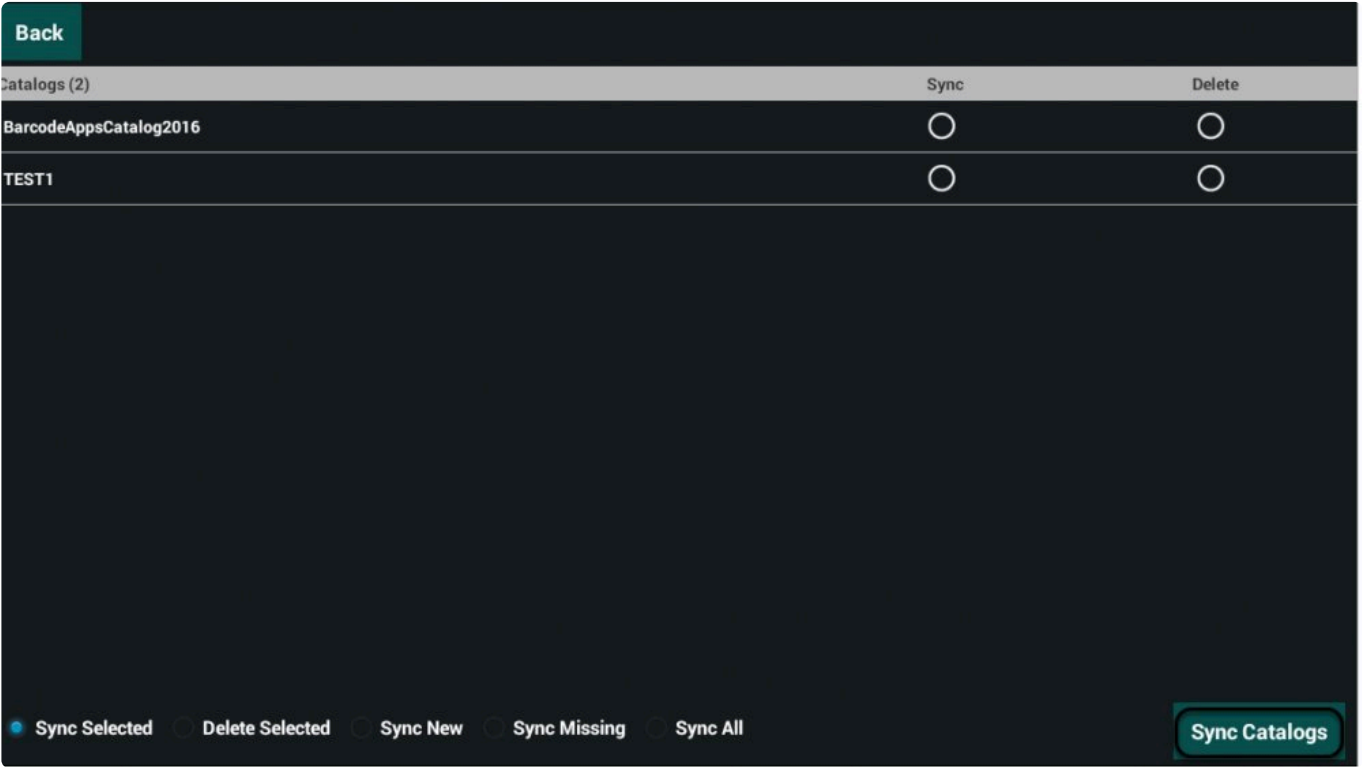
To sync catalogs on an android device, tap on settings on the main screen.



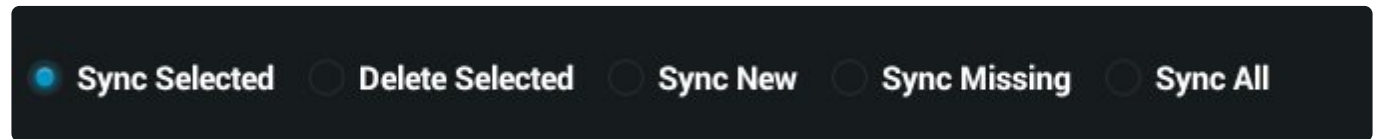
Tap on Sync Catalogs.



On the Sync catalogs window,just tap on the sync option(see sync options), and then tap on Sync Catalogs.



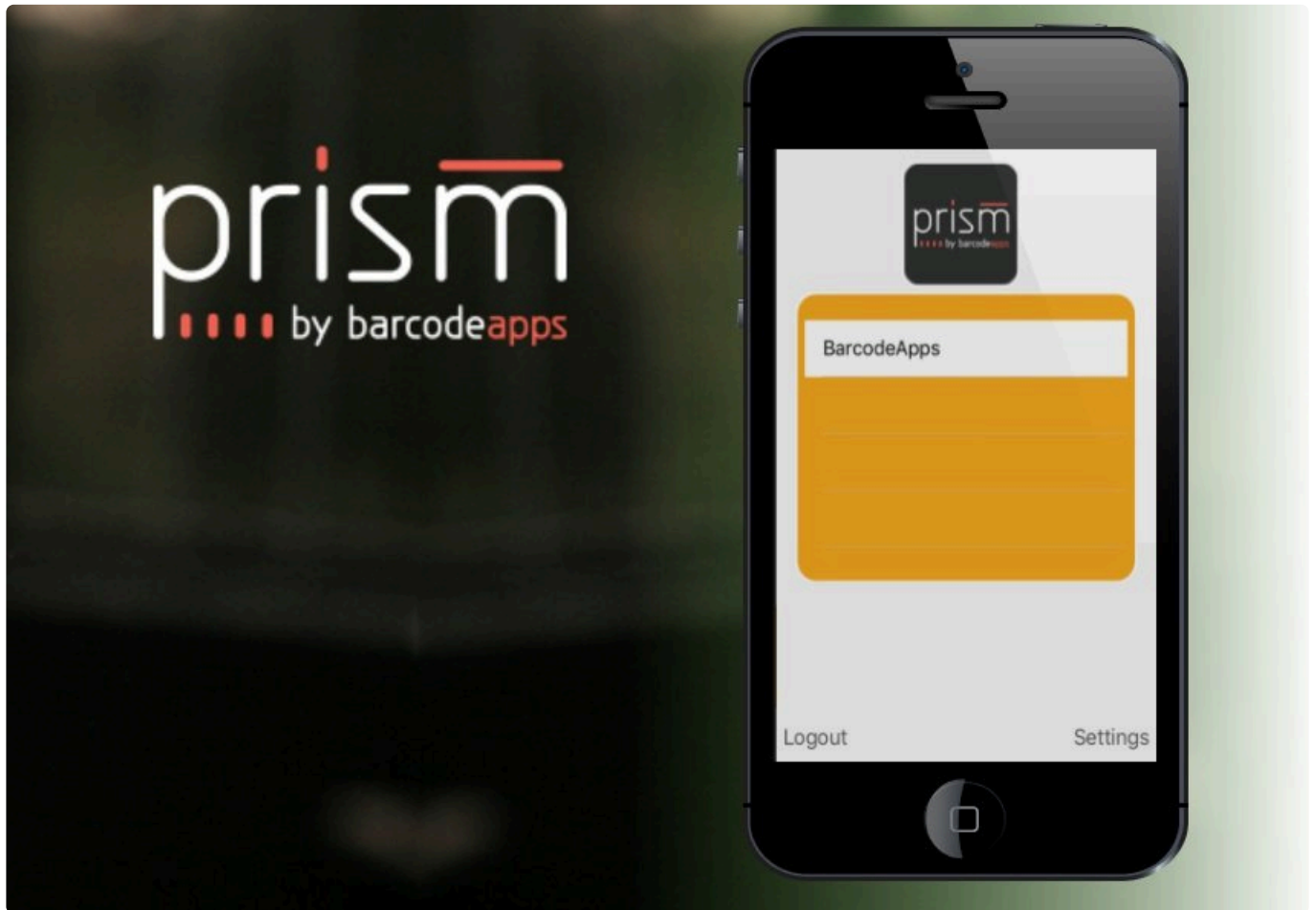
SYNC OPTIONS



1. Sync Selected – this option will let you choose the catalog that needs to be sync.
2. Delete Selected – This option will delete the selected catalog.
3. Sync New – this option will let you download a catalog that is not on the Catalog List.
4. Sync missing – this option will sync missing catalog
5. Sync All – this option will sync all the catalogs that is on the list and at the same time, it will download new and missing catalogs.

BarcodeApps © 2016

5. PRISM APP iPhone



5.1. A. How To Install And Setup PRISM App iPhone

This knowledge base article will guide users to download and install the PRISM App iPhone.

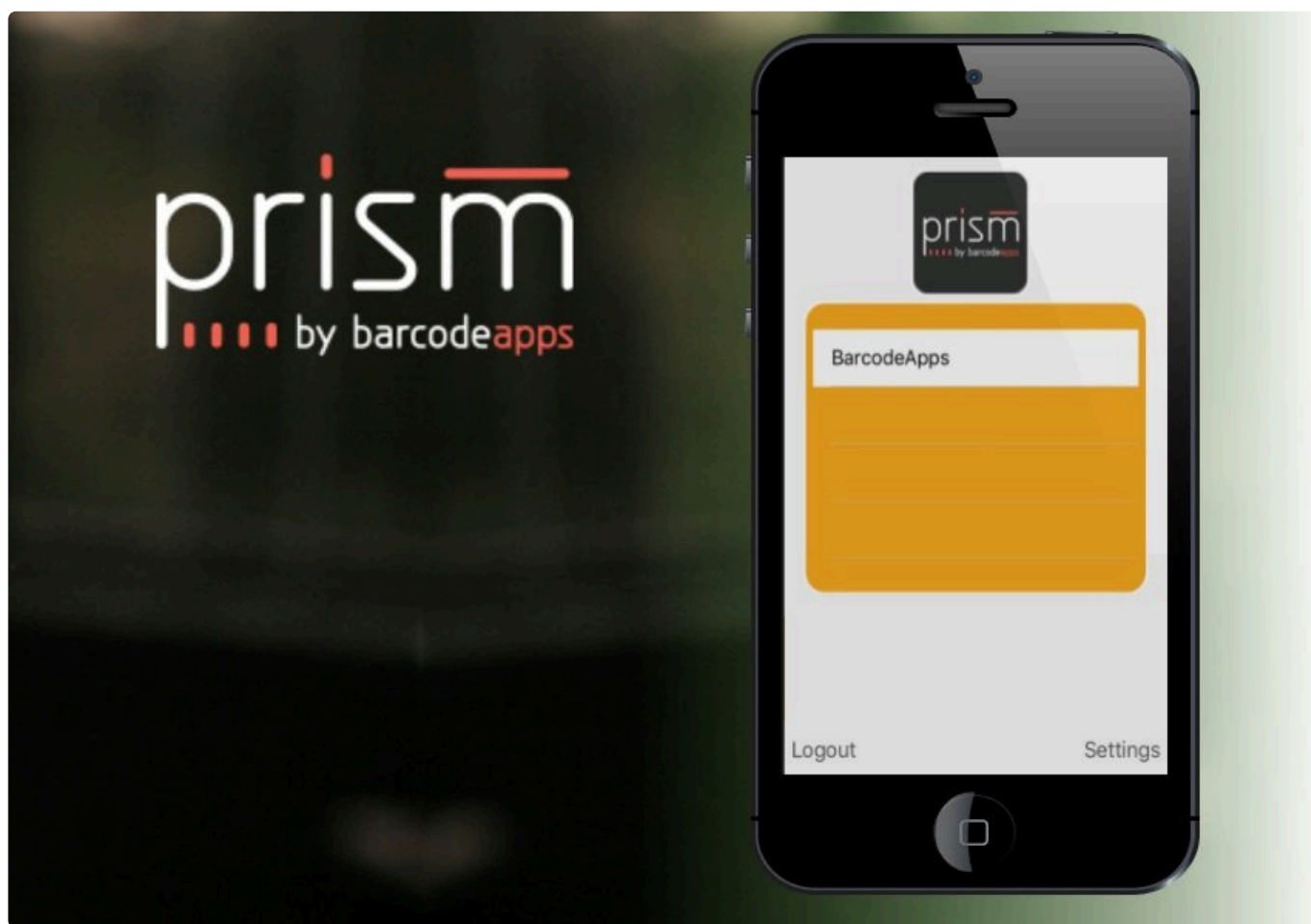
SYSTEM REQUIREMENTS

iOS 6 or newer

32 GB or up

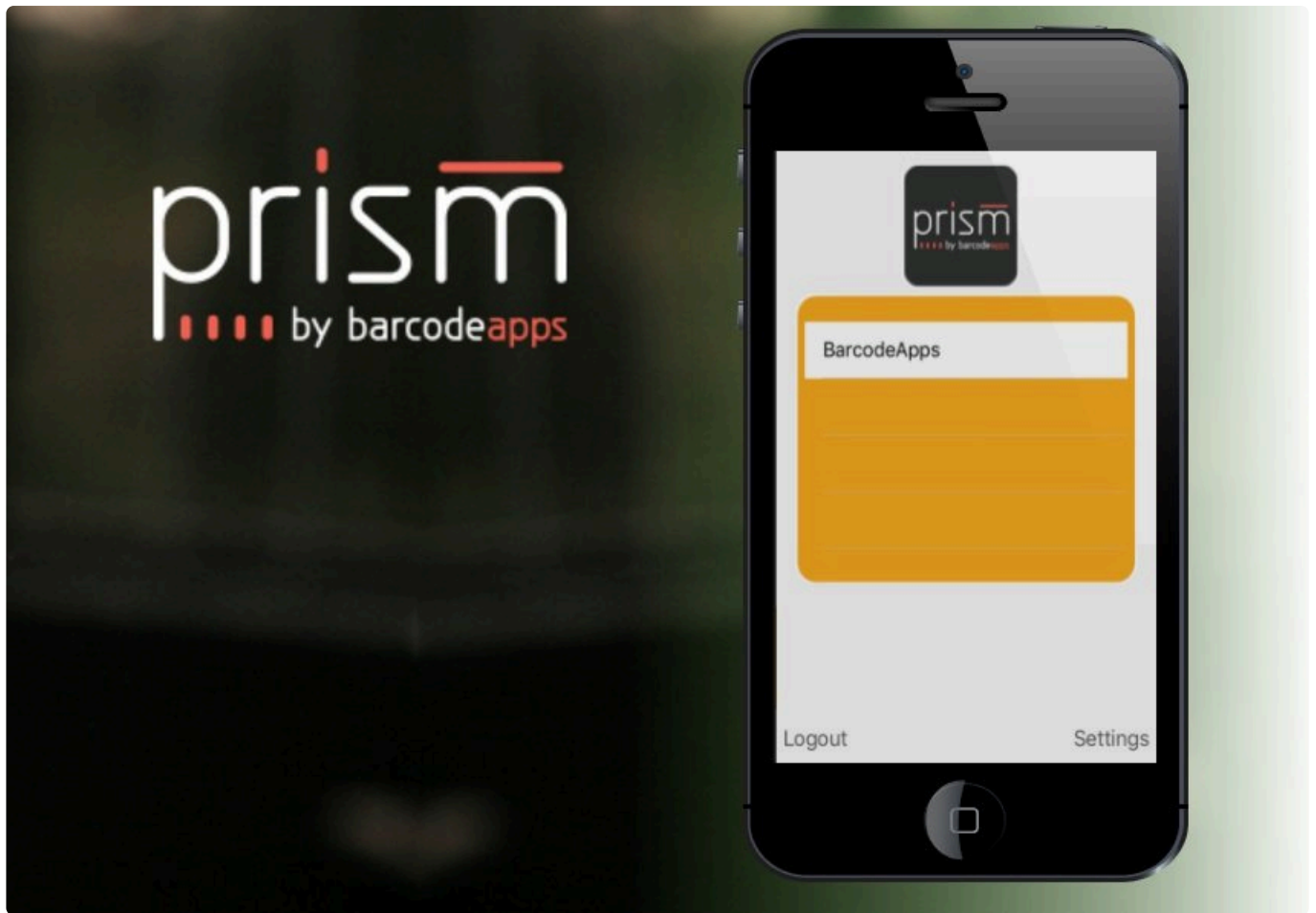
Strong wifi connection

Working email client

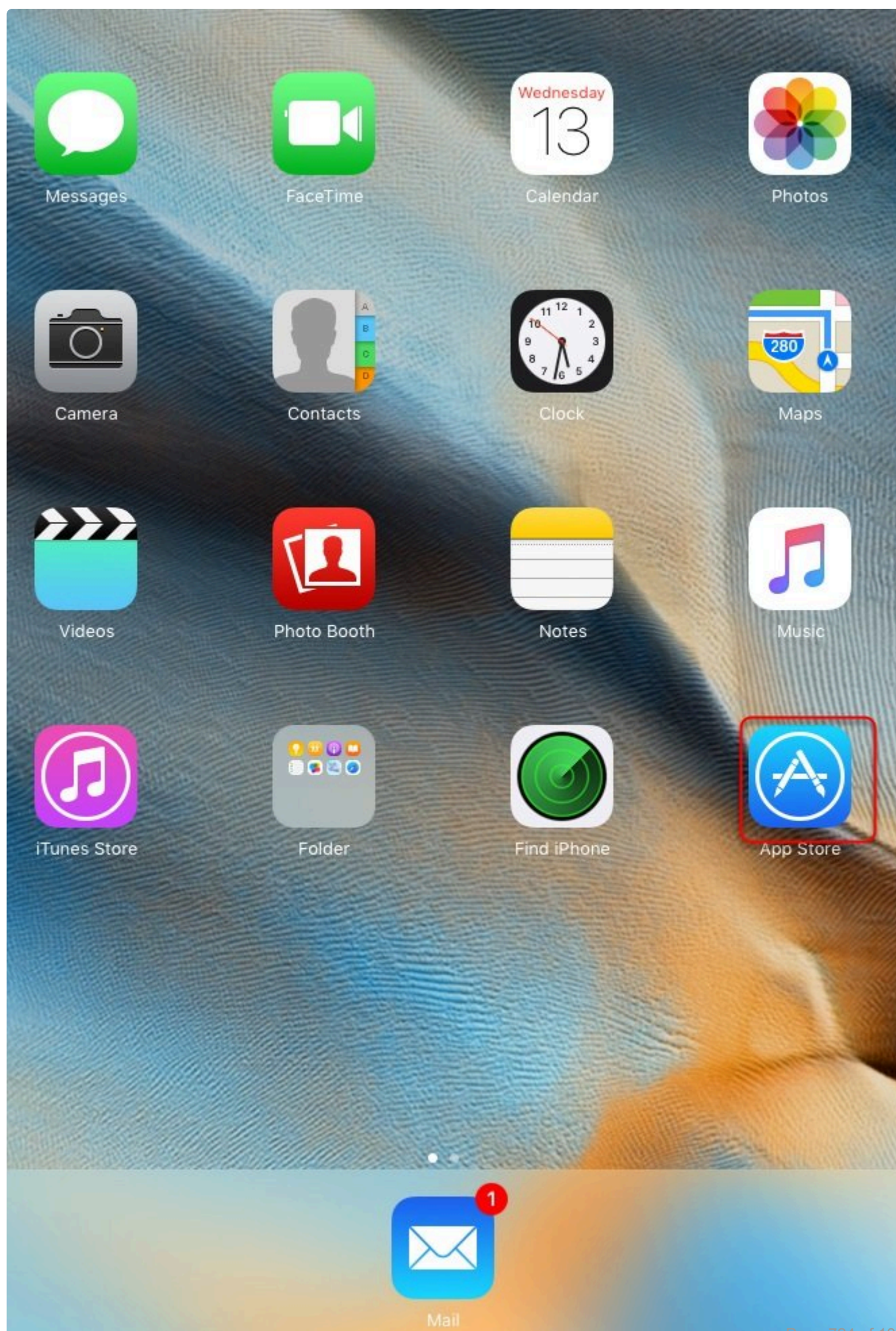


PRISM APP DOWNLOAD AND FIRST TIME SYNC

Open app store from your iOS device



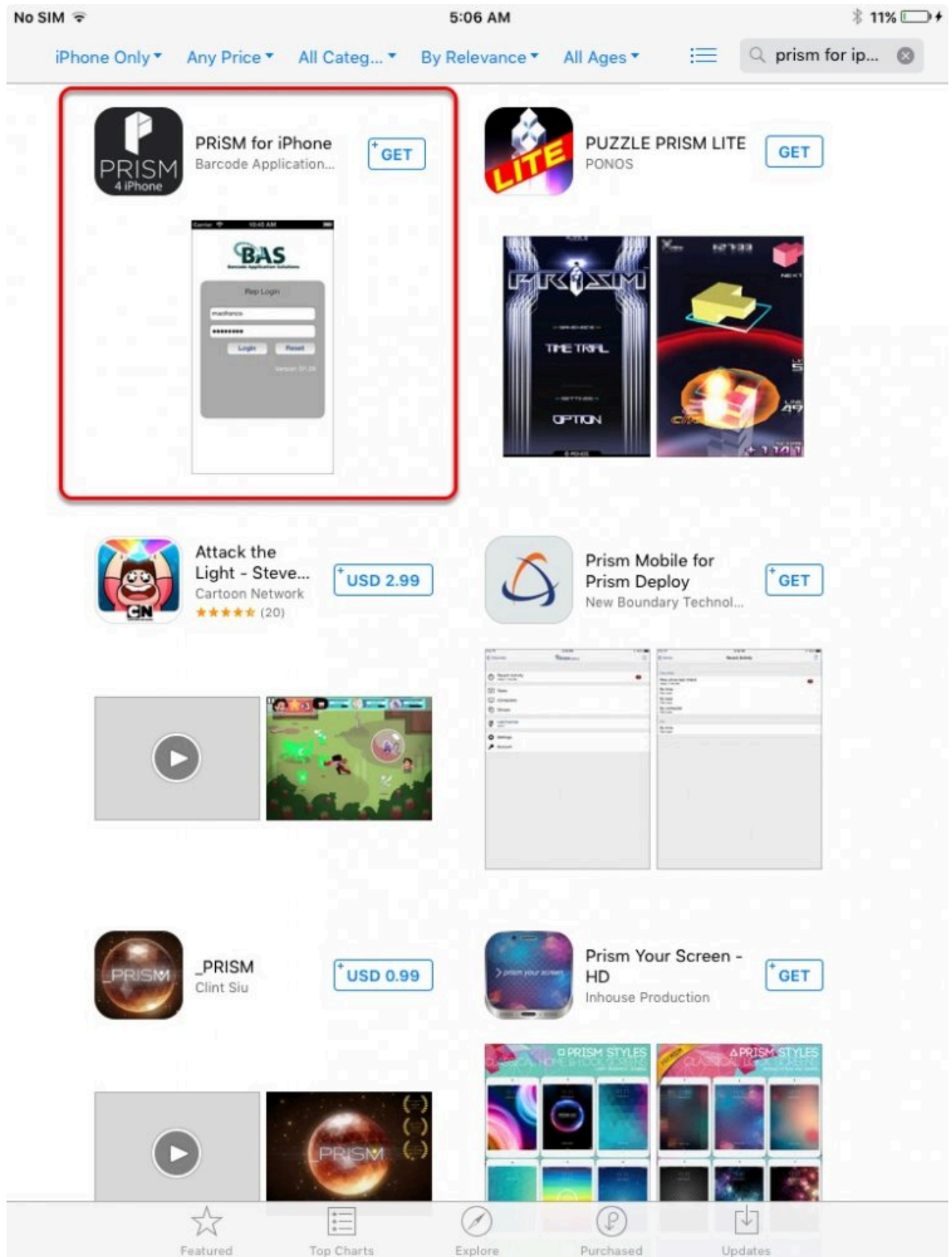
Search for PRISM for IPHONE



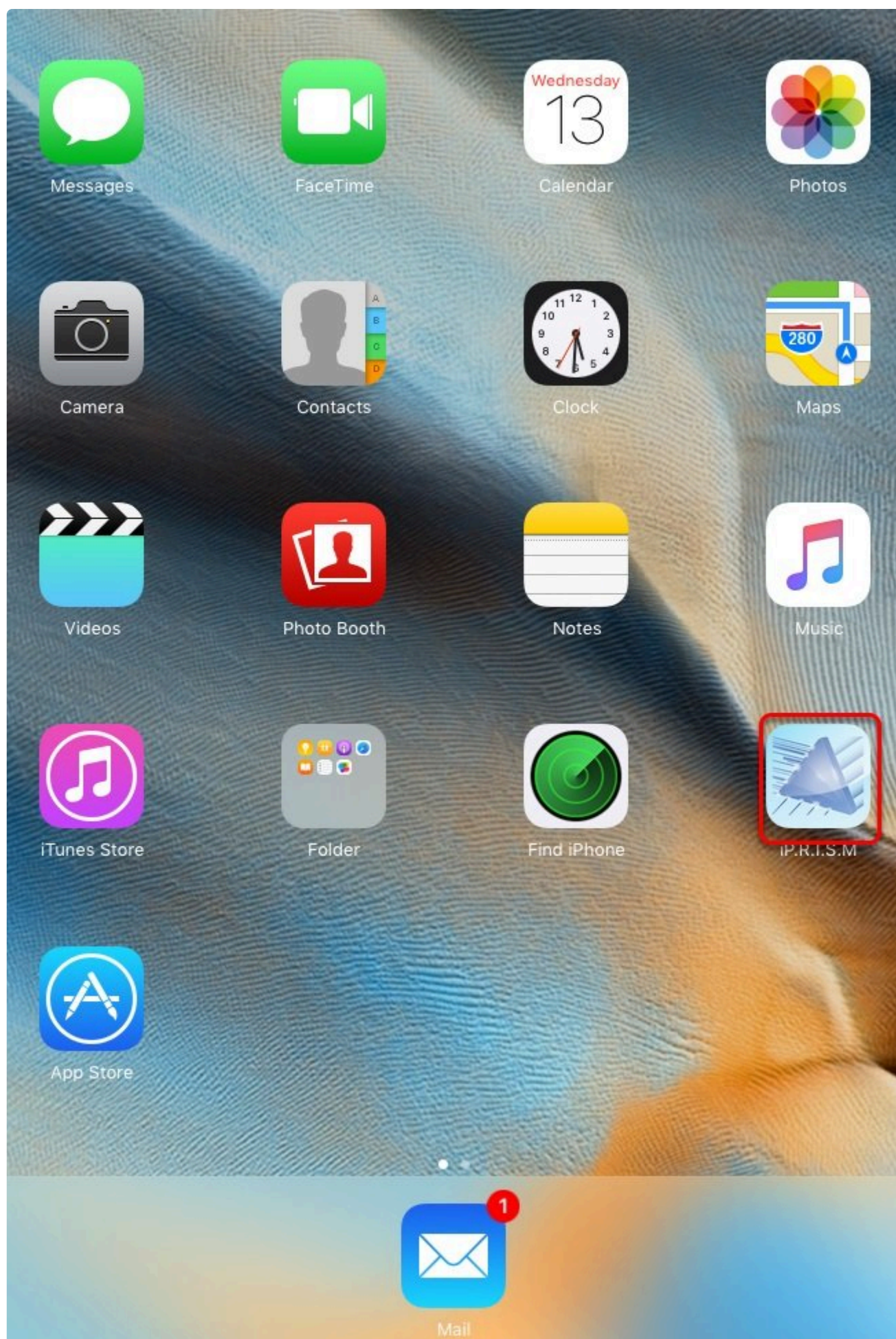
Tap on Get and then Install.



Tap on iP.R.I.S.M



Login using your credentials



Wait for the First Sync to finish.



Sales Rep Login

Login

Reset

Close

Version: D2.03

Sales Rep Login

Customer Login

Congratulations! You can now start using the app.



Syncing Product Images

83%

Manufacturers



Customers



Products



Product Pictures



Skip

5.2. B. How to Login to PRISM App iPhone

5.3. C. How To Create An Order (iPhone)

5.3.1. i. How To Search A Customer

5.3.2. ii. Adding an item from products

This knowledge base article will guide users on how to add an item from Products tab on their PRISM App iPhone.

ADDING AN ITEM FROM PRODUCTS

To add an item, select a customer.

[Home](#)[New Customer](#)[Orders](#)[More](#)**Access Technologies**

*380 St. Catherines St. Unit 15
Montreal*

[More](#)**Ace Electronics**

*1785 Rexway Ave. Suite 8
Toronto*

[More](#)**Acme Electronics Corp.**

*13444 Mockingbird Drive, Unit 35A
King City*

[More](#)

Total Customers : 37

New Order From Previous Customer

Tap on the item or product that you'd like to add on your order.

Back



Products



Access Technologies

**P1210A****\$ 59.99**

T

Semi-gloss resin paint (SP-250)

**PCM3550****\$ 410.0**

T

Personal Hand-held Organizer

**PCM8420****\$ 1049.4**

T

Personal Organizer

**PRCB-250****\$ 129.0**

T

Total Products: 51

Products

Category

Item Code
Ascending

Specify a quantity and then tap Wishlist.

[< Products](#)**PCM3550**

2

Wishlist +**Product 14 of 51**

PCM3550

*Price: \$* 410.0*Discount(%):* 0Personal Hand-held
Organizer

UOM: EA

On Hand: 176

1

1

—

+

Credit

YES

No

Sample

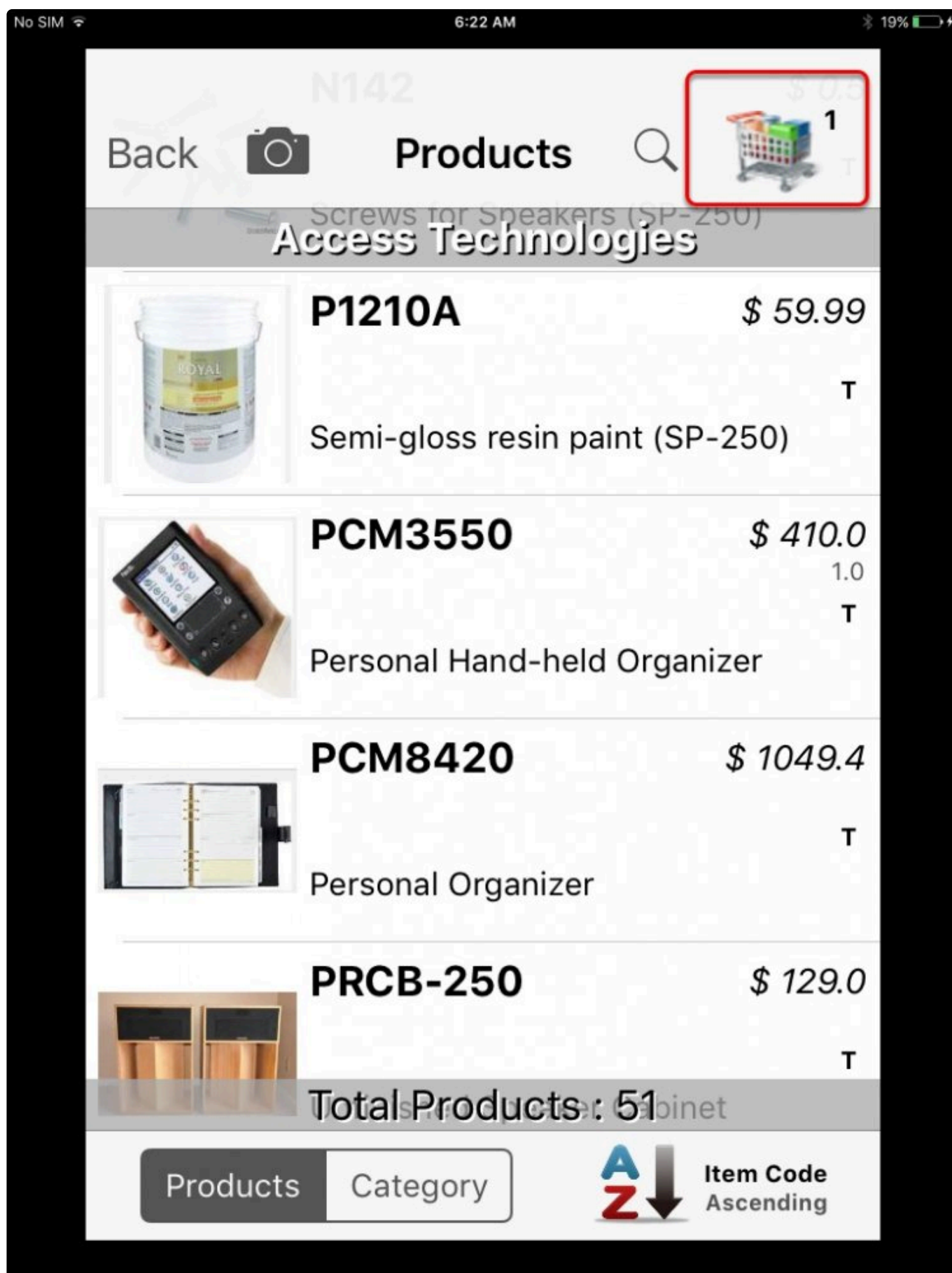
Yes

No

Additional Info :

Additional Info :

Once the item or product has been added you should see it added on your shopping cart (located on the upper right hand corner of your app).

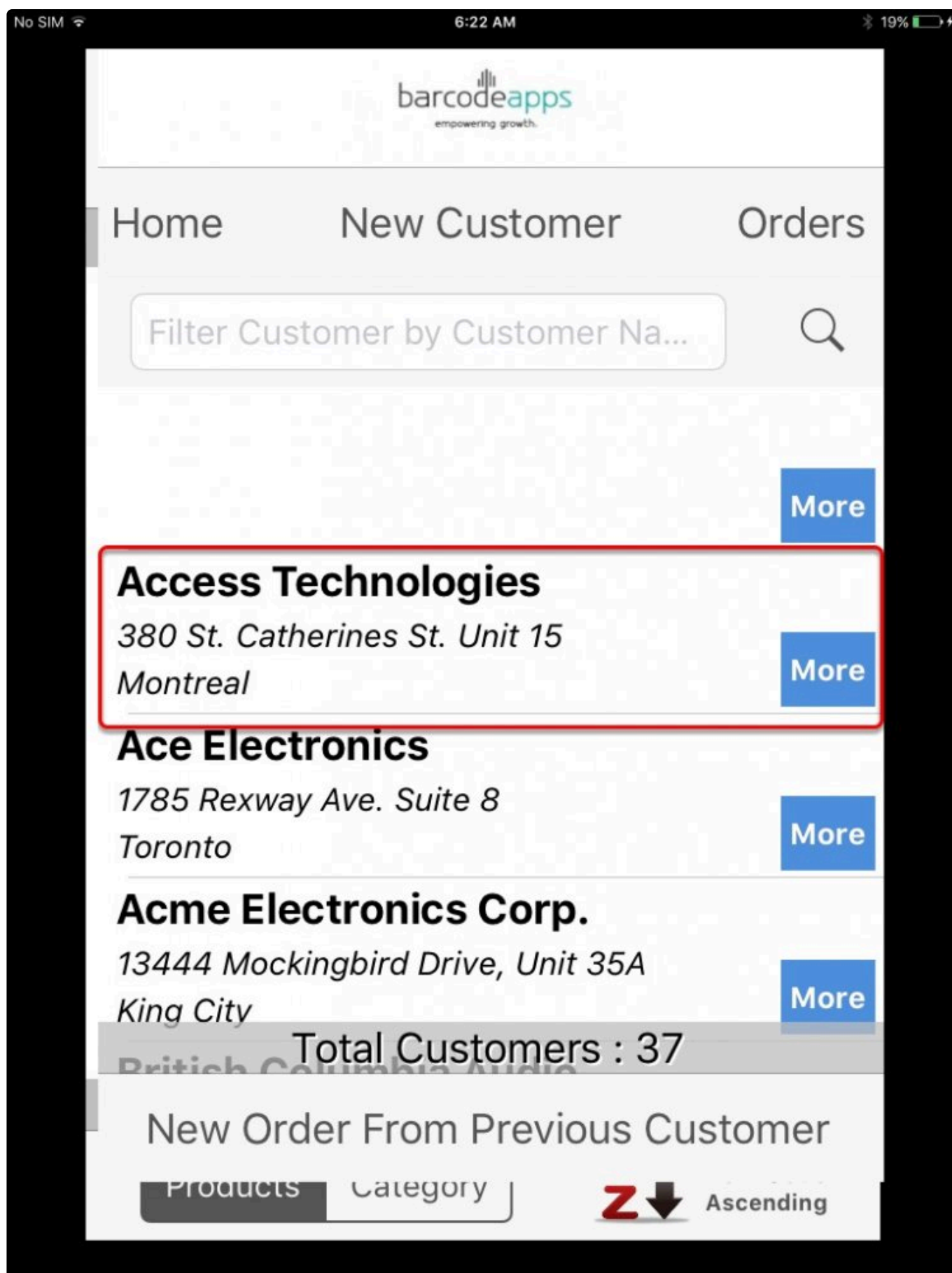


5.3.3. iii. Adding An Item from Categories









This knowledge base article will guide user to add products from category using the prism app iPhone.

ADDING AN ITEM FROM CATEGORY

To add an item from categories, select a customer.



Tap Category.

Back  Products  		
Access Technologies		
	CD-204 Compact Disk Player with Autoskip	\$ 313.7 T
	CD-800 Compact Disk Player - 5 disk capacity	\$ 511.9 T
	EN-BATD Energizer ACCU Rechargeable D Batteries	\$ 9.99 T
	EQ-1245	\$ 107.6 T
Total Products : 51		
<div>Products</div> <div>Category</div>		 <div>Item Code Ascending</div>

Tap the Category.

[Back](#)**Products**

Access Technologies



COMPONENTS



COMPUTERS



DVD



HOME SYSTEM

Total Products : 9

[Products](#)[Category](#)

**Description
Ascending**

Tap on any item or product image to add to your order.

[Back](#)[Products](#)

Access Technologies

\$ 193.5



Digital-VHS VCR with HDTV-Recording

T

V1-4A

\$ 473.9



Hi-fi Stereo 4 Head VCR

T

STS-01

\$ 2194.5



Home Sound System with MP3 Decoder

T

XBX1

\$ 500



Microsoft Xbox One W/ 1 controller and Kinect Sensor

Total Products : 6[Products](#)[Category](#)**Description
Ascending**

Tap on the shopping cart once to proceed on completing the order.

Back



Products



Access Technologies

**V1-2A****\$ 193.5**

1.0

T

Digital-VHS VCR with HDTV-Recording

V1-4A**\$ 473.9****T**

Hi-fi Stereo 4 Head VCR

**STS-01****\$ 2194.5****T**

Home Sound System with MP3 Decoder

**XBX1****\$ 500**

1.0

Microsoft Xbox One W/ 1 Controller and Kinect Sensor

Total Products : 6

Products

Category






Description
Ascending


5.3.4. iv. Editing an Order


This knowledge base article will guide users to edit an order using the PRISM App iPhone.


EDITING AN ORDER


To Edit an order, Open the shopping cart.

[Back](#)  **Products**  

**Access Technologies**
SP-20 **\$ 146.9**
T
Speakers - 10" Bookshelf


**SP-250** **\$ 271.7**
1.0
T
Speakers - Indoor/Outdoor

**SP-30** **\$ 185.4**
T
Speakers - Ceiling

**SP-303** **\$ 453.8**
T
Speakers - Wharfedale Floor

Total Products : 51

Products **Category**

 **Item Code Ascending**

To Change Quantity. Tap on the Plus or Minus sign.

[Products](#) **Order Review**

Access Technologies **All products**

No of Items # 2 **Order no # 1**

	Order ID	Item Code	Description
<div><div><div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div><div><div></div><div></div><div></div></div></div></div> <div><div><div></div><div></div><div></div></div><div><div></div><div></div><div></div></div></div>			

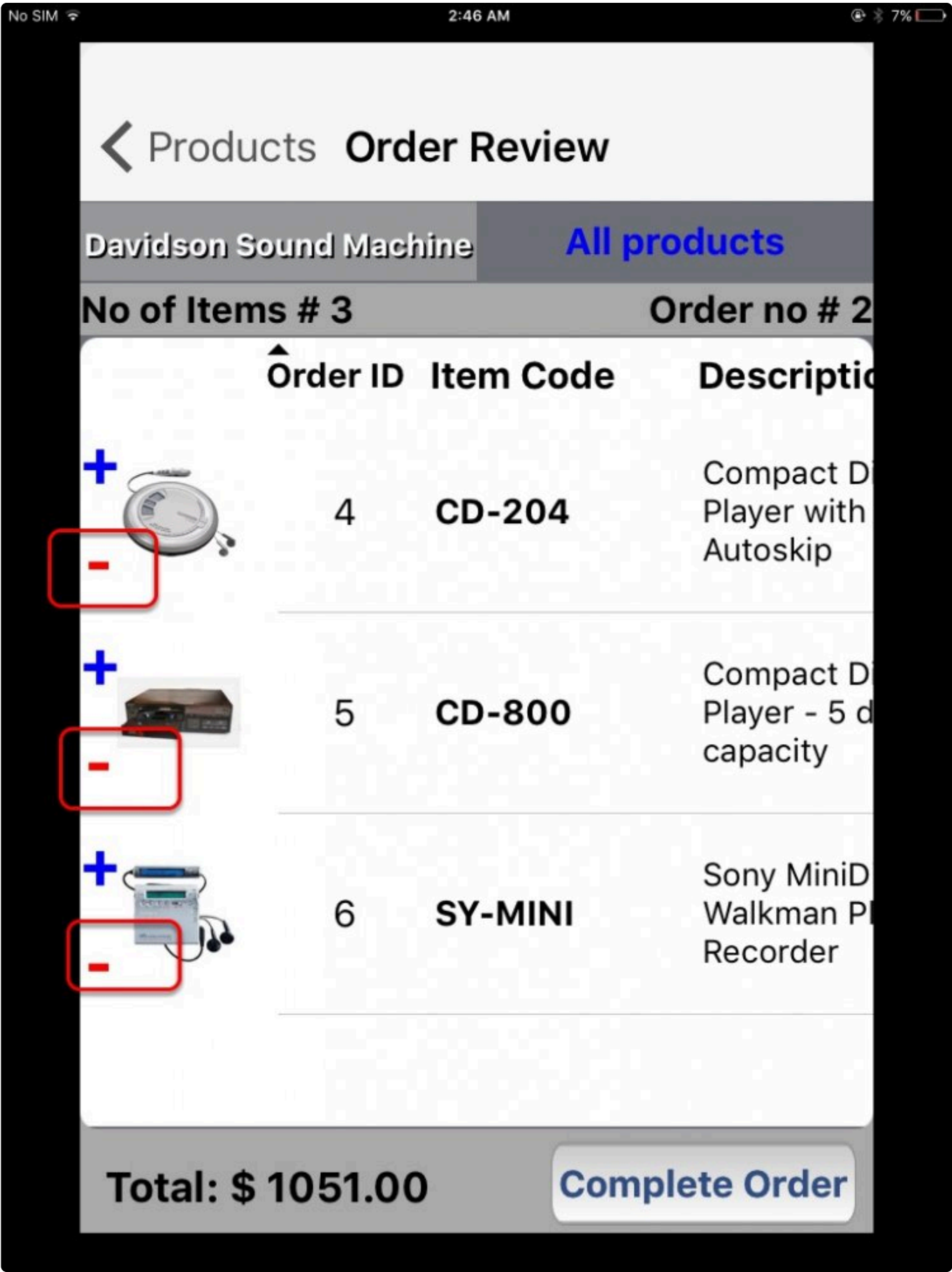
2

PCM3550

Personal Handheld Organizer

Total: \$ 1911.70 **Complete Order**

To remove an item, tap on the minus until the quantity reaches zero.











5.3.5. v. Completing An Order

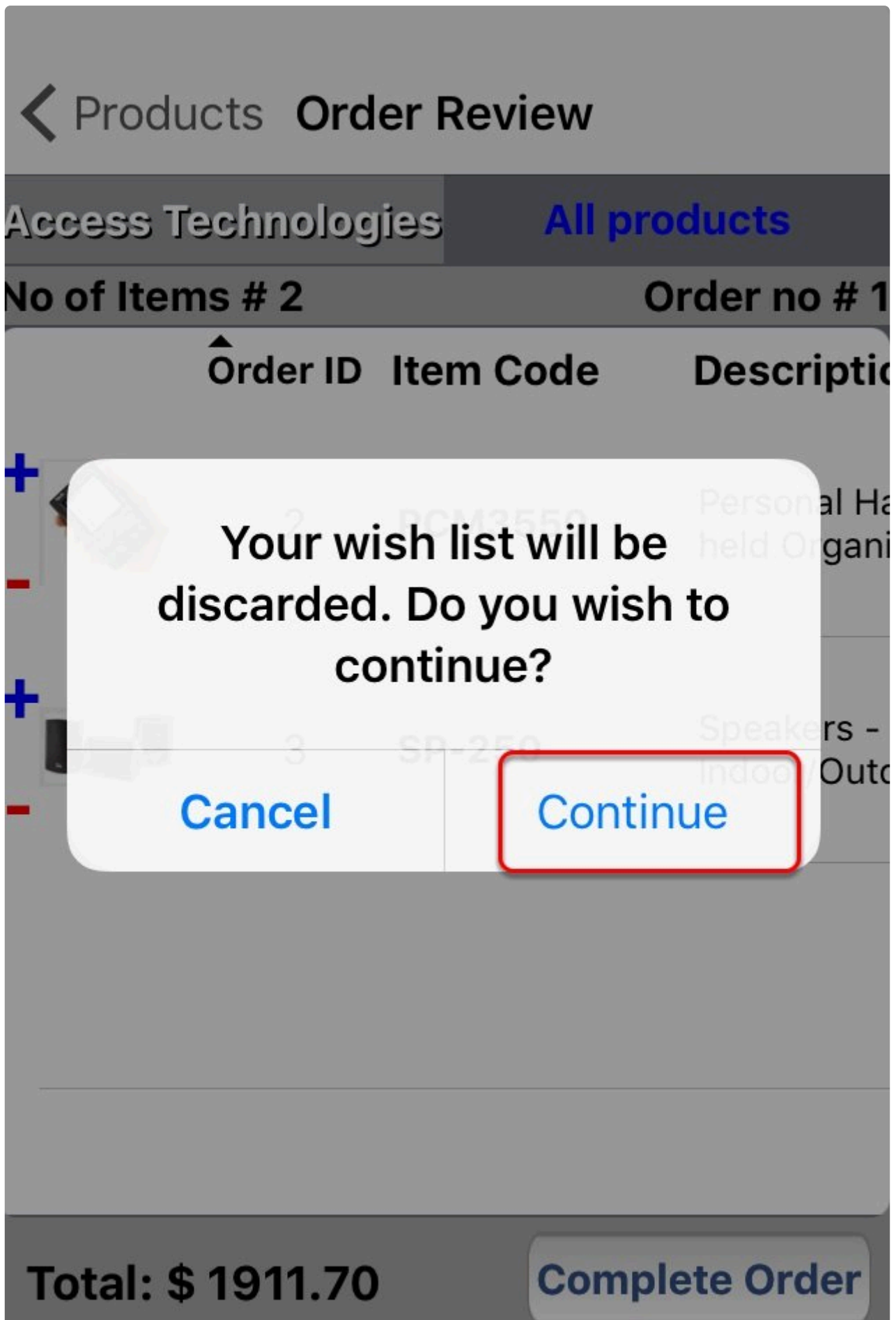
This knowledge base article will guide users to complete an order using the PRISM App iPhone.

COMPLETING AN ORDER

To complete an order, tap on the shopping cart.

Back				Products					
Access Technologies									
		SP-20				\$ 146.9		T	
Speakers - 10" Bookshelf									
		SP-250				\$ 271.7		1.0	
Speakers - Indoor/Outdoor									
		SP-30				\$ 185.4		T	
Speakers - Ceiling									
		SP-303				\$ 453.8		T	
Speakers - Wharfedale Floor									
Total Products : 51									
Products		Category				Item Code Ascending			

Click on Continue



Tap on complete order.

Products **Order Review**

Access Technologies**All products****No of Items # 2****Order no # 1**

	Order ID	Item Code	Description
--	-----------------	------------------	--------------------

**2****PCM3550**Personal Ha
held Organi**3****SP-250**Speakers -
Indoor/Outc**Total: \$ 1911.70****Complete Order**

Fill out the needed information and then tap on confirm.

 Order Review **Corfirm Order**

Access Technologies

No. of items # 1

Order no #

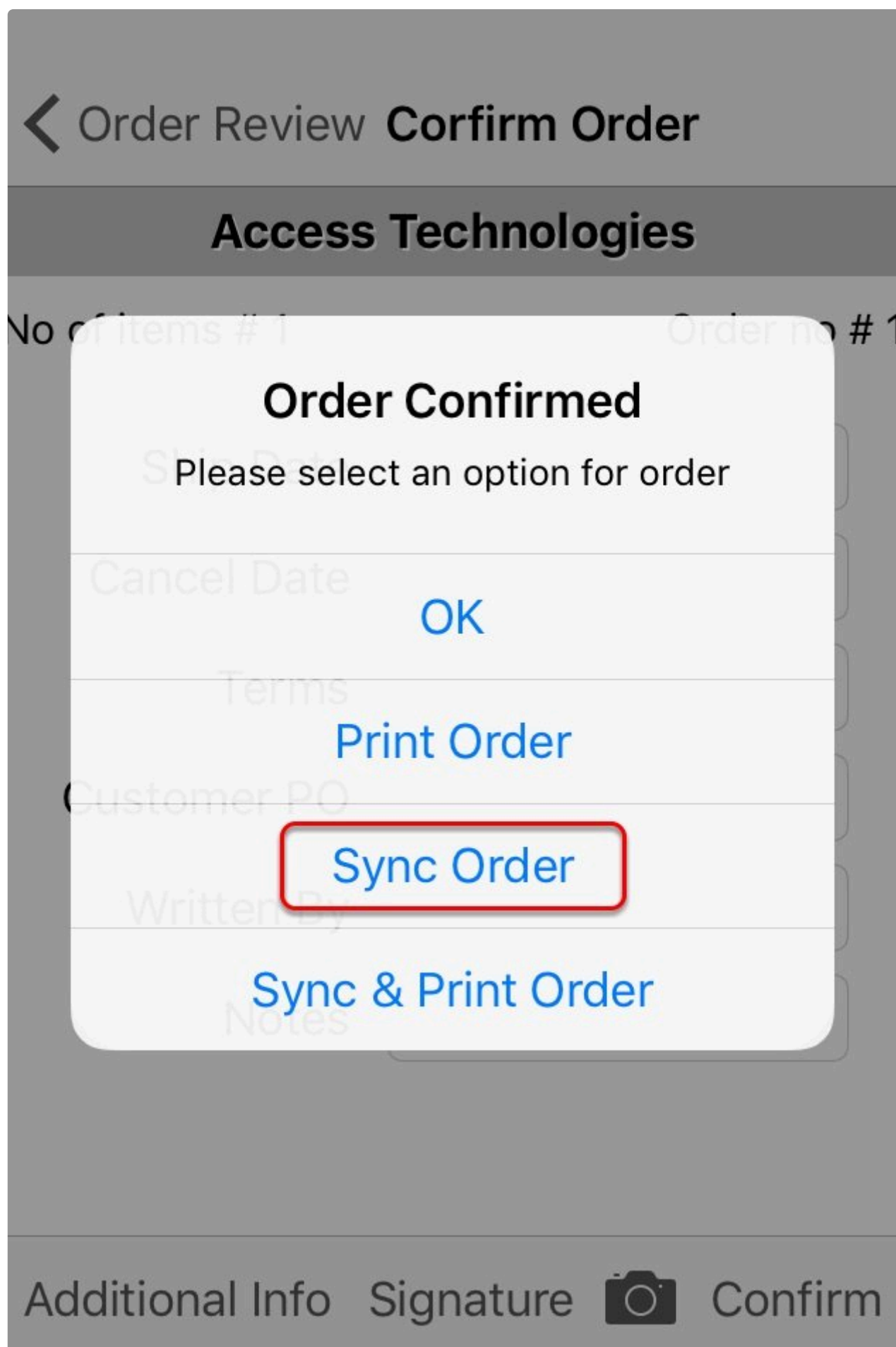
Ship Date	<input type="text"/>
Cancel Date	<input type="text"/>
Terms	<input type="text"/>
Customer PO	<input type="text"/>
Written By	<input type="text"/>
Notes	<input type="text"/>

Additional Info Signature



Confirm

Tap on Sync Order to finish.



5.3.6. vi. Adding Item With A Bluetooth Scanner

6. PRISM INTEGRATIONS

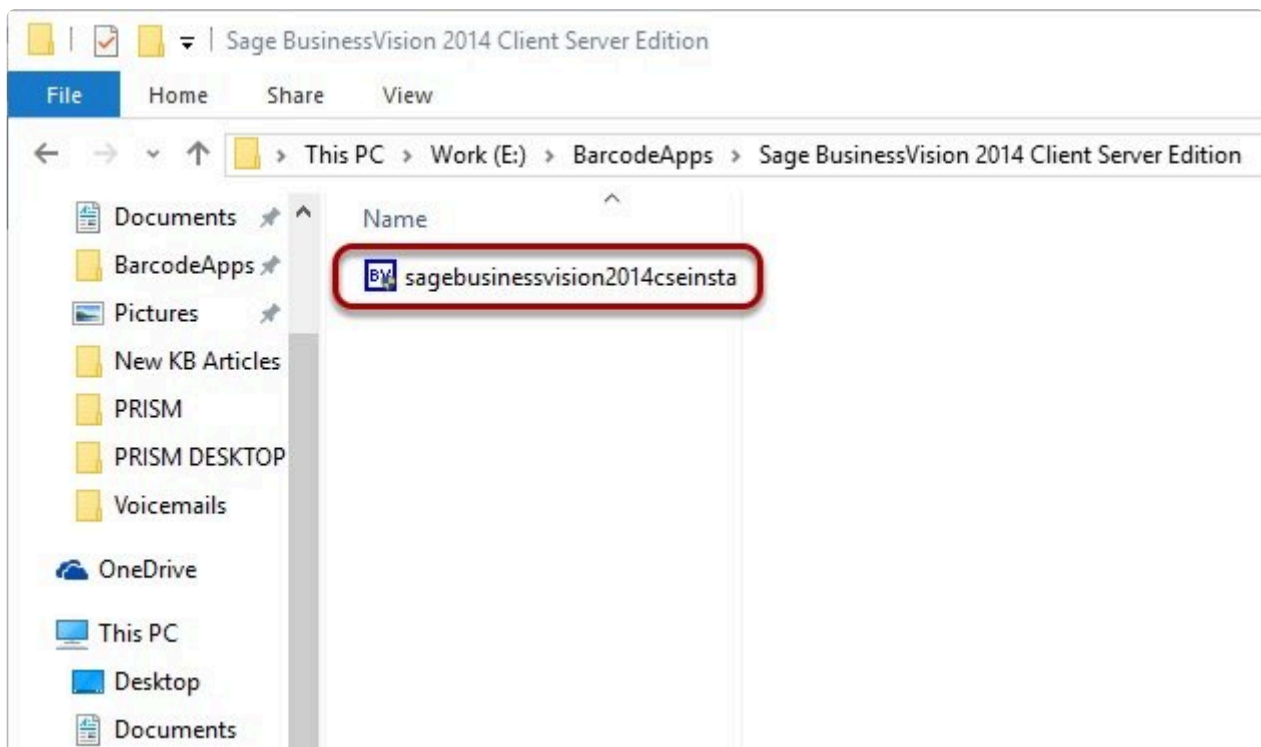
6.1. I. SAGE BUSINESS VISION

6.1.1. Sage Business Vision Installation

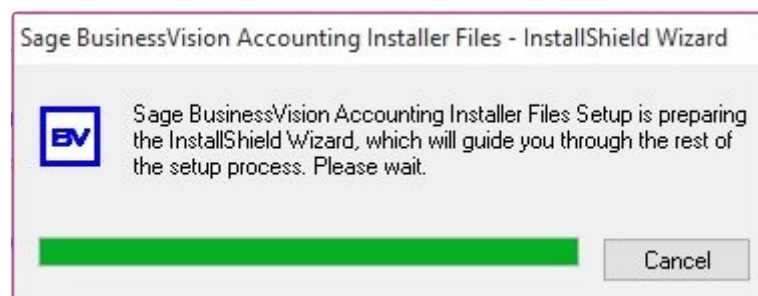
This knowledge base article will guide you on how to install Sage Business Vision.

SAGE BV INSTALL GUIDE

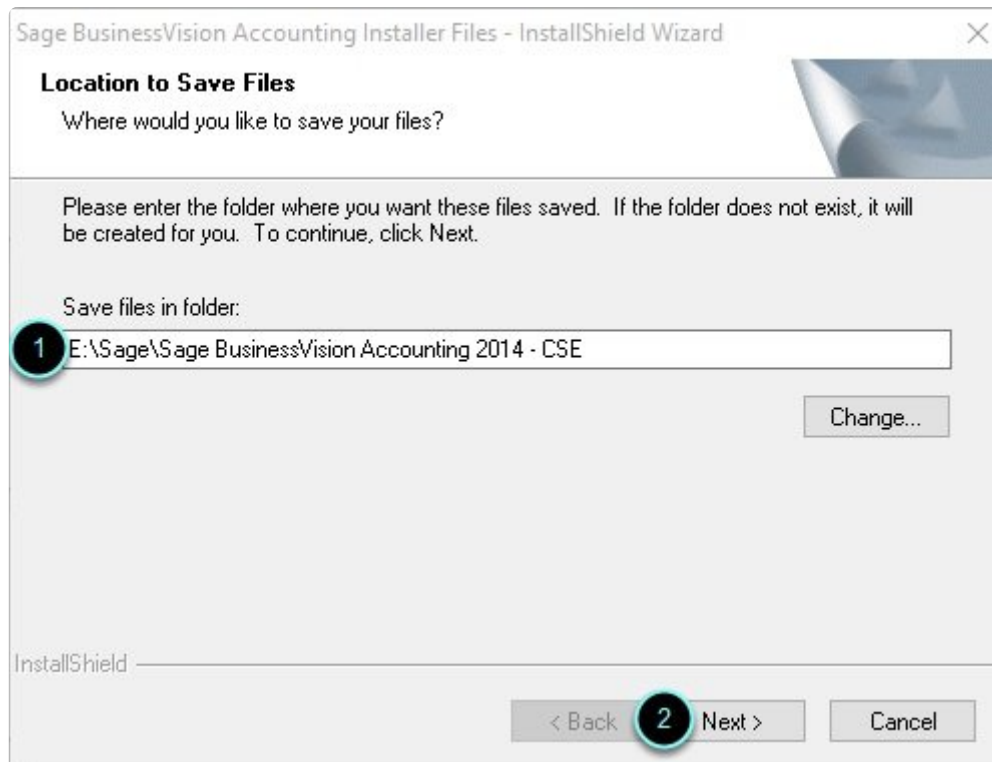
Download and run Sage Business Vision installer.



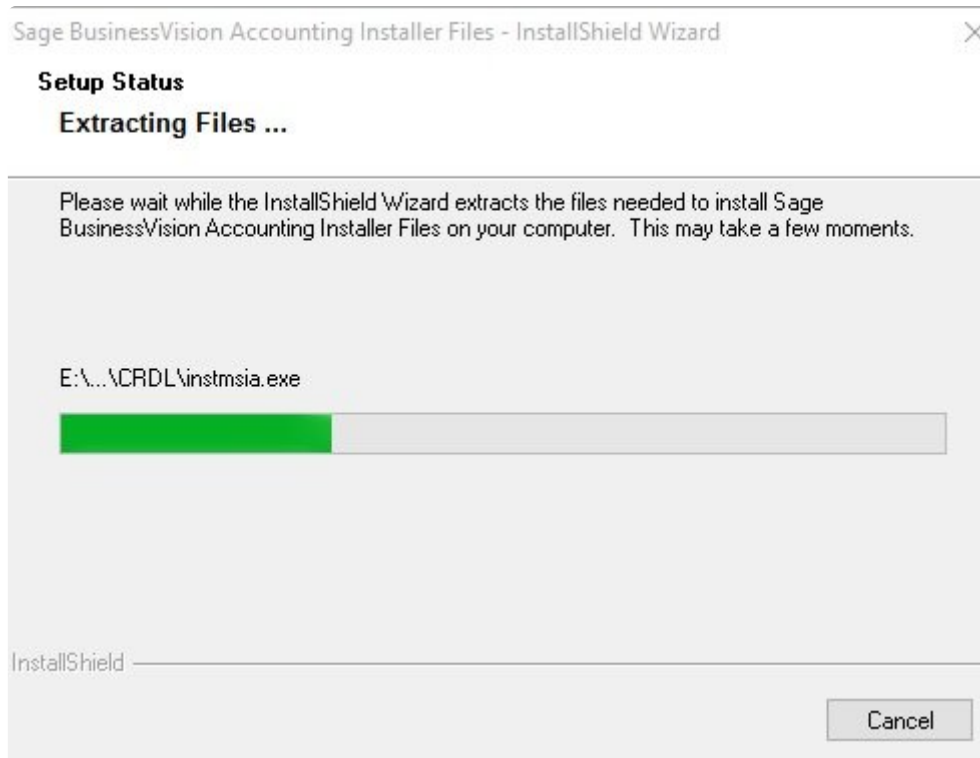
Preparing Install Shield Wizard...



Select a folder location then click Next.



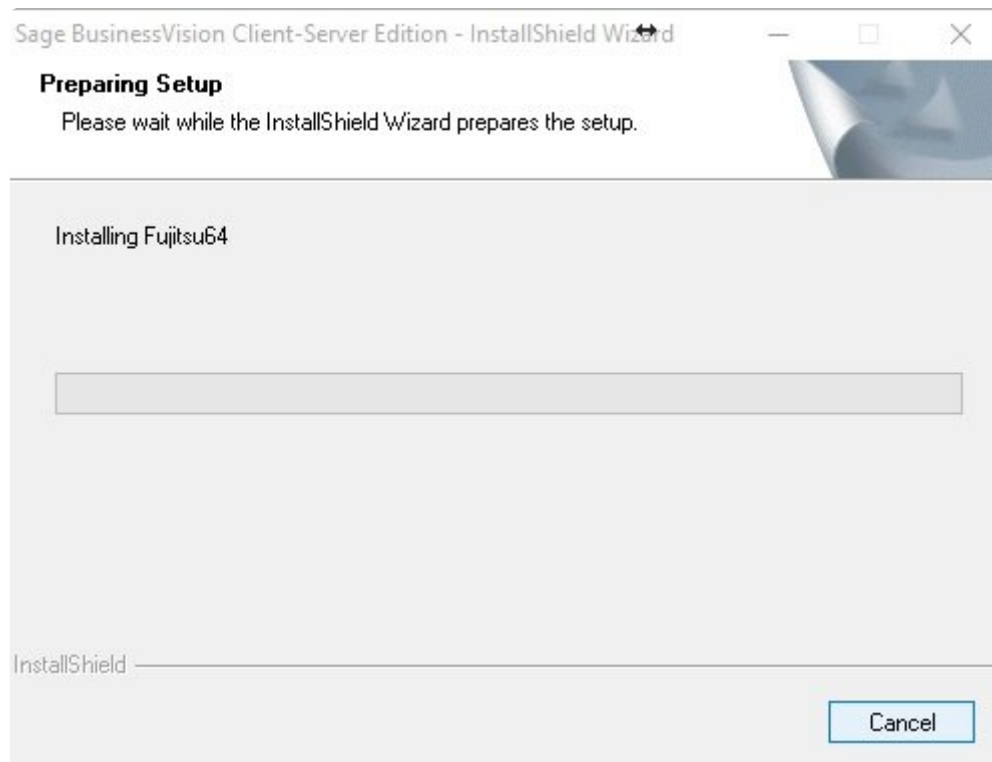
Extracting Files...



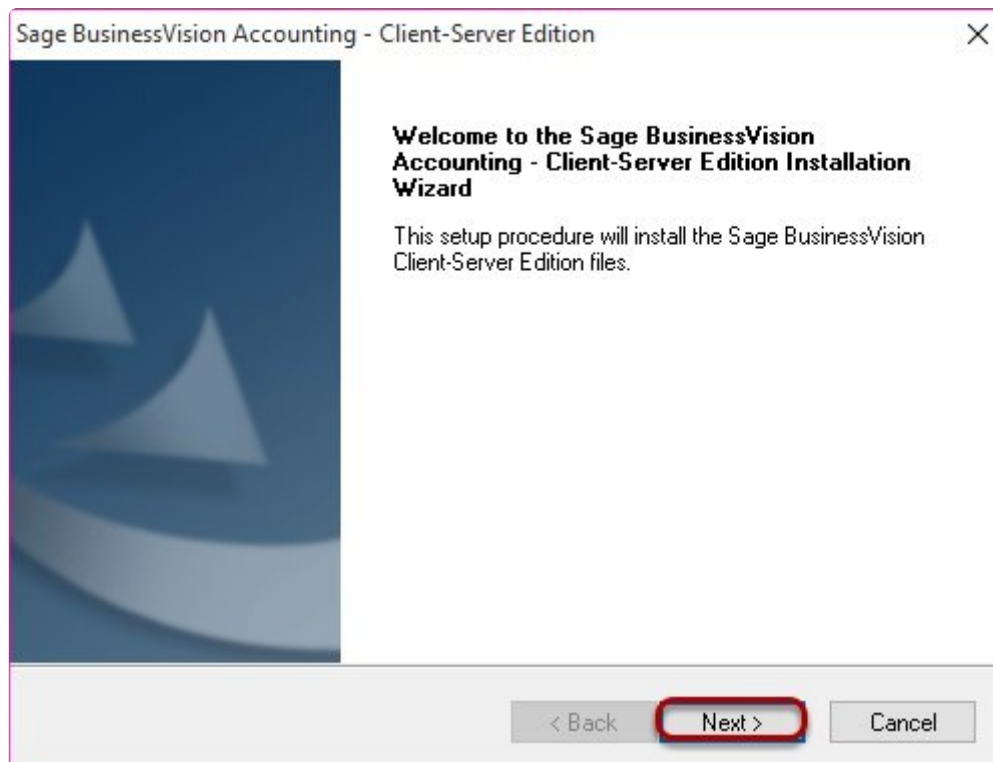
Click Install Sage BusinessVision.



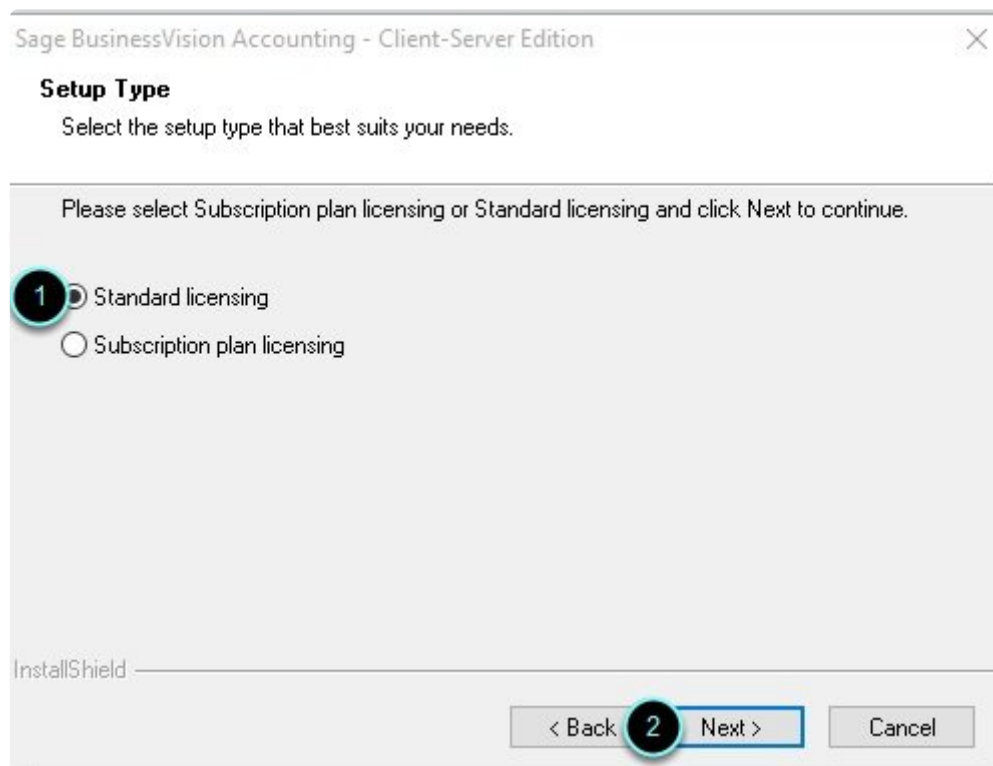
Preparing Setup...



Click Next.



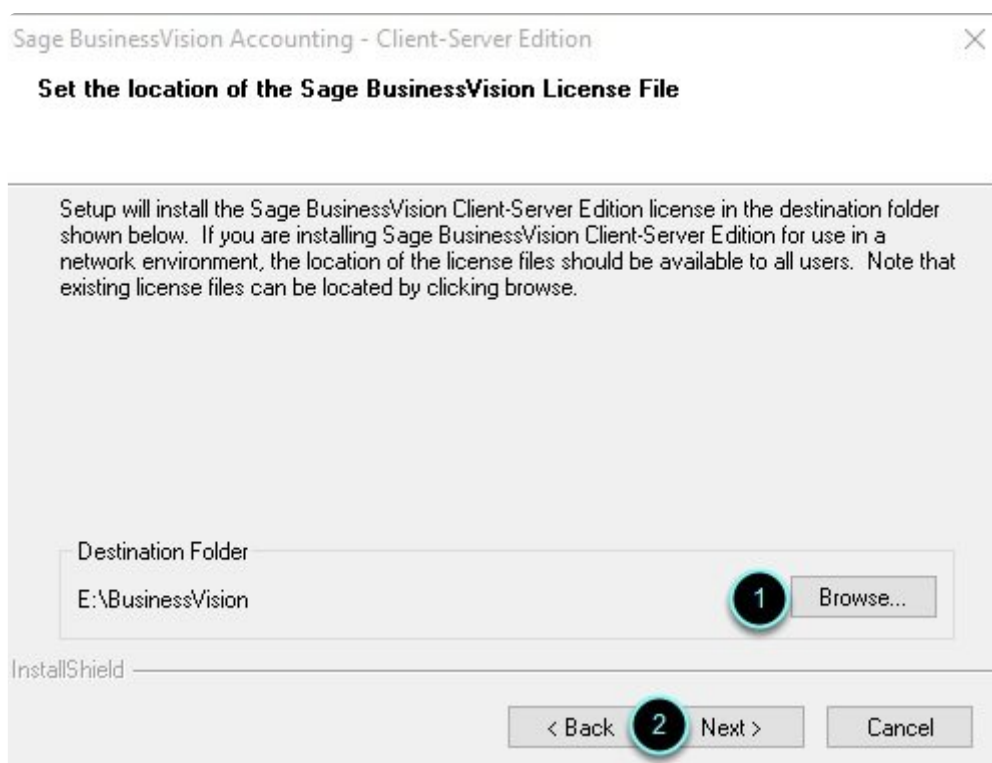
Select Standard licensing. Then click Next.



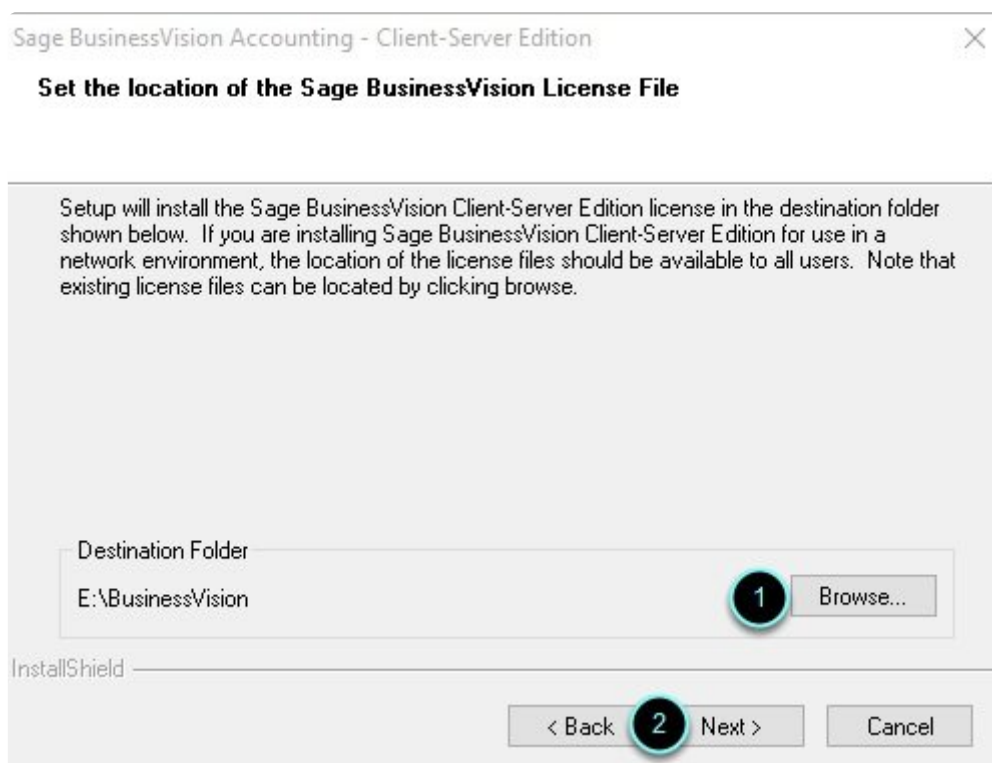
Select I accept then click Next.



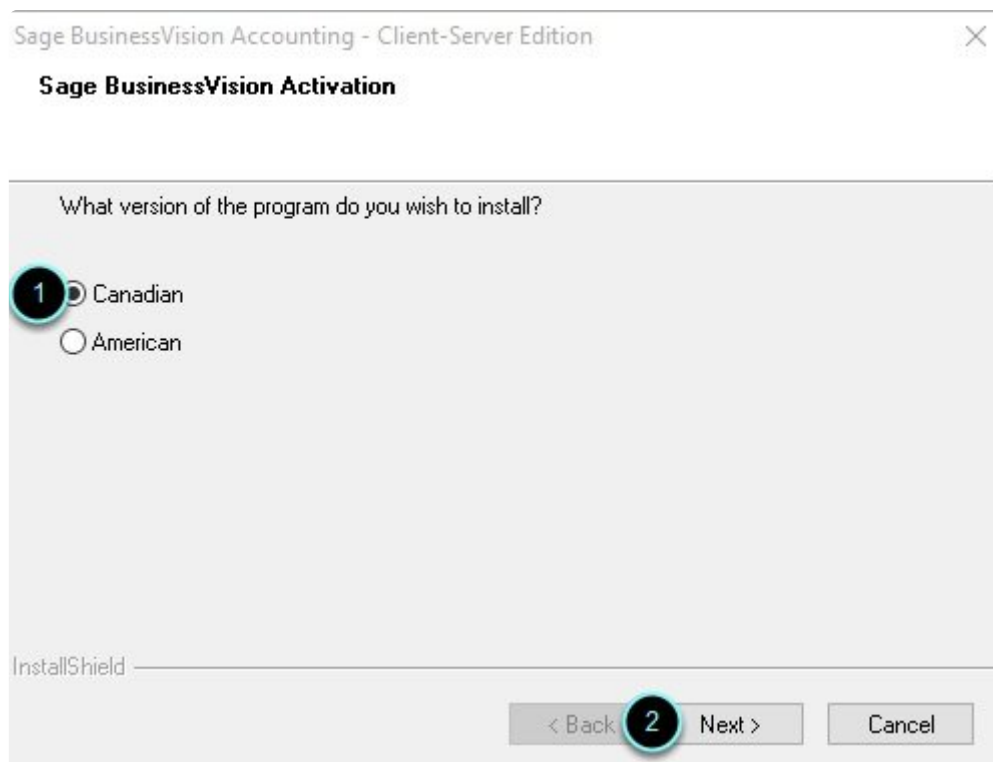
Select the location of the license file. Then click Next.



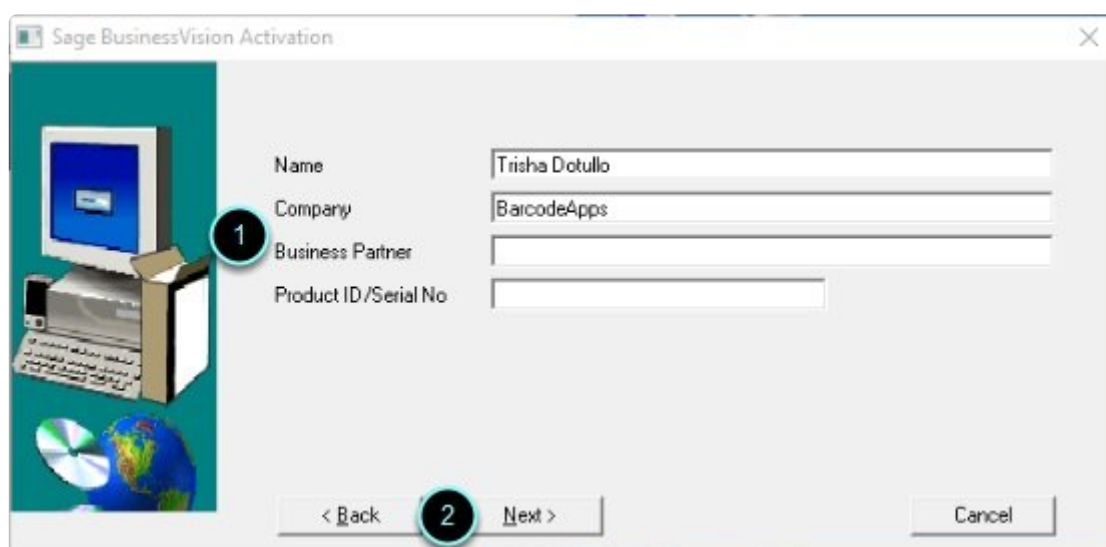
Select I have an activation code. Click Next.



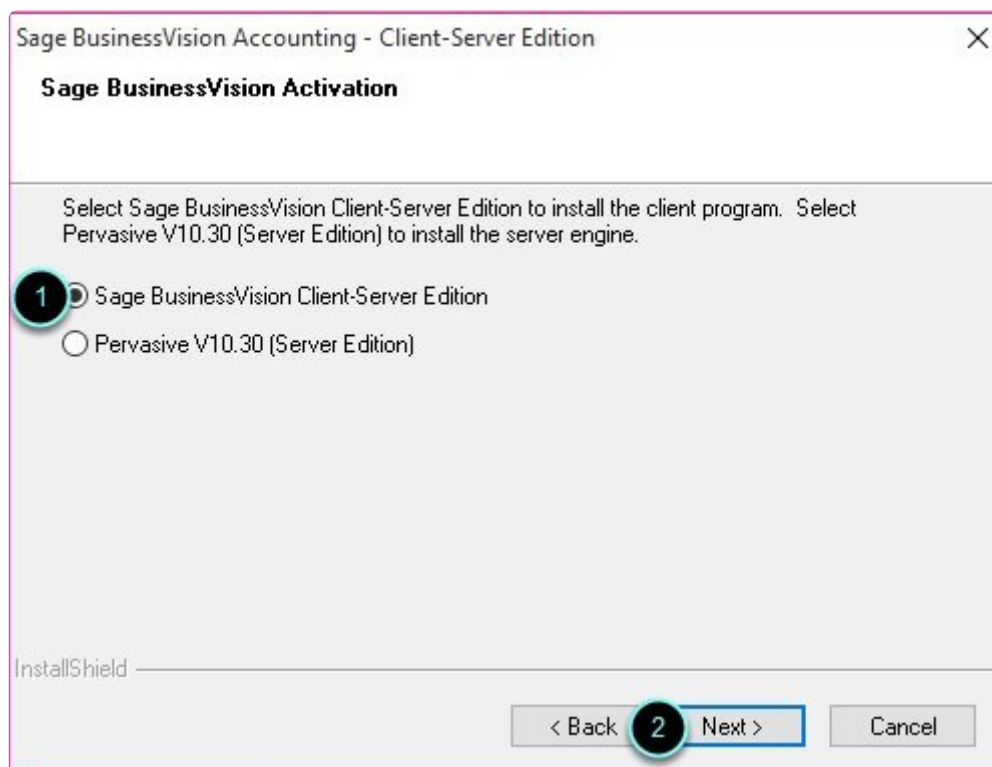
Select your program version and then click Next.



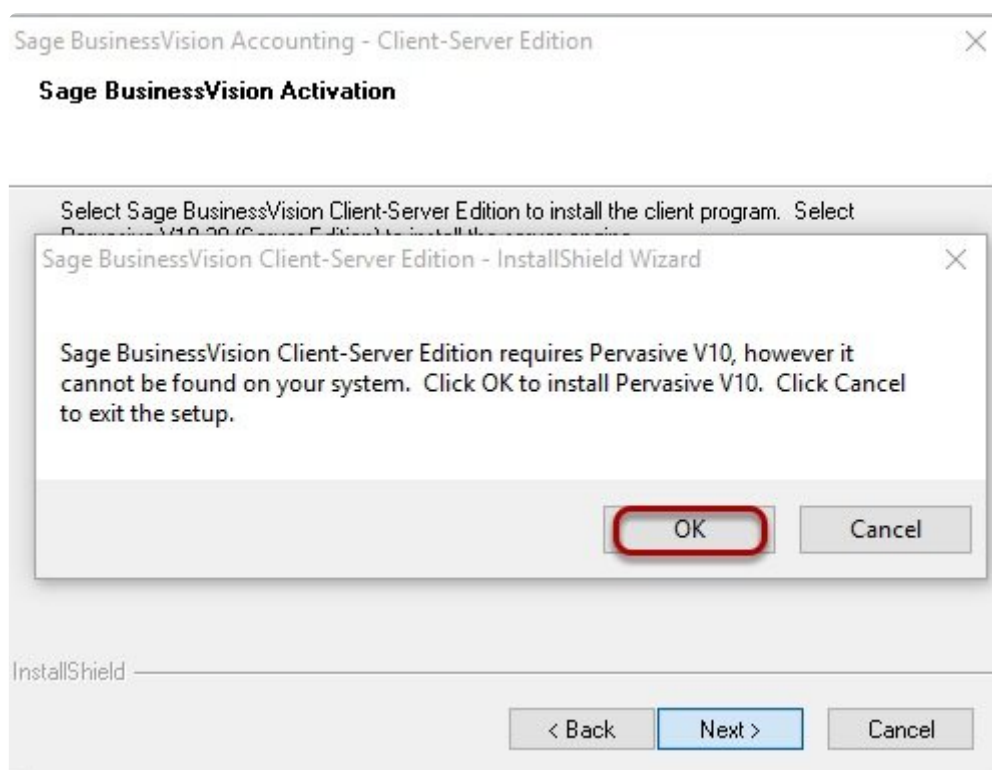
Fill out the activation screen. Click Next once done.



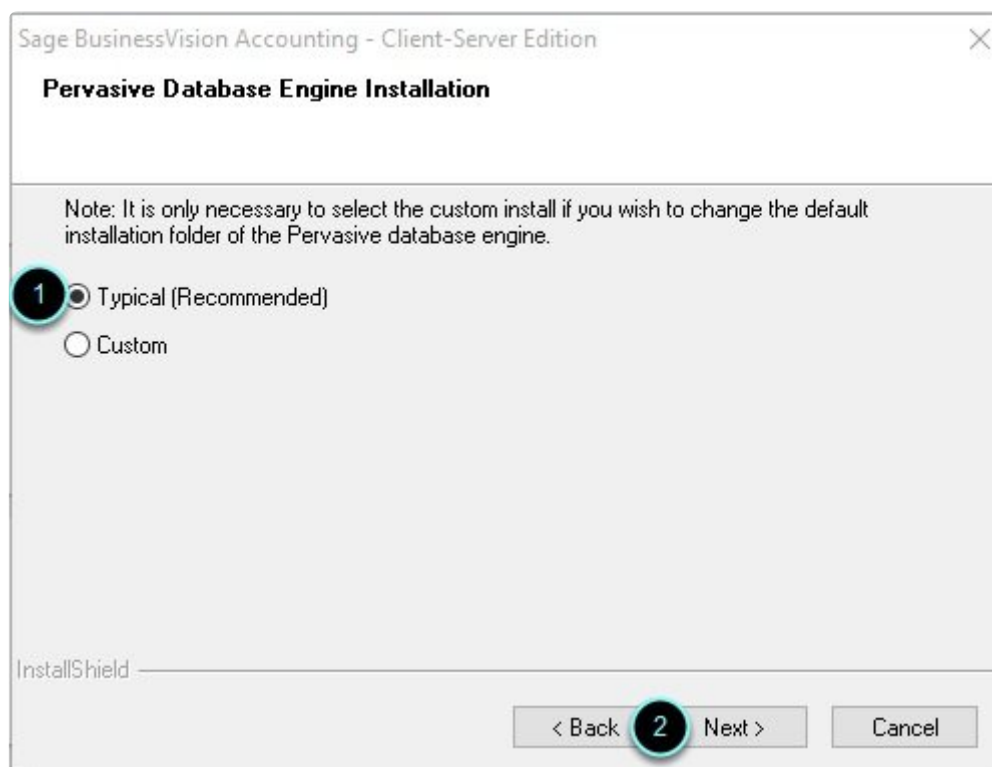
Select Sage BusinessVision Client-Server Edition. Click Next.



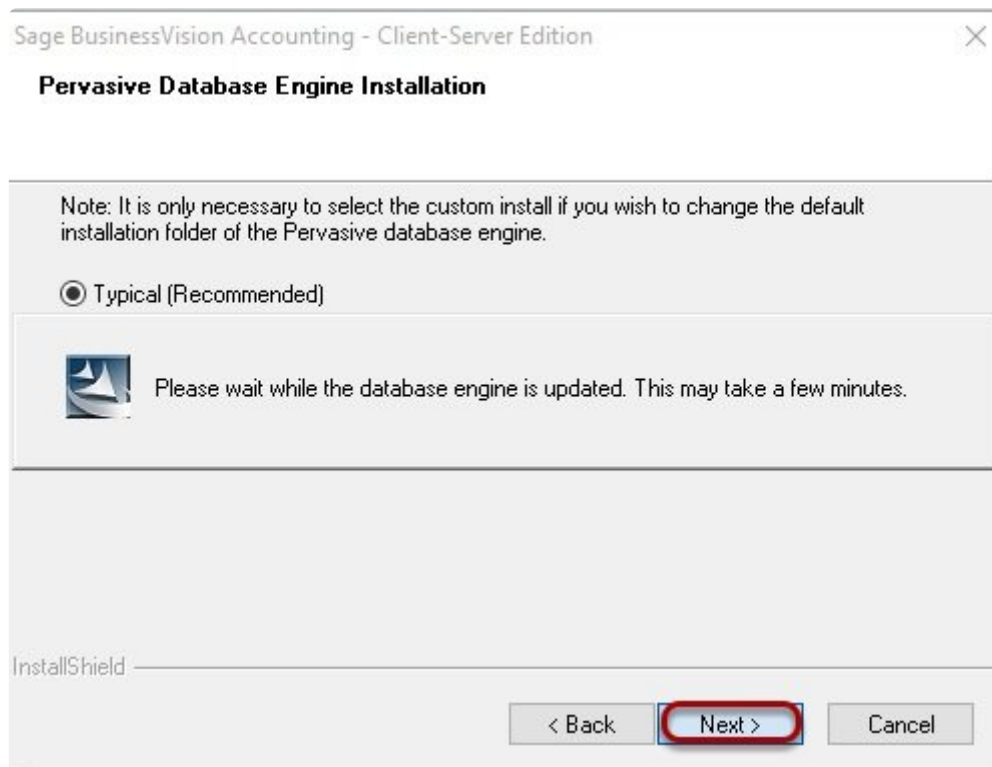
Click OK.



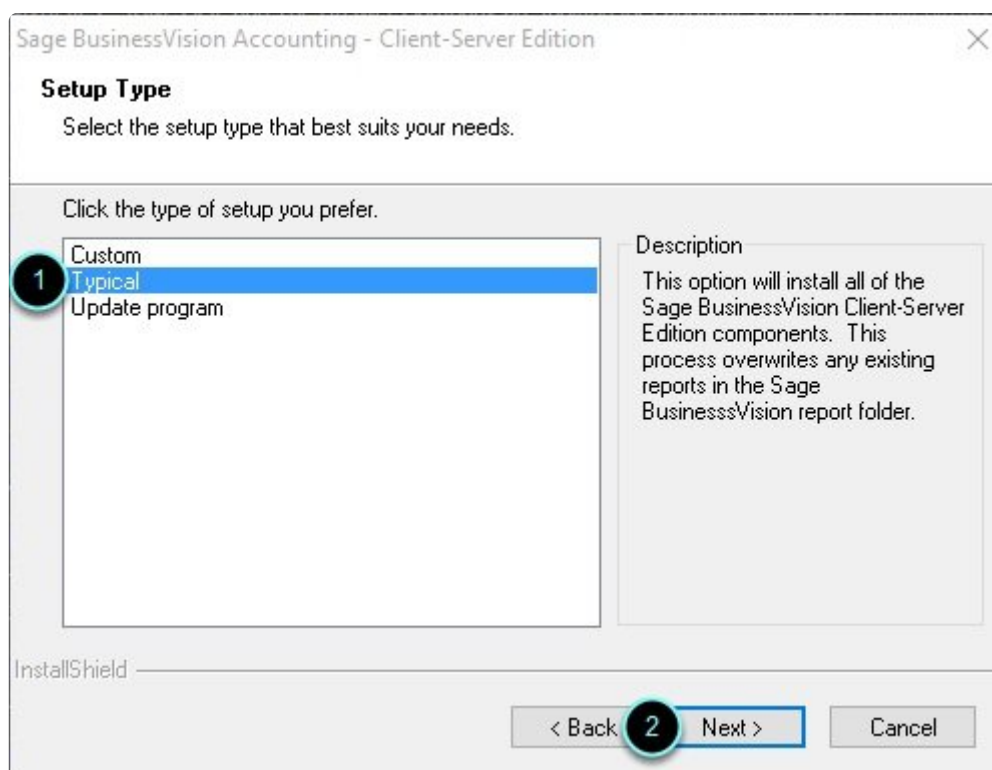
Select Typical and click Next.



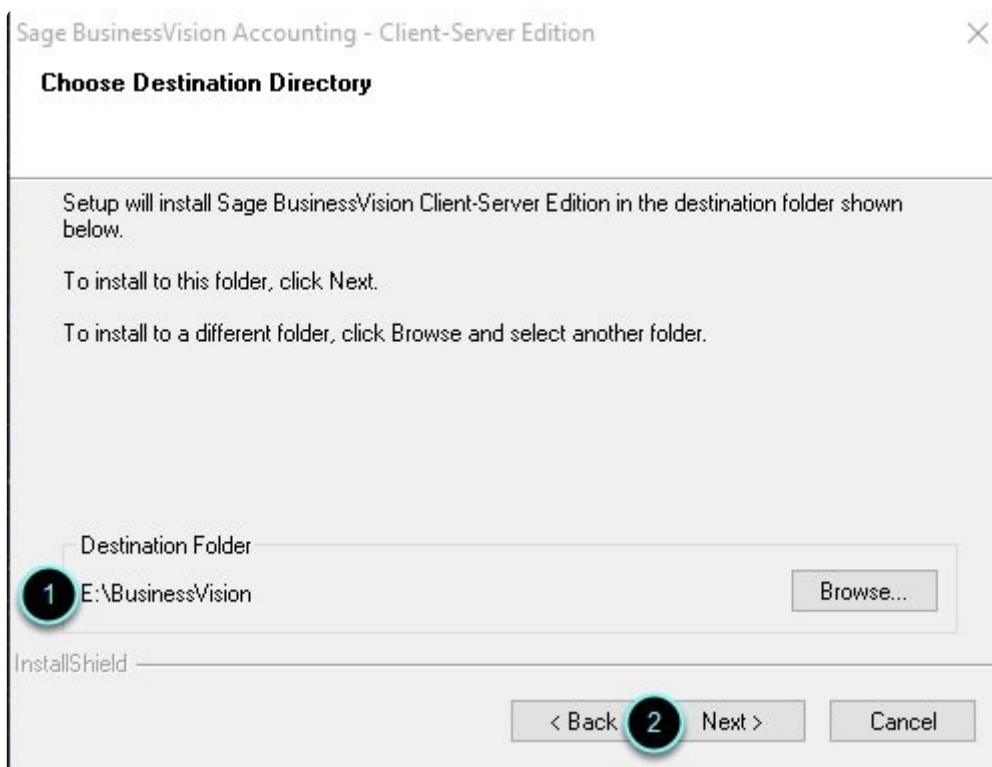
Click Next.



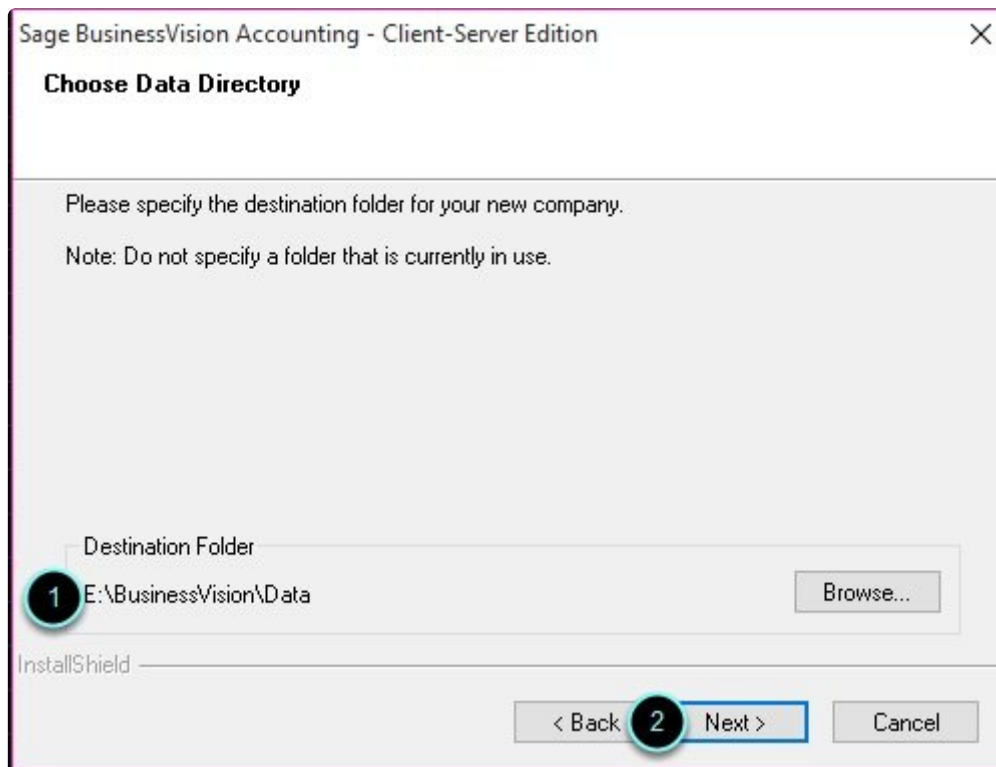
Choose Typical. Click Next.



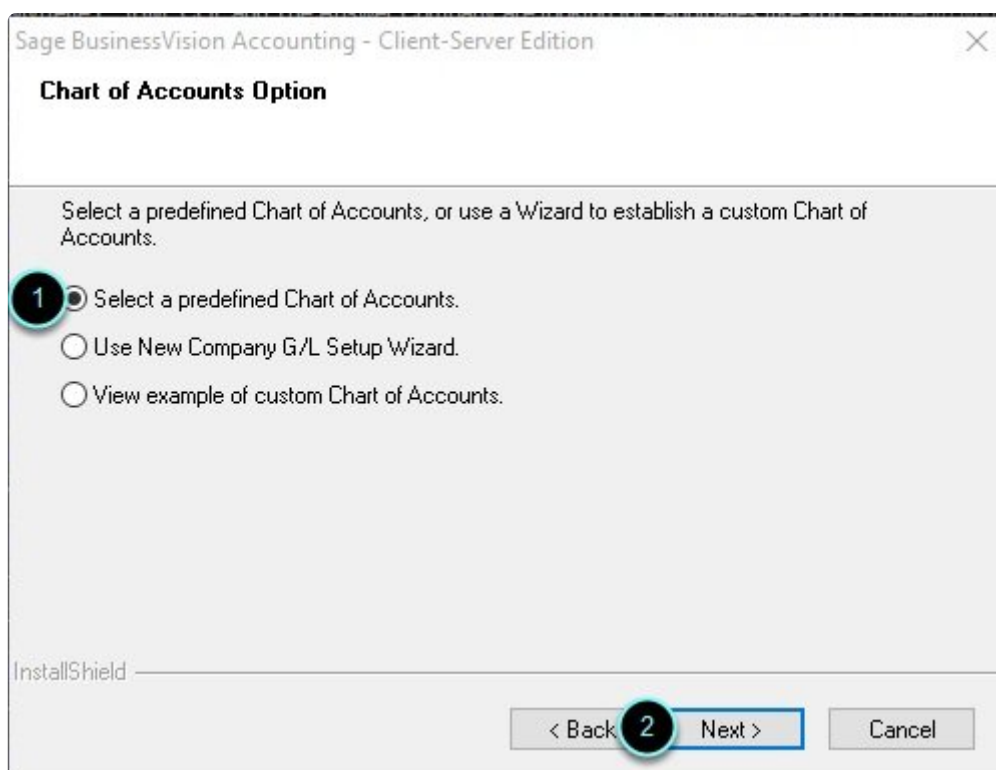
Choose a destination folder. Click Next.



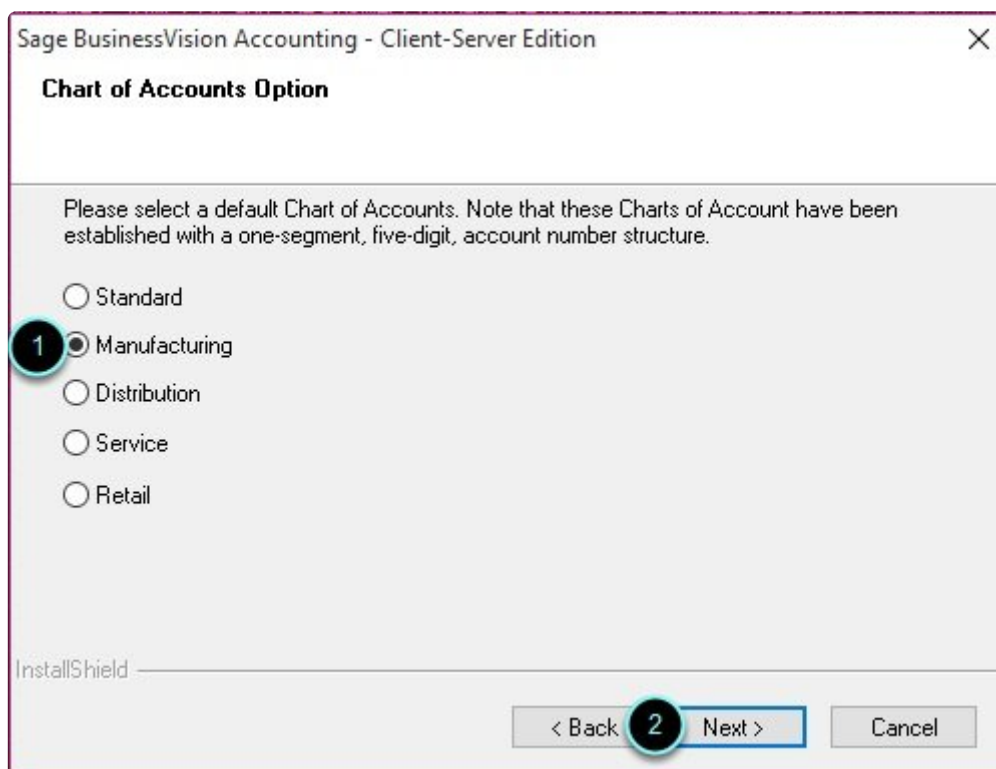
Choose a data directory. Click Next.



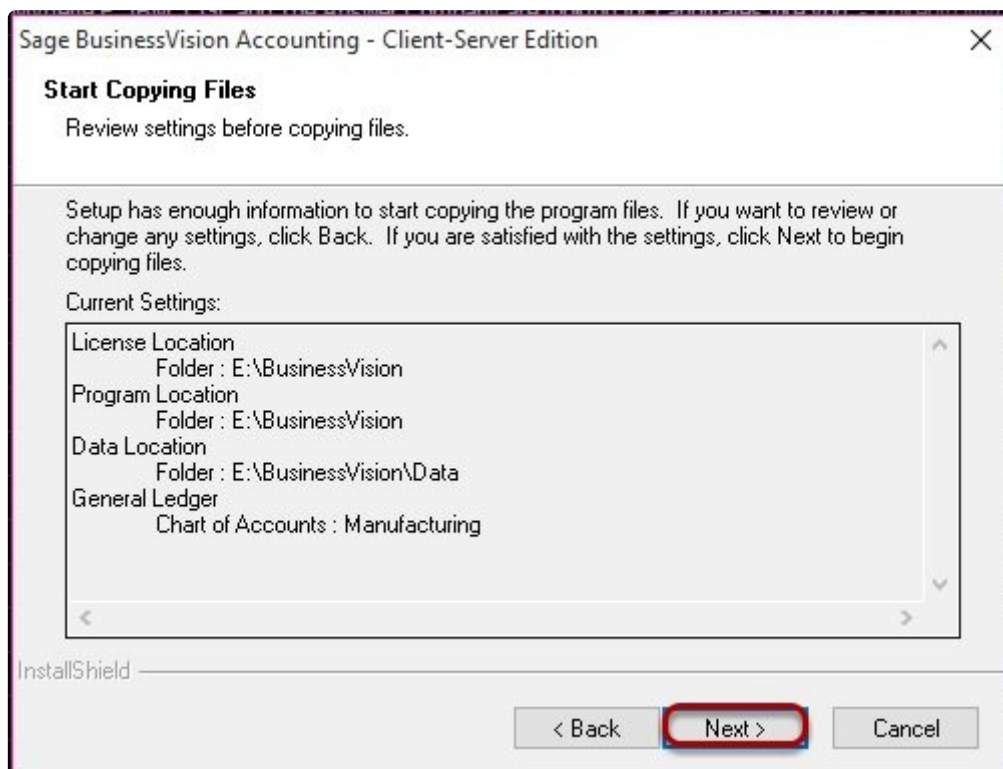
Select a predefined Chart of Accounts. Click Next.



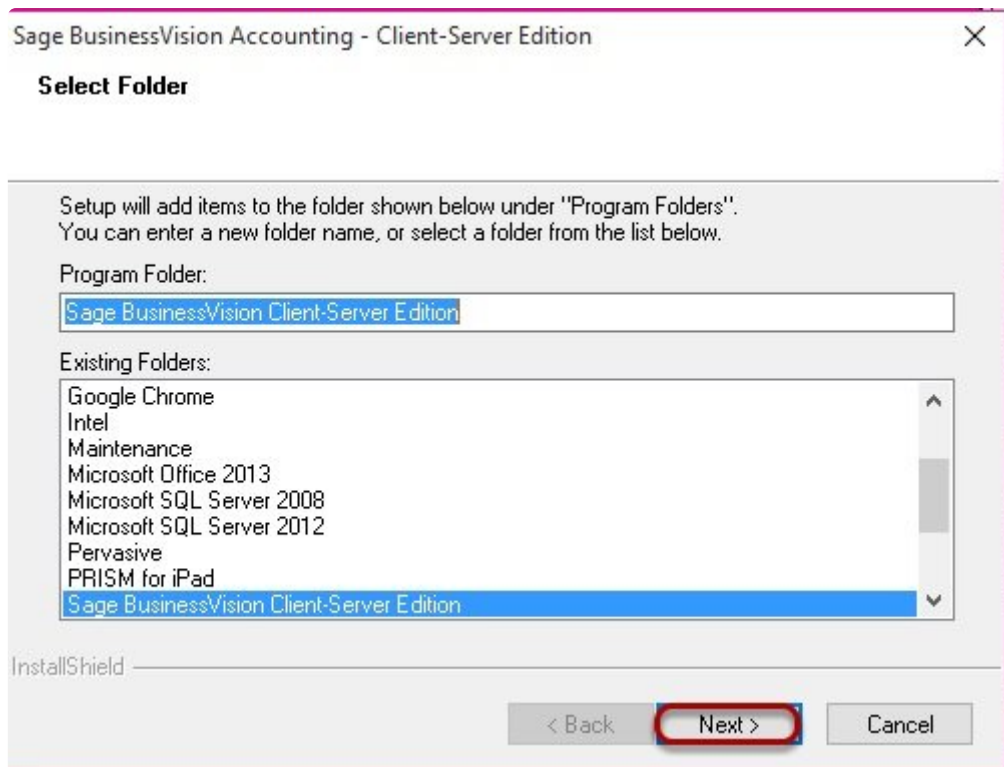
Choose an account option then click Next.



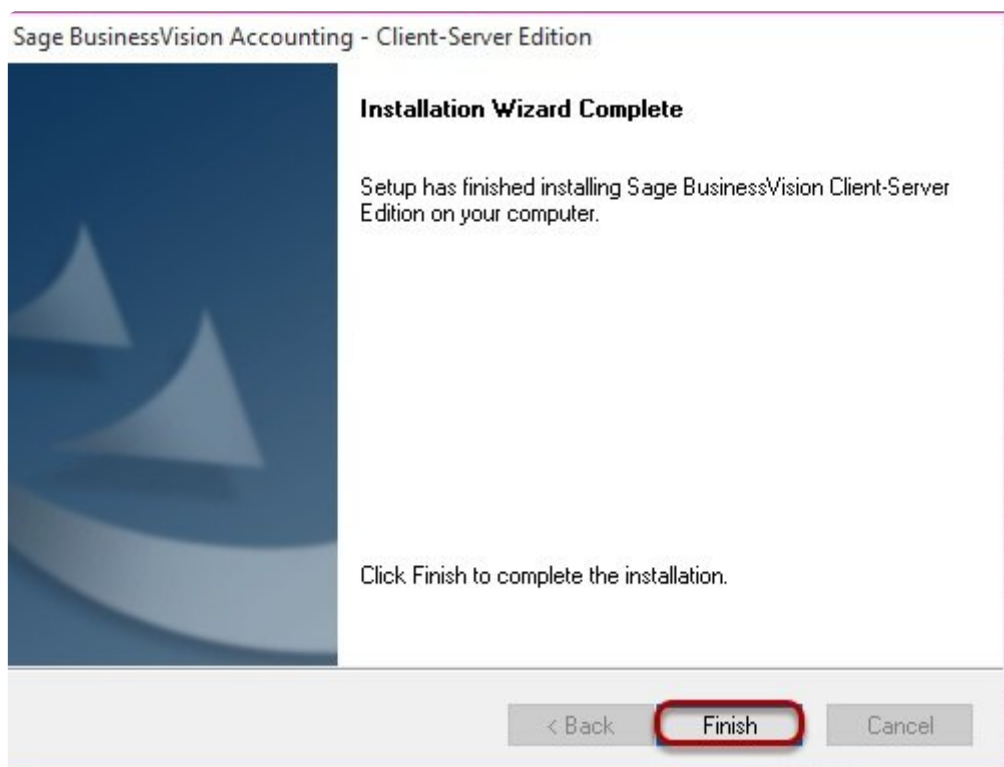
Click Next.



Click Next.



Click Finish.



6.2. III. SAGE 300 (ACCPAC)

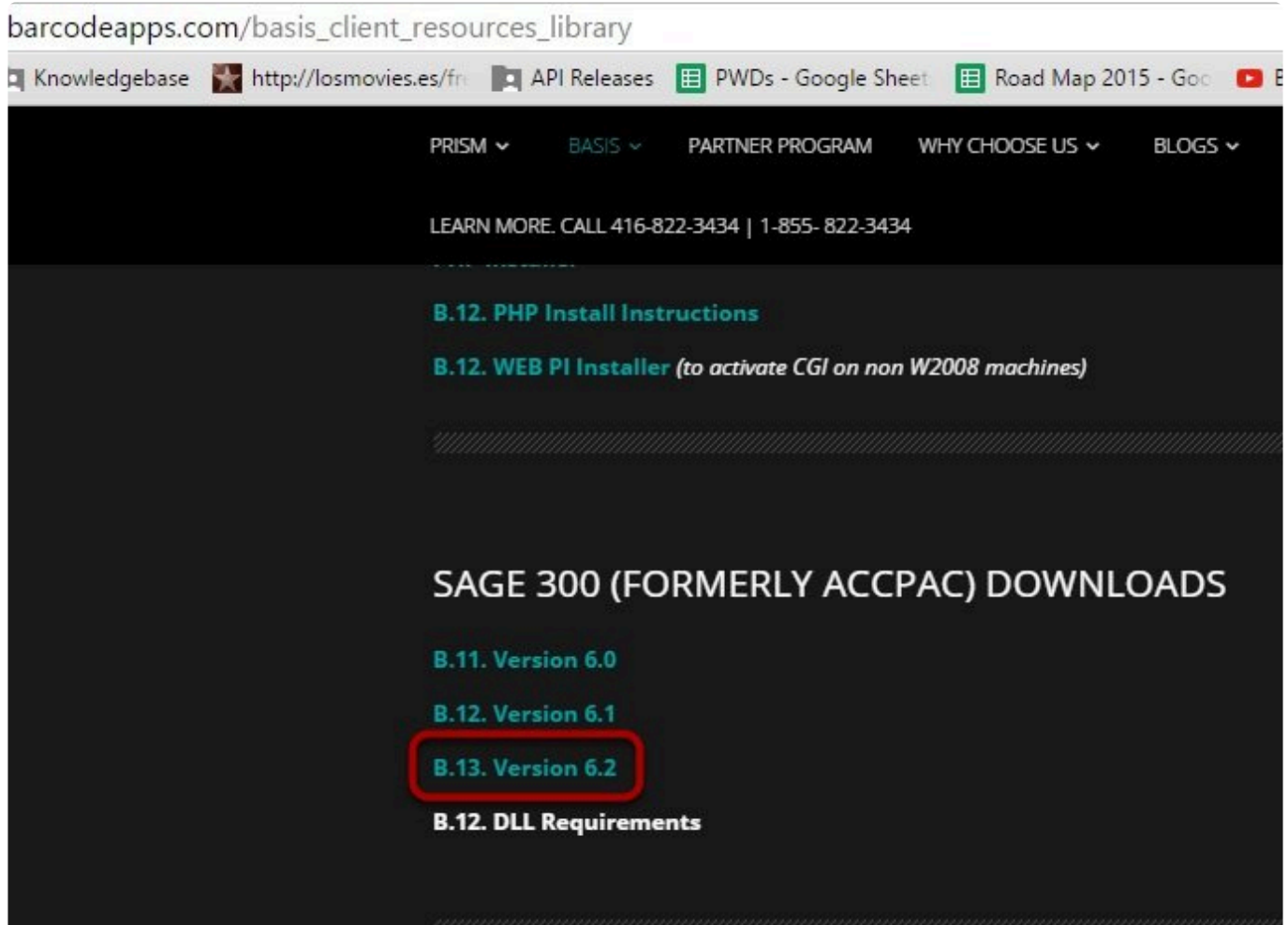
III. SAGE 300 (ACCPAC)

6.2.1. How To Setup Connection In Sage 300 (formerly AccPac)

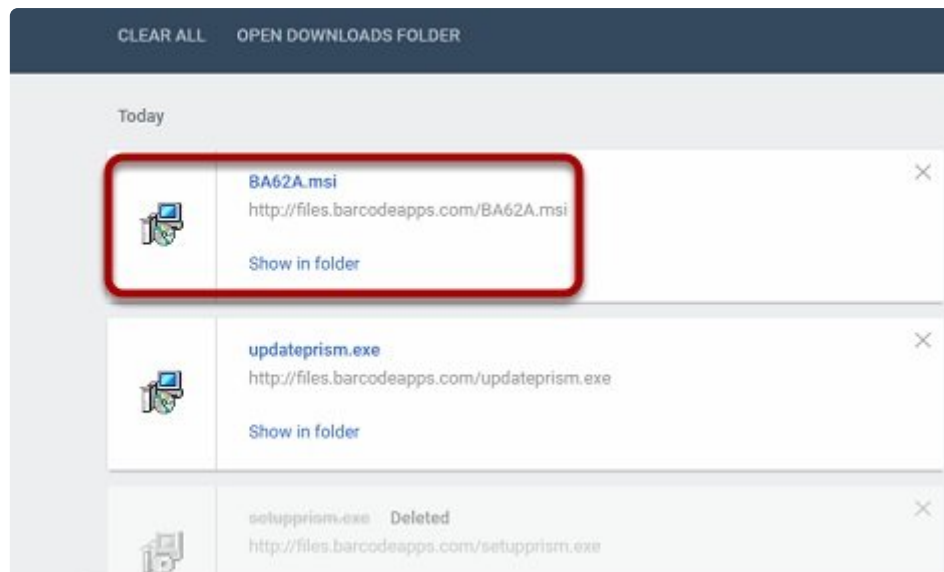
This knowledge base article will explain how to setup a connection and will also guide users on how to import customers and products from Sage 300.

SETTING UP CONNECTION IN SAGE 300

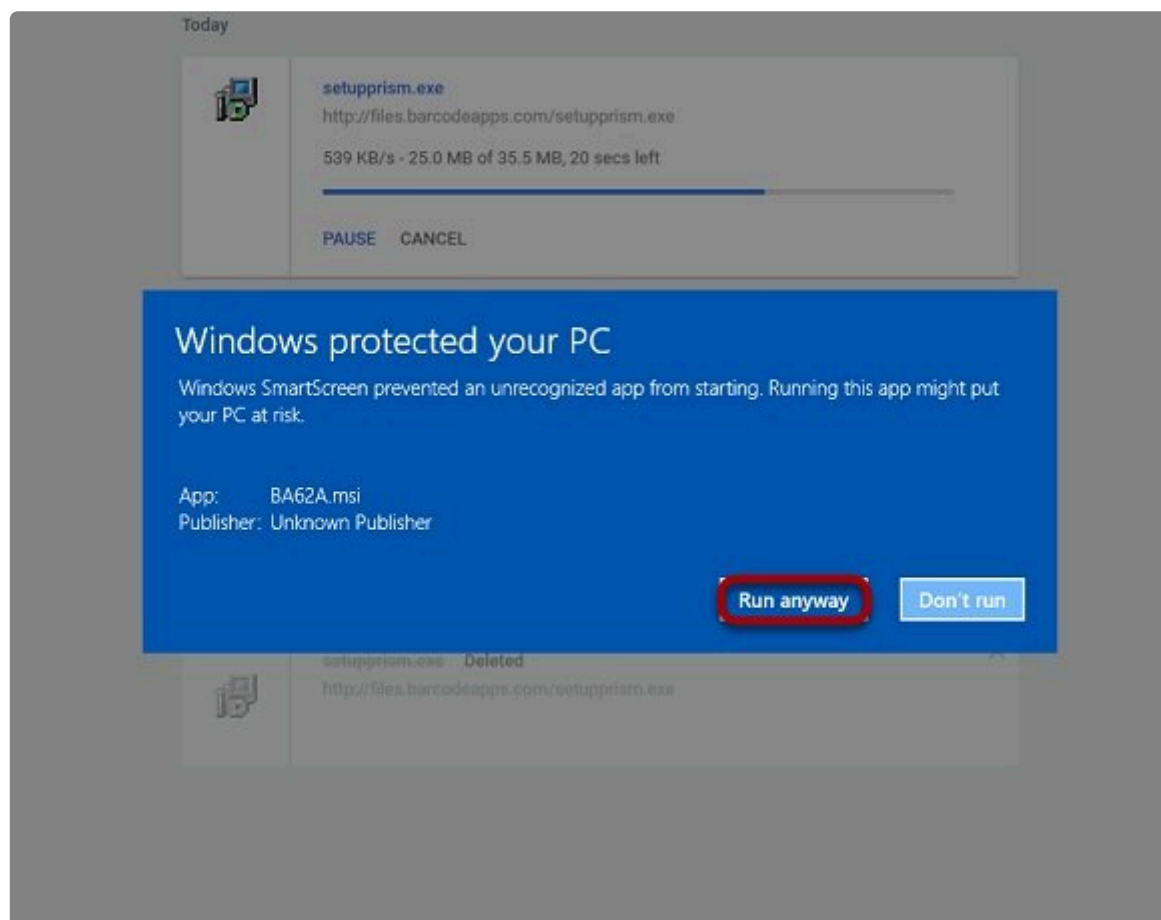
Go to our [Downloads Library](#) and download Sage 300 version 6.2. Run BA62A.msi installer.



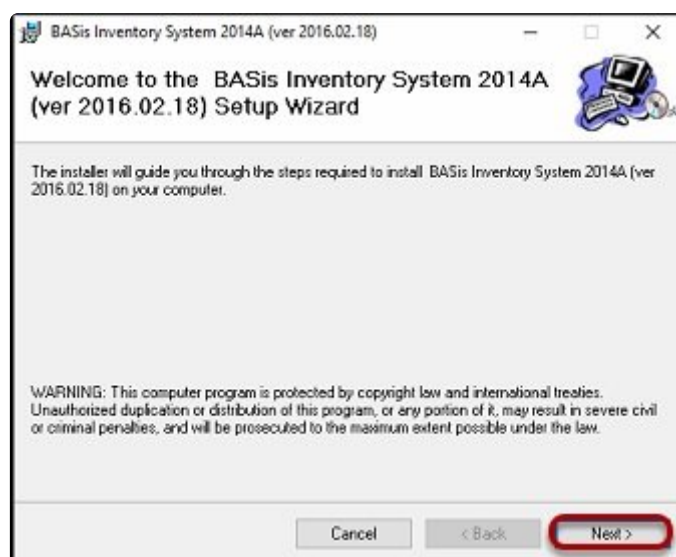
Click Run anyway.



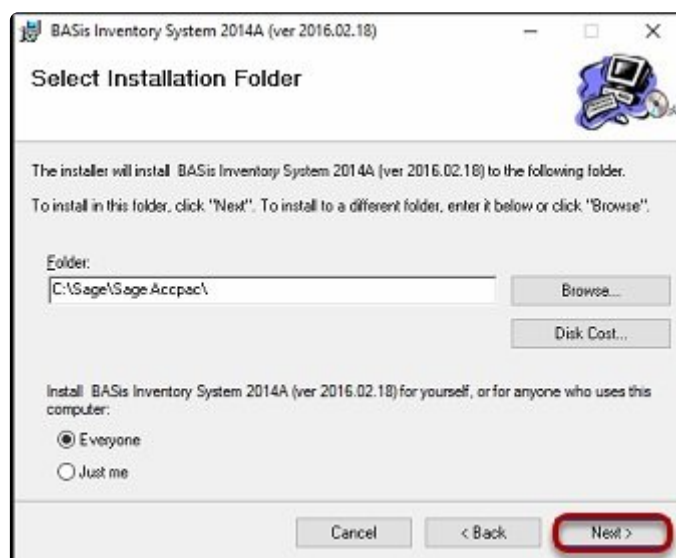
Click Next.



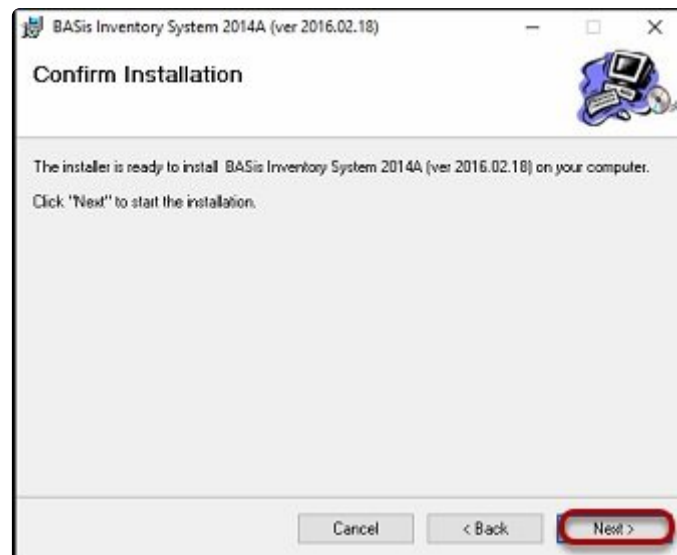
Click Next.



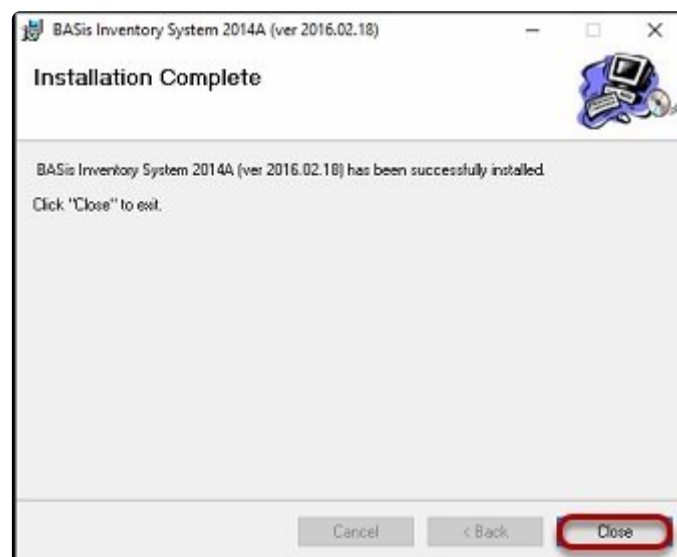
Click Next.



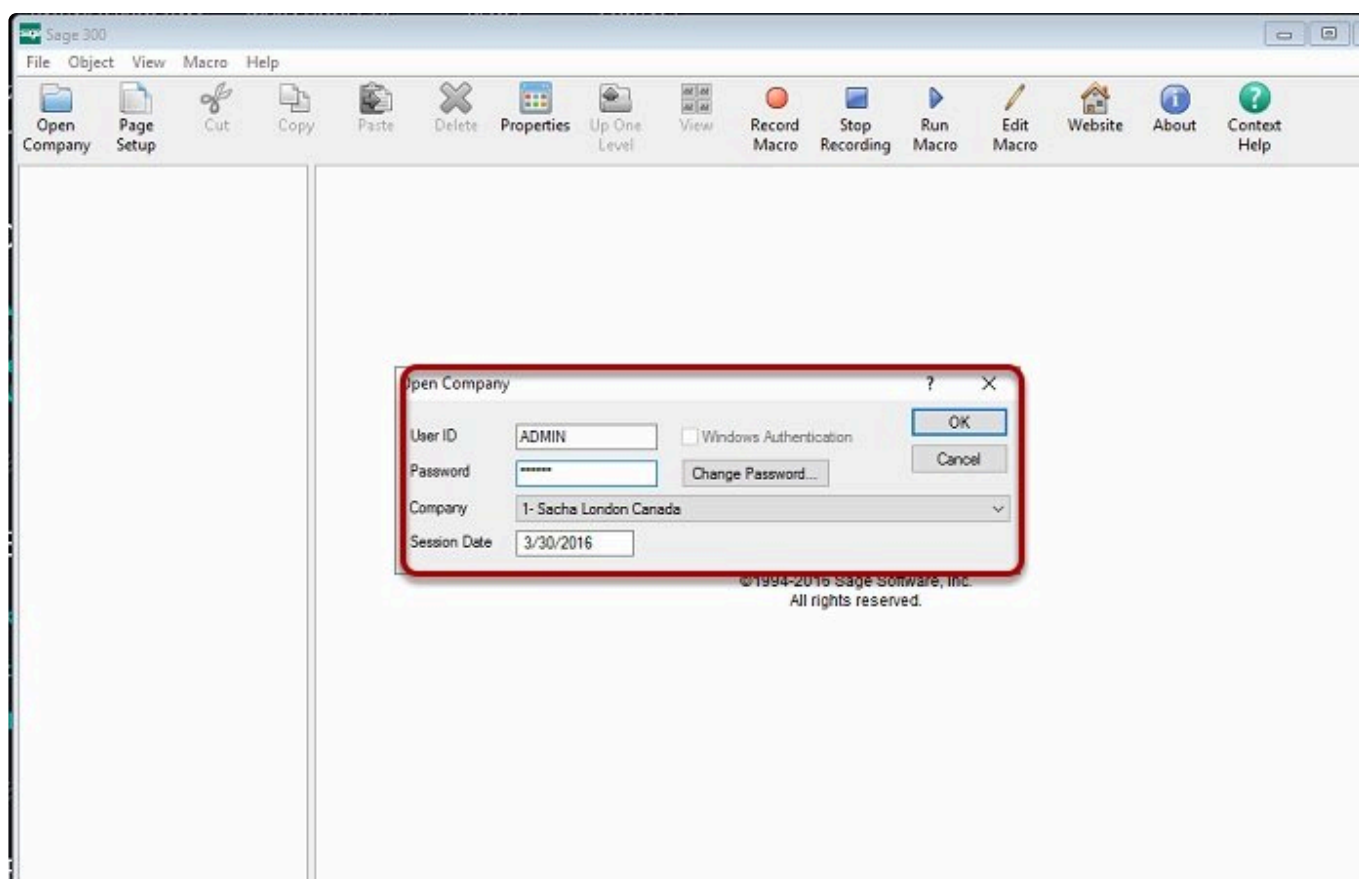
Installation Complete... Click Close.



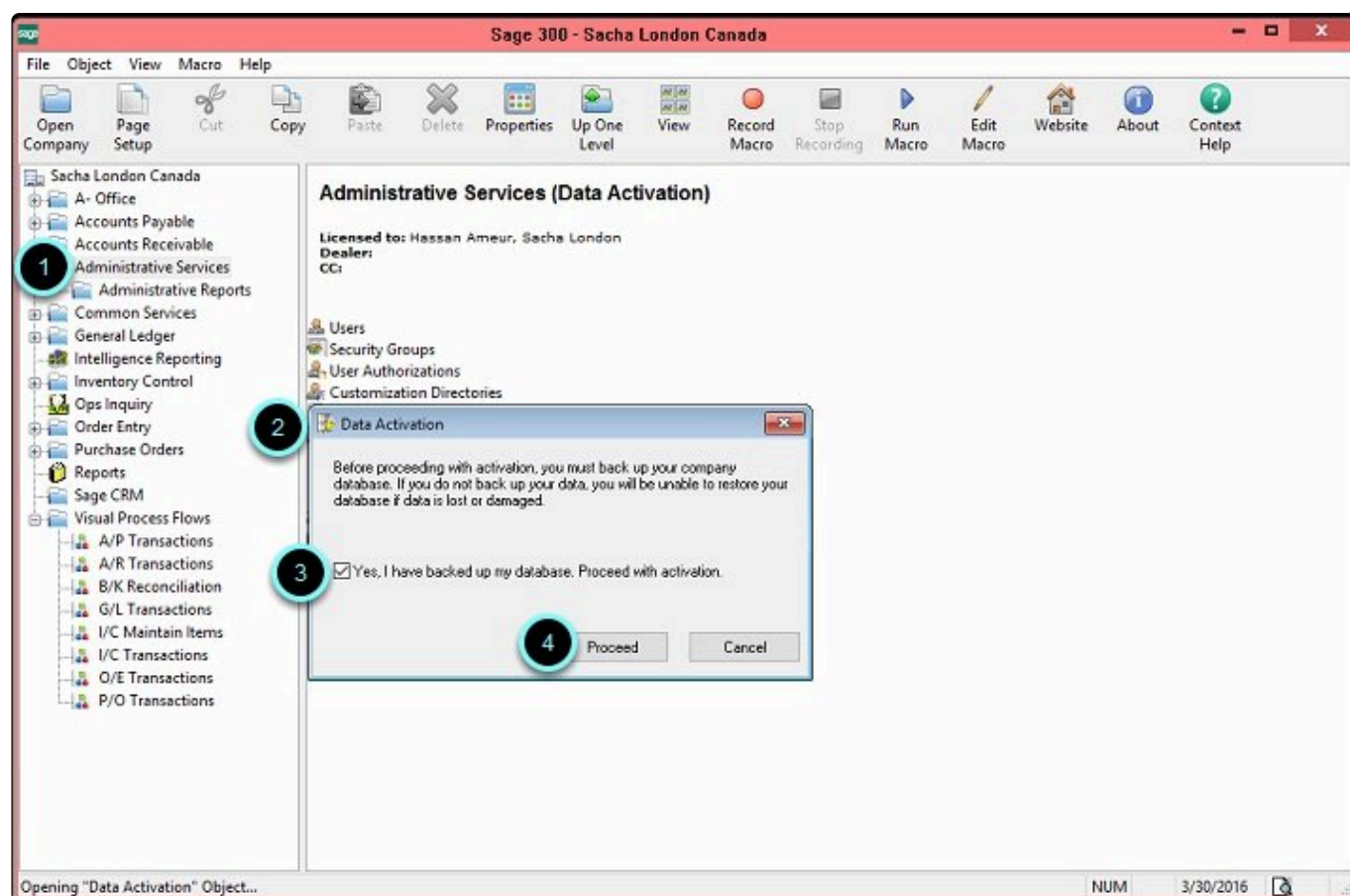
Login to Sage 300 as Administrator.



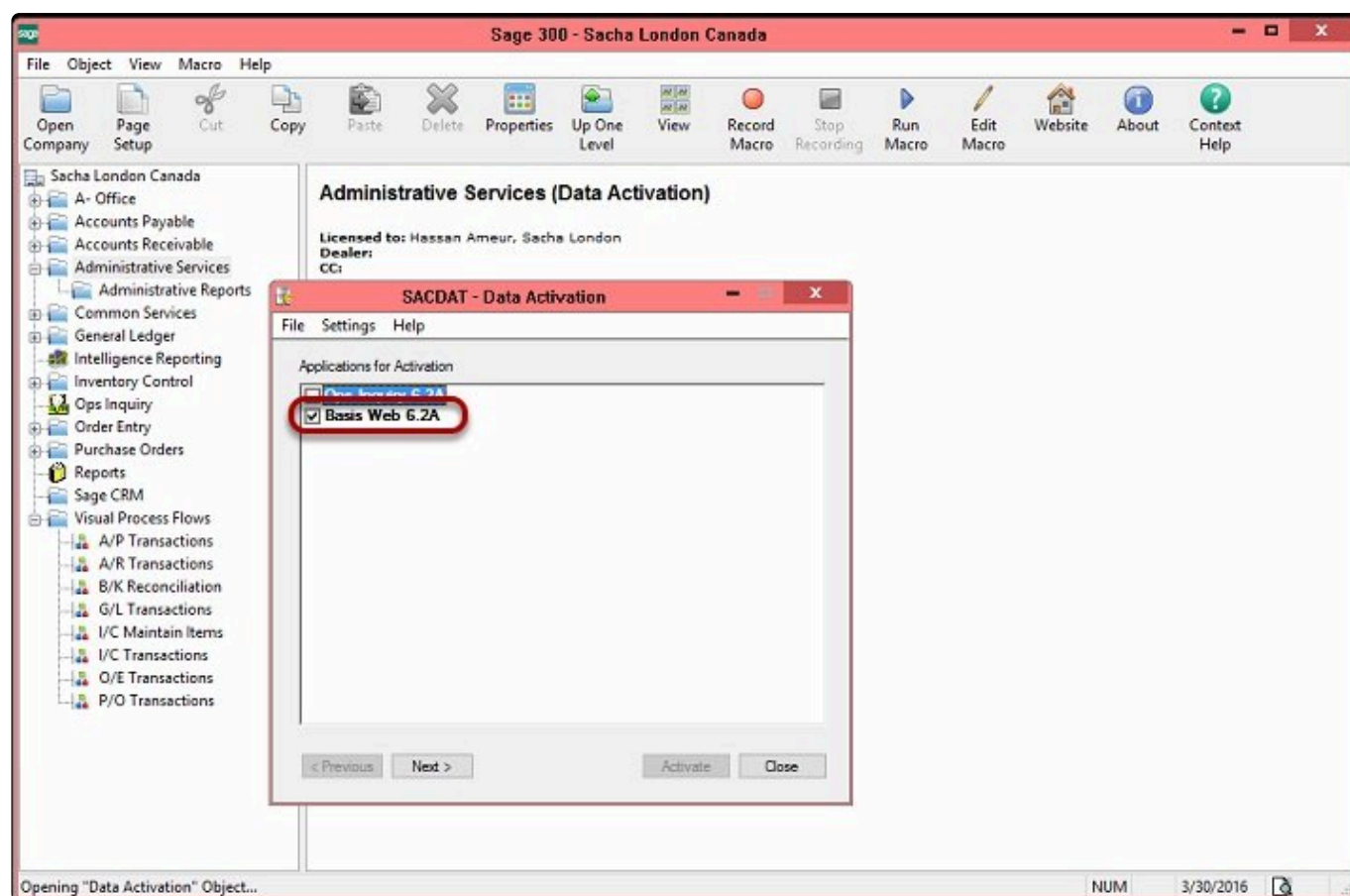
Click on Administrative Services then click on Data Activation. Click Yes and click Proceed.



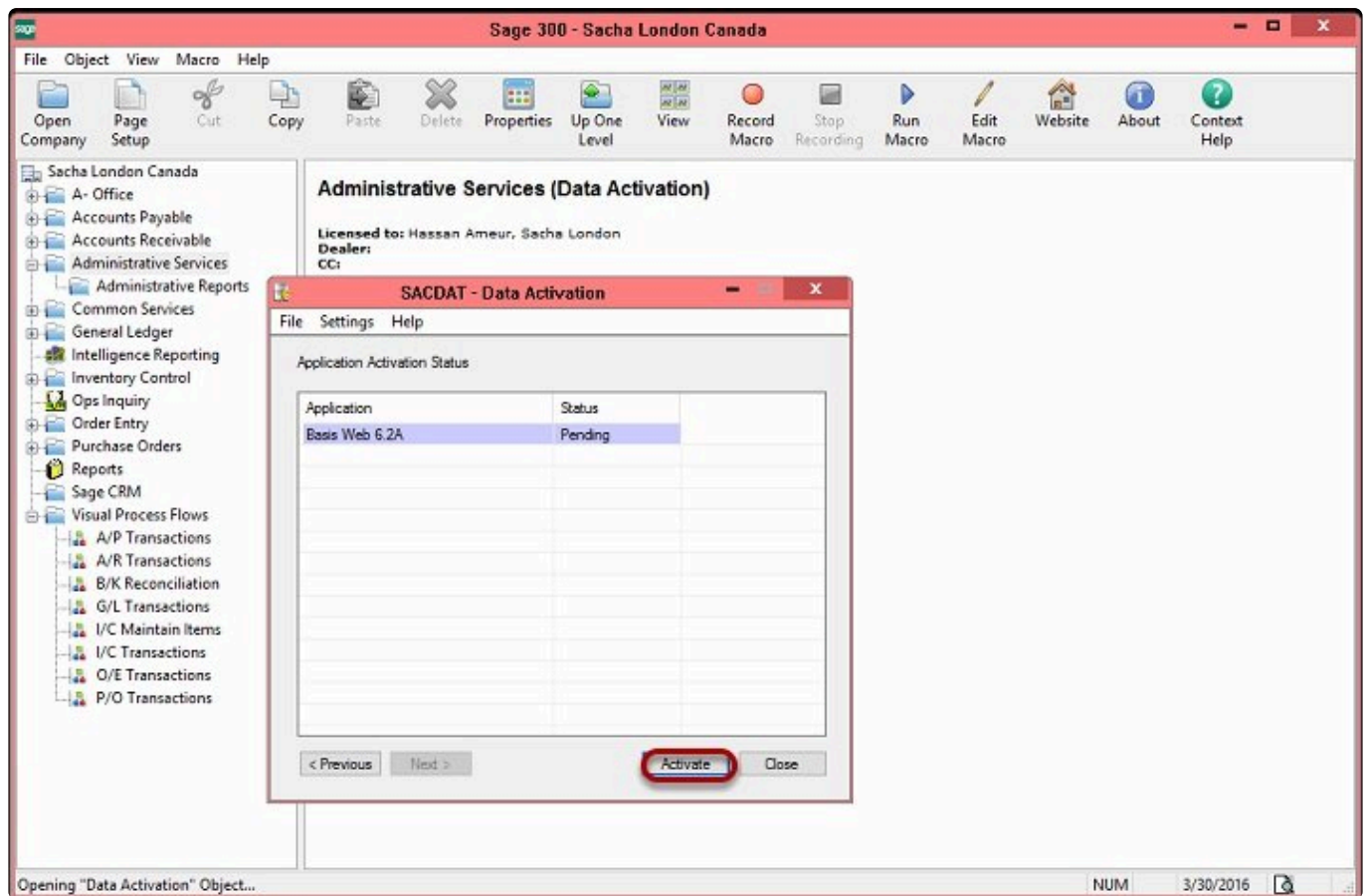
Put a checkmark on BASIS Web 6.2A.



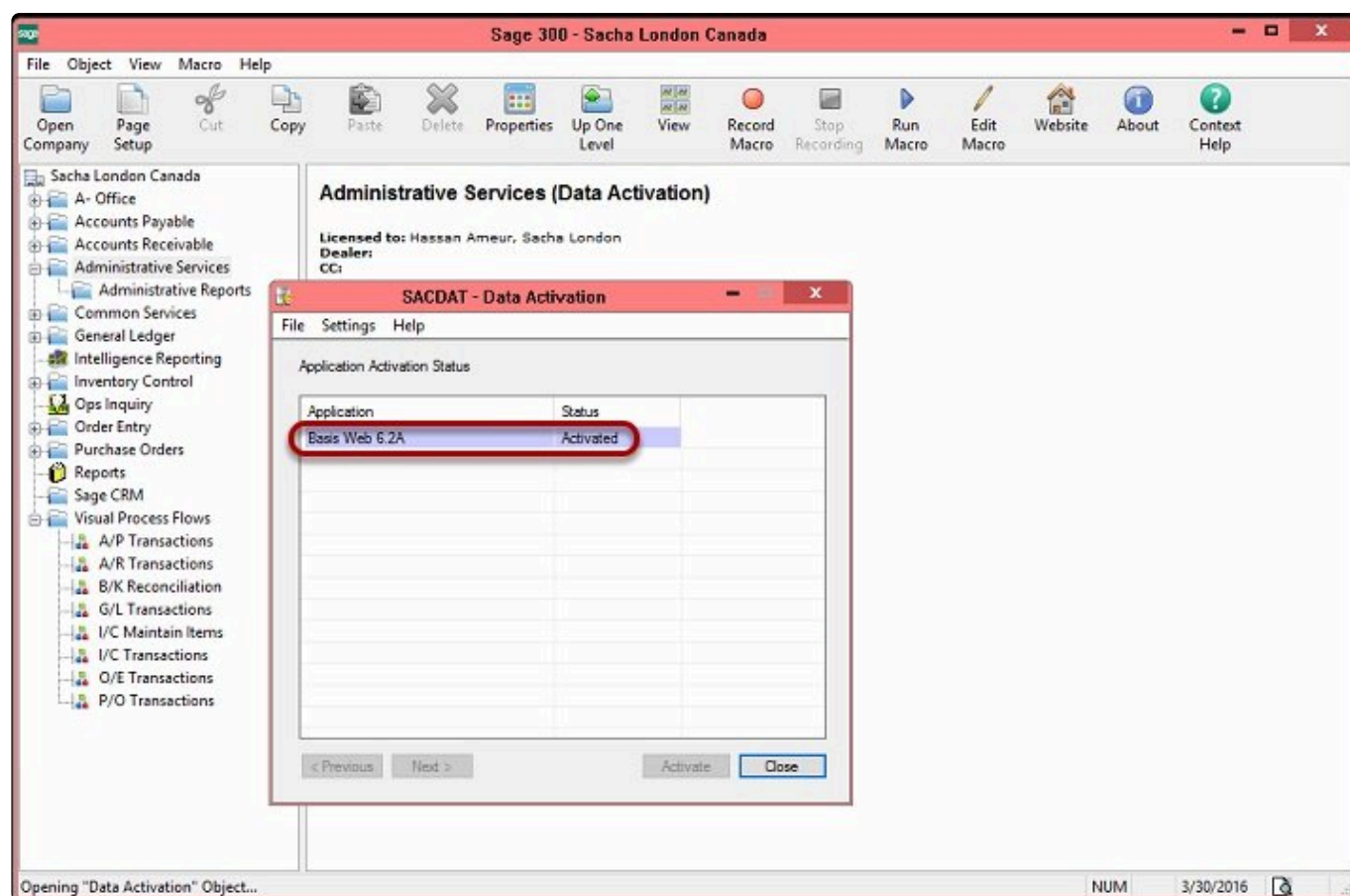
Click Activate.



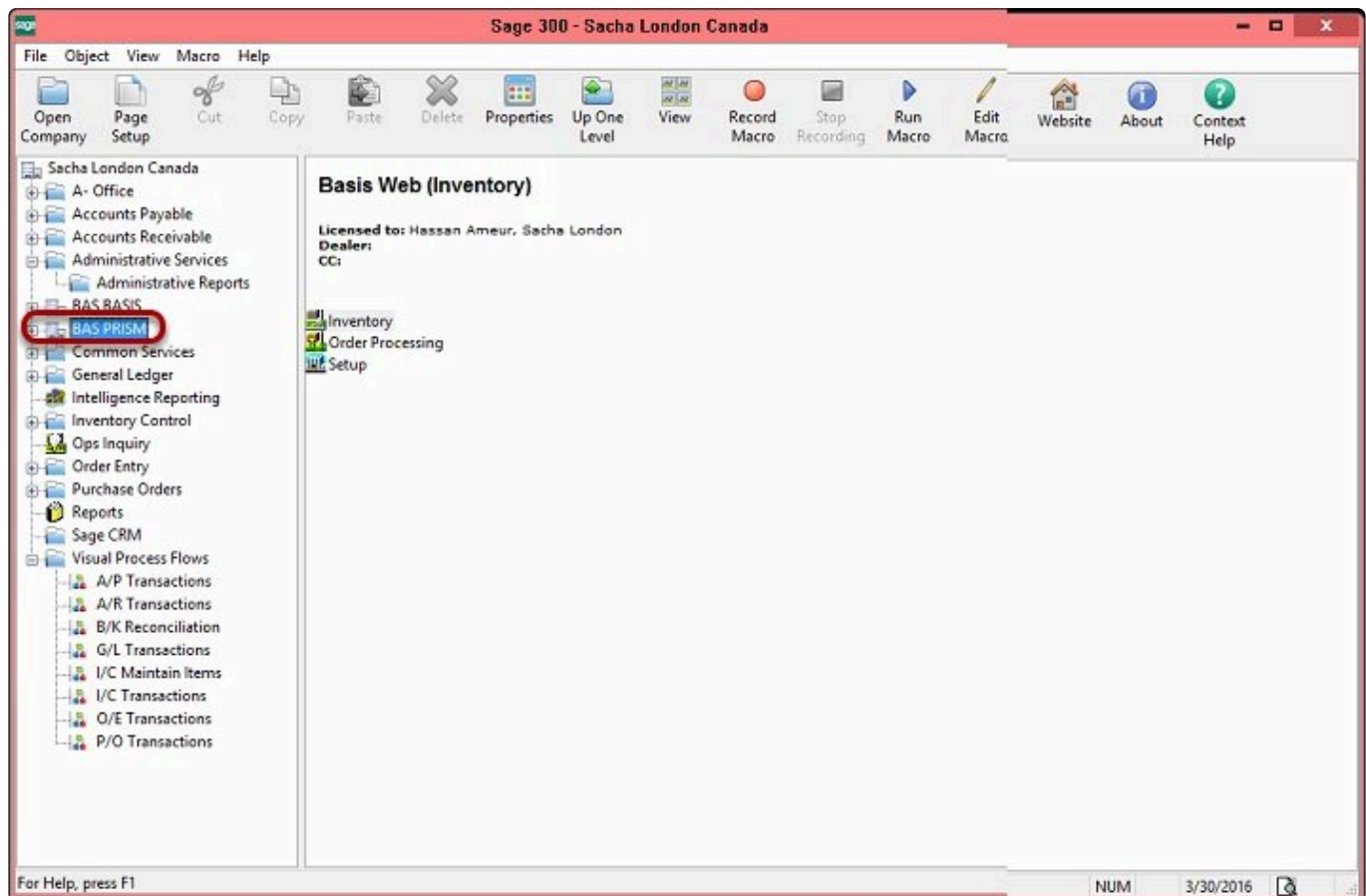
BASIS Web 6.2A should now say Activated. Click Close.



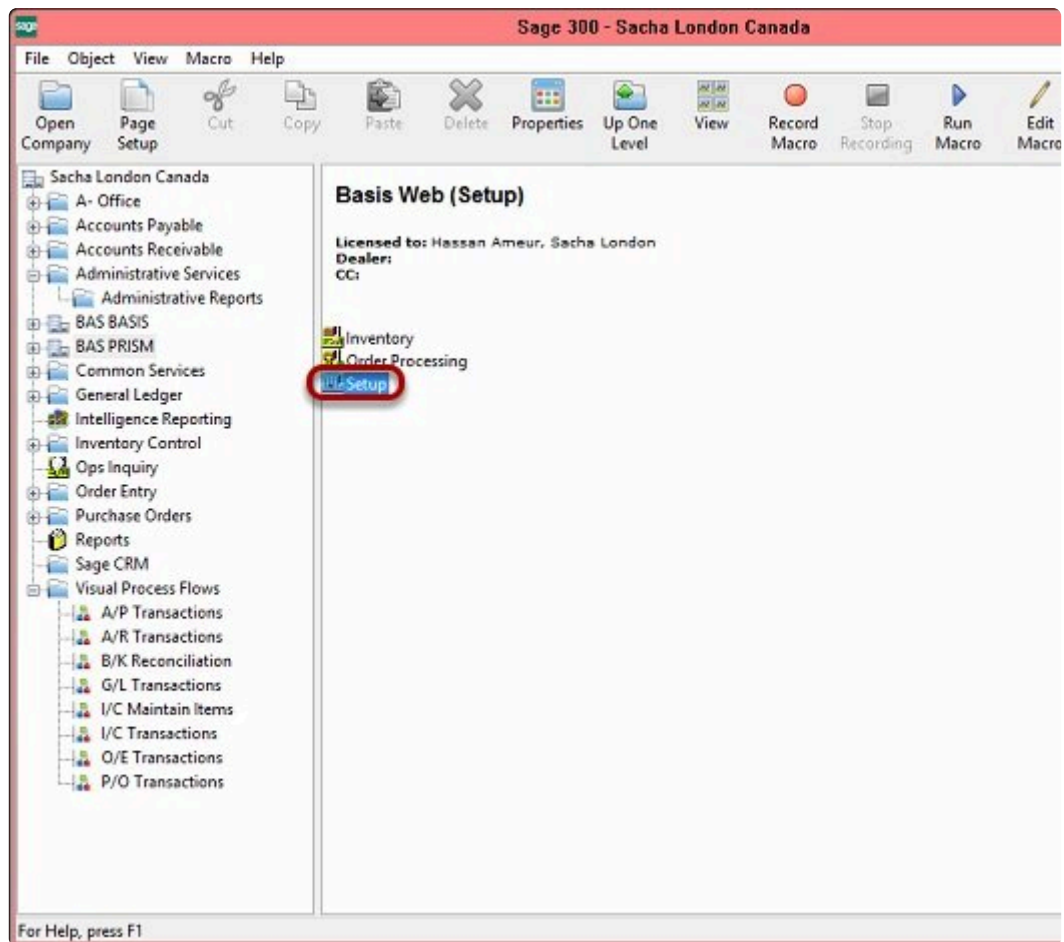
Click on BAS PRISM.



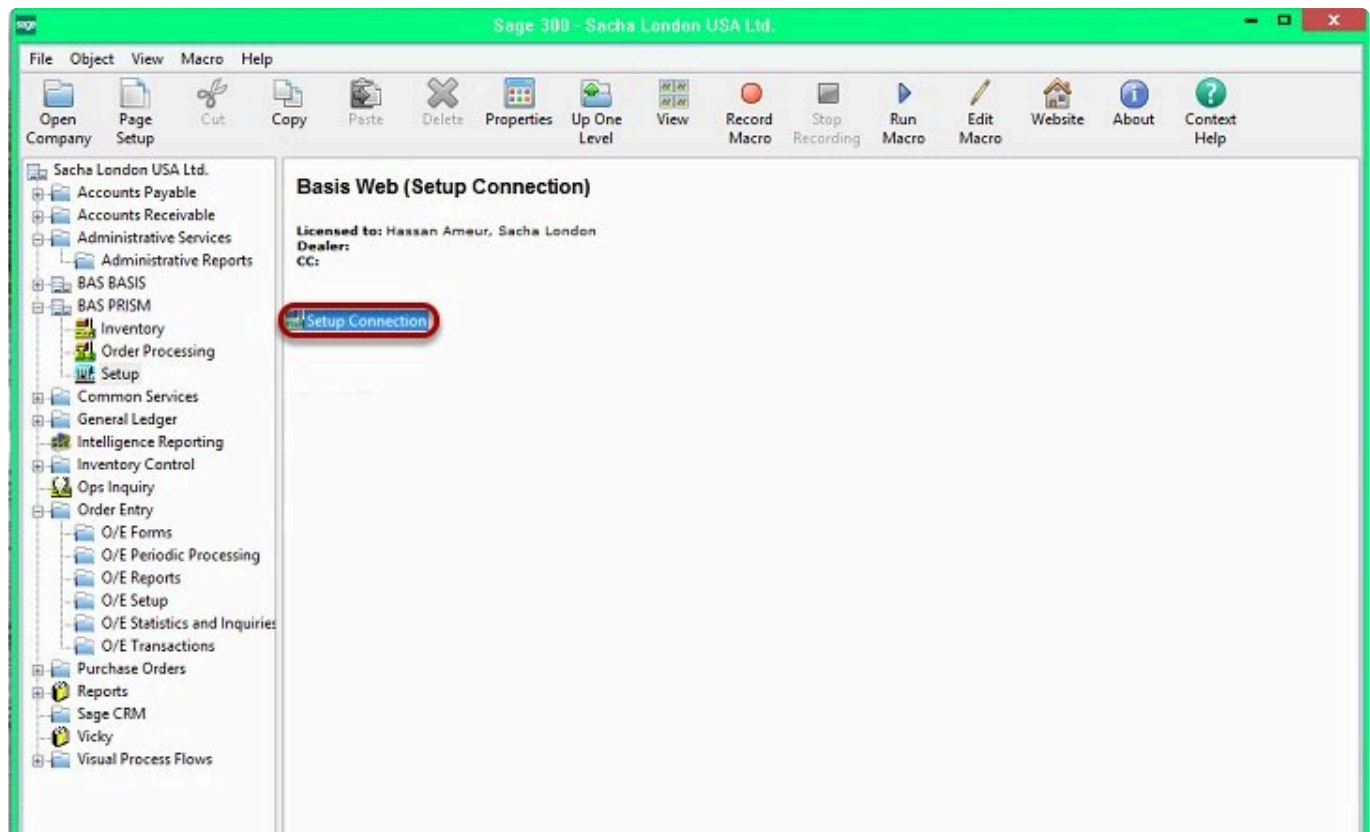
Click Setup.



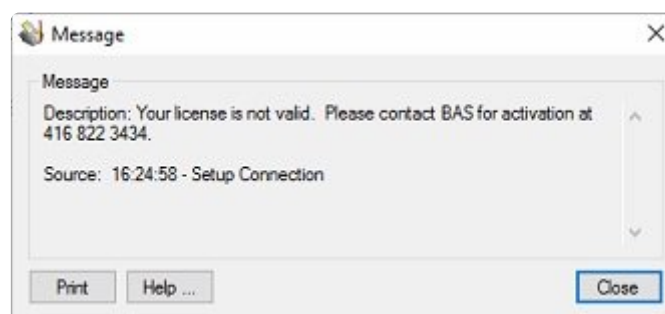
Click on Setup Connection.



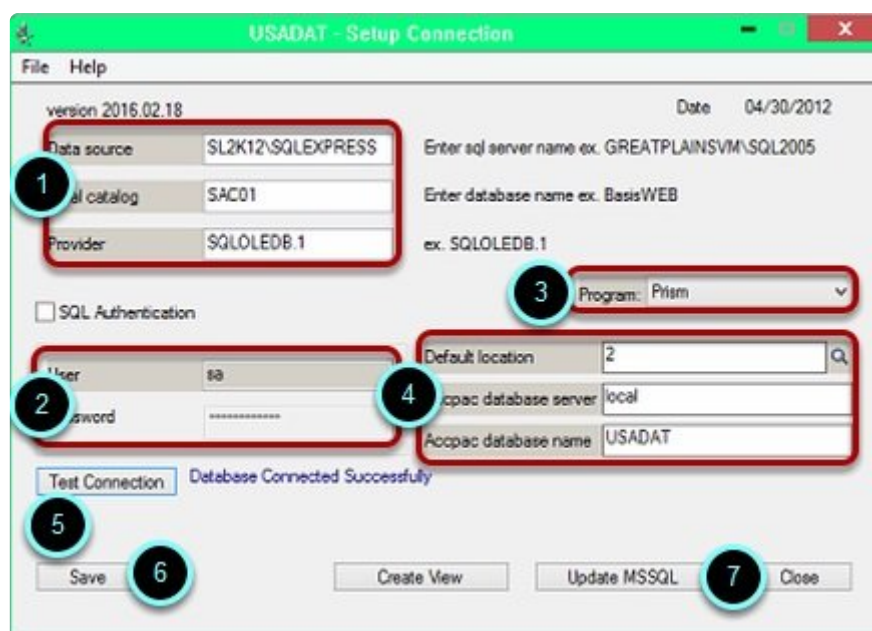
If you get this message, please contact BarcodeApps to have your Sage 300 license activated.



Enter the required connection credentials. Once done click Test Connection to check if the database is connected.

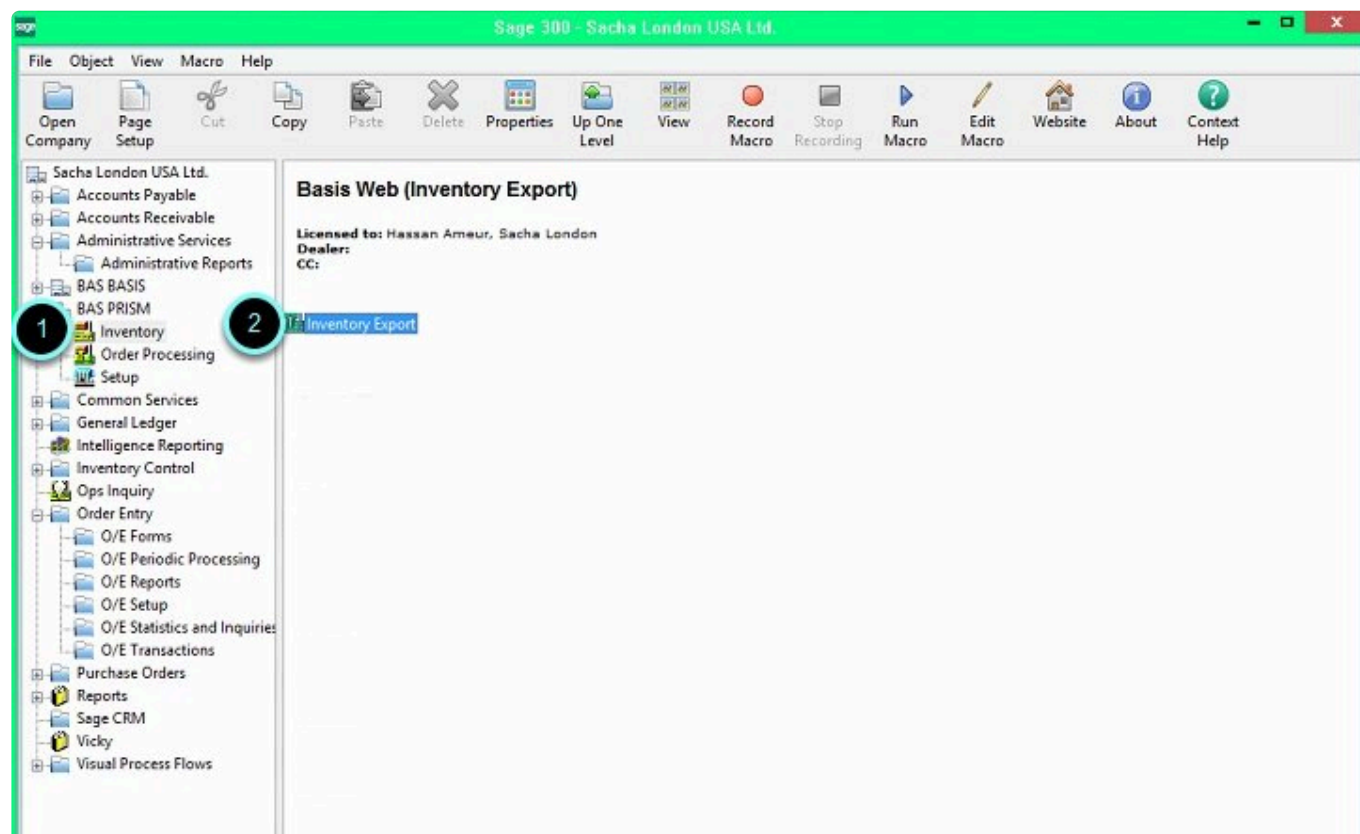


Click Save then Close.

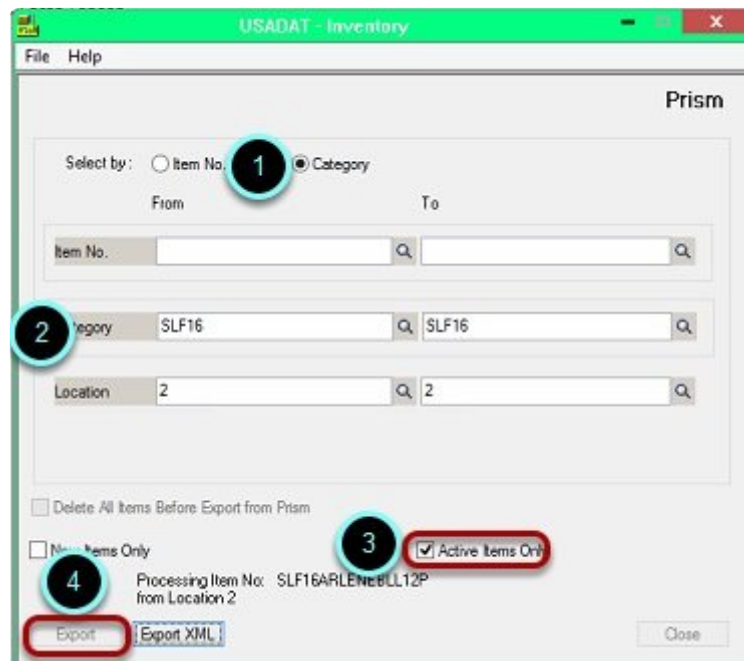


IMPORTING PRODUCTS FROM SAGE 300

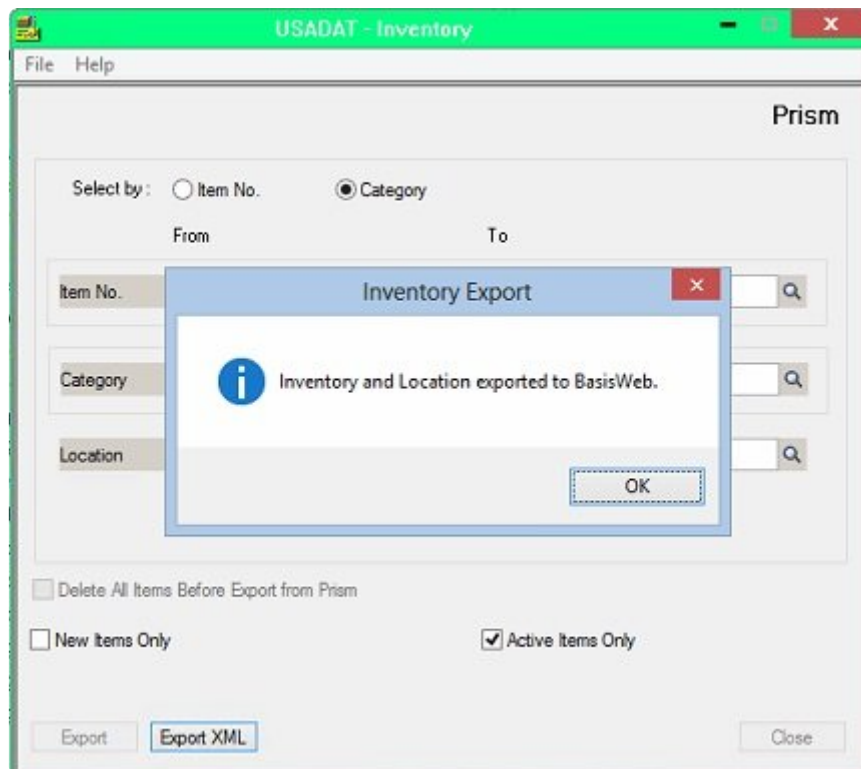
Click on Inventory then click Inventory Export.



You can import by item no. or category. Select Active Items only then click Export.

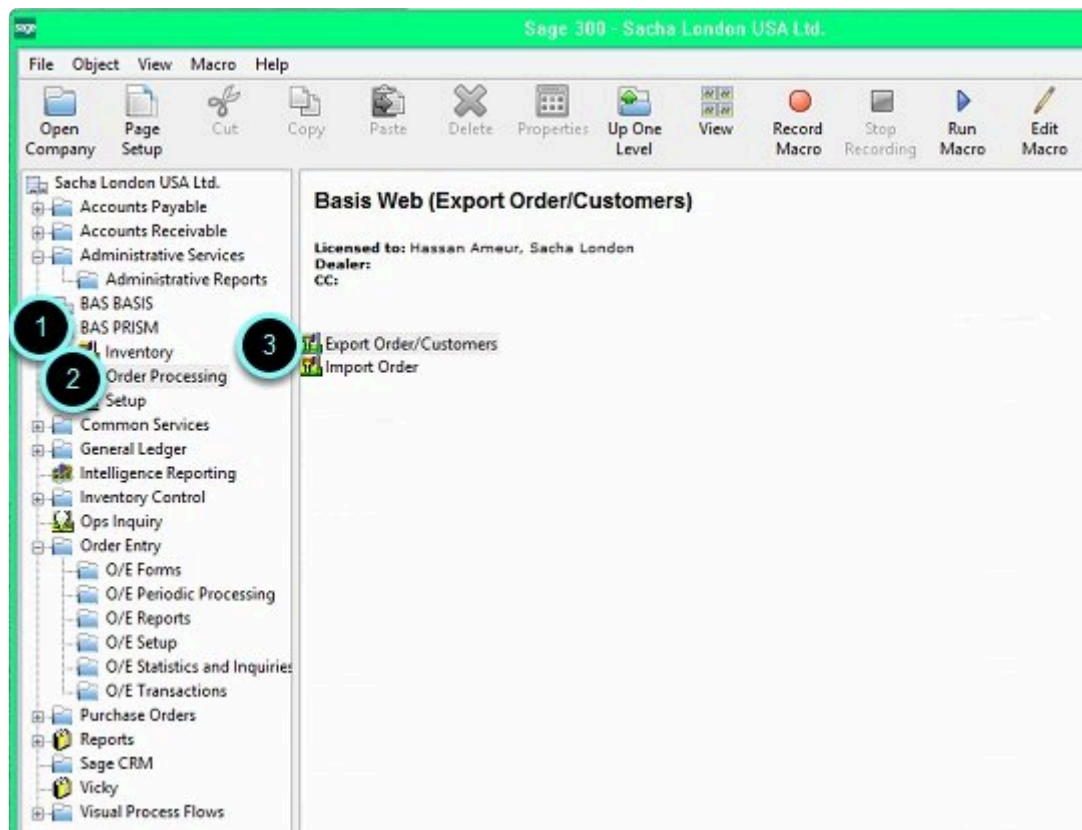


Inventory Export completed... Click OK.

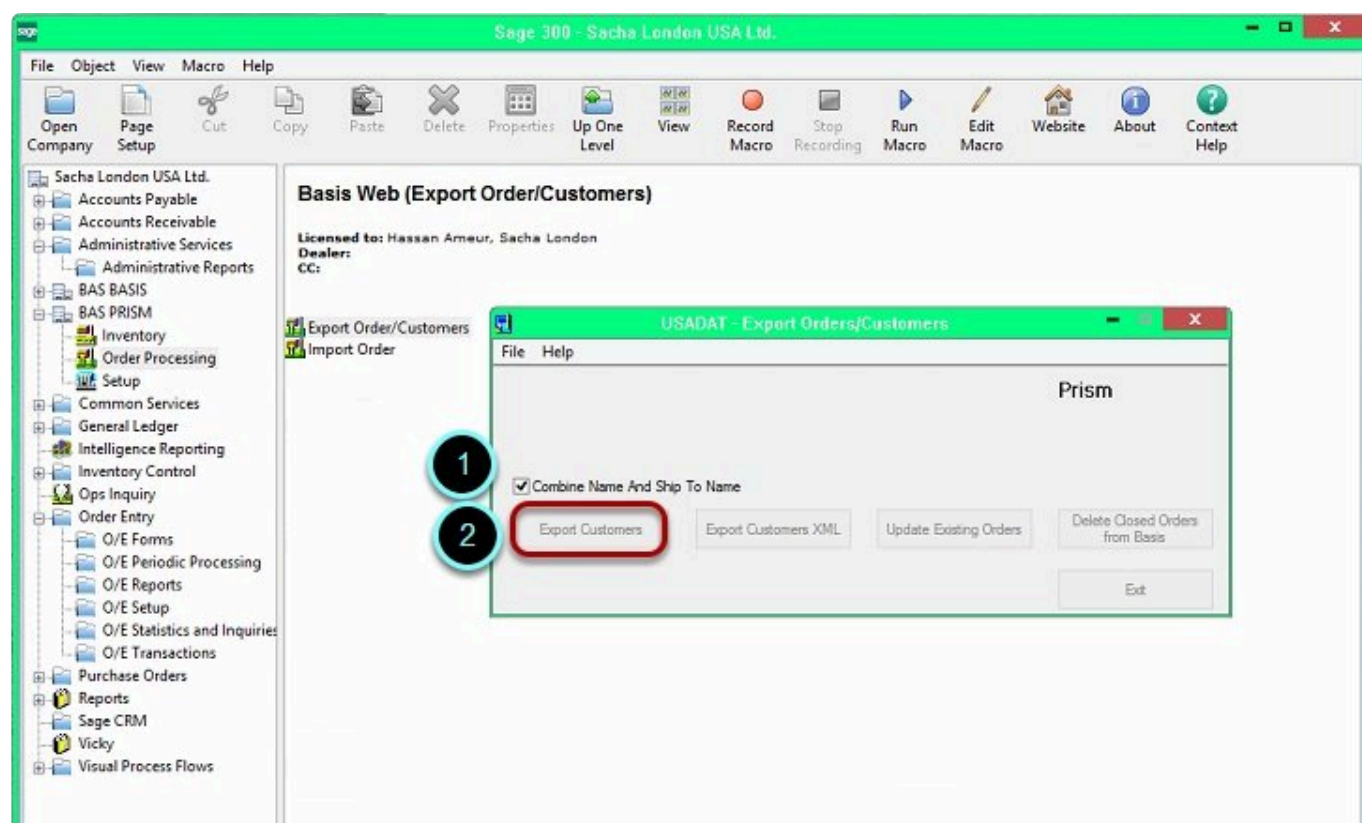


IMPORTING CUSTOMERS FROM SAGE 300

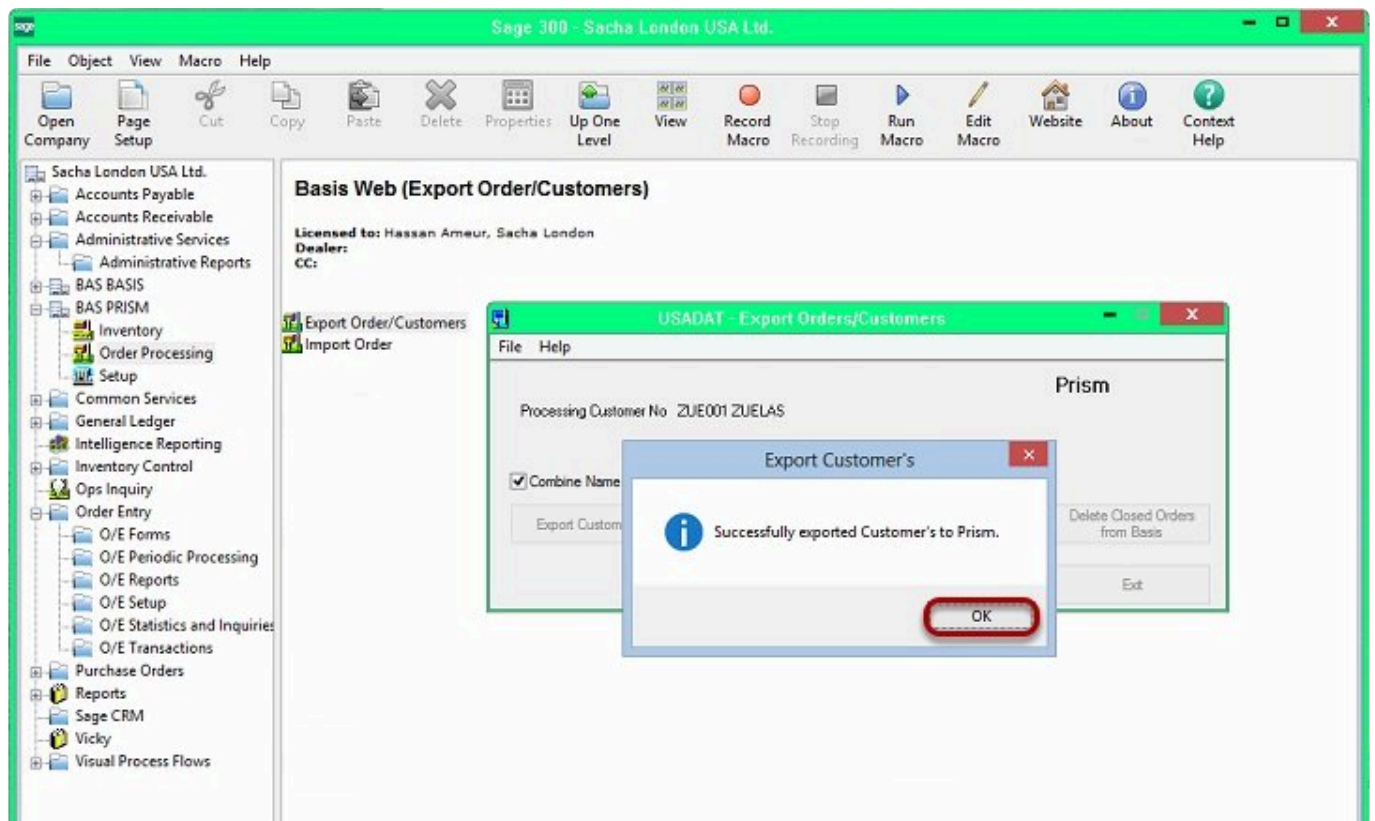
Click on BAS PRISM then go to Order Processing. Click on Export Order / Customers.



You can select Combine Name and Ship To Name then click Export Customers.



Export Customers completed... Click OK.



6.3. IV. FRESHBOOKS



6.3.1. A. PRISM Integration To FreshBooks

This knowledge base article will guide users on how they can integrate their FreshBooks account to PRISM.

PRISM INTEGRATION TO FRESHBOOKS

ACCOUNT REGISTRATION

To register a company to PRISM, visit http://basmax1.dyndns.biz/BASPortal/index.php/component/ea_manufacturer/?view=register, fill out the information needed and then click on Try it for 30 days.



Improve performance with Basis
complete warehouse
management system


PRISM CORPORATION

George Talbot

junpbas@gmail.com

TRY IT FREE FOR 30 DAYS

Already have an account? [Login](#)




Improve performance with Basis
complete warehouse
management system

Creating company files. This process takes around 15
seconds. A confirmation message will display once
completed.

PRISM CORPORATION

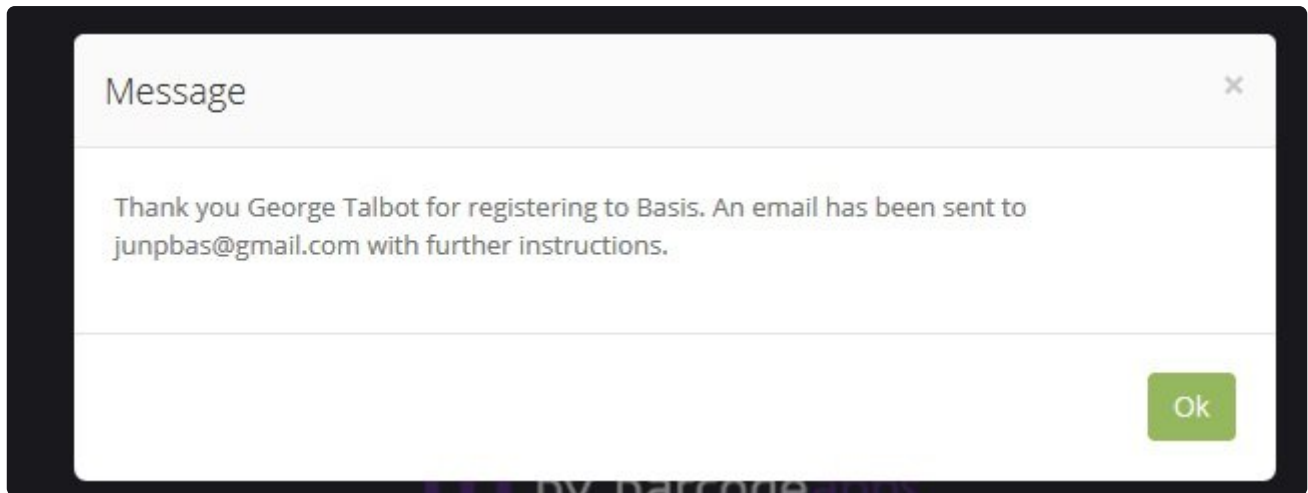
George Talbot

junpbas@gmail.com

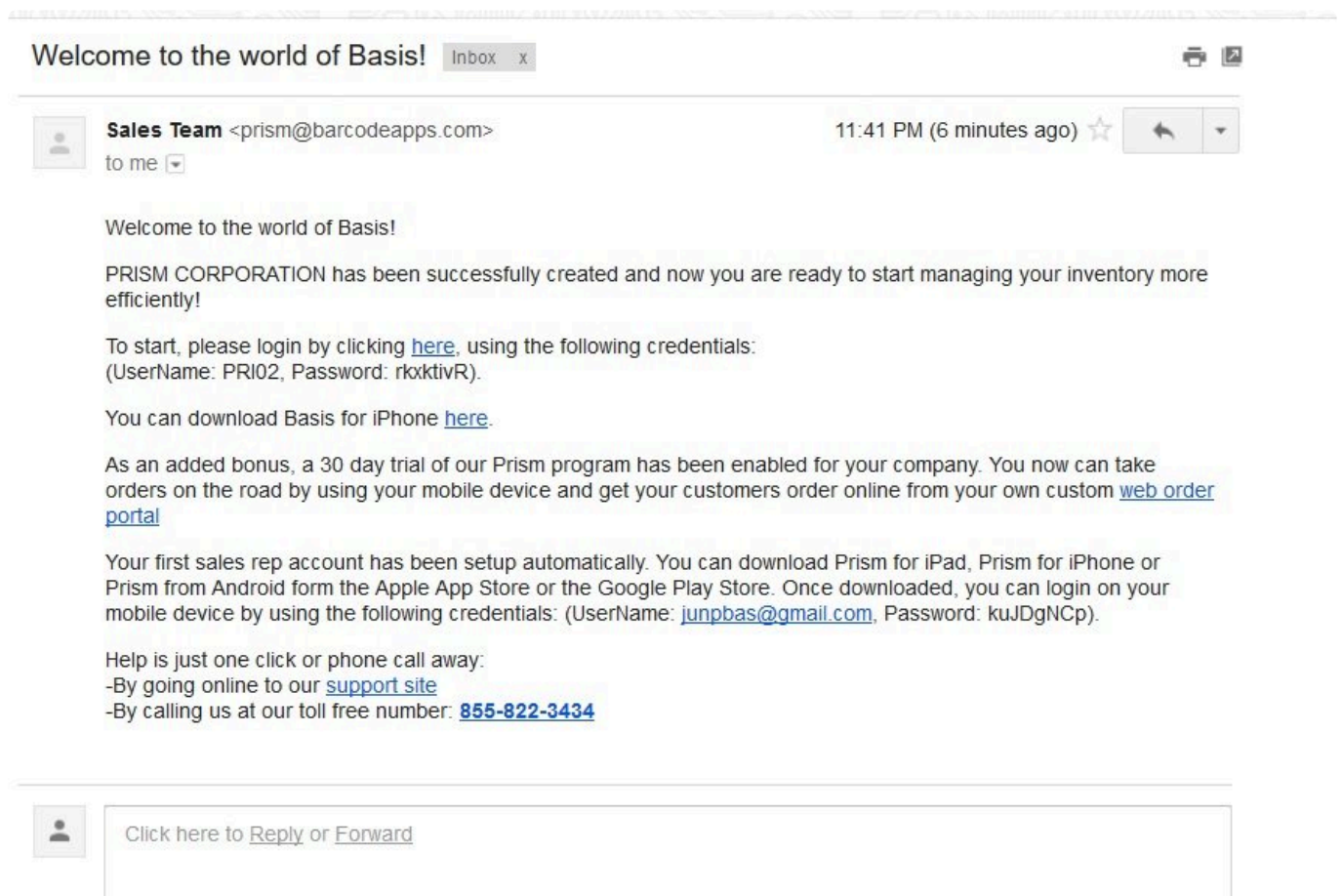


Already have an account? [Login](#)

A notification will show up once the registration is finish, click on Ok and then access the email account used on the registration to open the registration email message.

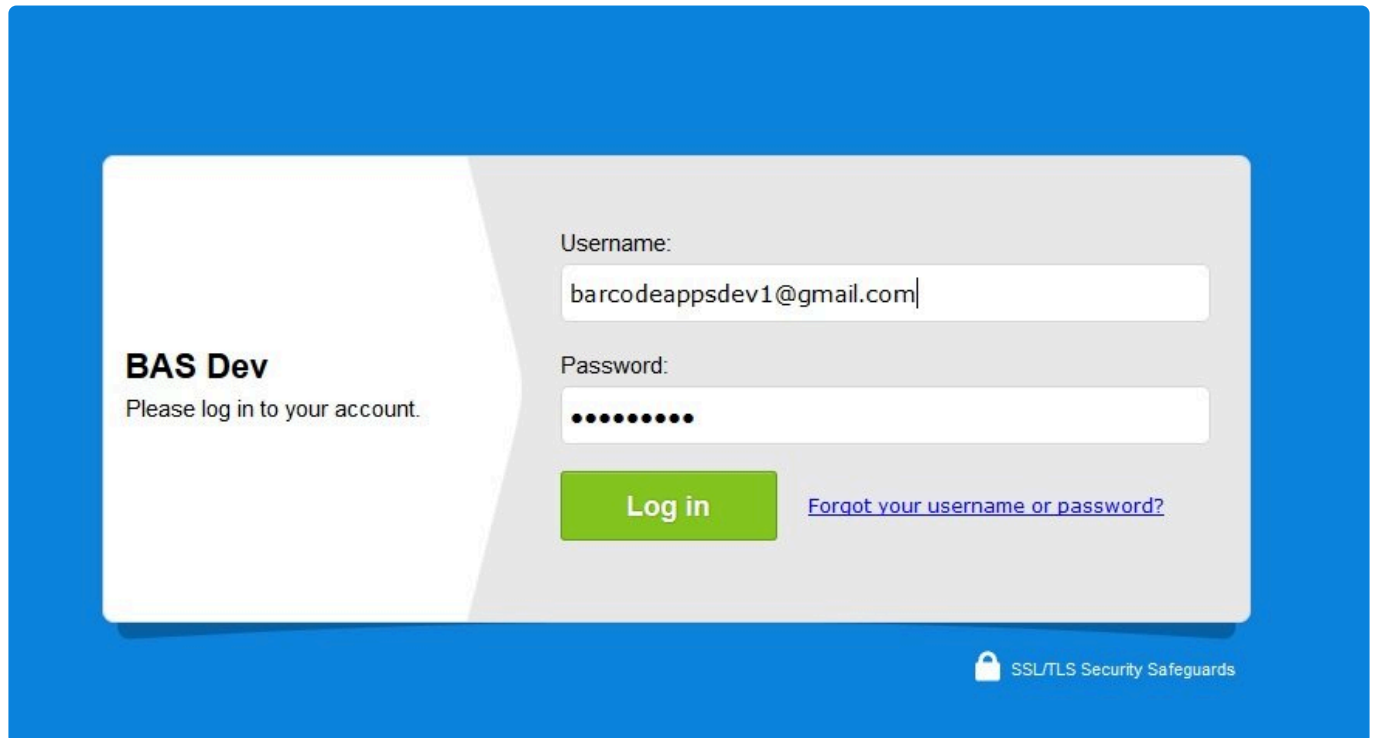


The email message will contain your company's login credential to our system (PRISM Admin site, PRISM webstore, PRISM app (iOS/Android)). We strongly advise for our users to save this information for reference.



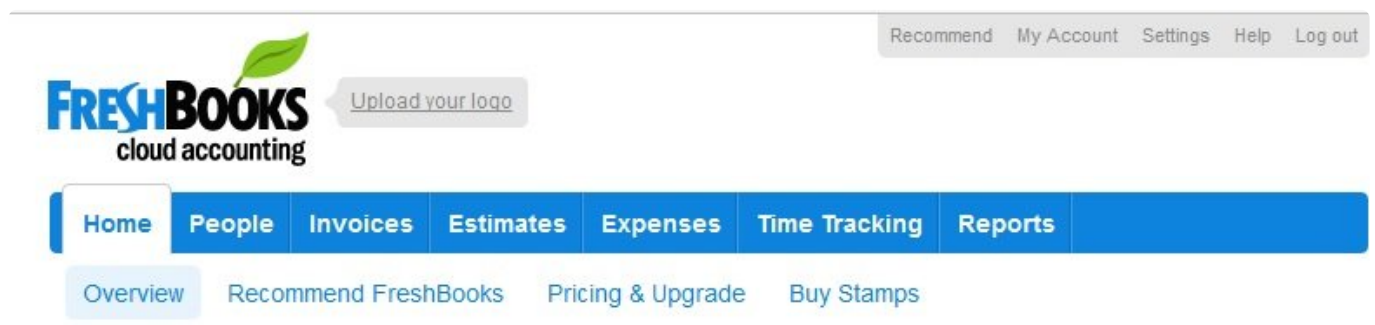
PRISM – FRESHBOOKS INTEGRATION

To begin integrating Freshbooks and PRISM. Log in to FRESHBOOKS



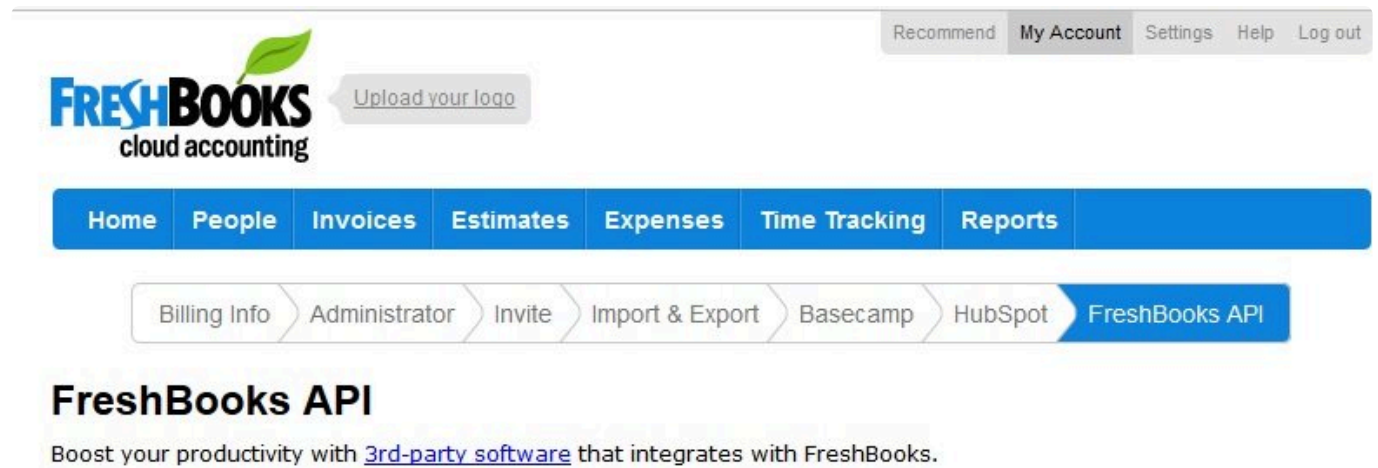
The image shows the FreshBooks login interface. On the left, a white box contains the text "BAS Dev" and "Please log in to your account." To the right, there are input fields for "Username:" (containing "barcodeappsdev1@gmail.com") and "Password:" (masked with dots). Below these is a green "Log in" button and a link "Forgot your username or password?". At the bottom right, there is a lock icon and the text "SSL/TLS Security Safeguards".

Click on My Account.



The image shows the FreshBooks dashboard navigation bar. At the top right, there are links: "Recommend", "My Account", "Settings", "Help", and "Log out". On the left, the FreshBooks logo is displayed with a green leaf icon and the text "cloud accounting". Below the logo is a button labeled "Upload your logo". A horizontal menu contains the following items: "Home", "People", "Invoices", "Estimates", "Expenses", "Time Tracking", and "Reports". Below this menu, there are four more items: "Overview", "Recommend FreshBooks", "Pricing & Upgrade", and "Buy Stamps".

click on FreshBooks API



The screenshot displays the FreshBooks web application interface. At the top left is the FreshBooks logo with a green leaf icon and the text "cloud accounting". To its right is a button labeled "Upload your logo". In the top right corner, there is a navigation bar with links: "Recommend", "My Account", "Settings", "Help", and "Log out". Below this is a primary navigation menu with blue buttons for "Home", "People", "Invoices", "Estimates", "Expenses", "Time Tracking", and "Reports". Underneath the primary menu is a secondary navigation bar with buttons for "Billing Info", "Administrator", "Invite", "Import & Export", "Basecamp", "HubSpot", and "FreshBooks API". The "FreshBooks API" button is highlighted in blue. Below the navigation bars, the heading "FreshBooks API" is displayed in bold, followed by the text: "Boost your productivity with [3rd-party software](#) that integrates with FreshBooks."

Copy and Save the API URL and the Authentication Token information. (These information will be used later to finish the integration to PRISM)

[Billing Info](#) [Administrator](#) [Invite](#) [Import & Export](#) [Basecamp](#) [HubSpot](#) **FreshBooks API**

FreshBooks API

Boost your productivity with [3rd-party software](#) that integrates with FreshBooks.

API URL	<input type="text" value="https://basdev.freshbooks.com/api/2.1/xml-in"/>
Authentication Token	<input type="text" value="8743294a6cc90c37c7ea8e6379c42a68"/> Reset API Token

[Save](#) **Integrations**

Integration

Integrate to

FREHSBOOKS

Connection Parameters for FreshBooks

URL *

Token *

[Test Connection](#)

Login to the PRISM Joomla Website (PRISM Admin Site) by clicking on the hyperlink supplied on the registration mail or by going to <http://basmax1.dyndns.biz/basportal/administrator/index.php>

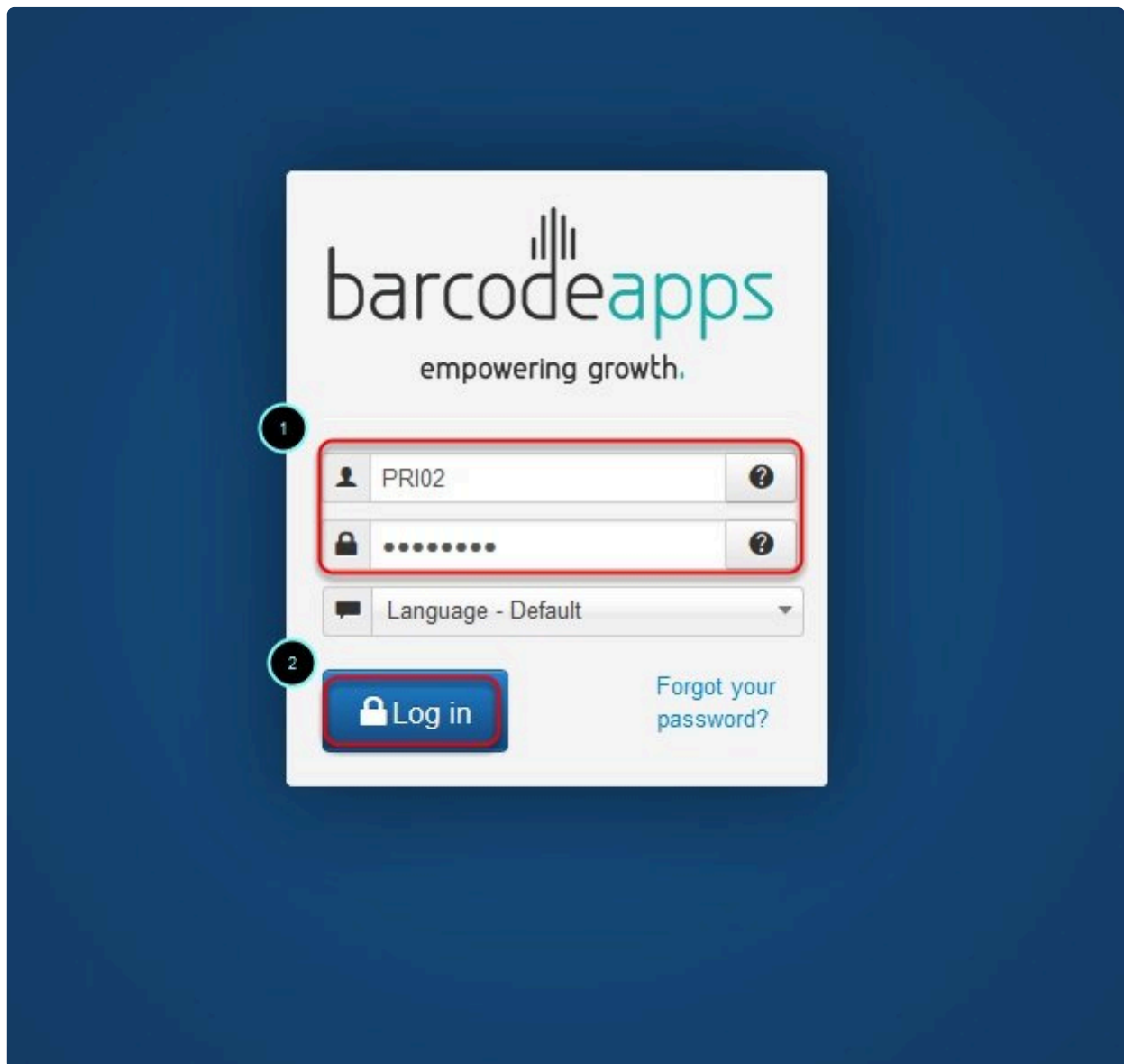
To start, please login by clicking [here](#), using the following credentials:

2

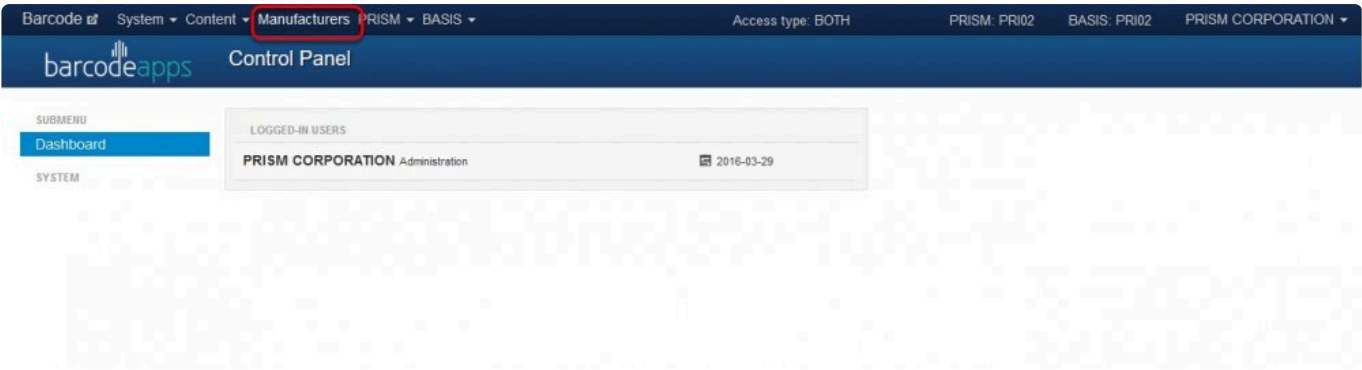
Fresh

Boost vo

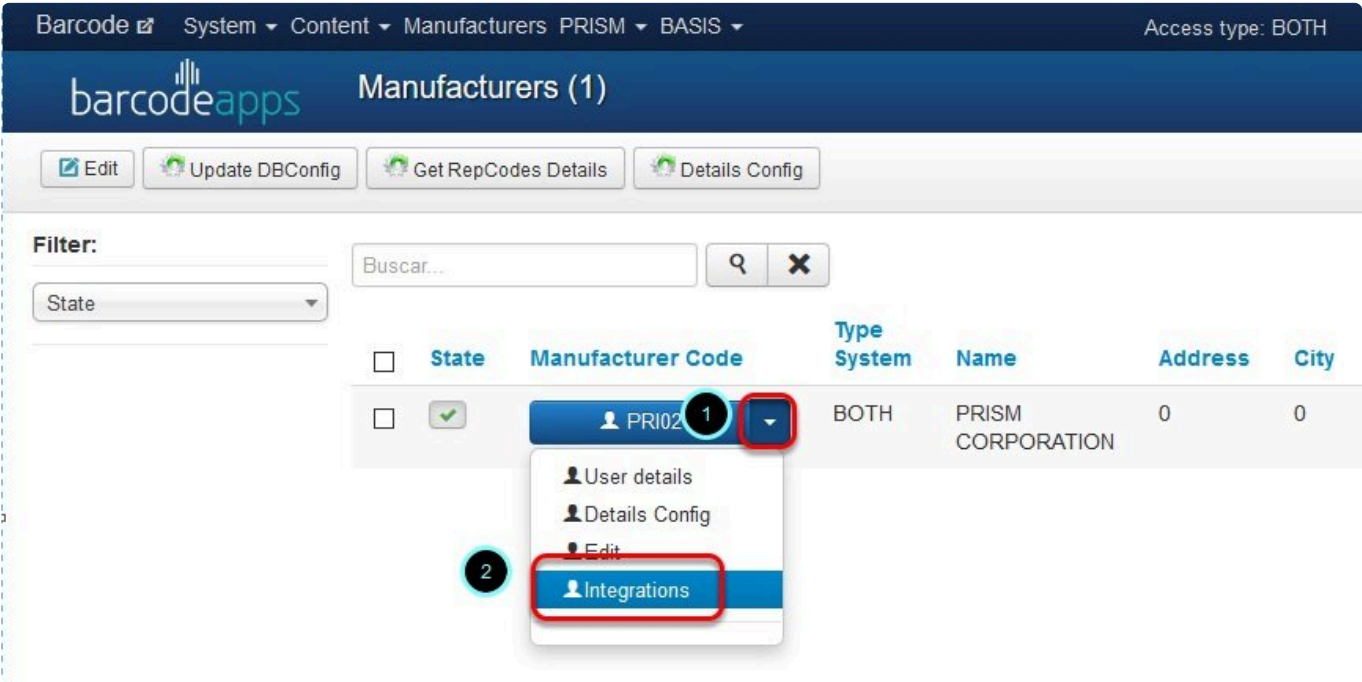
Log in using the user name and password supplied.



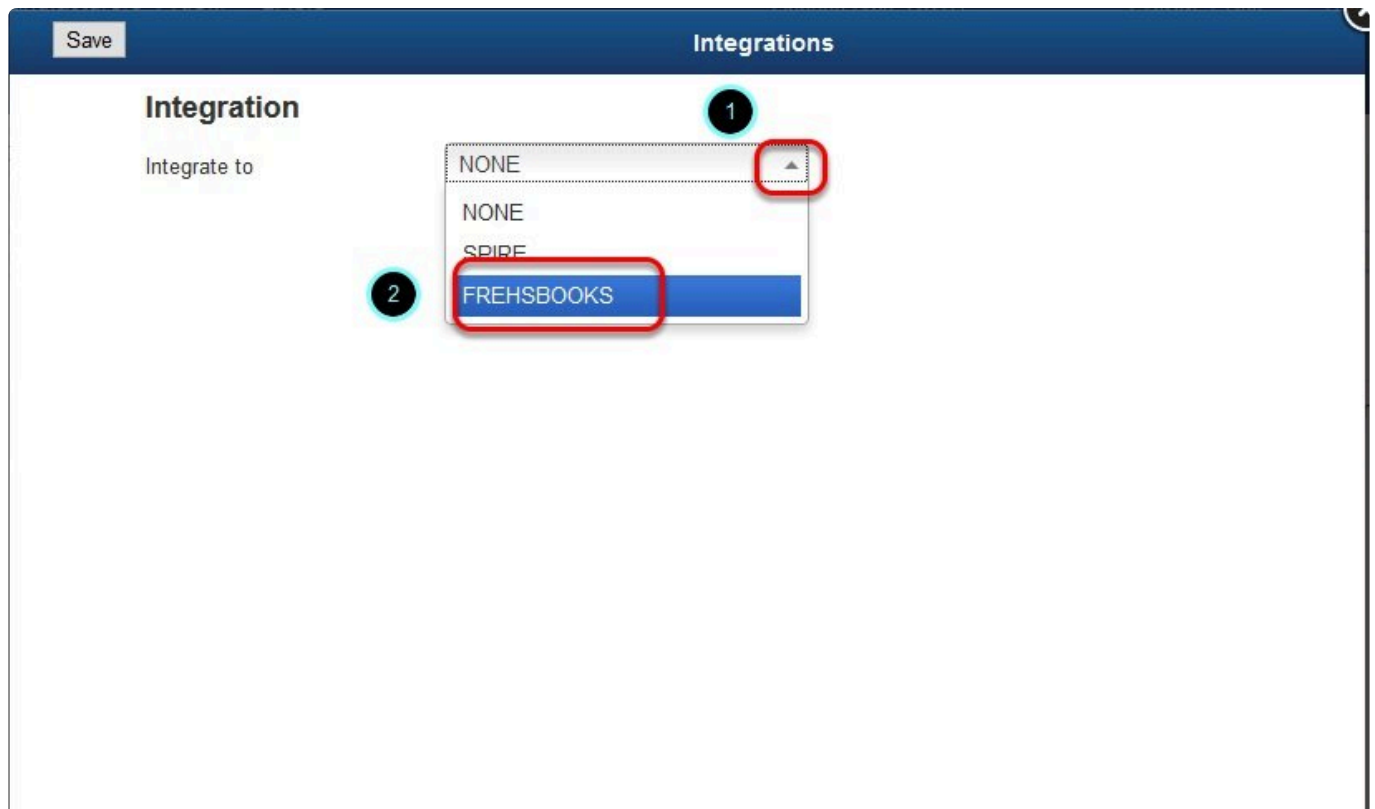
On the Control Panel window, click on Manufacturers.



Click on the drop down arrow just before the manufacturer code and then click on Integration.



Click on the drop down arrow and select FRESHBOOKS.



Copy the API URL and the Authentication Token information from the FRESHBOOKS API section and Paste them to the URL and Token field in the PRISM integration window.

Billing Info

Administrator

Invite

Import & Export

Basecamp

HubSpot

FreshBooks API

FreshBooks API

Boost your productivity with [3rd-party software](#) that integrates with FreshBooks.

1

API URL

Authentication Token

[Reset API Token](#)

Save

Integrations

Integration

Integrate to

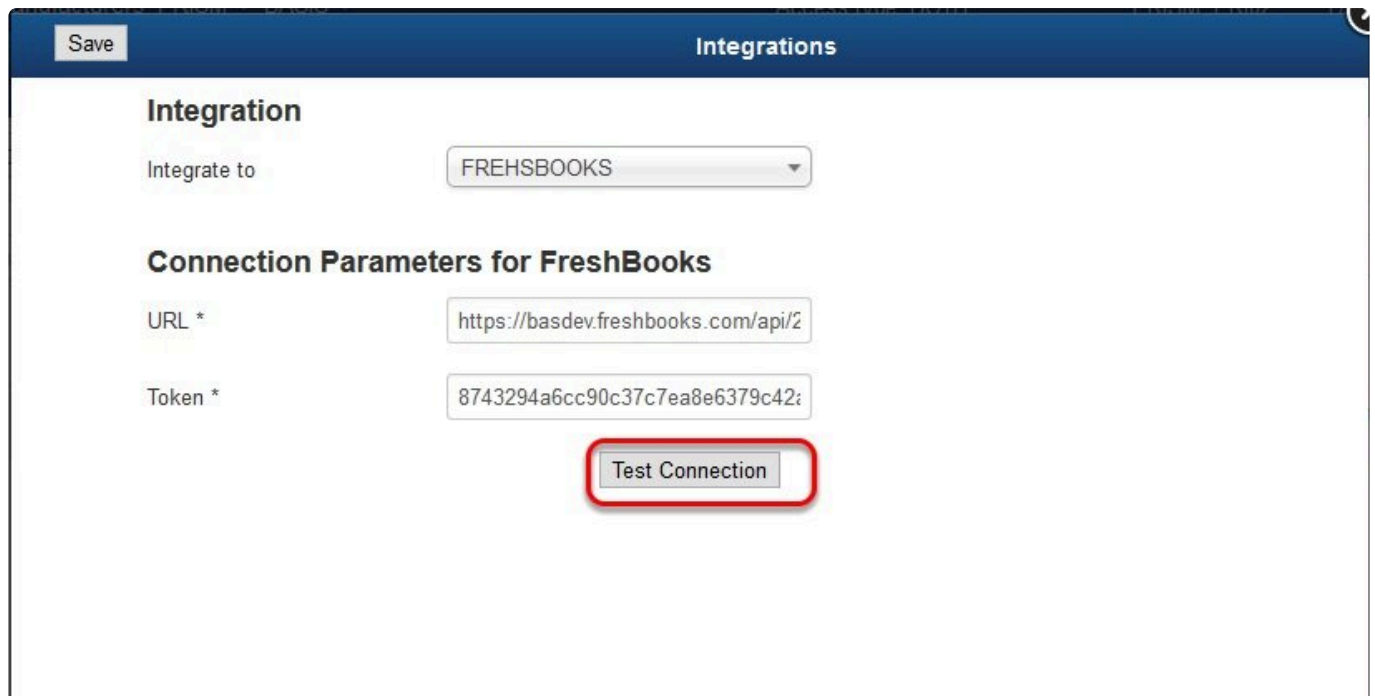
FREHSBOOKS

Connection Parameters for FreshBooks

URL *

Token *

Click on Test Connection to validate connectivity.



Integrations

Integration

Integrate to FREHSBOOKS

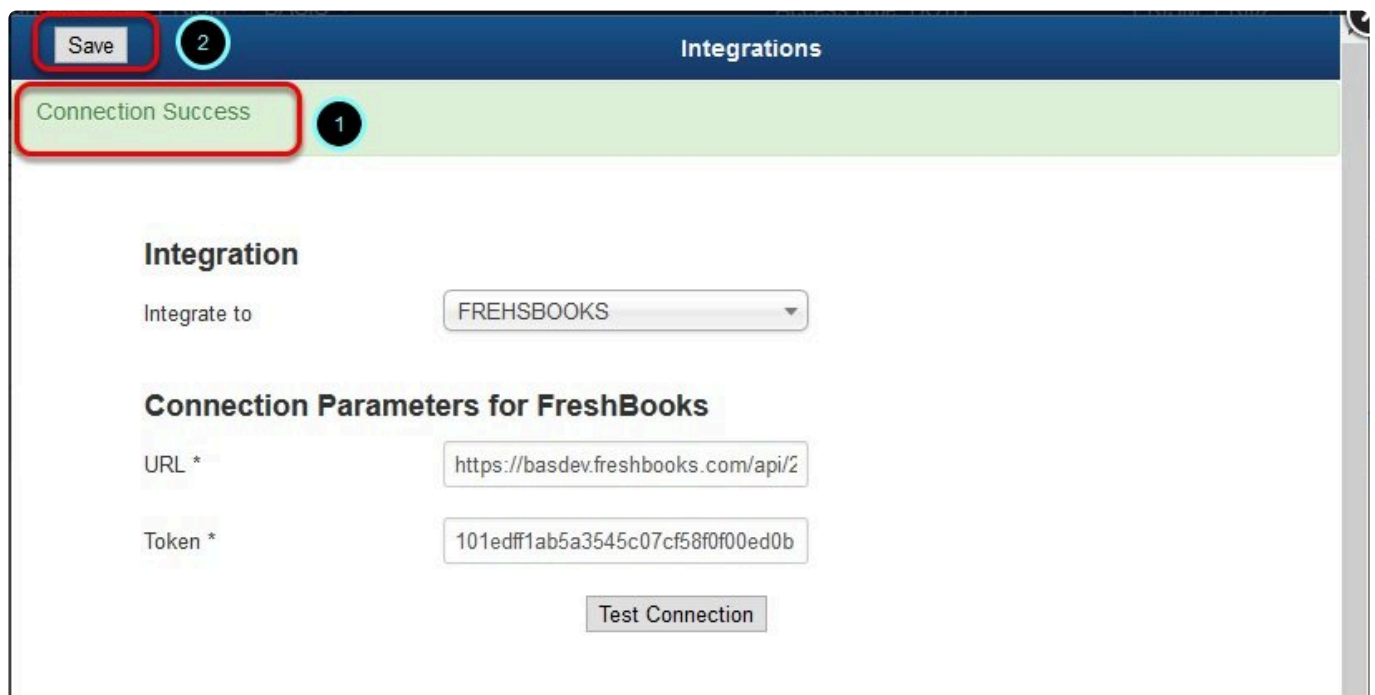
Connection Parameters for FreshBooks

URL * https://basdev.freshbooks.com/api/2

Token * 8743294a6cc90c37c7ea8e6379c42e

Test Connection

Click on Save as soon as you get a Connection Success notification.



Integrations

Save 2

Connection Success 1

Integration

Integrate to FREHSBOOKS

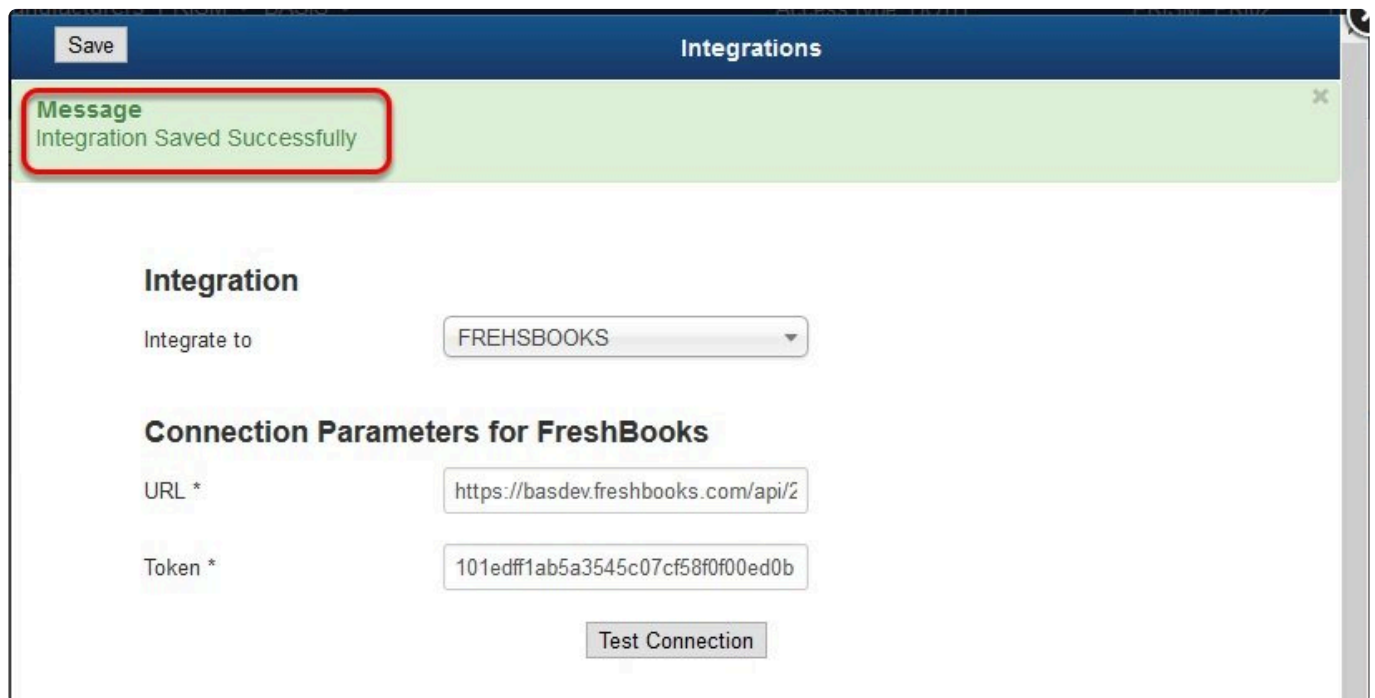
Connection Parameters for FreshBooks

URL * https://basdev.freshbooks.com/api/2

Token * 101edff1ab5a3545c07cf58f0f00ed0b

Test Connection

Congratulations! PRISM and FRESHBOOKS are now integrated.



The screenshot shows the 'Integrations' page in the BarcodeApps interface. At the top, there is a 'Save' button. Below it, a green message box with a red border states 'Message Integration Saved Successfully'. The main section is titled 'Integration' and contains a dropdown menu labeled 'Integrate to' with 'FREHSBOOKS' selected. Below this, the section 'Connection Parameters for FreshBooks' is shown, with fields for 'URL *' (https://basdev.freshbooks.com/api/2) and 'Token *' (101edff1ab5a3545c07cf58f0f00ed0b). A 'Test Connection' button is located at the bottom of this section.

Integrations

Message
Integration Saved Successfully

Integration

Integrate to: FREHSBOOKS

Connection Parameters for FreshBooks

URL *: https://basdev.freshbooks.com/api/2

Token *: 101edff1ab5a3545c07cf58f0f00ed0b

Test Connection


6.3.2. B. Importing FreshBooks Customers To PRISM

This knowledge base article will guide users to upload their Freshbooks customer information to PRISM.

UPLOADING FRESH BOOKS CUSTOMERS TO PRISM

To upload your Freshbooks customer information to PRISM.

Recommend My Account Settings Help Log out


[Upload your logo](#)

Home People Invoices Estimates Expenses Time Tracking Reports

Clients Staff and Contractors Accountant Assign Clients Sent Emails

Clients

Want to [import clients?](#) [+ New Client](#)

Archive Delete Email Search

<input type="checkbox"/>	Organization ▾	Contact	Last Login	Email Address	Business Phone	
<input type="checkbox"/>	Radio Land	Smithing, John	---	jh1@example.com	416555626	edit
<input type="checkbox"/>	Ontario Sound...	Smithy, John	---	jh2@example.com	416539457	edit
<input type="checkbox"/>	North York Audio...	Smithson, John	---	jh3@example.com	905658944	edit
<input type="checkbox"/>	Jackson Electronics	jh1@example.com	---	jh1@example.com	204822490	edit
<input type="checkbox"/>	Integrated Sound...	jh2@example.com	---	jh2@example.com	905555143	edit
<input type="checkbox"/>	Harris	jh3@example.com	---	jh3@example.com	604555432	edit
<input type="checkbox"/>	Harmons Home...	jh1@example.com	---	jh1@example.com	905555970	edit
<input type="checkbox"/>	Hardy Computer...	jh2@example.com	---	jh2@example.com	705252161	edit
<input type="checkbox"/>	Georgian...	jh3@example.com	---	jh3@example.com	902885650	edit
<input type="checkbox"/>	Freemont Radio Corp.	jh1@example.com	---	jh1@example.com	514586766	edit
<input type="checkbox"/>	Florence Radio...	jh2@example.com	---	jh2@example.com	905734812	edit
<input type="checkbox"/>	Entertainment Centre	jh3@example.com	---	jh3@example.com	416366290	edit
<input type="checkbox"/>	Downtown Stereo...	jh1@example.com	---	jh1@example.com	413451121	edit
<input type="checkbox"/>	Company 2	Casas, Pedro	---	maofranco@gmail.com		edit
<input type="checkbox"/>	Company 1	Franco, Mauricio	---	maofranco@hotmail.c...	4168223434	edit

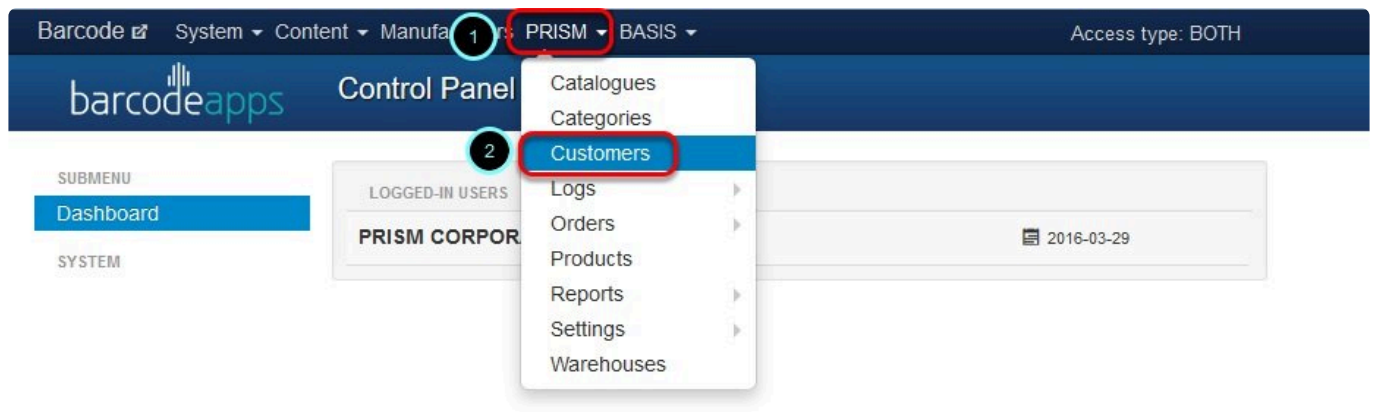
active | [archived](#) | [deleted](#)

1 2 next all 2 pages

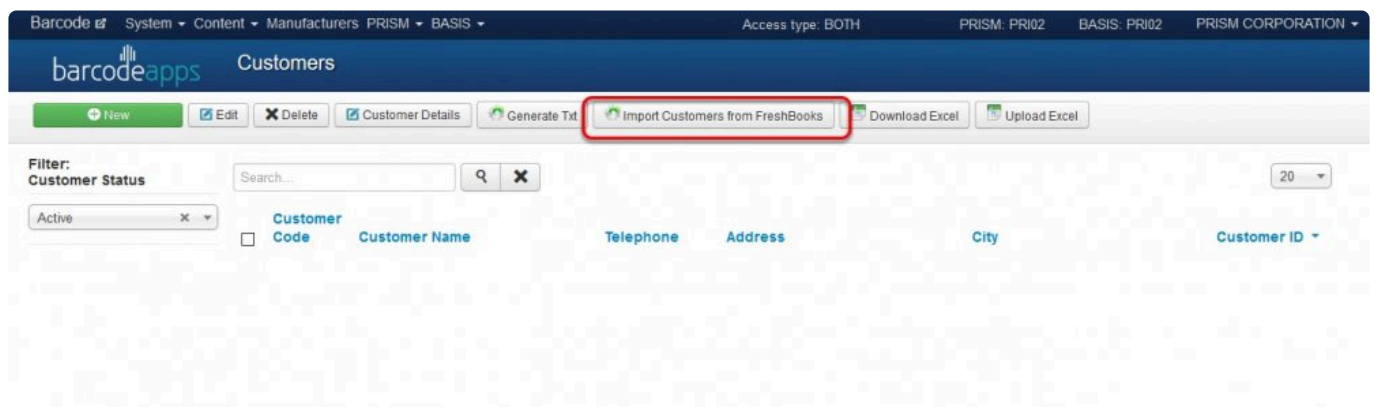
Login to the [PRISM Joomla Website](#) using your admin credentials.



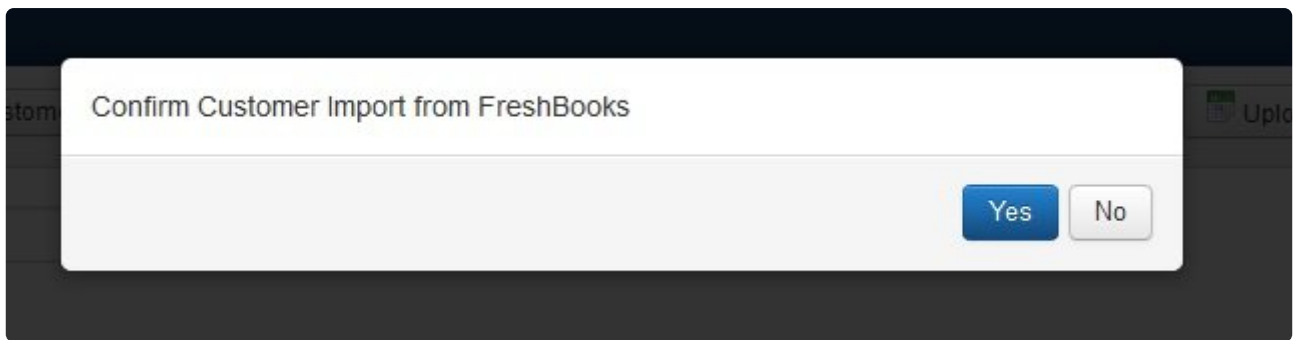
In the Control Panel, click on PRISM and then click on customers.



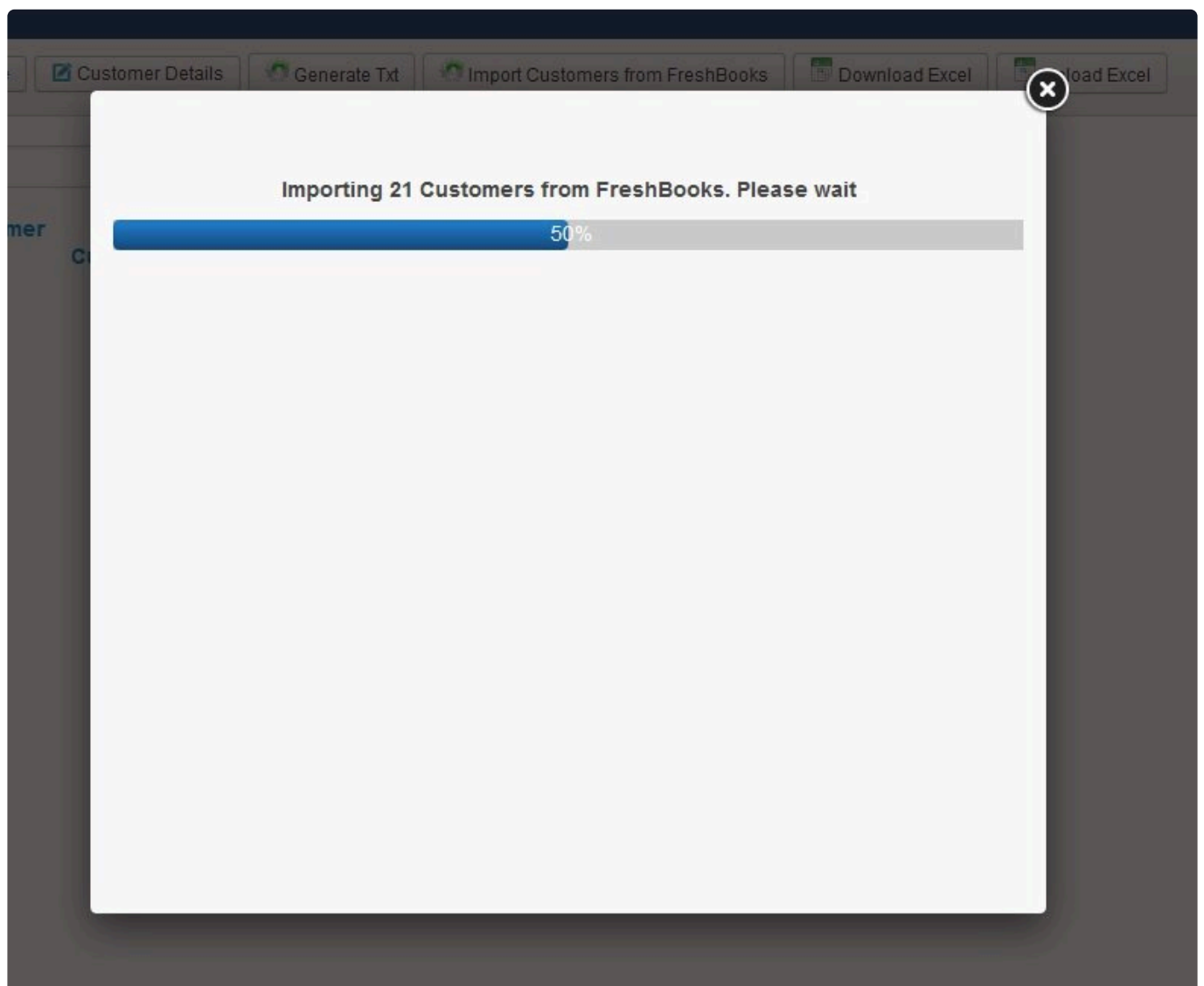
Click on Import Customers from FreshBooks



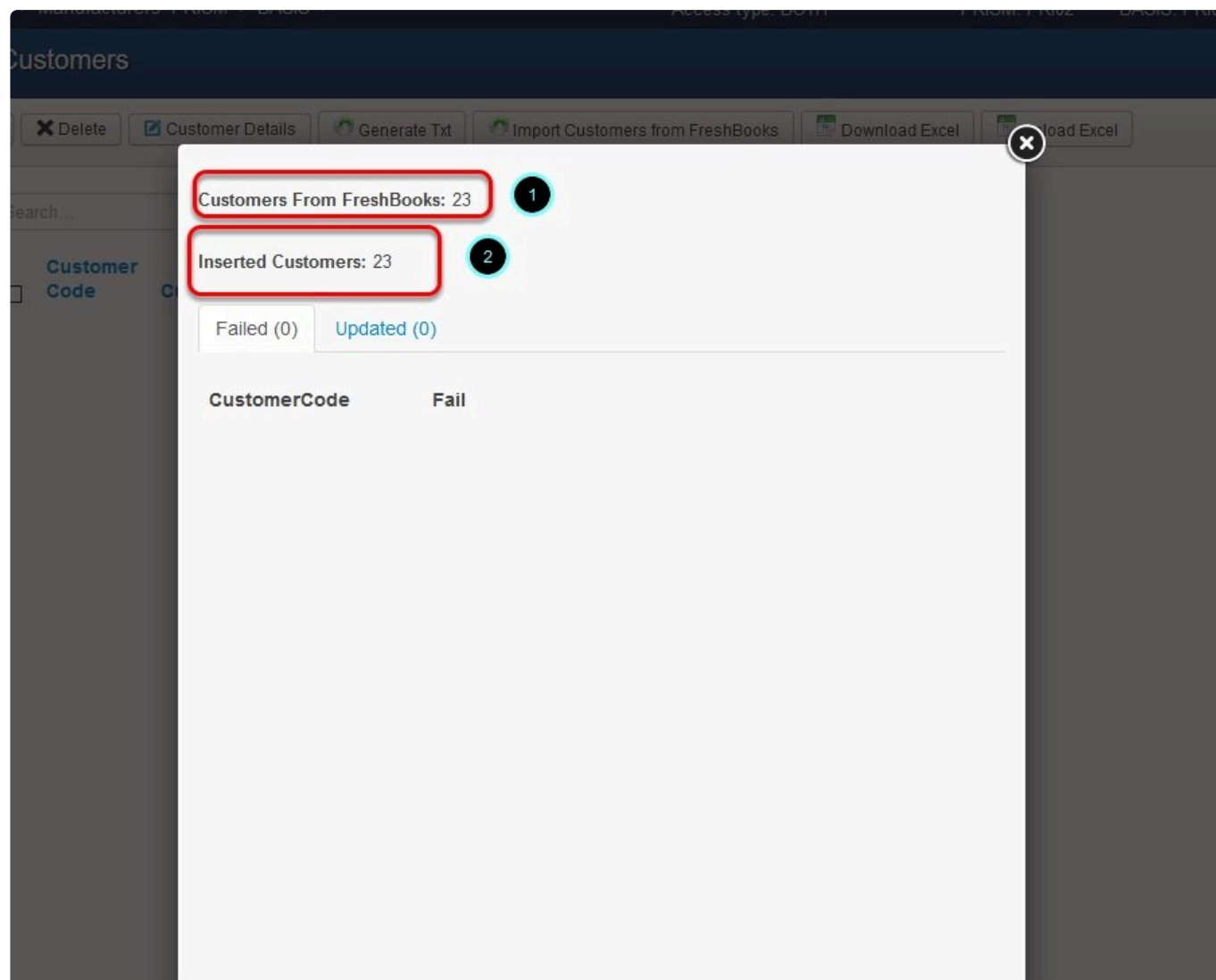
Click on Yes.




Wait for the Import to finish.



a notification will show the number of customers from Freshbooks and the total number of customers successfully inserted. Just click on the X sign to exit.



All customers are now loaded on the PRISM Joomla Portal from Freshbooks.

Barcode  System ▾ Content ▾ Manufacturers PRISM ▾ BASIS ▾

Access type: BOTHPRISM: PRI02BASIS: PRI02PRISM CORPORATION ▾

barcodeapps

Customers (23)

New

Edit

Delete

Customer Details

Generate Txt

Import Customers from FreshBooks

Download Excel

Upload Excel

Filter: Customer Status











Search...

Q X

20 ▾

Active X ▾

12

<input type="checkbox"/>	Customer Code	Customer Name	Telephone	Address	City	Customer ID ▾
<input type="checkbox"/>	 14698 ▾	Company 1	647123456	5080 Timberlea Blvd	Etobicoke	23
<input type="checkbox"/>	 4411 ▾	Company 1	416987654	5080 Timberlea Blvd	Etobicoke	22
<input type="checkbox"/>	 87084 ▾	Company 1	416822343	5080 Timberlea Blvd	Etobicoke	21
<input type="checkbox"/>	 87123 ▾	Company 2		123 Main Street	Barrie	20
<input type="checkbox"/>	 87157 ▾	Radio Land	416555626	103 MacArthur Drive Suite 459 Suite 311	Willowdale	19
<input type="checkbox"/>	 87158 ▾	Ontario Sound Emporium Inc.	416539457	1460 Lakeshore Boulevard Suite 311	Toronto	18
<input type="checkbox"/>	 87159 ▾	North York Audio Specialists	905658944	823 Griffin Way Suite 311	New York	17
<input type="checkbox"/>	 87160 ▾	Jackson Electronics	204822490	600 Niagara Way	Niagara Falls	16
<input type="checkbox"/>	 87161 ▾	Integrated Sound Solutions	905555143	1402 West Street Suite 200	Lethbridge	15
<input type="checkbox"/>	 87162 ▾	Harris	604555432	1197 Bartley Bull Plaza Unit 14	Chicago	14

NOTE ON MULTIPLE CUSTOMERS

Organization

Organization Name

CAD English

Send Invoices By ☒ Email ☐ Snail Mail

Contacts

Email *

Home Phone

1

Contact Name

First name
Last name

Login Credentials ☐ Assign Username and Password

Mobile

Email *

Phone 1

2

Contact Name

First name
Last name

Login Credentials ☐ Assign Username and Password

Phone 2

➖ [Remove this contact](#)

Email *

Phone 1

3

Contact Name

First name
Last name

Login Credentials ☐ Assign Username and Password

Phone 2

➖ [Remove this contact](#)

➕ [Add another contact](#)

Freshbooks can have multiple contacts associated with one Client Organization, while PRISM can only have one.

With that said, A Customer information may show up multiple times depending on the number of contact person

in an organization.

1. Customer Code – represents the contact person in FreshBooks.
2. Customer name – represents the Organization Name in FreshBooks

EditDeleteCustomer DetailsGenerate TxtImport Customers from FreshBooksDownload ExcelUpload Excel

Search...QX

20

12

	Customer Code	Customer Name	Telephone	Address	City	Customer ID
<input type="checkbox"/>	14698	Company 1	647123456	5080 Timberlea Blvd	Etobicoke	23
<input type="checkbox"/>	4411	Company 1	416987654	5080 Timberlea Blvd	Etobicoke	22
<input type="checkbox"/>	87084	Company 1	416822343	5080 Timberlea Blvd	Etobicoke	21

6.3.3. C. Importing FreshBooks Products To PRISM

This knowledge base article will guide user to upload their product items from Freshbooks to PRISM.

UPLOADING FRESH BOOKS ITEMS TO PRISM

To upload your Freshbooks items to PRISM.

FreshBooks cloud accounting

Upload your logo

Recommend My Account Settings Help Log out

Home People Invoices Estimates Expenses Time Tracking Reports

Invoices Recurring Received Payments Credits Items

Items [+ New Item](#)

Archive Delete Search

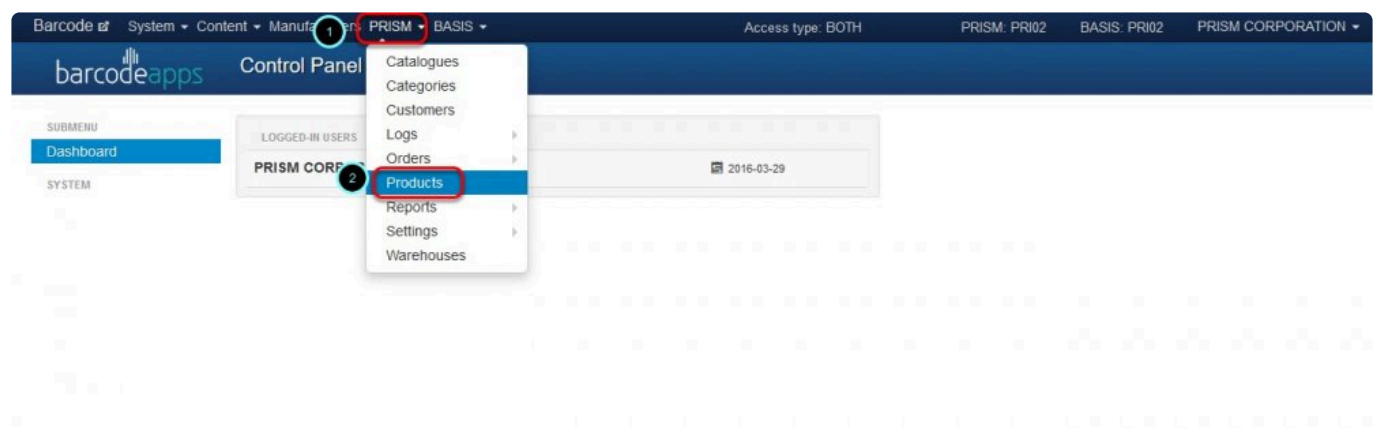
Item Name	Description	Inventory	Unit Cost (\$)	Qty	Tax 1	Tax 2	
Socket CH7	Bluetooth Barcode Scanner	300	199.99	1	GST	---	edit
Shoe Holder	Very nice and durable	1113	8.50	100	---	---	edit
Remote Control	Battery operated	8764	12.56	1	---	---	edit
Product 2	This is a not so good...	-59	8.75	11	HST	---	edit
Product 1	This is a very good...	109	2.50	2	HST	---	edit
Pen Stylus	small and convinient	994	12.56	80	---	---	edit

active | [archived](#) | [deleted](#)

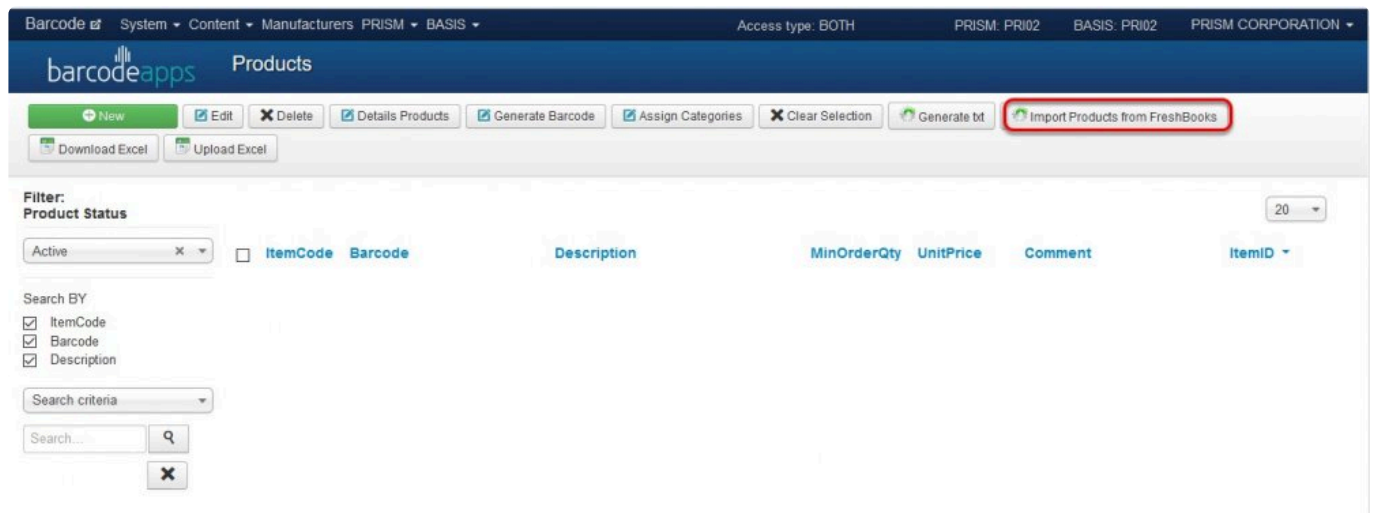
Login to the [PRISM Joomla Website](#) using your admin credentials.



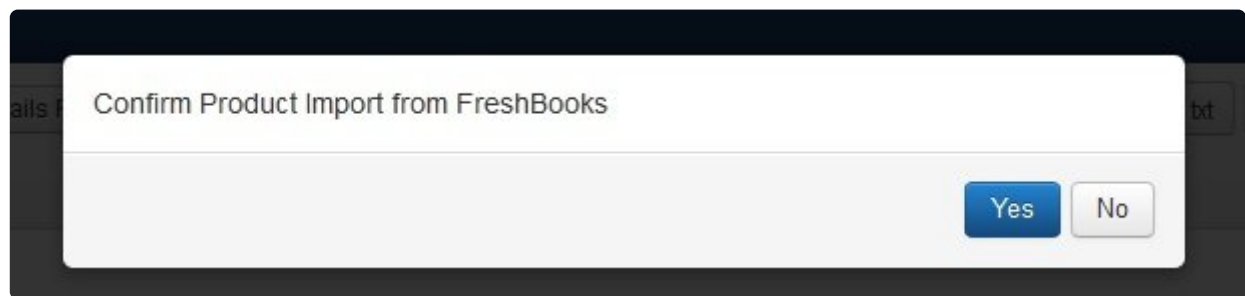
In the Control Panel window, click on PRISM and then click on products.



Click on Import Products from Freshbooks



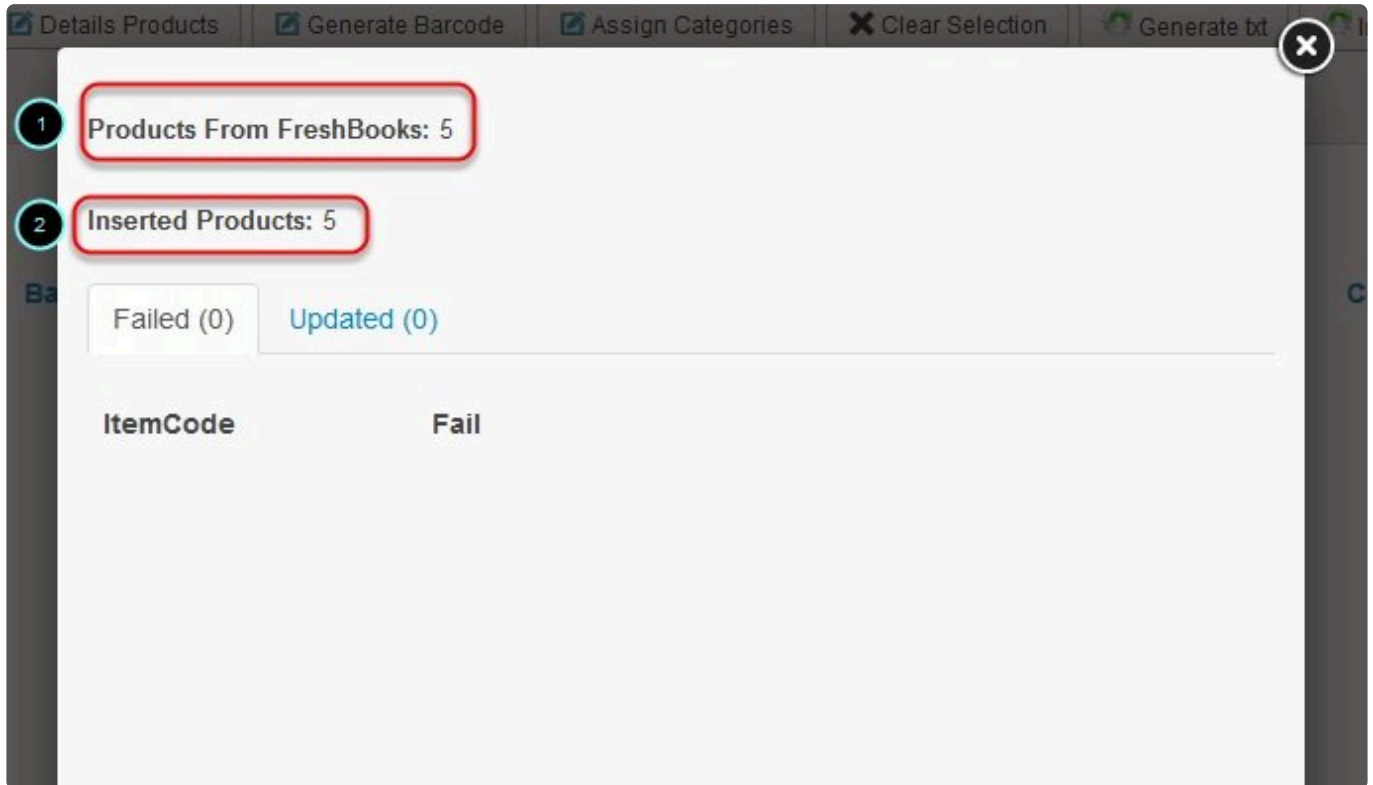
Click on Yes.



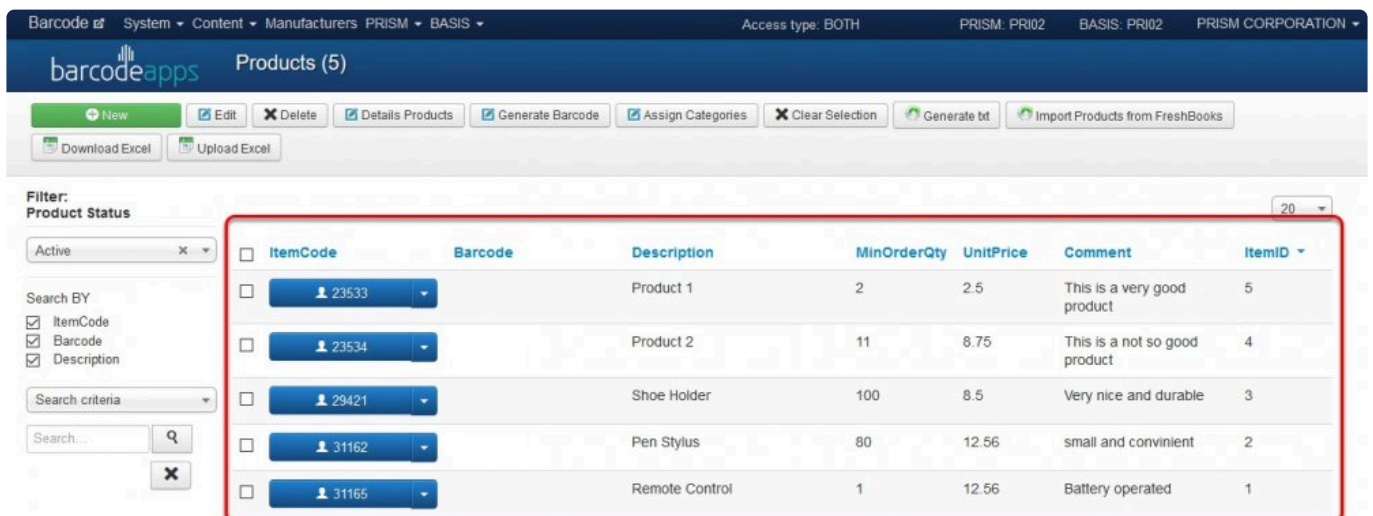
Wait for the Products to be uploaded.



a notification will show the number of products from Freshbooks and the total number of products successfully inserted. Just click on the X sign to exit.



All products from Freshbooks are now uploaded to the PRISM Joomla Website.



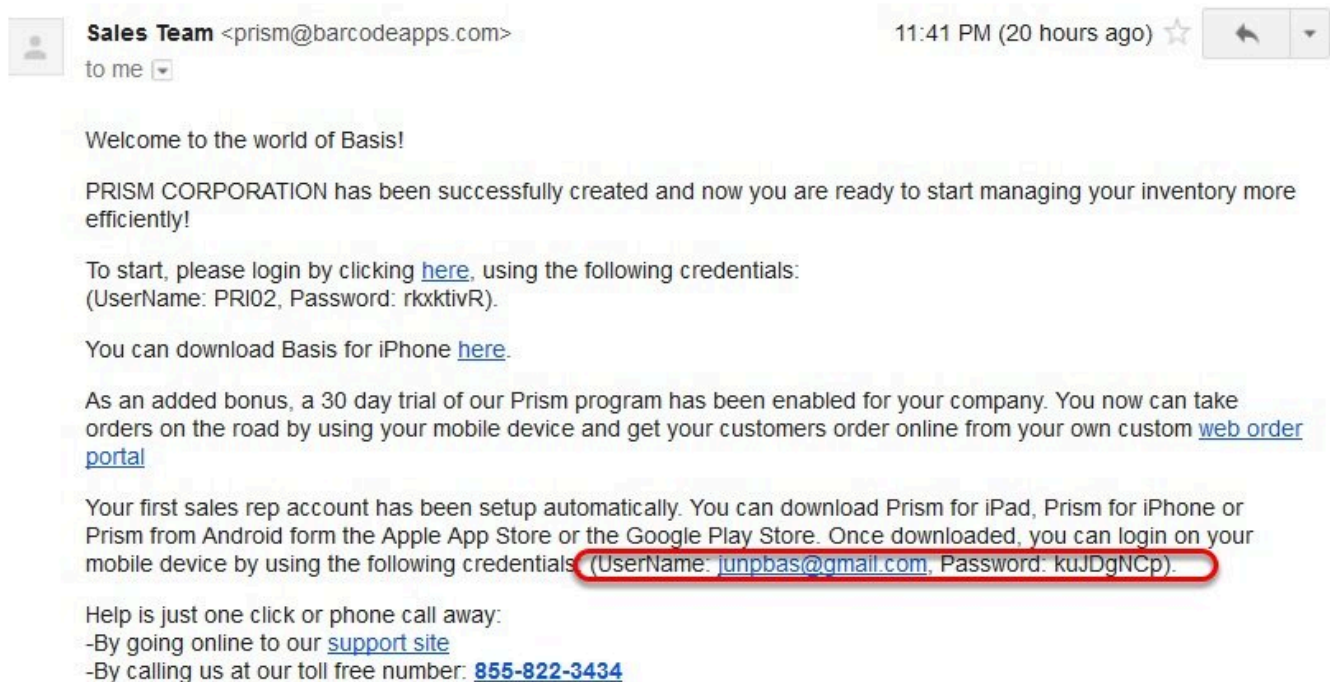
6.3.4. D. First Time Sync

This knowledge base article will guide FreshBooks users to do the first time sync using the PRISM App.

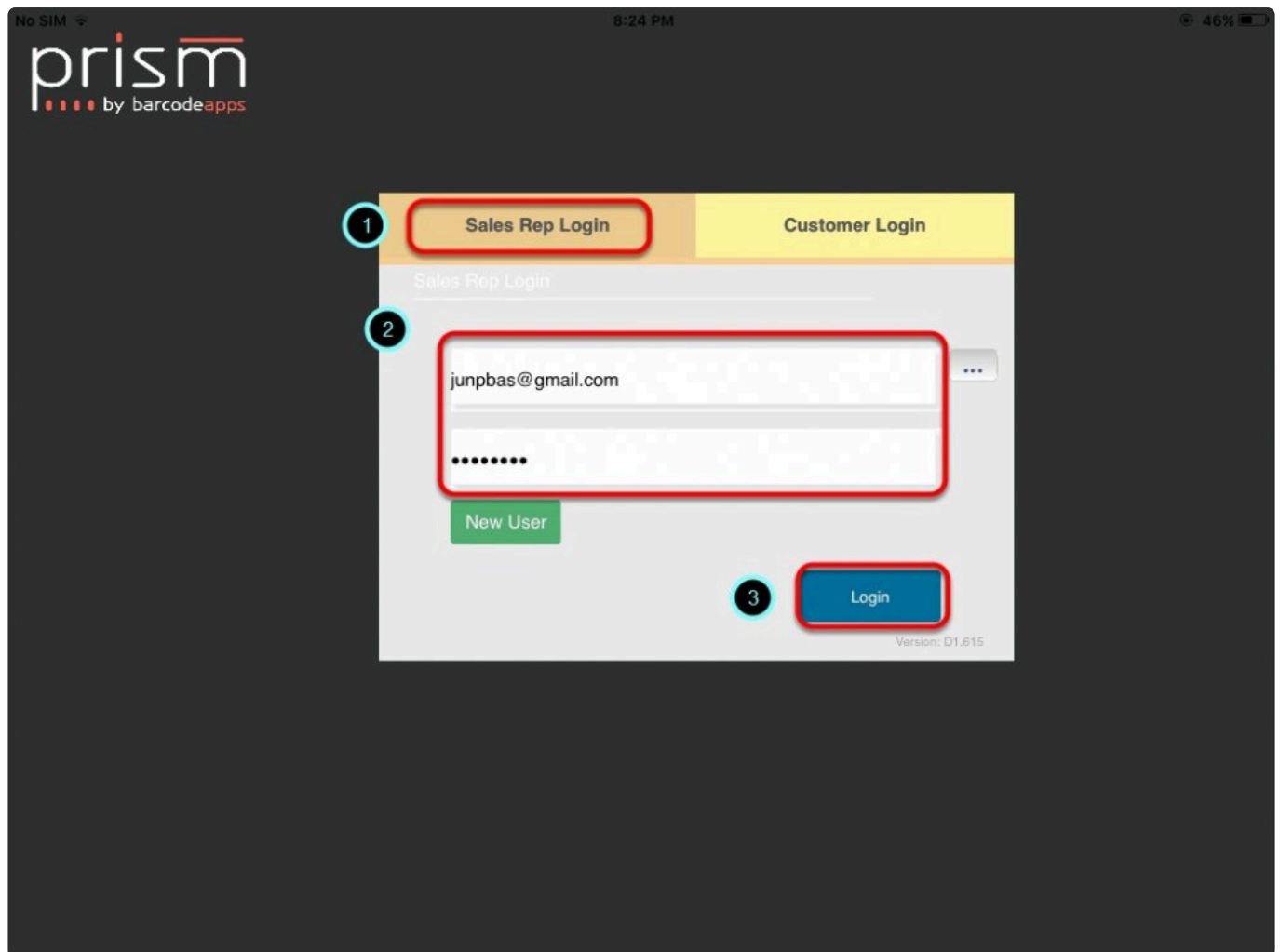
FIRST TIME SYNC

To get started

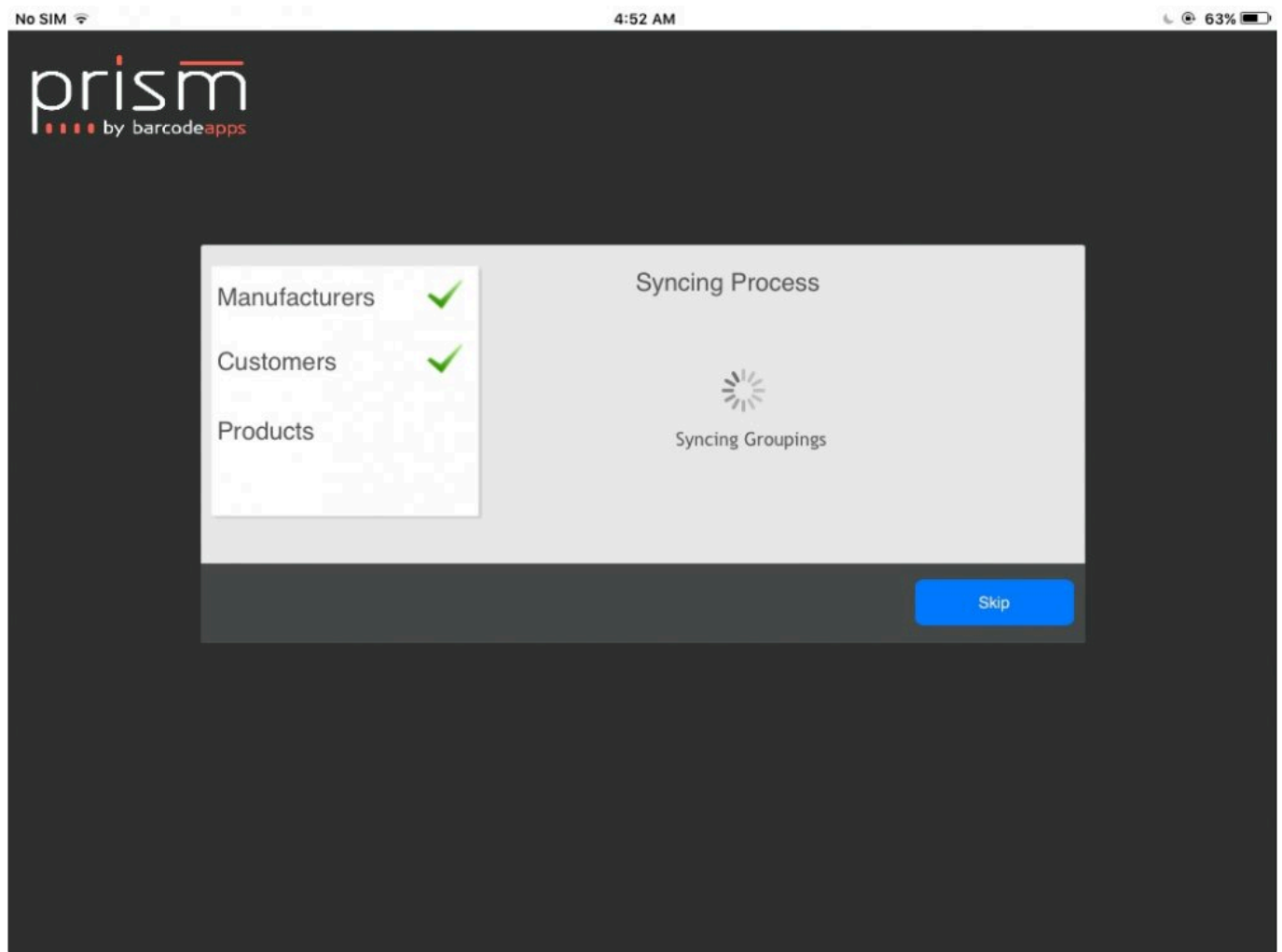
1. Download the PRISM App (iOS/Android). click [here](#) our PRISM App tutorials.
2. Take note of the sales rep login credential found in the registration e-mail message.



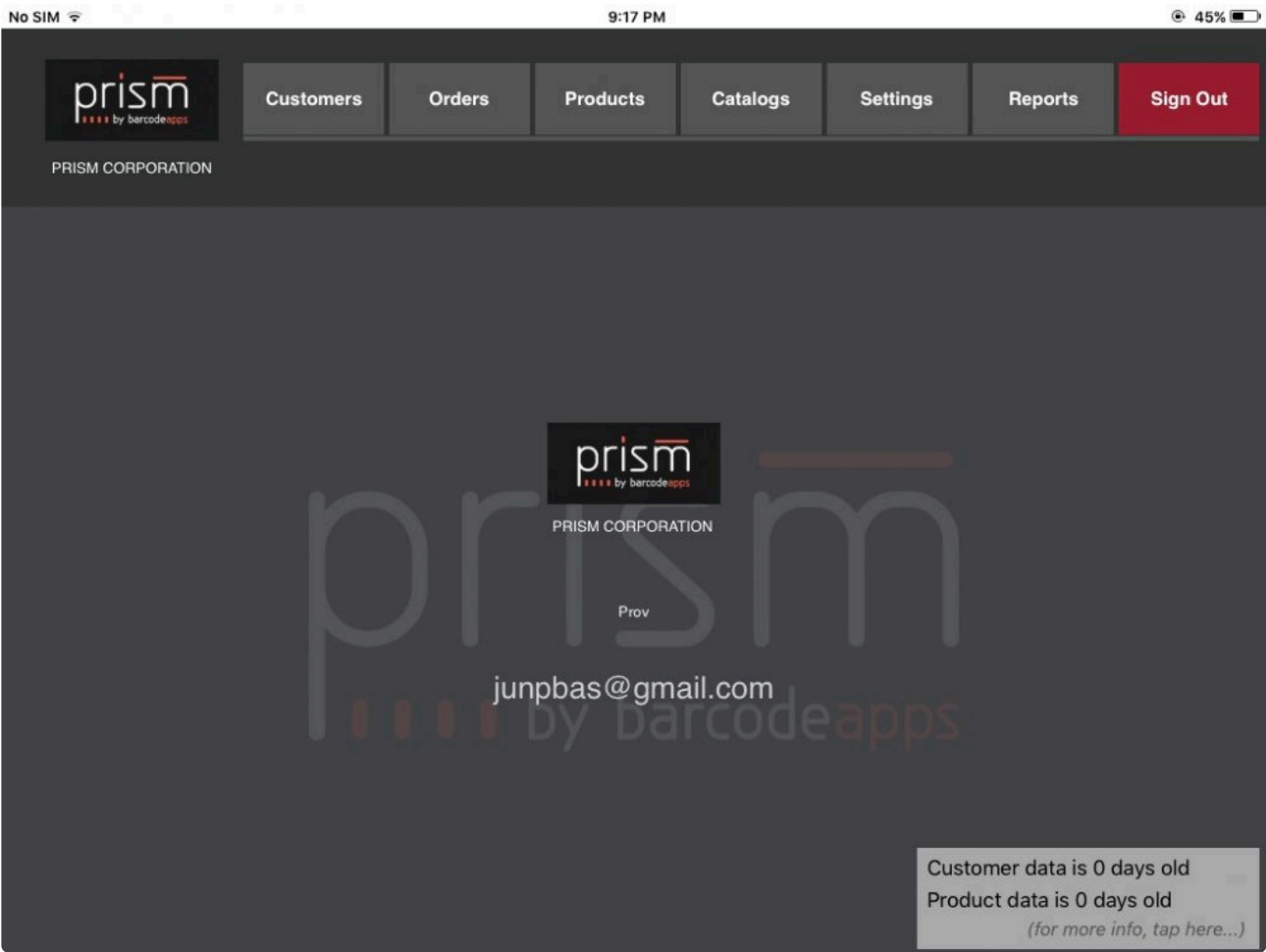
Login to the App by tapping the Sales Rep Login Tab, type in the sales rep user name and password, and then Tap on Login.



Wait for the sync to finish.



Congratulations! PRISM App is now ready to use.

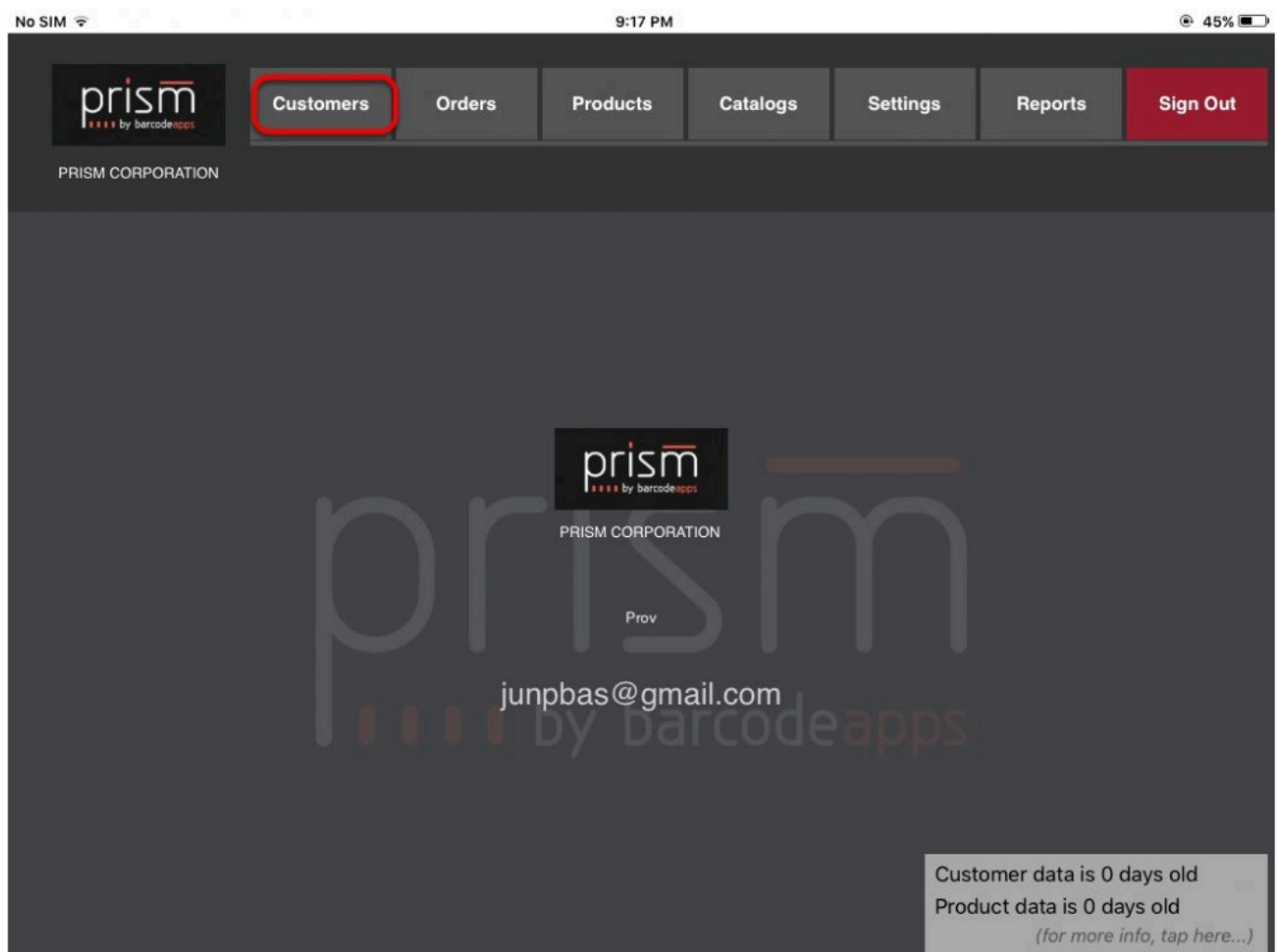


6.3.5. E. Uploading An Order From PRISM To FreshBooks

This knowledge base article will show users the basics on how an order is processed from PRISM going to Freshbooks.

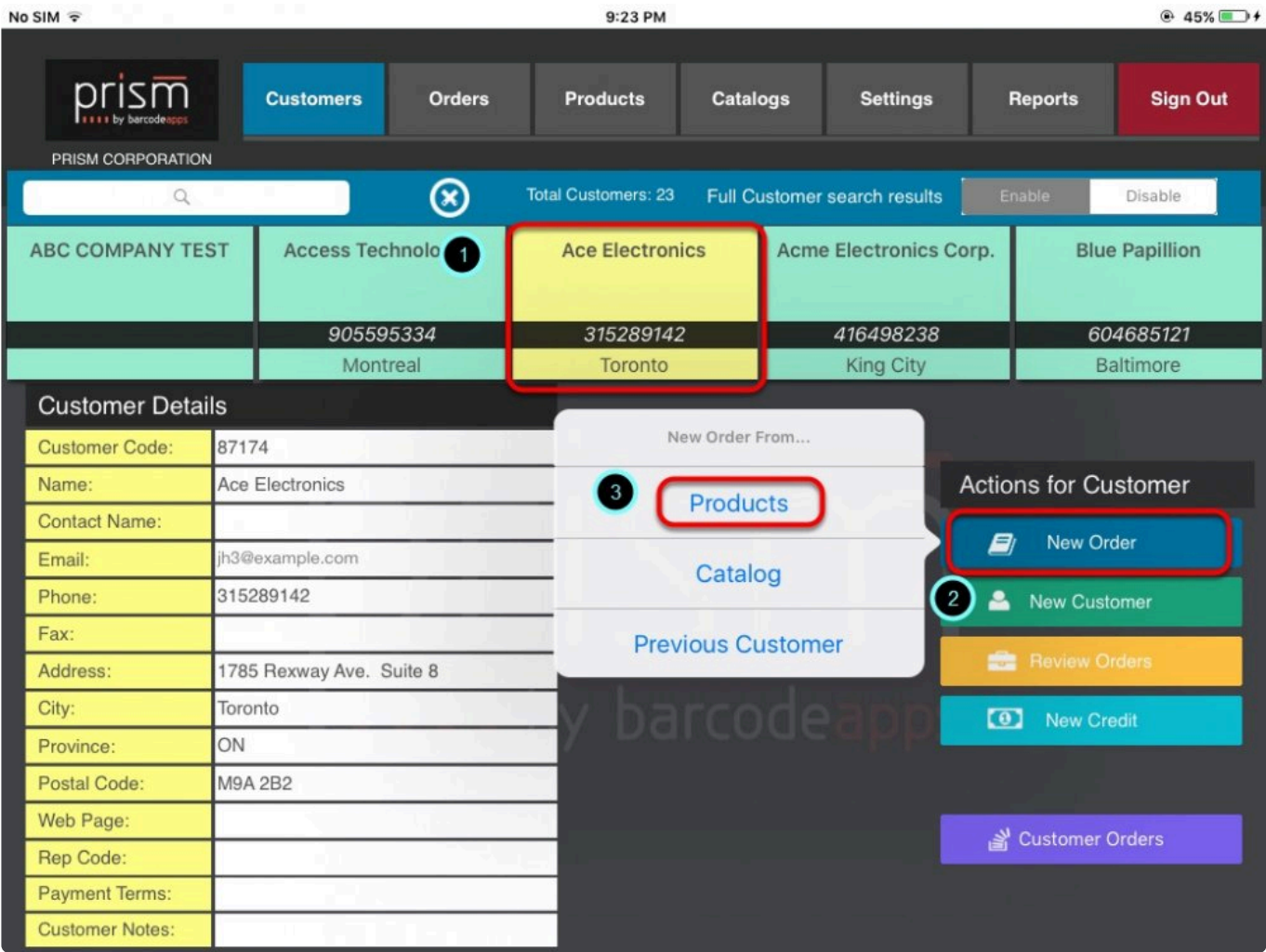
CREATING AN ORDER USING PRISM App iOS

To create an order on the PRISM App iOS. On the Main Screen, tap on the Customers Tab.

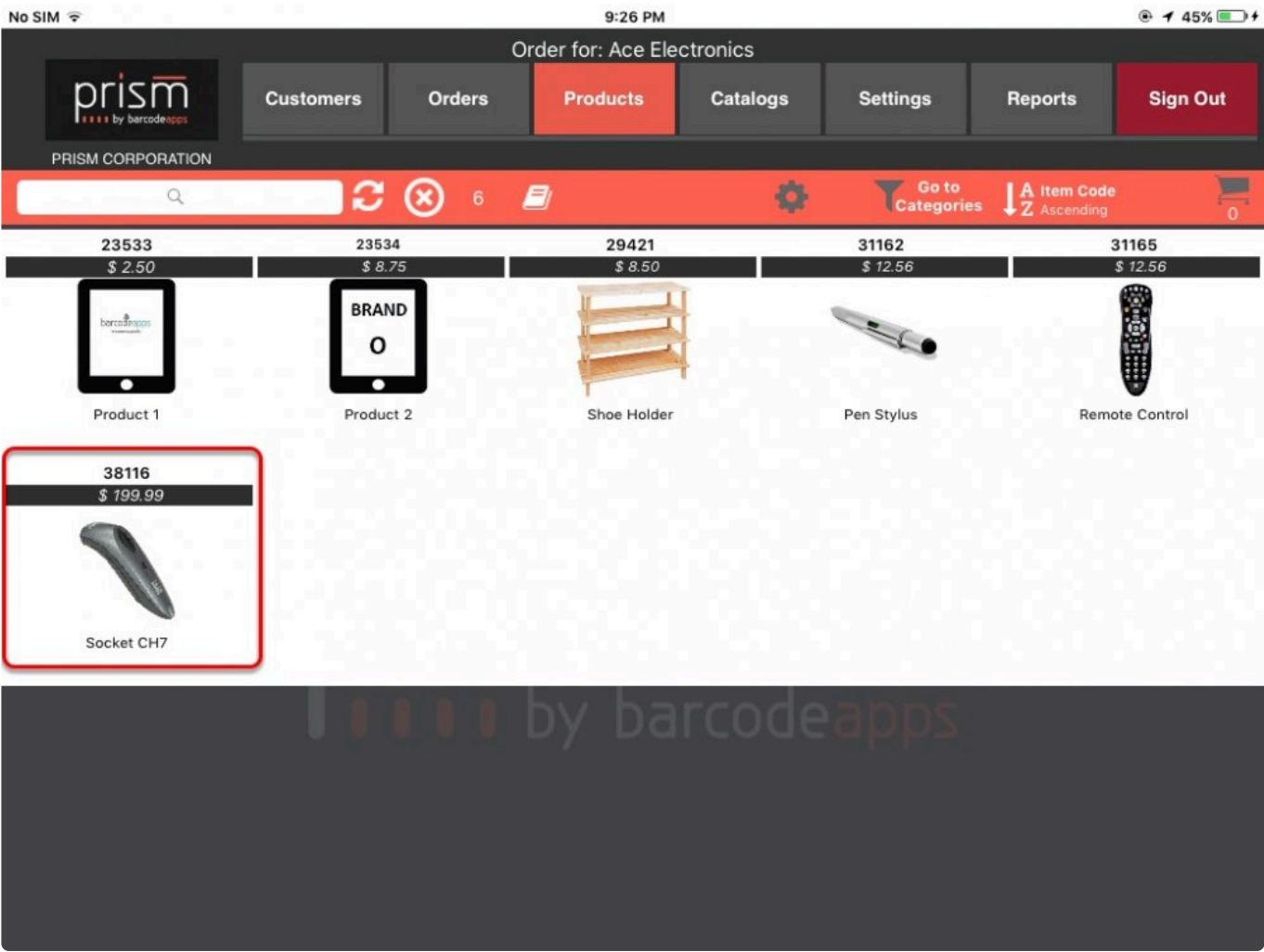


ADDING AN ITEM

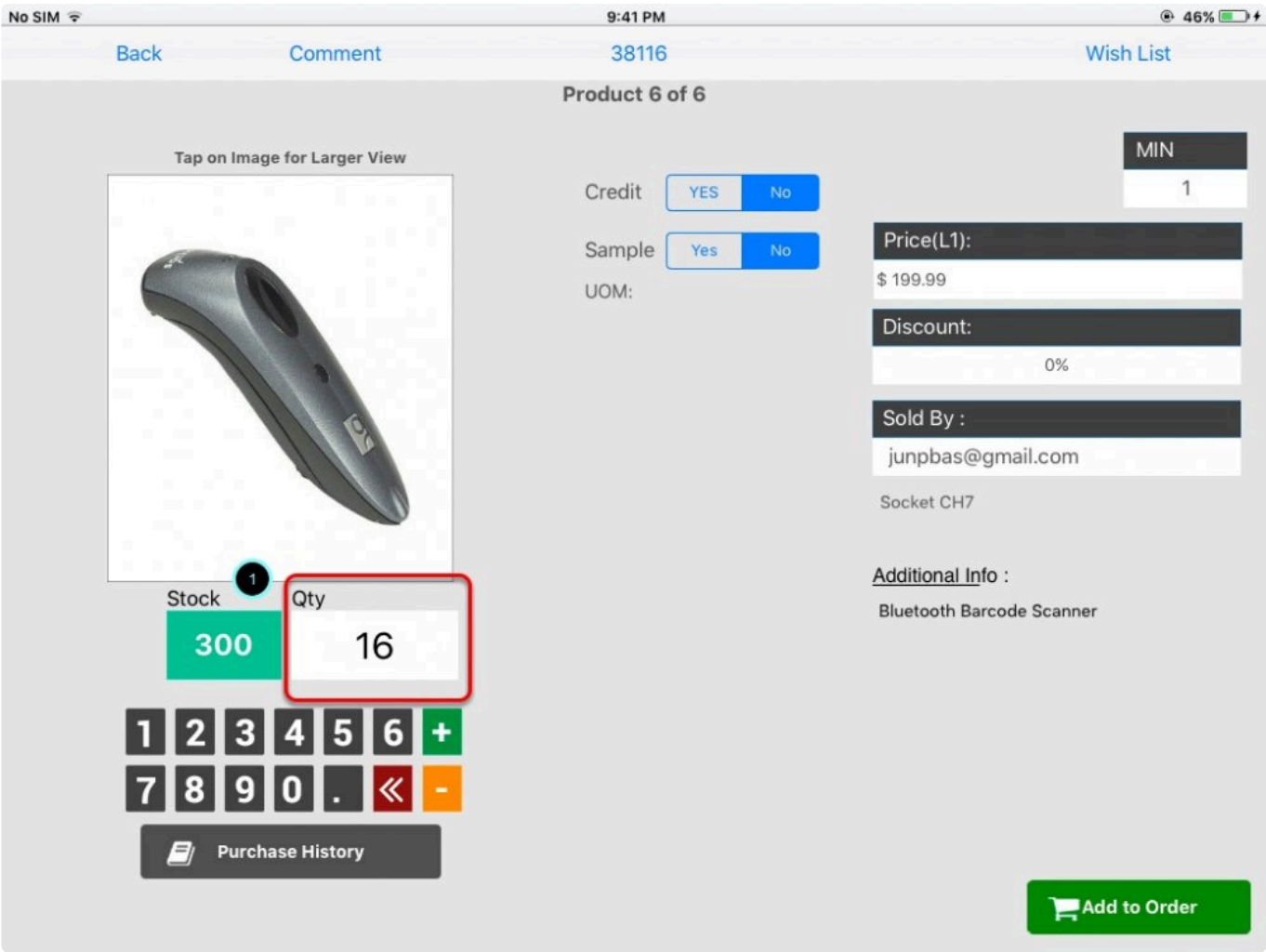
Select a customer, tap on New Order and then tap on Products.



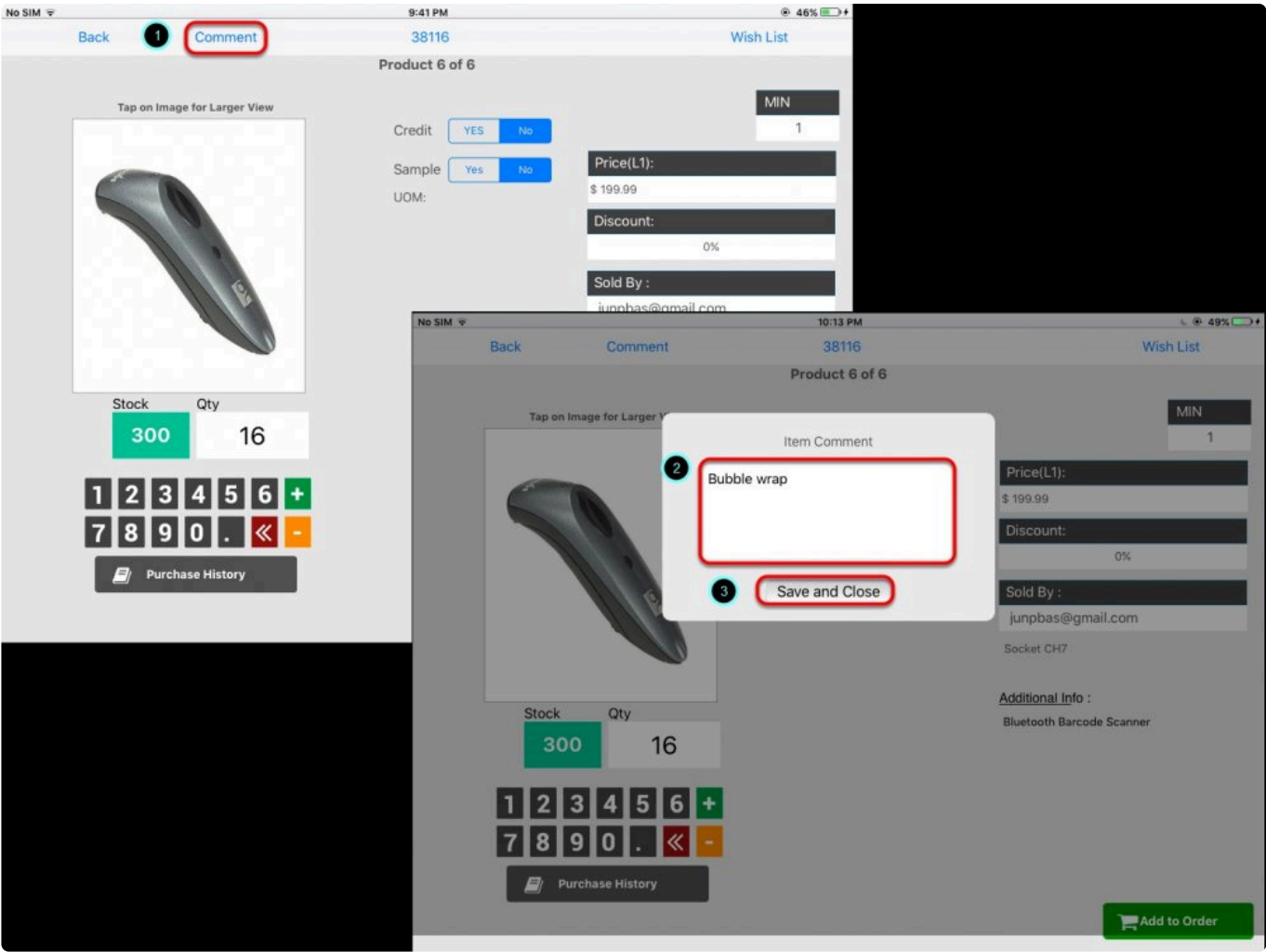
In the Products Window. Tap on the item or product that you'd like to add on your order.



Specify a quantity.

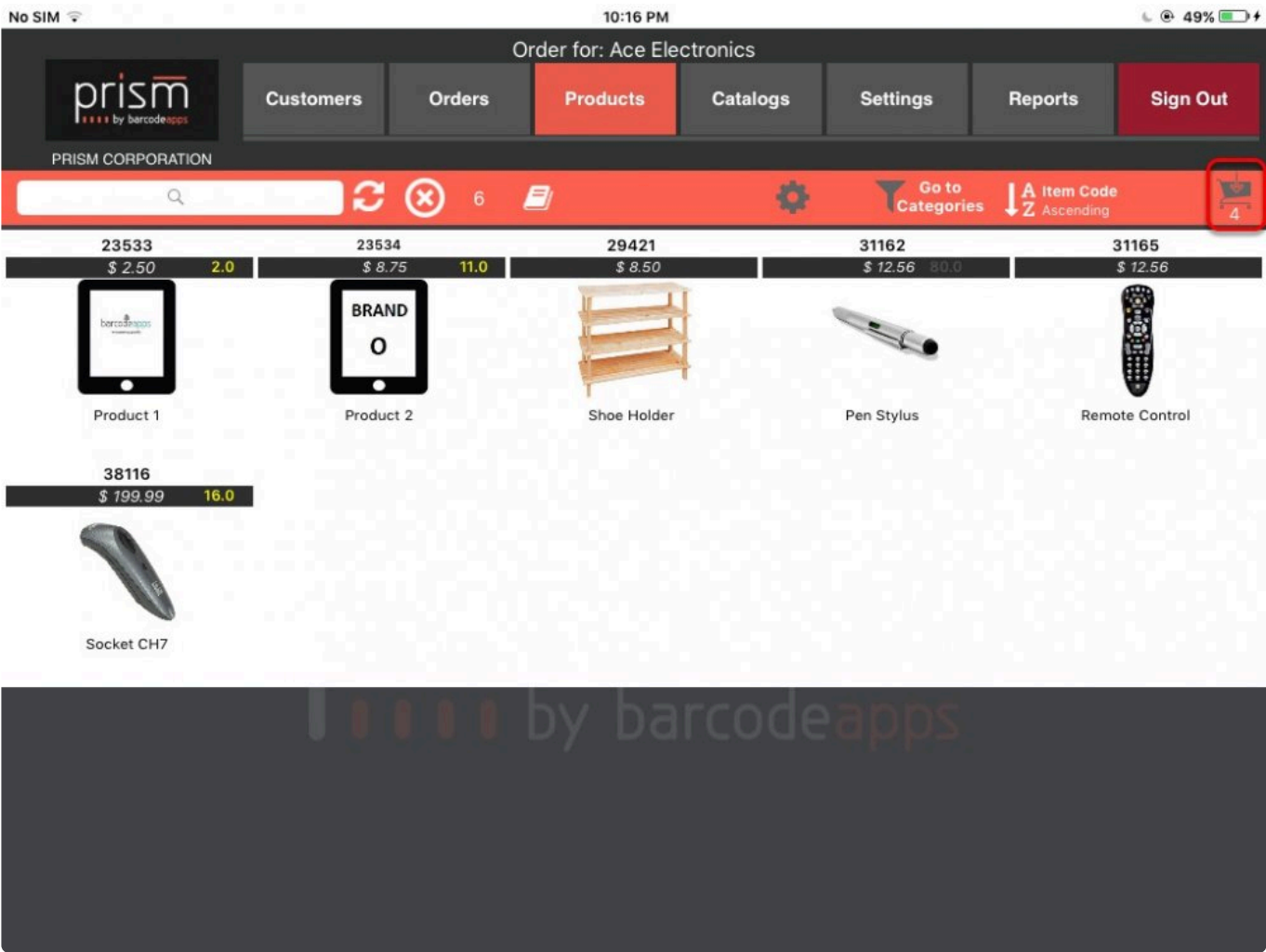


A comment on an item can also be added by tapping on comment on top, type in the comment and then tap on save and close.



COMPLETING THE ORDER

To complete an order, Tap on the shopping cart.



On the Order Summary window tap on Complete.

No SIM 10:16 PM 49%

Order for: Ace Electronics

prism by barcodeapps

PRISM CORPORATION

Customers Orders **Products** Catalogs Settings Reports Sign Out

Number of Items # 4 Order Summary Order Number # 37

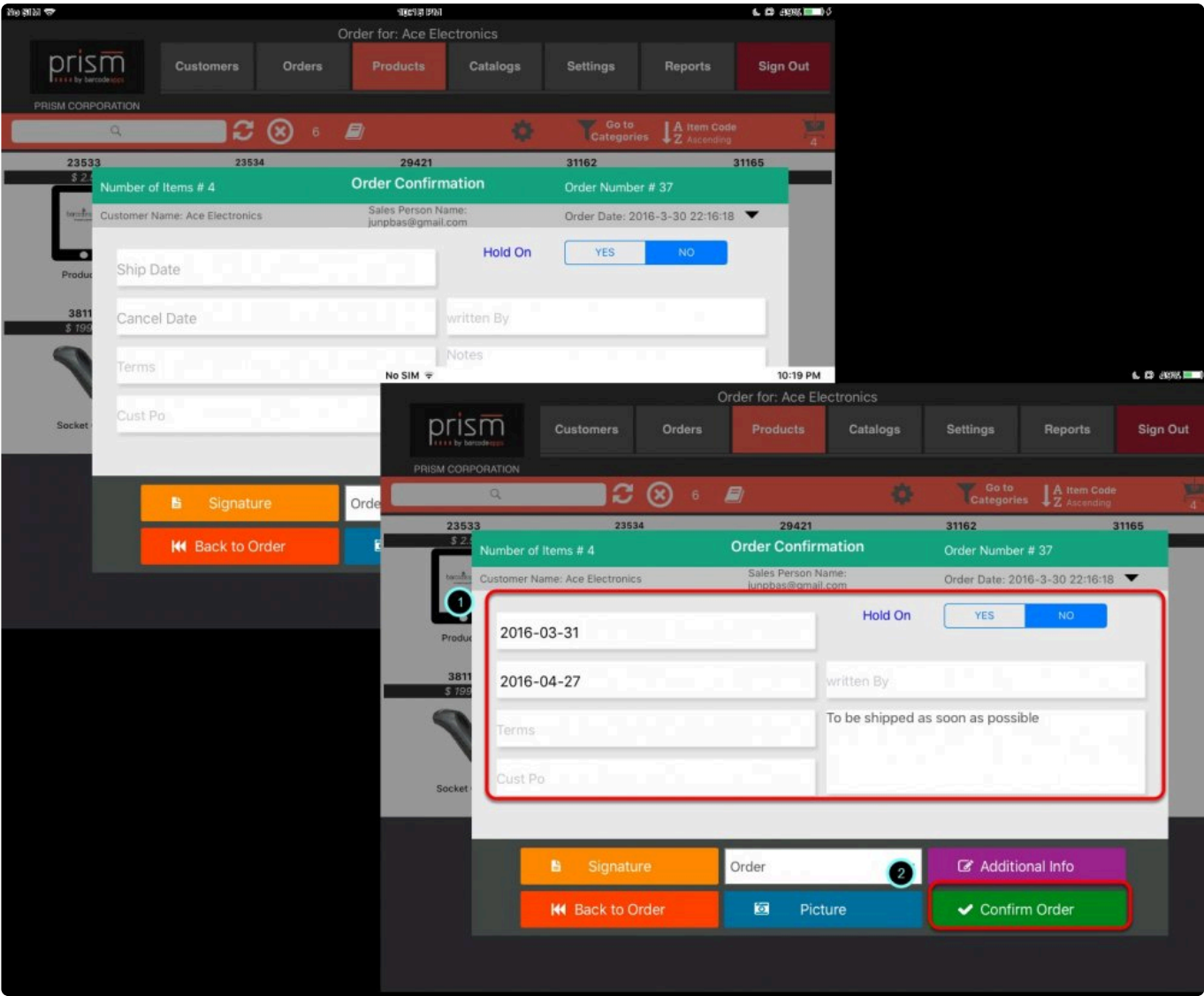
Customer Name: Ace Electronics Sales Person Name: junpbas@gmail.com Order Date: 2016-3-30 22:16:10

ID	Product Code	Description	Quantity	Unit Price	Total
30	38116	Socket CH7	16.00	\$ 199.99	\$ 3199.84
31	31162	Pen Stylus	80.00	\$ 12.56	\$ 1004.80
32	23533	Product 1	2.00	\$ 2.50	\$ 5.00
33	23534	Product 2	11.00	\$ 8.75	\$ 96.25

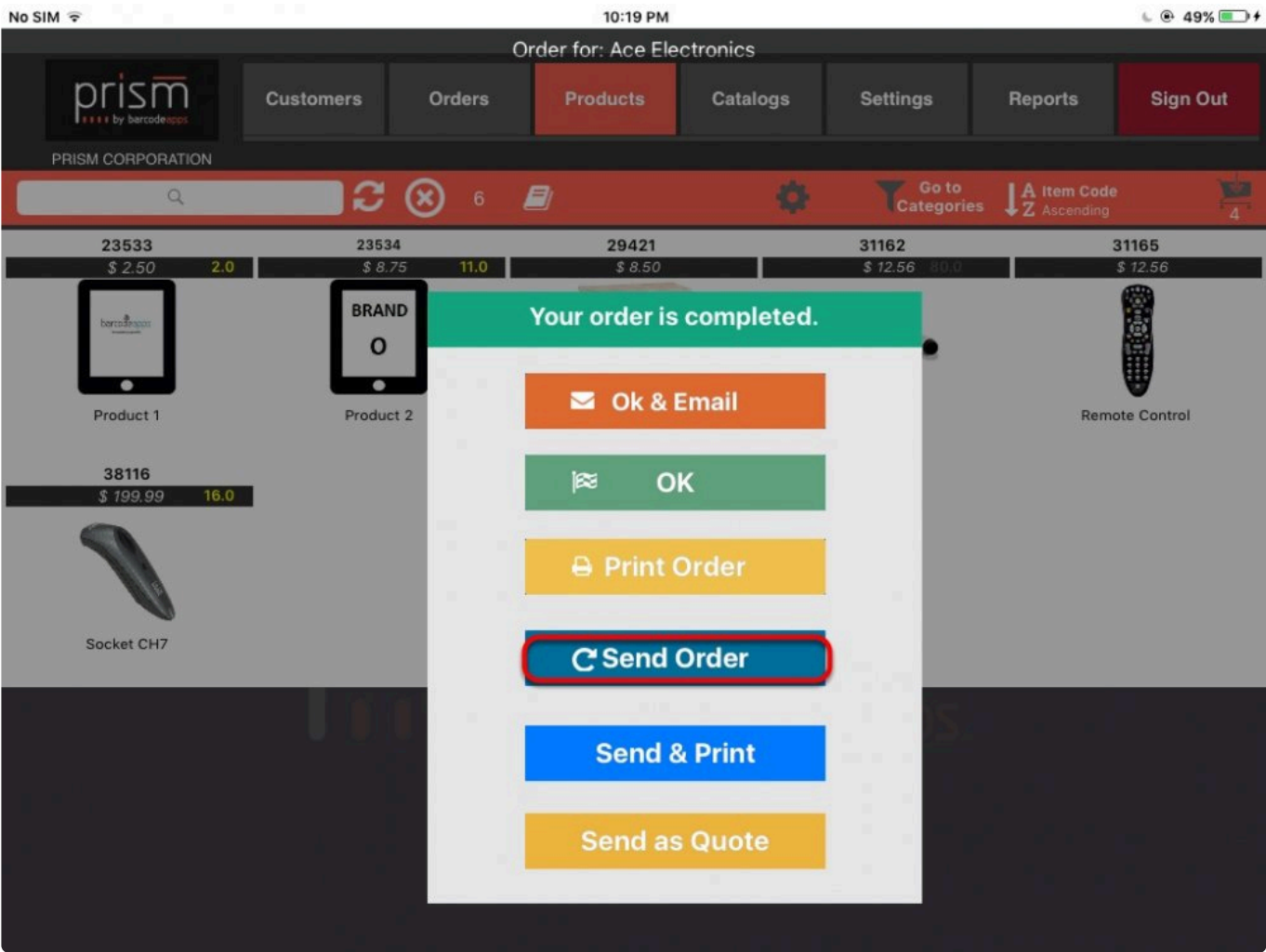
Order Total \$ 4305.89

Back Show ordered products 0% Show Wholesale Price Complete

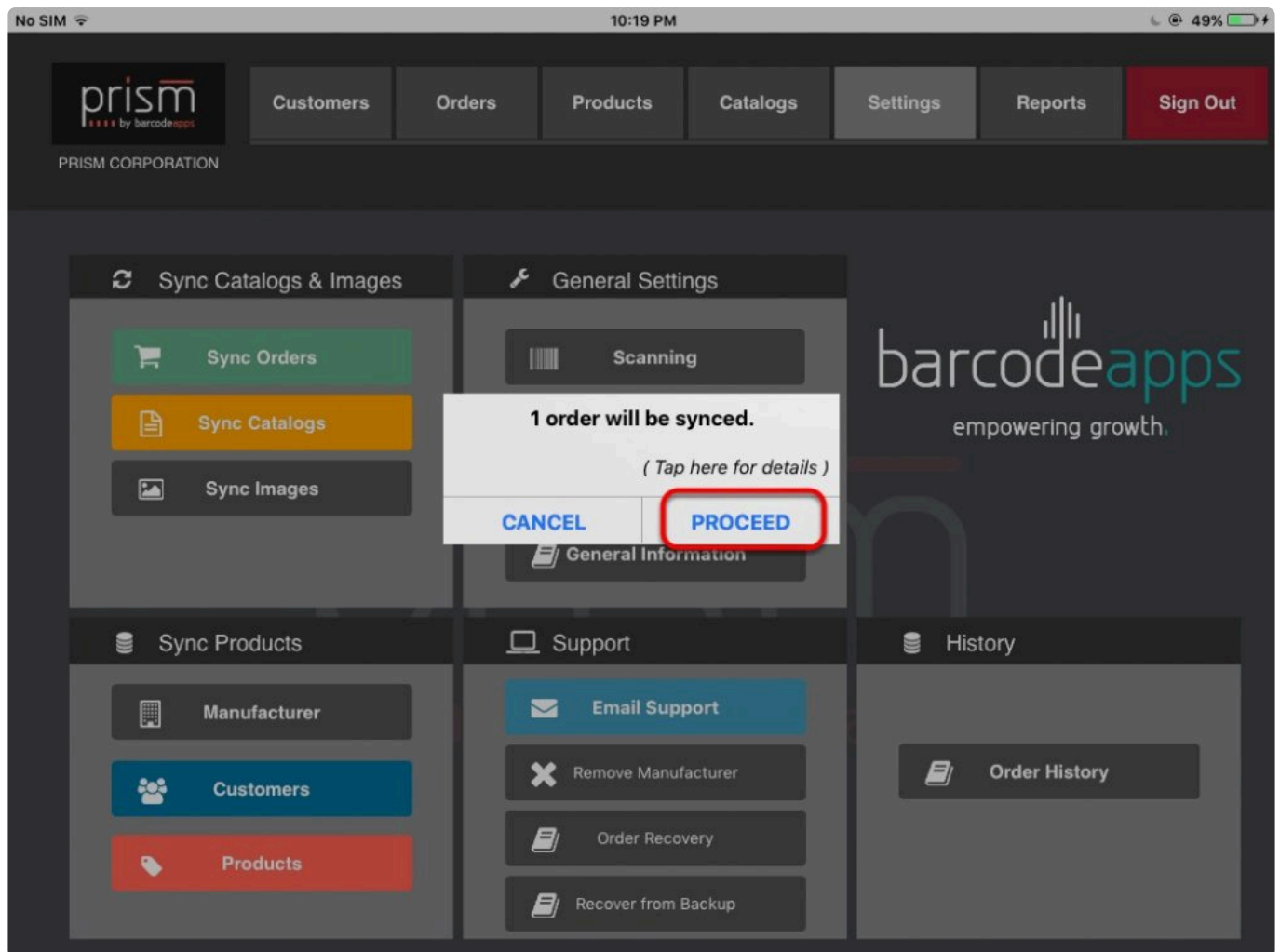
Fill out the information needed in the Order Confirmation window ,and then tap on Confirm Order.



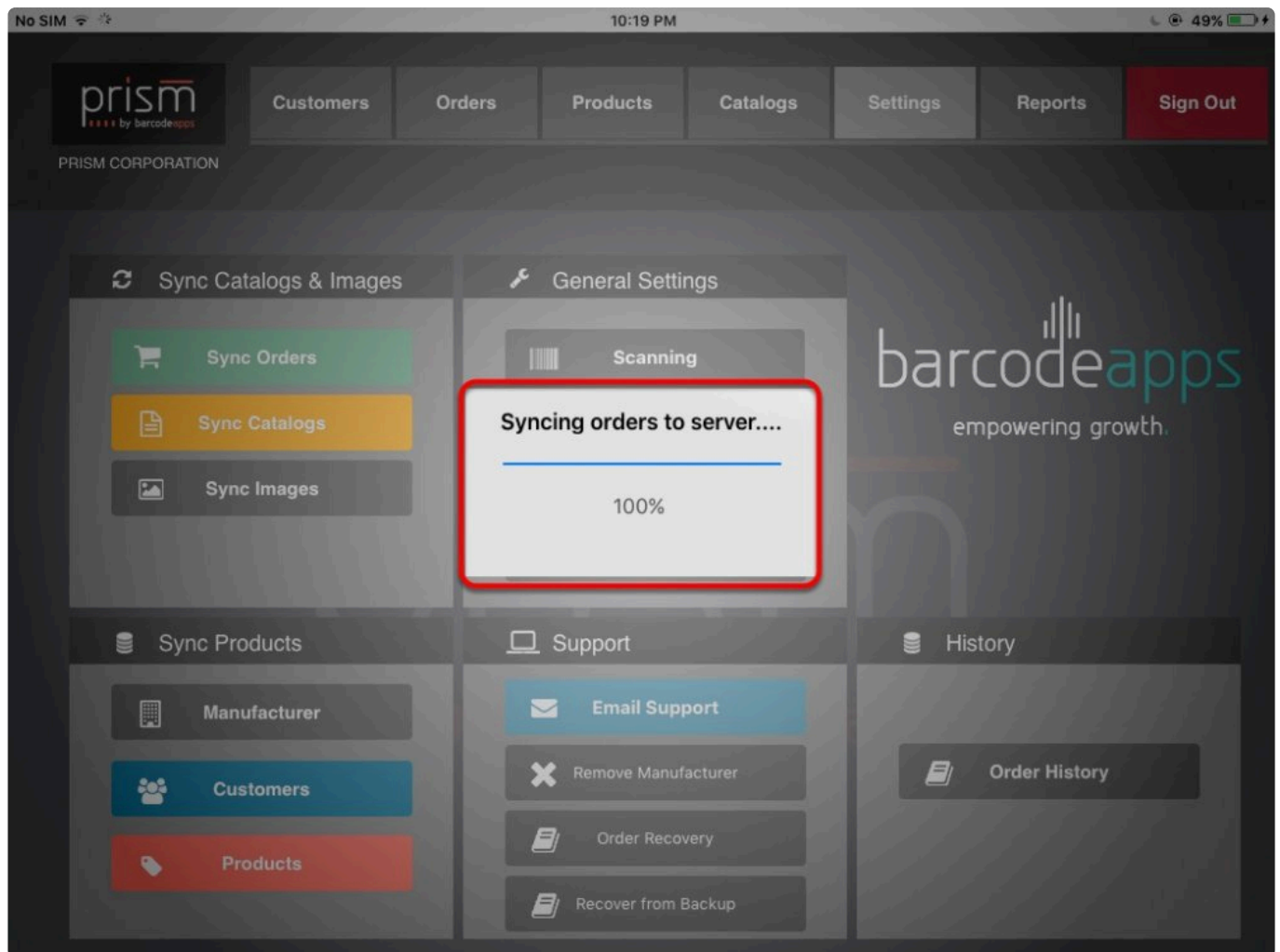
Tap on Send Order.



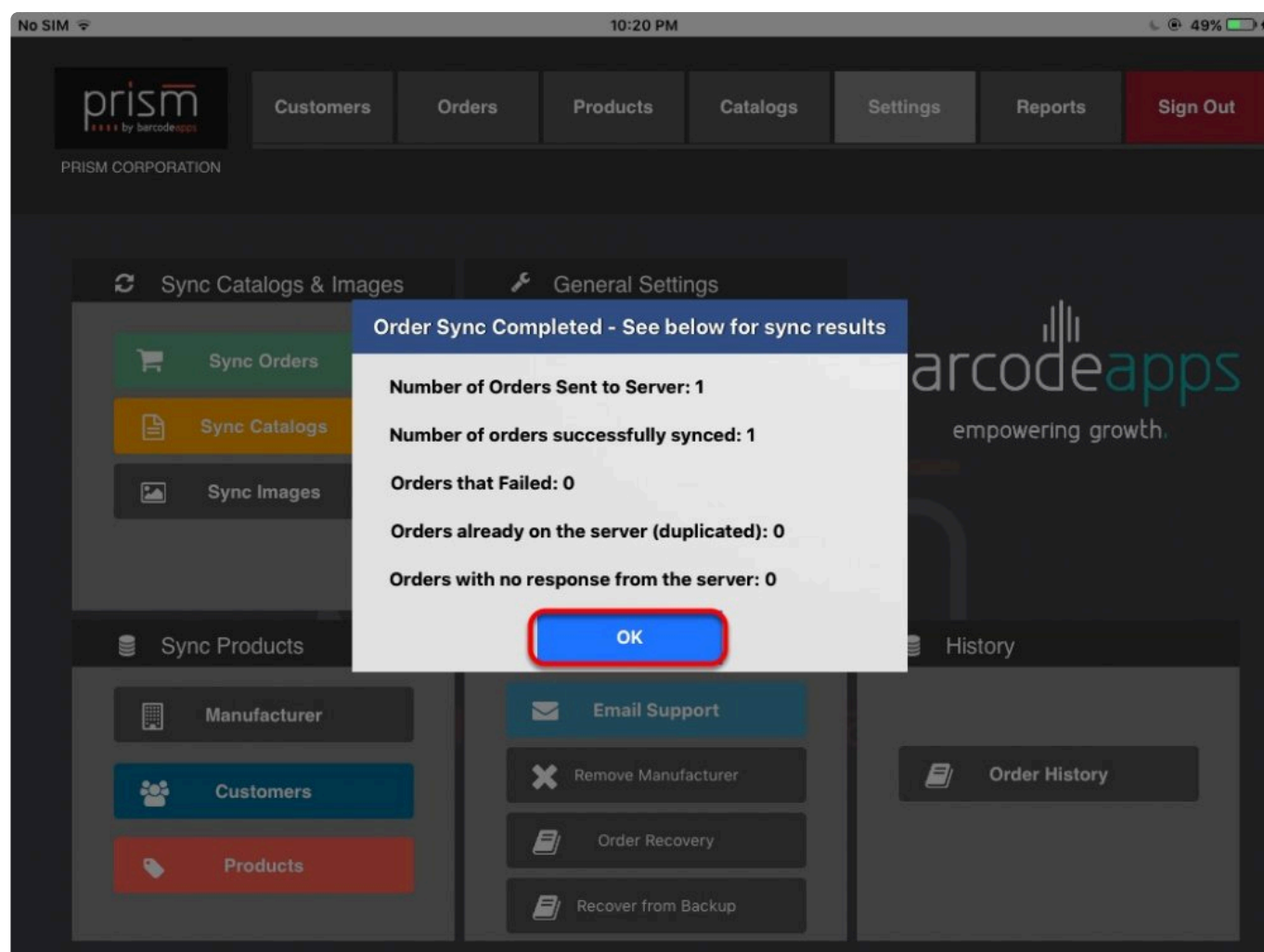
Tap on Proceed.



Wait for the sync to finish.



Check sync results (Make sure that there are no errors) and then click on Ok.



To learn and explore on how to manage your orders using the PRISM App. Please visit our support site.

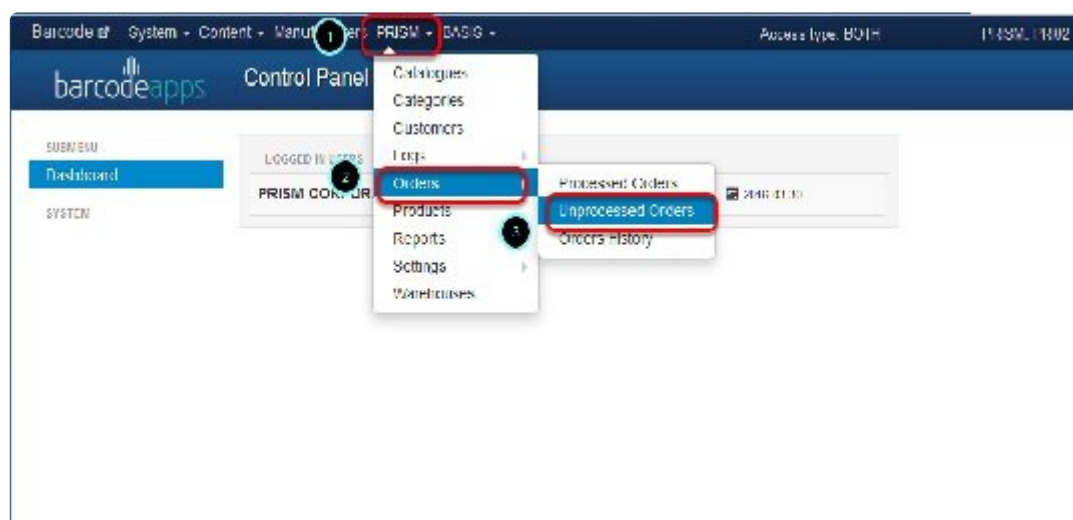
EXPORTING ORDER FROM PRISM JOOMLA WEBSITE TO FRESHBOOKS

To export the order created using the PRISM App iOS in the PRISM Joomla Website going to FreshBooks.

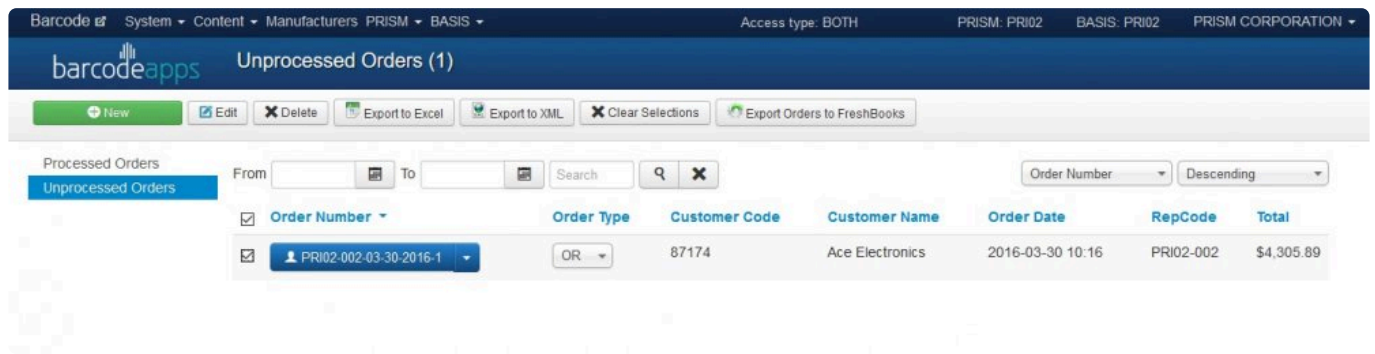
Login to the PRISM Joomla Website using your admin credentials.



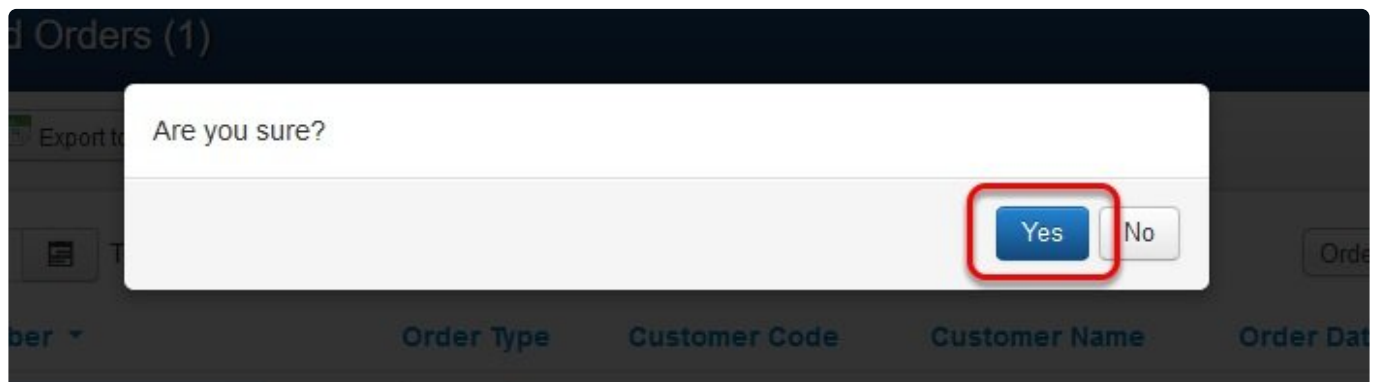
In the Control panel window, click on PRISM, Orders and the select Unprocessed Orders.



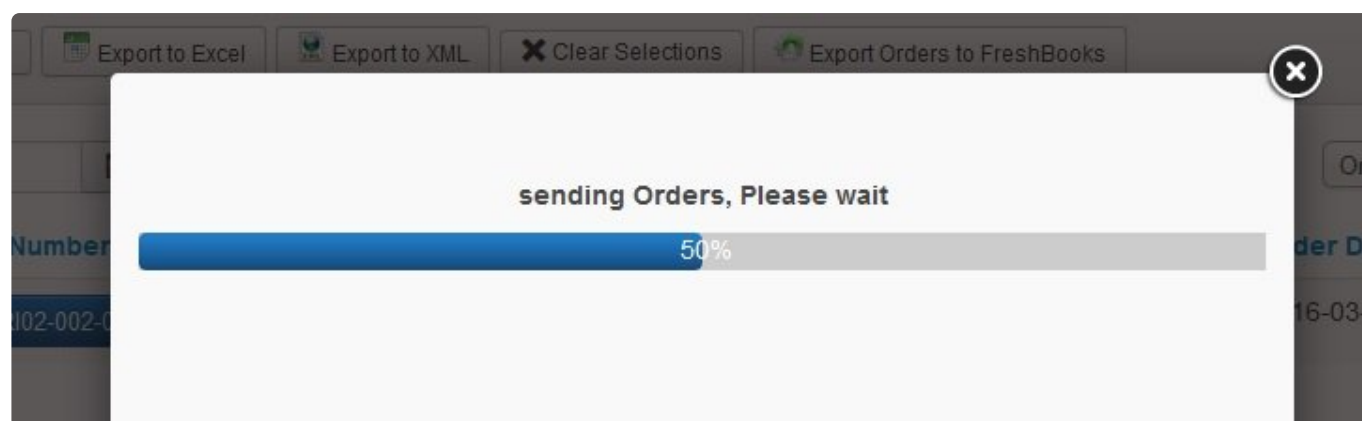
In the Unprocessed Orders Window. Select the order that needs to be exported by putting a check mark in the box just before the order number (Multiple selection can be done), and then tap on Export Orders to FreshBooks.



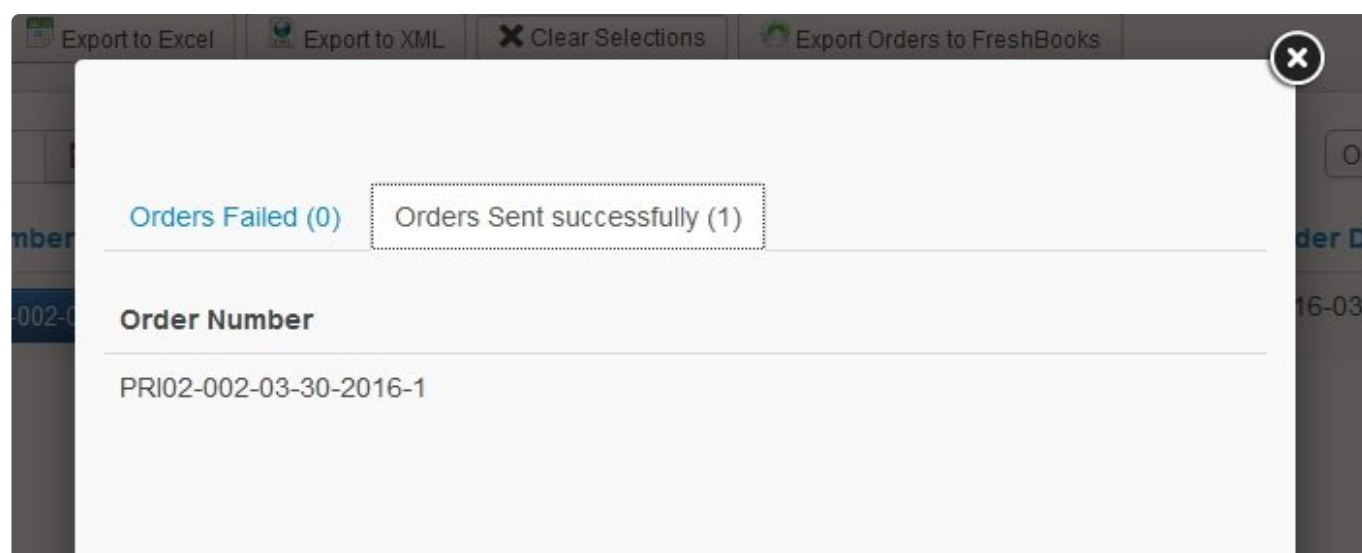
Click on Yes.



Wait for the sync to finish.




A summary will show if the orders were sent successfully or not. If there is no error, take note of the Order number and then go back to Freshbooks to check if the Orders are exported.



CHECKING EXPORTED ORDER IN FRESHBOOKS

To check the order, click on Invoices, and then click on the new order to check the invoice details.
Order successfully exported to Freshbooks.


[Upload your logo](#)

[Recommend](#)
[My Account](#)
[Settings](#)
[Help](#)
[Log out](#)

[Home](#)
[1 Invoices](#)
[Estimates](#)
[Expenses](#)
[Time Tracking](#)
[Reports](#)

[Invoices](#)
[Recurring](#)
[Received](#)
[Payments](#)
[Credits](#)
[Items](#)

Invoices

[+ New Invoice](#)

[Archive](#)
[Delete](#)
[Copy](#)
[Print](#)
[Send](#)
[Enter Payment](#)
[Pay Online](#)
[Search](#)

<input type="checkbox"/> Invoice	Client Name	Description	Date ▼	Total	Status
<input type="checkbox"/> 26	Ace Electronics	Bluetooth Barcode...	03/30/16	4,305.89 CAD	draft edit
<input type="checkbox"/> 25	Ace Electronics	This is a very good...	03/28/16	402.56 CAD	draft edit
<input type="checkbox"/> 23	Entertainment...	This is a very good...	03/24/16	2,257.36 CAD	draft edit
<input type="checkbox"/> 22	Freemont Radio...	Battery operated	03/24/16	1,983.61 CAD	draft edit
<input type="checkbox"/> 21	Freemont Radio...	This is a not so good...	03/24/16	96.25 CAD	draft edit
<input type="checkbox"/> 20	Entertainment...	This is a not so good...	03/24/16	96.25 CAD	draft edit
<input type="checkbox"/> 2	Ace Electronics	This is a not so good...	03/24/16	96.25 CAD	draft edit
<input type="checkbox"/> 19	ABC COMPANY TEST	This is a very good...	03/24/16	5.00 CAD	draft edit
<input type="checkbox"/> 18	Florence Radio...	This is a very good...	03/24/16	2,651.25 CAD	draft edit
<input type="checkbox"/> 17	Company 1	Very nice and...	03/24/16	5,300,127.00 CAD	draft edit
<input type="checkbox"/> 16	Blue Papillion	This is a very good...	03/24/16	5.00 CAD	draft edit
<input type="checkbox"/> 15	Company 1	Very nice and durable	03/24/16	9,138.15 CAD	draft edit
<input type="checkbox"/> 14	Company 1	Very nice and durable	03/24/16	7.65 CAD	draft edit
<input type="checkbox"/> 13	Company 1	Very nice and durable	03/24/16	7.65 CAD	draft edit
<input type="checkbox"/> 12	Company 1	Very nice and durable	03/24/16	7.65 CAD	draft edit

active | [archived](#) | [deleted](#)

Note:

1. All orders from PRISM will be exported as a DRAFT invoice.
2. Comments tagged on an item will display after the description of an item.

Managing an Order from PRISM to FreshBooks – 15 BarcodeApps © 2016

3. The Notes field is composed of three components

- a. The actual note created in PRISM
- b. The Signature – By PrismMobile- ordered using the PRISM App (iOS/ Android) or By PrismWeb – ordered using the PRISM Webstore
- c. The Order number in PRISM – can be used as a reference if an order needs to be tracked in the PRISM Joomla Website.

1 Invoice: 26[Enter Payment](#)[Edit](#)[More](#)**DRAFT**BAS Dev
Etobicoke ONAce Electronics
1785 Rexway Ave. Suite 8
Toronto ON M9A 2B2Invoice # 26
Invoice Date March 30, 2016
Balance Due (CAD) \$4,305.89

Item	Description	Unit Cost	Quantity	Line Total
Socket CH7	Bluetooth Barcode Scanner -- Bubble wrap	199.99	16	3,199.84
Pen Stylus	small and convenient	12.56	80	1,004.80
Product 1	This is a very good product	2.50	2	5.00
Product 2	This is a not so good product	8.75	11	96.25

Total 4,305.89
Amount Paid 0.00
Balance Due (CAD) \$4,305.89

Notes	a	b	c
To be shipped as soon as possible.	By PrismMobile	PRI02-002-03-30-2016-1	

This invoice was sent using **FRESHBOOKS****Invoice Autobiography**[Created](#)

Created by you.

30 Mar 2016, 11:55 AM

6.4. V. SPIRE



6.4.1. A. PRISM Integration To Spire

This knowledge base article will guide users on how they can integrate their SPIRE account to PRISM.

ACCOUNT REGISTRATION

To register a company to PRISM, visit

http://basmax1.dyndns.biz/BASPortal/index.php/component/ea_manufacturer/?view=register, fill out the information needed and then click on Try it for 30 days.



Improve performance with Basis
complete warehouse
management system


PRISM CORPORATION

George Talbot

junpbas@gmail.com

TRY IT FREE FOR 30 DAYS

Already have an account? [Login](#)




Improve performance with Basis
complete warehouse
management system

Creating company files. This process takes around 15
seconds. A confirmation message will display once
completed.

PRISM CORPORATION

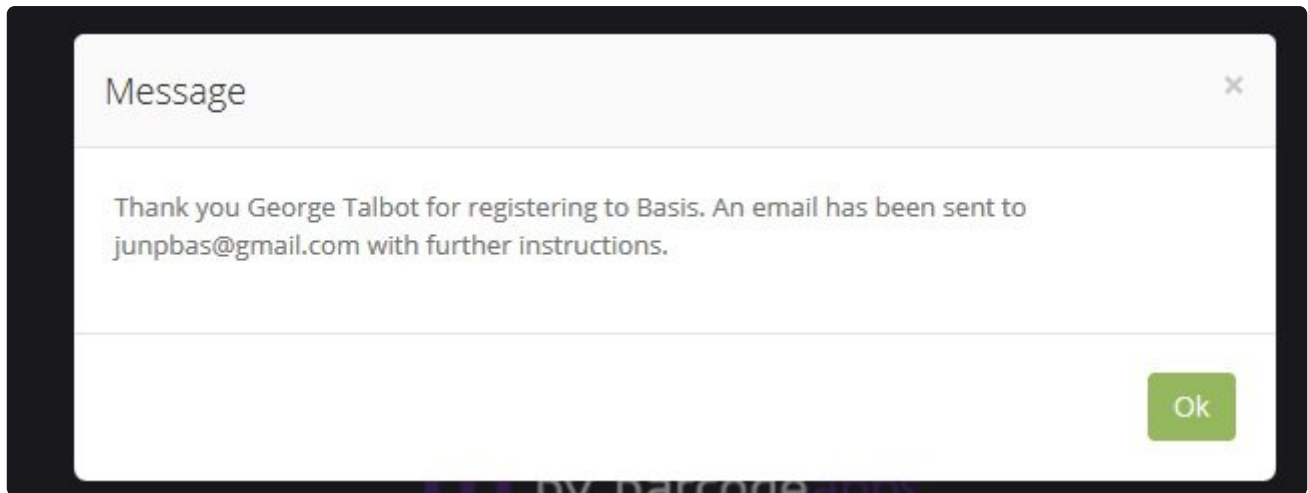
George Talbot

junpbas@gmail.com

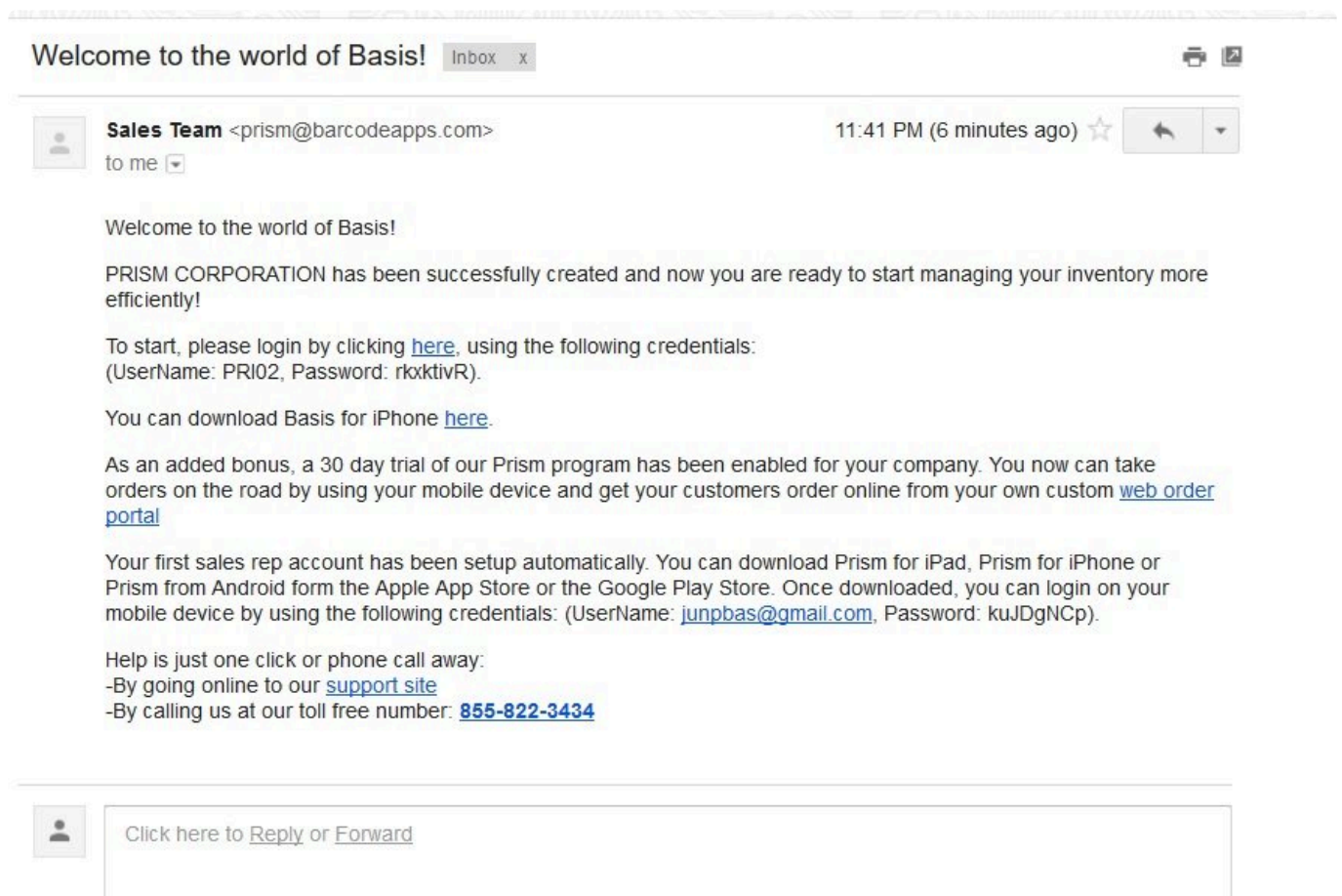


Already have an account? [Login](#)

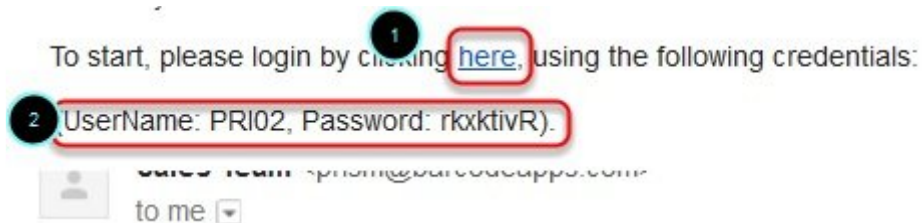
A notification will show up once the registration is finish, click on Ok and then access the email account used on the registration to open the registration email message.



The email message will contain your company's login credential to our system (PRISM Admin site, PRISM web store, PRISM AP (iOS/Android)). We strongly advise for our users to save this information for reference.



Login to the [PRISM Joomla Website](#) (PRISM Admin Site) by clicking on the hyperlink supplied on the registration mail or by going to <http://basmax1.dyndns.biz/basportal/administrator/index.php>



Log in using the user name and password.

barcodeapps
empowering growth.

User ID

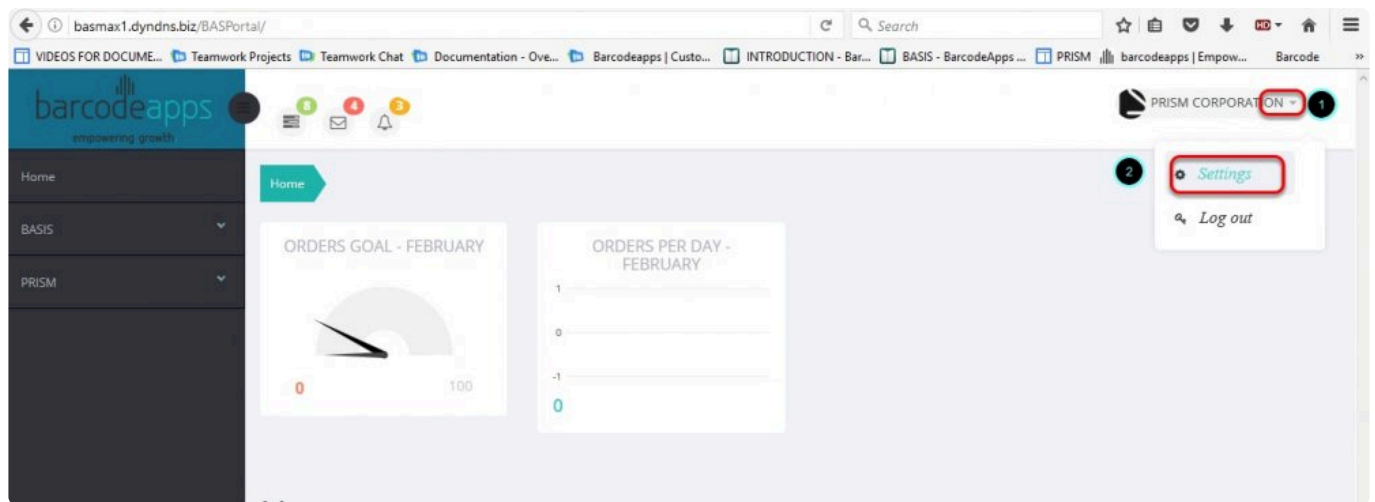
Password

☐ Remember me [Forgot your password?](#)

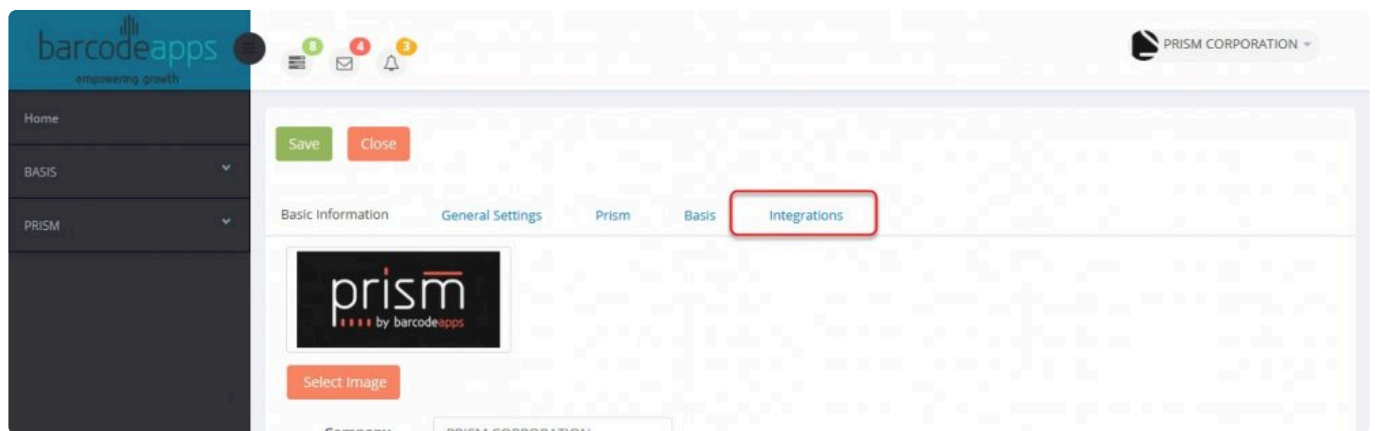
LOG IN

Don't have an account yet? [Create an account](#)

On the Home page, click on the drop down arrow and then click on settings.



In the setting window click on Integration



Click on the drop down arrow and select SPIRE.

Save

Close

Basic Information

General Settings

Prism

Basis

Integrations

Integrate to:

URL *:

Username *:

SPIRE

NONE

SPIRE

FREHSBOOKS

NOVASOFT

SYSTEM GROUP

**

Fill out the information needed to complete the integration.

Integrate to:

SPIRE

URL *

Username

Username *

Password *

Company Name *

Respect prism prices:

ON

Commit Prism Orders:

OFF

Import Prism Orders as Basis Sales Orders

OFF

Automatically export shipped orders back to Spire

OFF

Automatic update:

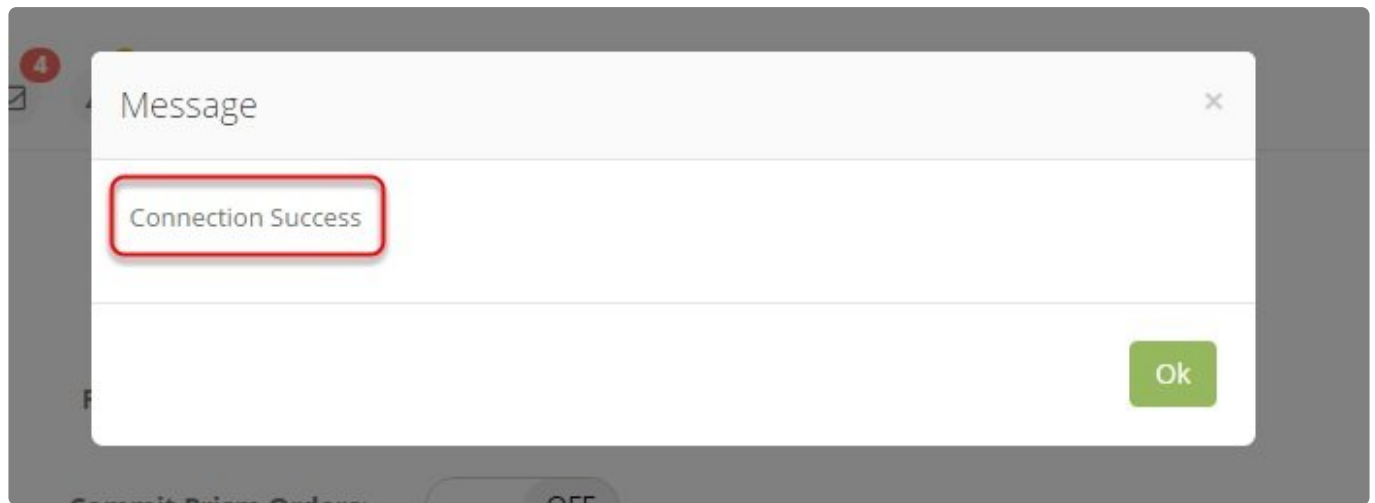
OFF

1. URL – URL of the spire server. This information can be obtained from the I.T team that did the set up of spire in your Company.
2. User name – same username to login to spire
3. Password – same password to login to spire
4. Company name – your company name
5. Respect prism prices – this should be set to enabled.

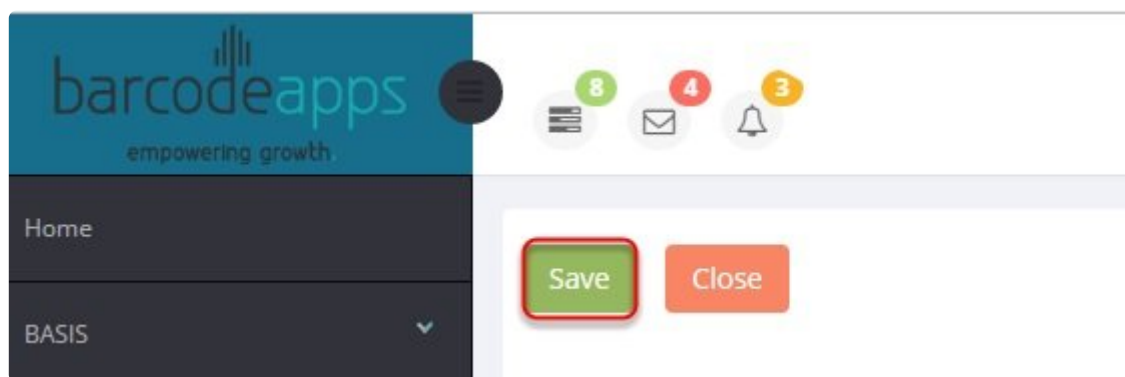
Click on Test connection to validate connectivity.

Integrate to:	<input type="text" value="SPIRE"/>
URL *:	<input type="text" value="https://spire.com"/>
Username *:	<input type="text" value="M"/>
Password *:	<input type="password" value="....."/>
Company Name *	<input type="text" value=""/>
Respect prism prices:	<input type="checkbox" value="OFF"/>
Commit Prism Orders:	<input type="checkbox" value="OFF"/>
Import Prism Orders as Basis Sales Orders	<input type="checkbox" value="OFF"/>
Automatically export shipped orders back to Spire	<input checked="" type="checkbox" value="ON"/>
Automatic update:	<input checked="" type="checkbox" value="ON"/>

Click on Ok as soon as you get a connection success message



Click on Save.



Congratulations! PRISM and SPIRE are now integrated.

6.4.2. B. Importing Spire Customers To PRISM

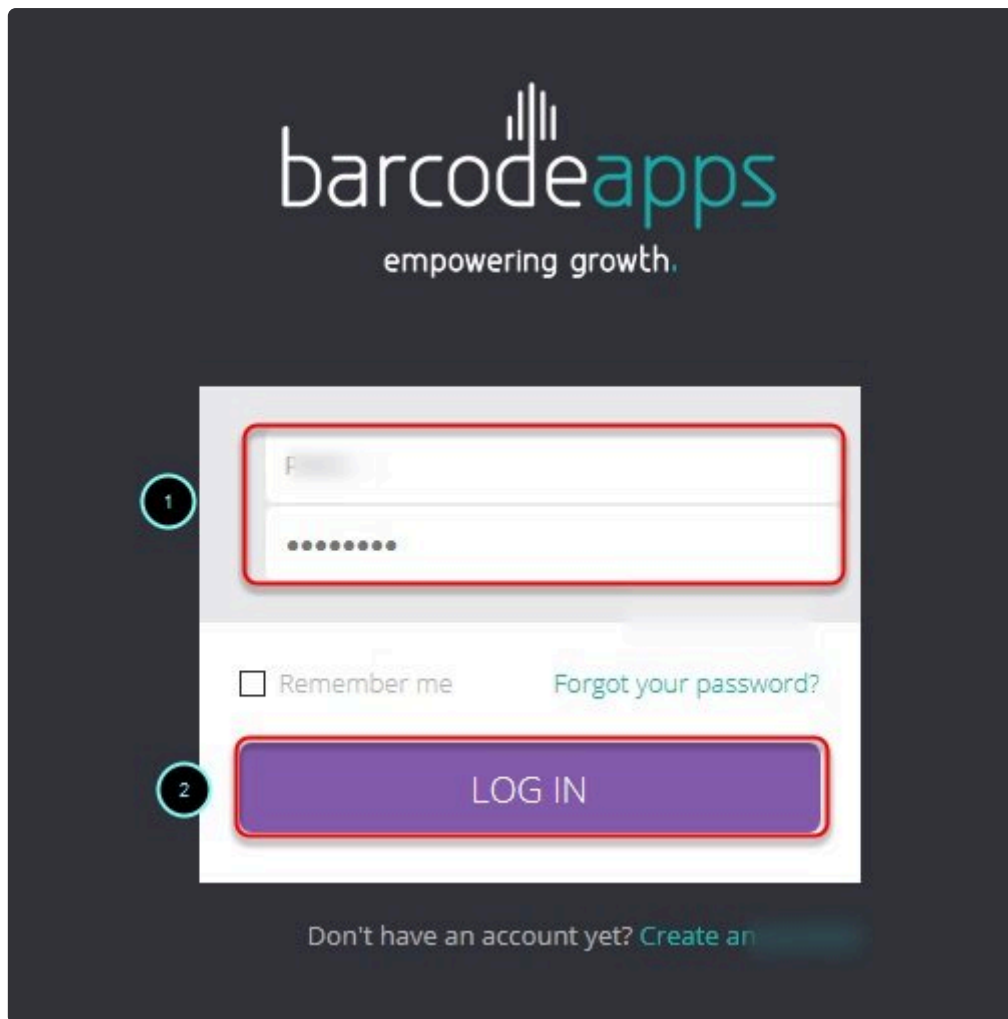
This knowledge base article will guide spire users to upload their customers to PRISM.

IMPORTING SPIRE CUSTOMERS TO PRISM

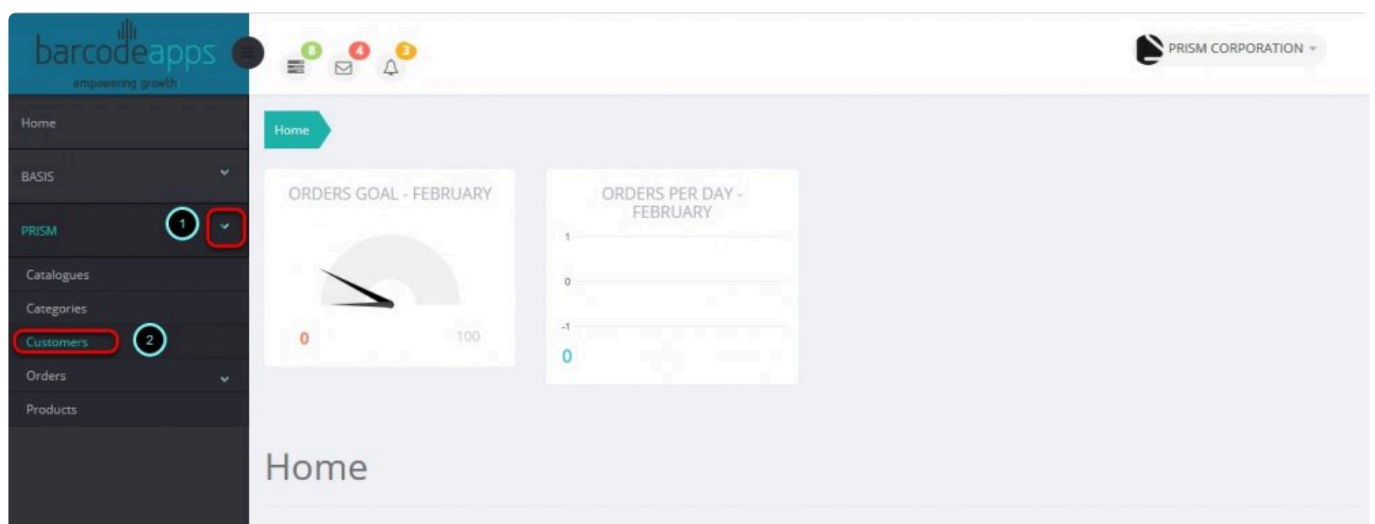
To import Spire customers to PRISM.

Customer No	Name	On Hold	Status	Address 1	Address 2	Address 3	Address 4	City	Zip
9165000	ALLIANCE CASTINGS COMPANY LLC	<input type="checkbox"/>	Active	1001 E. BROADWAY ST.				ALLIANCE	44601
9165555	ALLIANCE WATER *	<input type="checkbox"/>	Active	1015 NORTH WALNUT				ALLIANCE	44601
9132000	AMERICAN CRANE INC.	<input type="checkbox"/>	Active	7791 TAYLOR RD. SW				REYNOLDSB...	43068
9165750	AMERISEAL	<input type="checkbox"/>	Active	200 WELER DRIVE				SMITHVILLE	44677
	ANTI-SEIZE TECH	<input type="checkbox"/>	Active	2345 N. 17TH AVE				FRANKLIN P...	60131
	AP AUTOMOTIVE	<input type="checkbox"/>	Active	DEPT 1907	PO BOX 2153			BIRMINGHAM	35287
	ARGROVE BOX	<input type="checkbox"/>	Active	PO BOX 305				MIDDLETOWN	45042
9133000	ARROW CONCRETE	<input type="checkbox"/>	Prospect	ATTN: ANTHONY COLER	816 MCKINLEY ...			COLUMBUS	43222
	ASST USS GD8 72H	<input type="checkbox"/>	Active					Columbus	
9166200	ATLAS ENERGY RESOURCES LLC	<input type="checkbox"/>	Active	1823 ST RT 14				DEERFIELD	44411
	ATN CORPORATION	<input type="checkbox"/>	Active					Columbus	
	AUNECO PRODUCTS	<input type="checkbox"/>	Active	PO BOX 631376				CINCINNATI	45263
9166500	AVALON RV	<input type="checkbox"/>	Prospect	1604 MEDINA ROAD				MEDINA	44256
9176600	B & T EXPRESS	<input type="checkbox"/>	Active	400 MILEY RD				NORTH LIMA	44452
9088	B&B BLENDING INC.	<input type="checkbox"/>	Active	10963 LEROY DRIVE				NORTHGLENN	80233
9176500	B&N COAL	<input type="checkbox"/>	Prospect	38455 MARIETTA ROAD	PO BOX 100			DEXTER CITY	45727
	B.W. ROGERS CO.	<input type="checkbox"/>	Active	PO BOX 569				AKRON	44309
9177000	BABCOCK & WILCOX FOUNDRY OPERA...	<input type="checkbox"/>	Active	600 W.FORD AVE				BARBERTON	44203
	BAIRD ASSOCIATES	<input type="checkbox"/>	Active	445 WEST PUTNAM AVE				GREENWICH	06830
	BAM TECH	<input type="checkbox"/>	Active	2125 FRONT STREET				CUYAHOGA ...	44221
9177500	BARBERTON TREE	<input type="checkbox"/>	Active	3307 CLARK MILL ROAD				NORTON	44203
	BARCODE APPLICA...	<input type="checkbox"/>	Active	6411 EDWARDS BLVD.				MISSISSAUGA	L5T2Y1
	BAYCO	<input type="checkbox"/>	Active	640 S. SANDEN BLVD				WYLLIE	75098
9177852	BEAVER CONSTRUCTORS INC.	<input type="checkbox"/>	Active	PO BOX 2000 BEAVER PLACE SW				CANTON	44706
9177850	BEAVER EXCAVATING COMPANY	<input type="checkbox"/>	Active	2000 BEAVER PLACE AVE S.W.	PO BOX 6059			CANTON	44706
914000	BEU EQUIPMENT COMPANY	<input type="checkbox"/>	Active	850 SCIENCE BLVD.				CAMARIA	43230

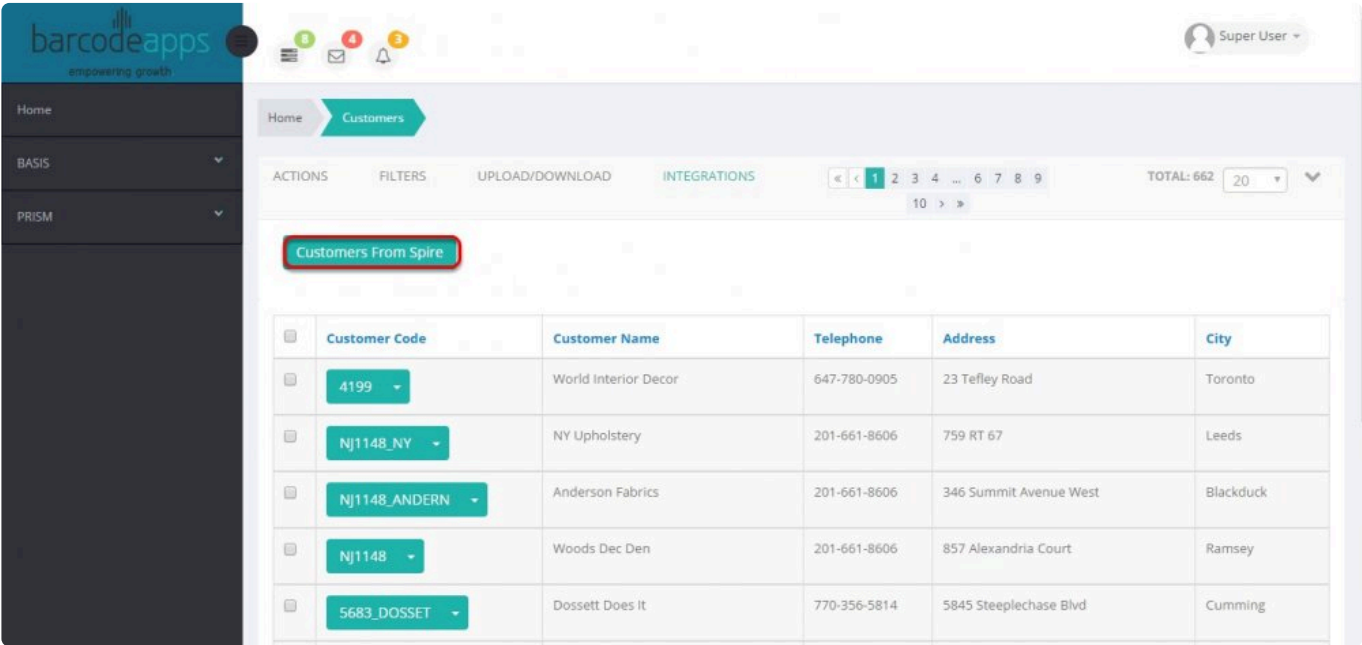
Login to the [PRISM Joomla Website](#) using your admin credentials.



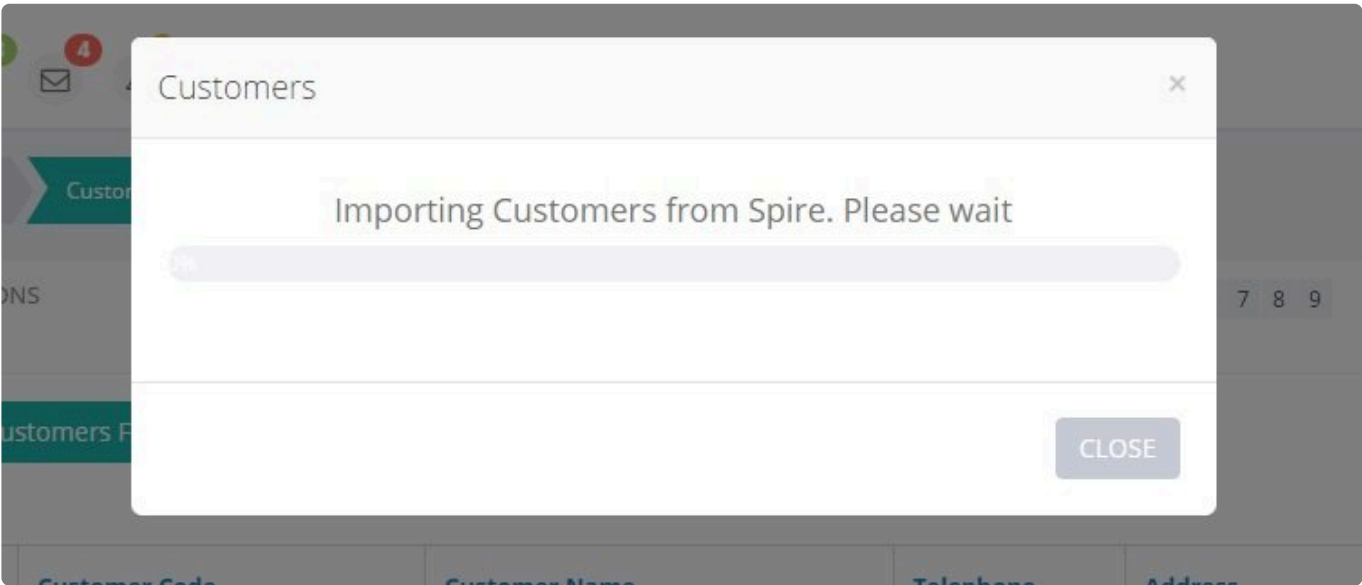
In the Control Panel, click on PRISM and then click on customers.



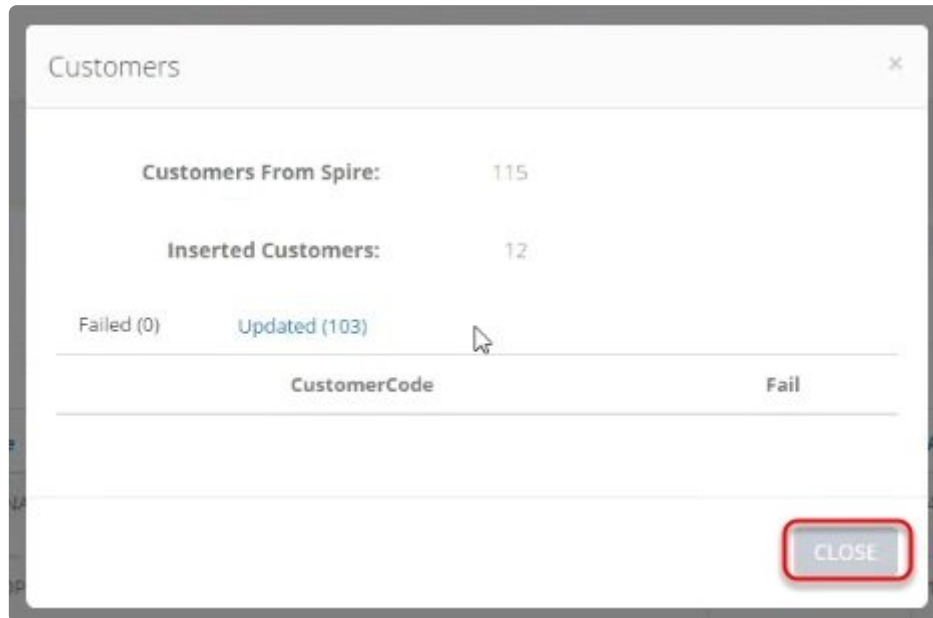
Click on Customers from SPIRE.



Wait for the sync to finish.



a notification will show the number of customers from Spire and the total number of customers successfully inserted. Just click on the close button to exit.



All customers are now imported on the PRISM Joomla Portal from Spire.

The screenshot displays the BarcodeApps web application interface. On the left is a dark sidebar with navigation links: Home, BASIS, and PRISM. The main header area includes the BarcodeApps logo, a user profile dropdown for 'Super User', and a navigation bar with 'Home' and 'Customers' (the latter being active). Below the navigation bar are tabs for ACTIONS, FILTERS, UPLOAD/DOWNLOAD, and INTEGRATIONS. A pagination bar shows a list of numbers (1-9) with '1' selected, and a 'TOTAL: 662' indicator. A green button labeled 'Customers From Spire' is positioned above a table. The table has five columns: Customer Code, Customer Name, Telephone, Address, and City. It contains eight rows of customer data, each with a green dropdown menu next to the Customer Code. The table is enclosed in a red border.

Customer Code	Customer Name	Telephone	Address	City
4199	World Interior Decor	647-780-0905	23 Tefley Road	Toronto
NJ1148_NY	NY Upholstery	201-661-8606	759 RT 67	Leeds
NJ1148_ANDERN	Anderson Fabrics	201-661-8606	346 Summit Avenue West	Blackduck
NJ1148	Woods Dec Den	201-661-8606	857 Alexandria Court	Ramsey
5683_DOSSET	Dossett Does It	770-356-5814	5845 Steeplechase Blvd	Cumming
5683_MJN	MJN & Associates Interiors	770-356-5814	4131 Jim Moore Rd	Dacula
5683_COX	COX DESIGN	770-356-5814	3737 Lake Oconee Place	Buford
5683	Villa Bella Interior Design Inc.	770-356-5814	DBA MJN & Associates Interiors	Virginia Beach

To know more about on Navigating to the PRISM Joomla Website. Please click here for our Tutorials.

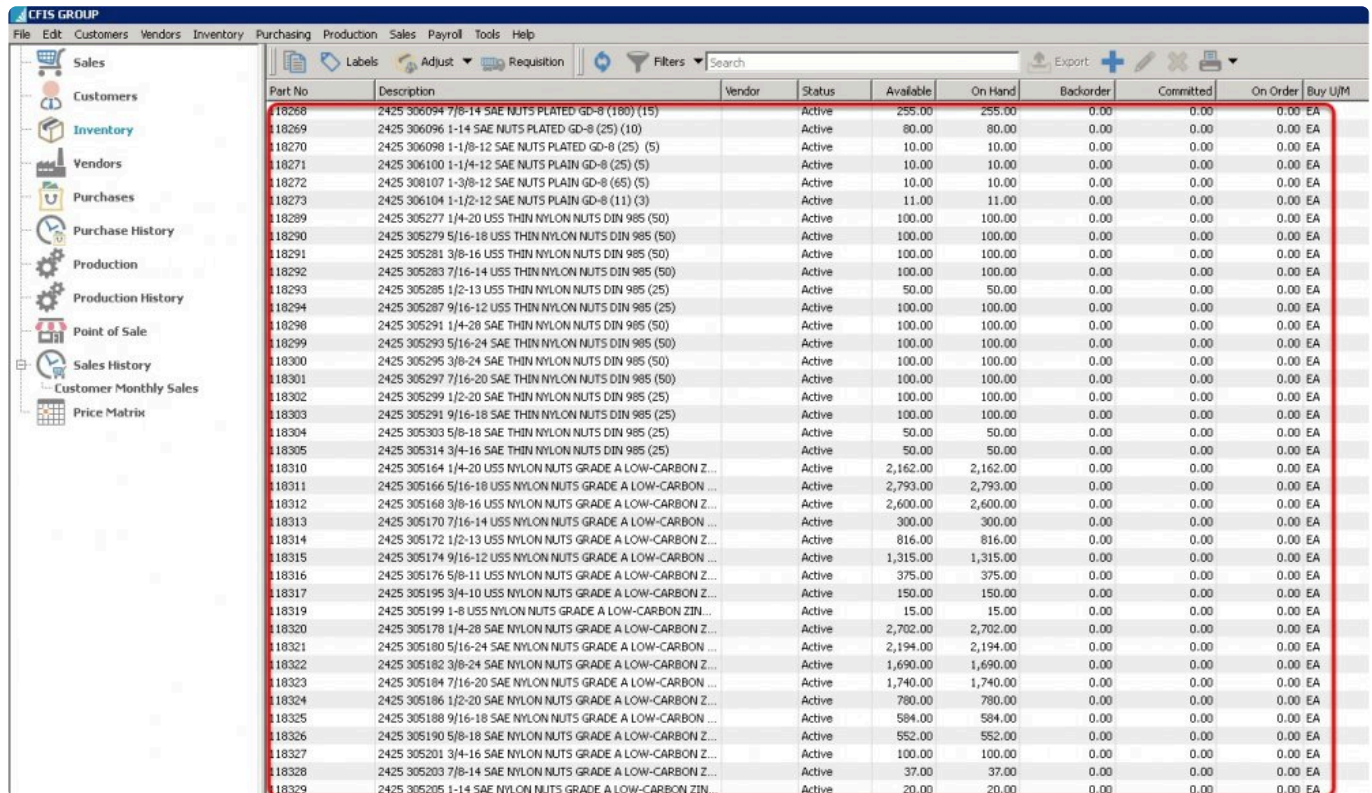
BarcodeApps © 2017

6.4.3. C. Importing Spire Inventory To PRISM

This knowledge base article will guide spire users to import their inventory to PRISM

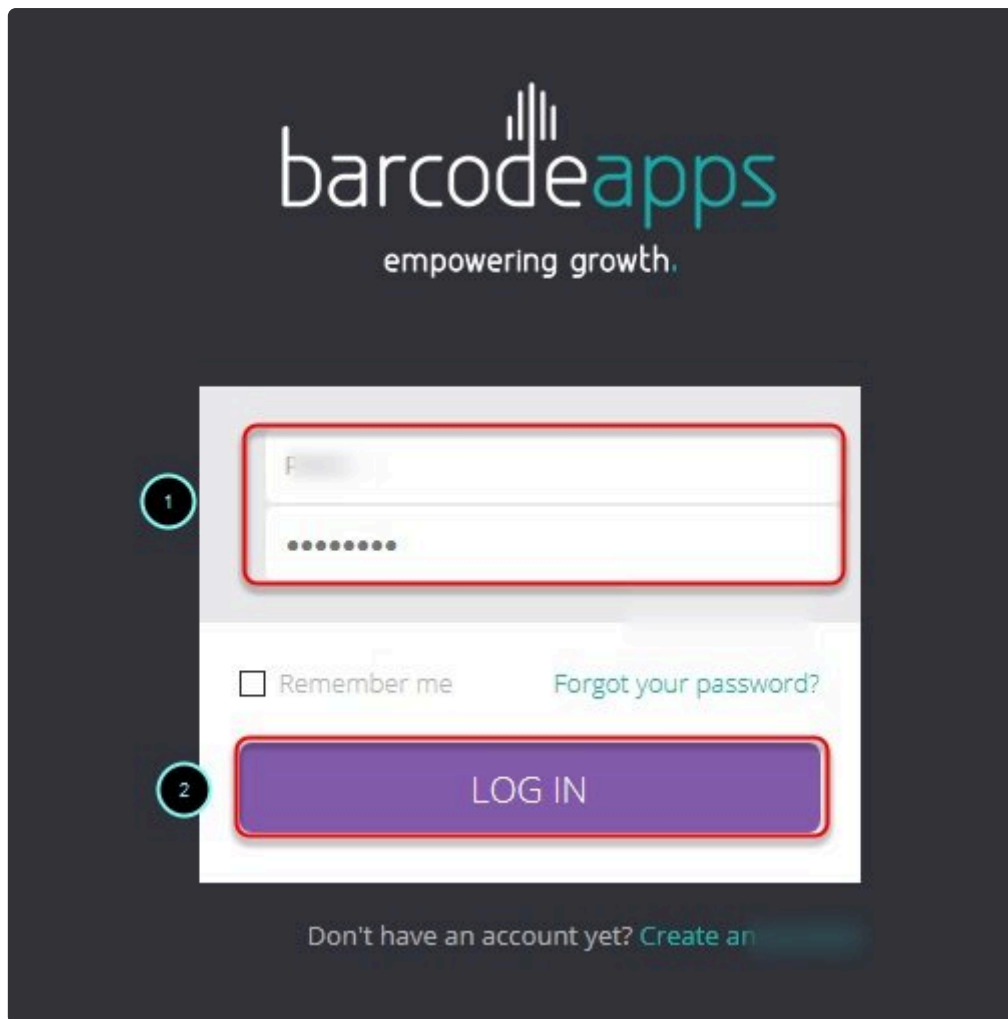
IMPORTING SPIRE INVENTORY TO PRISM

To import spire inventory to PRISM.

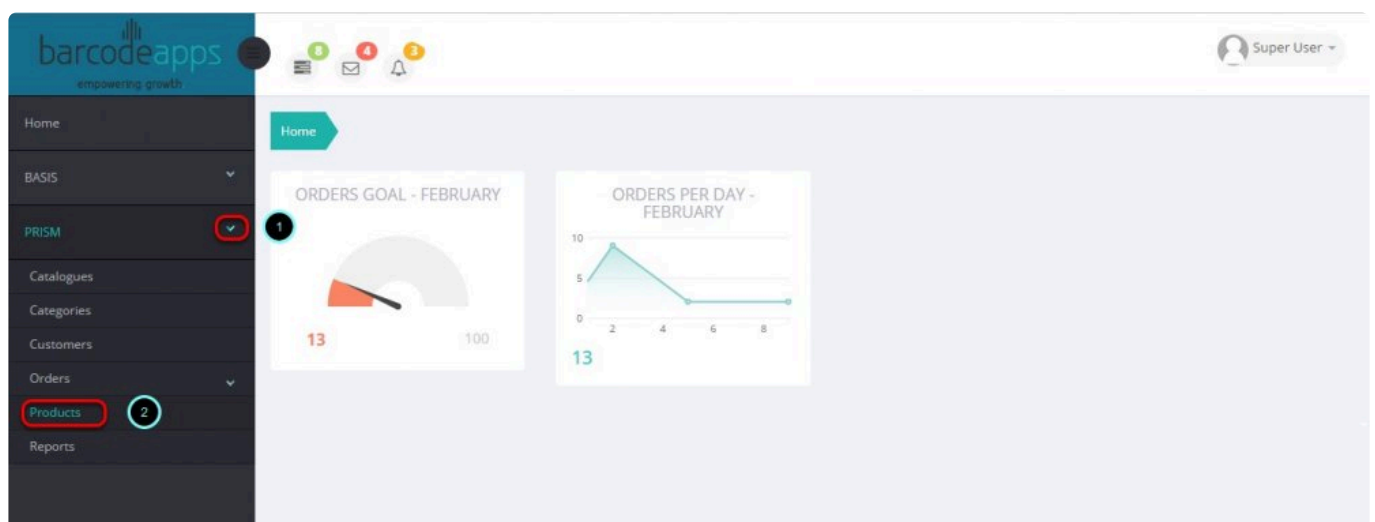


Part No	Description	Vendor	Status	Available	On Hand	Backorder	Committed	On Order	Buy U/M
18268	2425 306094 7/8-14 SAE NUTS PLATED GD-8 (180) (15)		Active	255.00	255.00	0.00	0.00	0.00	EA
18269	2425 306096 1-14 SAE NUTS PLATED GD-8 (25) (10)		Active	80.00	80.00	0.00	0.00	0.00	EA
18270	2425 306098 1-1/8-12 SAE NUTS PLATED GD-8 (25) (5)		Active	10.00	10.00	0.00	0.00	0.00	EA
18271	2425 306100 1-1/4-12 SAE NUTS PLAIN GD-8 (25) (5)		Active	10.00	10.00	0.00	0.00	0.00	EA
18272	2425 308107 1-3/8-12 SAE NUTS PLAIN GD-8 (65) (5)		Active	10.00	10.00	0.00	0.00	0.00	EA
18273	2425 306104 1-1/2-12 SAE NUTS PLAIN GD-8 (11) (3)		Active	11.00	11.00	0.00	0.00	0.00	EA
18289	2425 305277 1/4-20 USS THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18290	2425 305279 5/16-18 USS THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18291	2425 305281 3/8-16 USS THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18292	2425 305283 7/16-14 USS THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18293	2425 305285 1/2-13 USS THIN NYLON NUTS DIN 985 (25)		Active	50.00	50.00	0.00	0.00	0.00	EA
18294	2425 305287 9/16-12 USS THIN NYLON NUTS DIN 985 (25)		Active	100.00	100.00	0.00	0.00	0.00	EA
18298	2425 305291 1/4-28 SAE THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18299	2425 305293 5/16-24 SAE THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18300	2425 305295 3/8-24 SAE THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18301	2425 305297 7/16-20 SAE THIN NYLON NUTS DIN 985 (50)		Active	100.00	100.00	0.00	0.00	0.00	EA
18302	2425 305299 1/2-20 SAE THIN NYLON NUTS DIN 985 (25)		Active	100.00	100.00	0.00	0.00	0.00	EA
18303	2425 305291 9/16-18 SAE THIN NYLON NUTS DIN 985 (25)		Active	100.00	100.00	0.00	0.00	0.00	EA
18304	2425 305303 5/8-18 SAE THIN NYLON NUTS DIN 985 (25)		Active	50.00	50.00	0.00	0.00	0.00	EA
18305	2425 305314 3/4-16 SAE THIN NYLON NUTS DIN 985 (25)		Active	50.00	50.00	0.00	0.00	0.00	EA
18310	2425 305164 1/4-20 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	2,162.00	2,162.00	0.00	0.00	0.00	EA
18311	2425 305166 5/16-18 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	2,793.00	2,793.00	0.00	0.00	0.00	EA
18312	2425 305168 3/8-16 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	2,600.00	2,600.00	0.00	0.00	0.00	EA
18313	2425 305170 7/16-14 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	300.00	300.00	0.00	0.00	0.00	EA
18314	2425 305172 1/2-13 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	816.00	816.00	0.00	0.00	0.00	EA
18315	2425 305174 9/16-12 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	1,315.00	1,315.00	0.00	0.00	0.00	EA
18316	2425 305176 5/8-11 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	375.00	375.00	0.00	0.00	0.00	EA
18317	2425 305195 3/4-10 USS NYLON NUTS GRADE A LOW-CARBON Z...		Active	150.00	150.00	0.00	0.00	0.00	EA
18319	2425 305199 1-8 USS NYLON NUTS GRADE A LOW-CARBON ZIN...		Active	15.00	15.00	0.00	0.00	0.00	EA
18320	2425 305178 1/4-28 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	2,702.00	2,702.00	0.00	0.00	0.00	EA
18321	2425 305180 5/16-24 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	2,194.00	2,194.00	0.00	0.00	0.00	EA
18322	2425 305182 3/8-24 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	1,690.00	1,690.00	0.00	0.00	0.00	EA
18323	2425 305184 7/16-20 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	1,740.00	1,740.00	0.00	0.00	0.00	EA
18324	2425 305186 1/2-20 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	780.00	780.00	0.00	0.00	0.00	EA
18325	2425 305188 9/16-18 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	584.00	584.00	0.00	0.00	0.00	EA
18326	2425 305190 5/8-18 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	552.00	552.00	0.00	0.00	0.00	EA
18327	2425 305201 3/4-16 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	100.00	100.00	0.00	0.00	0.00	EA
18328	2425 305203 7/8-14 SAE NYLON NUTS GRADE A LOW-CARBON Z...		Active	37.00	37.00	0.00	0.00	0.00	EA
18329	2425 305205 1-14 SAE NYLON NUTS GRADE A LOW-CARBON ZIN...		Active	20.00	20.00	0.00	0.00	0.00	EA

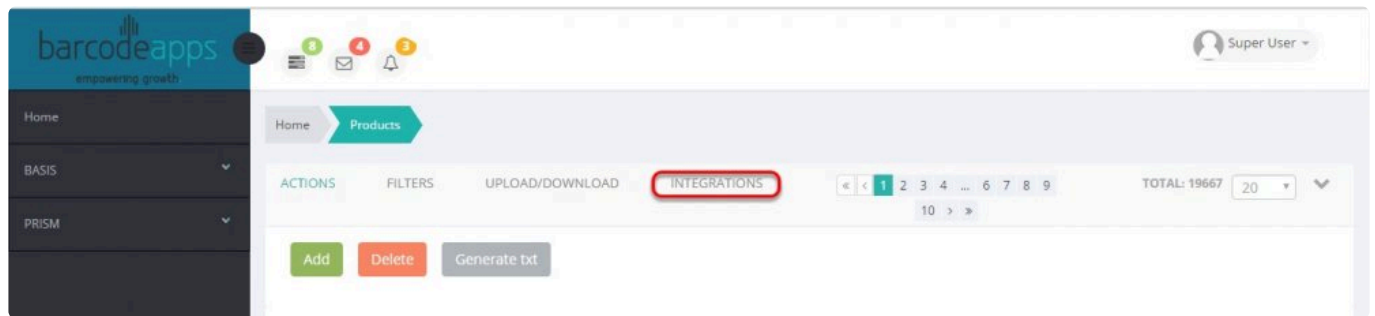
Login to the [PRISM Joomla Website](#) using your admin credentials.



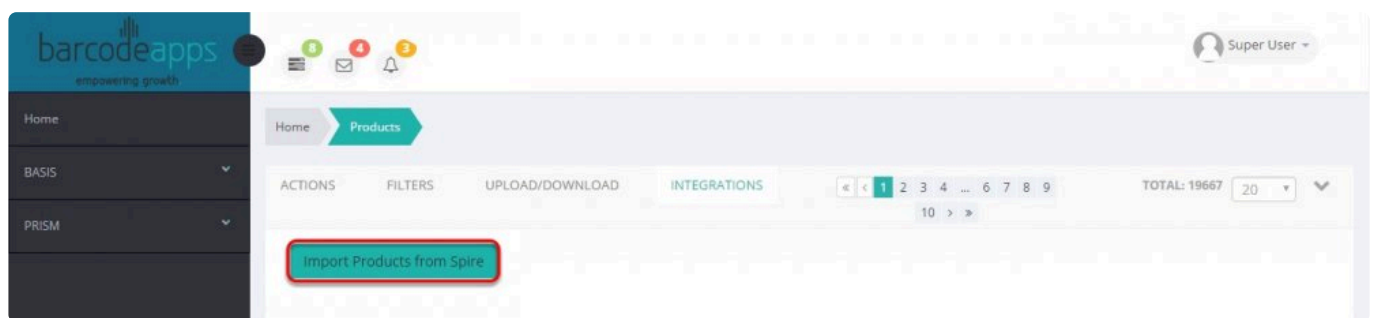
On the main window. Click on PRISM and then Products.



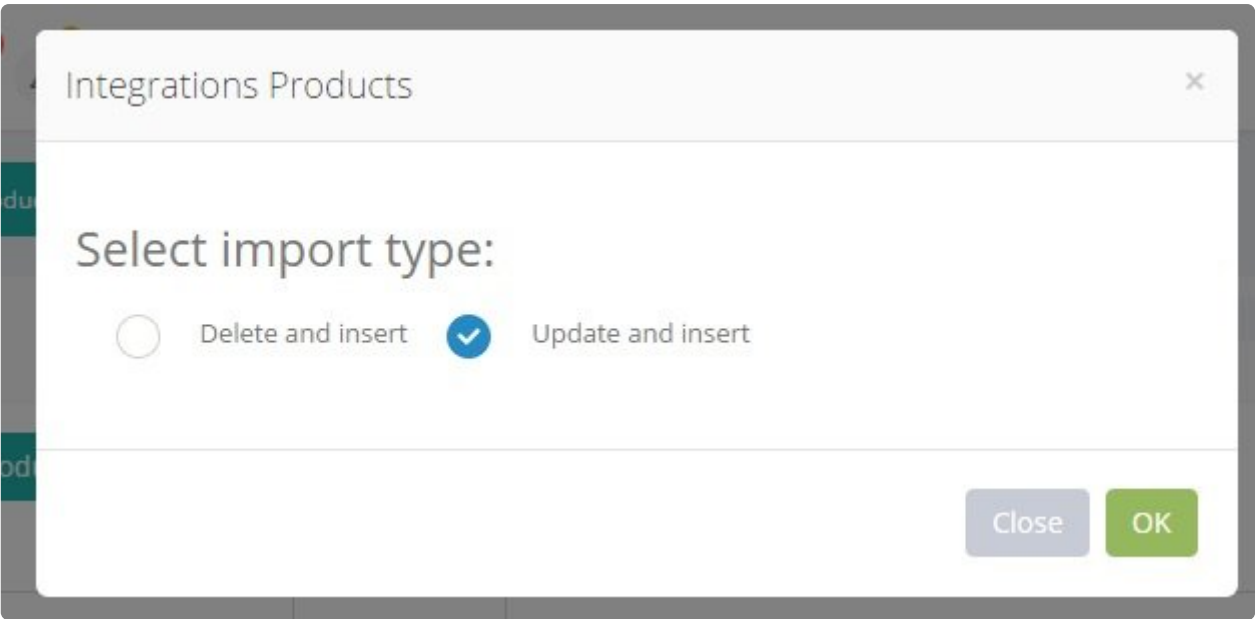
In the products window click on integrations



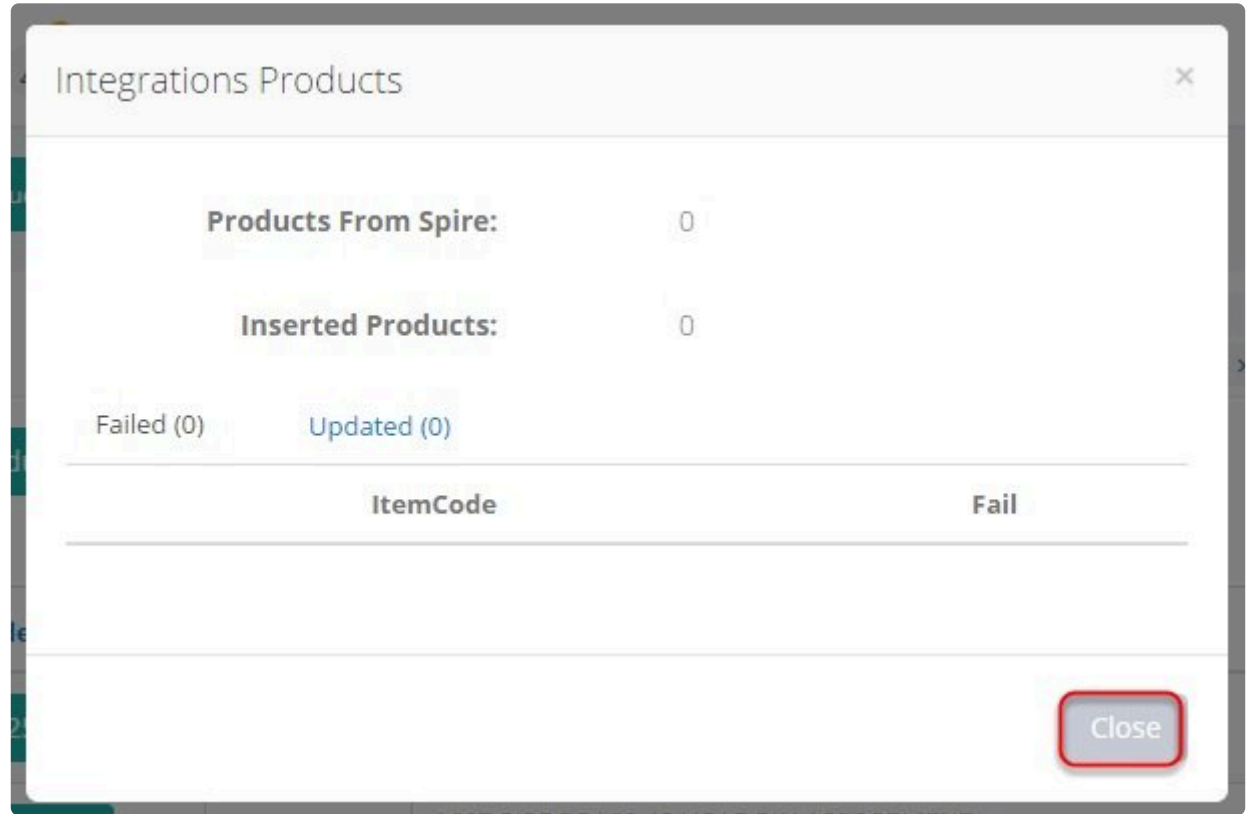
Click on Import Products from Spire



Select the import type and then click on OK



Wait or the upload to finish and then a notification will show the number of products from Spire and the total number of products successfully inserted. Just click on the close button to exit.



All products from SPIRE are now uploaded to the PRISM Joomla Website.

The screenshot displays the BarcodeApps PRISM Joomla Website interface. The left sidebar contains navigation links: Home, BASIS, and PRISM. The main content area shows a 'Products' section with a table of imported items. A red box highlights the table, and another red box highlights the 'TOTAL: 19665' status indicator.

ItemCode	Barcode	Description	MinOrderQty	UnitPrice	Comment
0625-25		ASST 92 PC COMPRESSION BRASS 24H ASSORTMENT	0	144.98	
0621-75		ASST PIPE BRASS 40 HOLE BIN ASSORTMENT	0	286	
0621-45		ASST 44 PC PIPE BRASS DRAWER 24H ASSORTMENT	0	82.72	
0621-27		ASST PIPE BRASS DRAWER 24H ASSORTMENT	0	144.98	
0621-25		ASST PIPE BRASS DRAWER 24H ASSORTMENT	0	109.89	
0611-25		ASST 40 PC HOSE BARBS BRASS 24H ASSORTMENT	0	144.98	
0607-50		6800 0251 2-BRAKE AND FUEL LINE NUT KITS ASSORTMENT	0	126.5	

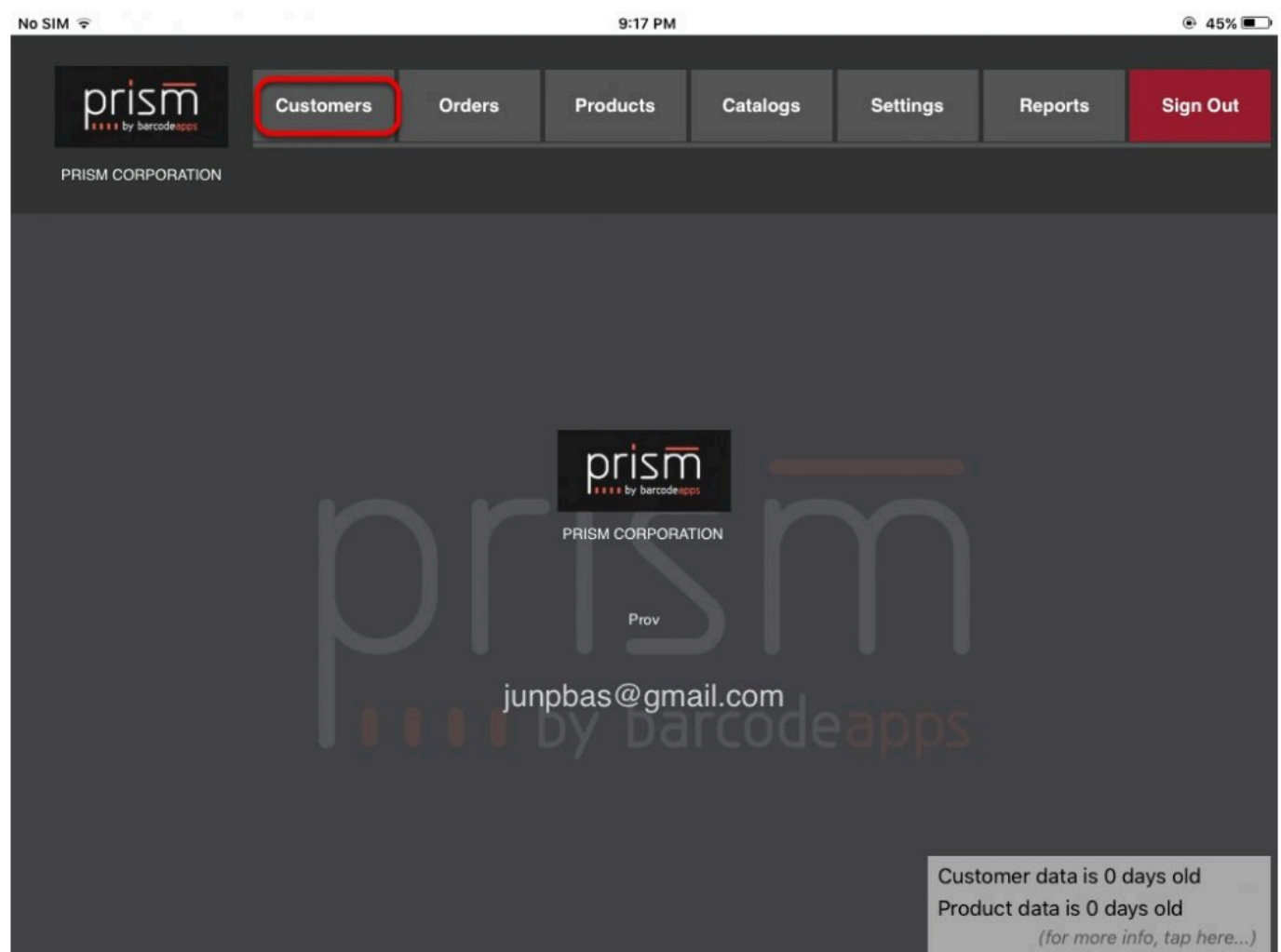
To know more about on Navigating to the PRISM Joomla Website please click [here](#) our Tutorials.

6.4.4. D. Uploading An Order From PRISM To Spire

This knowledge base article will show users the basics on how an order is processed from PRISM going to SPIRE.

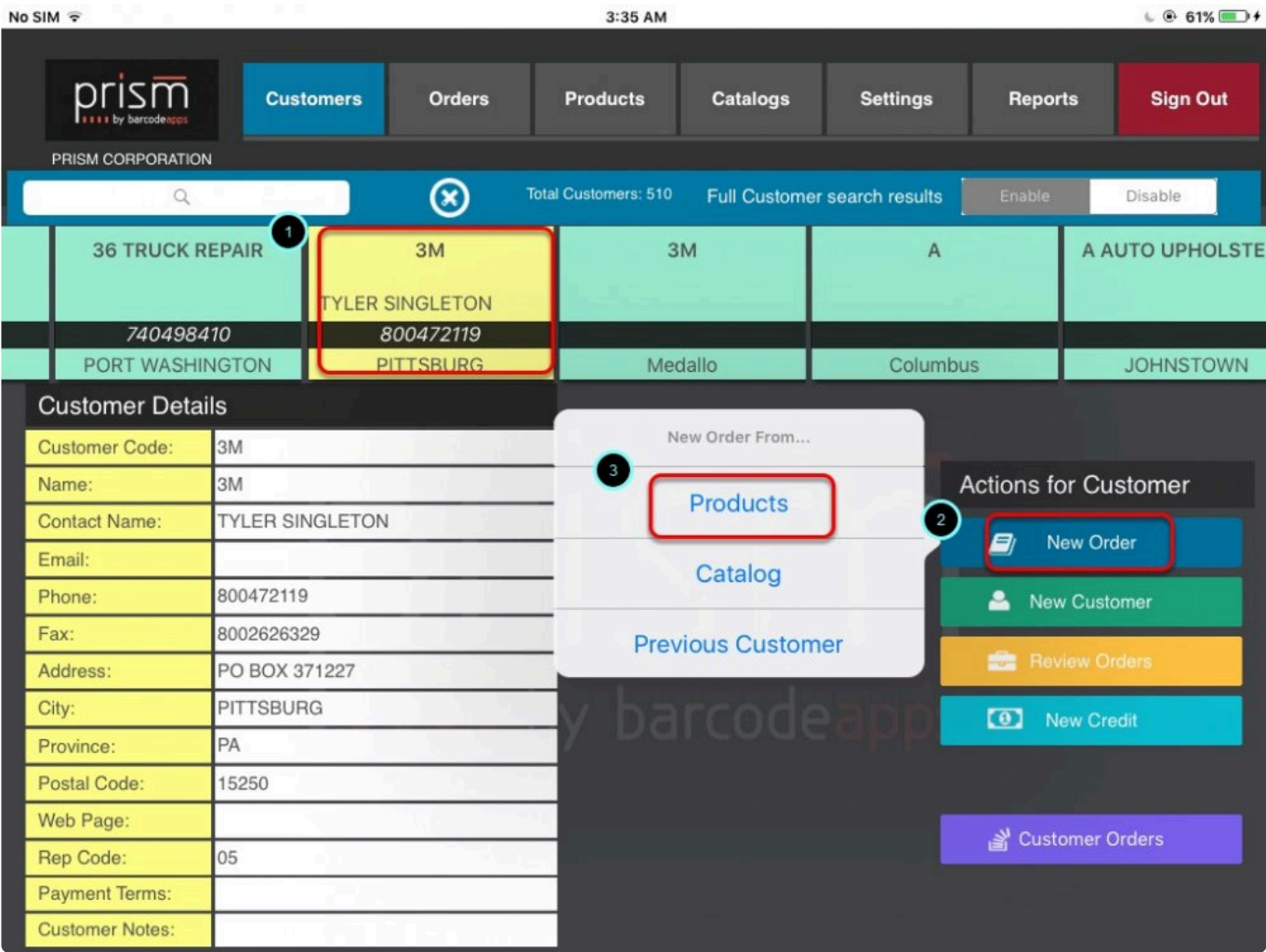
CREATING AN ORDER USING PRISM App iOS

To create an order on the PRISM App iOS. On the Main Screen, tap on the Customers Tab.



ADDING AN ITEM

Select a customer, tap on New Order and then tap on Products.



In the Products Window. Tap on the item or product that you'd like to add on your order.

No SIM 2:33 AM 62%

Order for: .
















prism by barcodeapps

PRISM CORPORATION

Customers Orders **Products** Catalogs Settings Reports Sign Out

19661

Go to Categories Item Code A Z Ascending

00019-10 \$ 29.95  6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA	00106-20 \$ 15.80  6800 W5331 240 PC NUTS	00121-20 \$ 9.80  6800 W5216 350 PC MACH LOCK	00121-30 \$ 9.98  6800 W5218 720 PC INT/EXT MACH WASHER SMALL DRAWER ASSORTMENT	00150-25 \$ 17.90  6800 W5342 106 PC SOCKET HEADS SMALL DRAWER ASSORTMENT
00165-10 \$ 35.22  451 PC PHILLIP HEAD MACHINE SCREW SMALL DRAWER ASSORT LIST 86.73	00165-25 \$ 9.10  6800 W5222 347 PC METRIC NUTS	00168-20 \$ 13.80  6800 W5220 200 PC HEX HEAD TEK SCREWS SMALL DRAWER ASSORTMENT	00191-10 \$ 32.25  301 PC COTTER PIN SMALL DRAWER ASSORT LIST 39.95	00191-20 \$ 15.80  6800 W5206 150 PC LARGE COTTER PIN SMALL DRAWER ASSORTMENT
00191-5 \$ 15.80  6800 W5204 1000 PC SMALL COTTER PIN SMALL DRAWER ASSORTMENT	00192-5 \$ 13.80  6800 W5210 150 PC HAIR PIN SMALL DRAWER ASSORTMENT	00193-10 \$ 23.80  6800 W5359 74 PC UNIVERSAL CLEVIS PIN SMALL DRAWER ASSORTMENT	00195-20 \$ 13.80  6800 W5340 120 PC SPRING PIN SMALL DRAWER ASSORTMENT	00195-40 \$ 15.80  6800 W5341 80 PC WOODRUFF KEY SMALL DRAWER ASSORTMENT


Specify a quantity.

No SIM 2:38 AM 62%

Back Comment 00019-10 Wish List

Product 1 of 1500

Tap on Image for Larger View



5819 or 5825 : 4 or 5 Tier Single/Multi Color Plastic Cabinet

Credit

Sample

UOM: EA

MIN 0

Price(L1): \$ 29.95

Discount: 0%

Sold By : junpbas@gmail.com

6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA


Additional Info :


Stock Qty

4 1

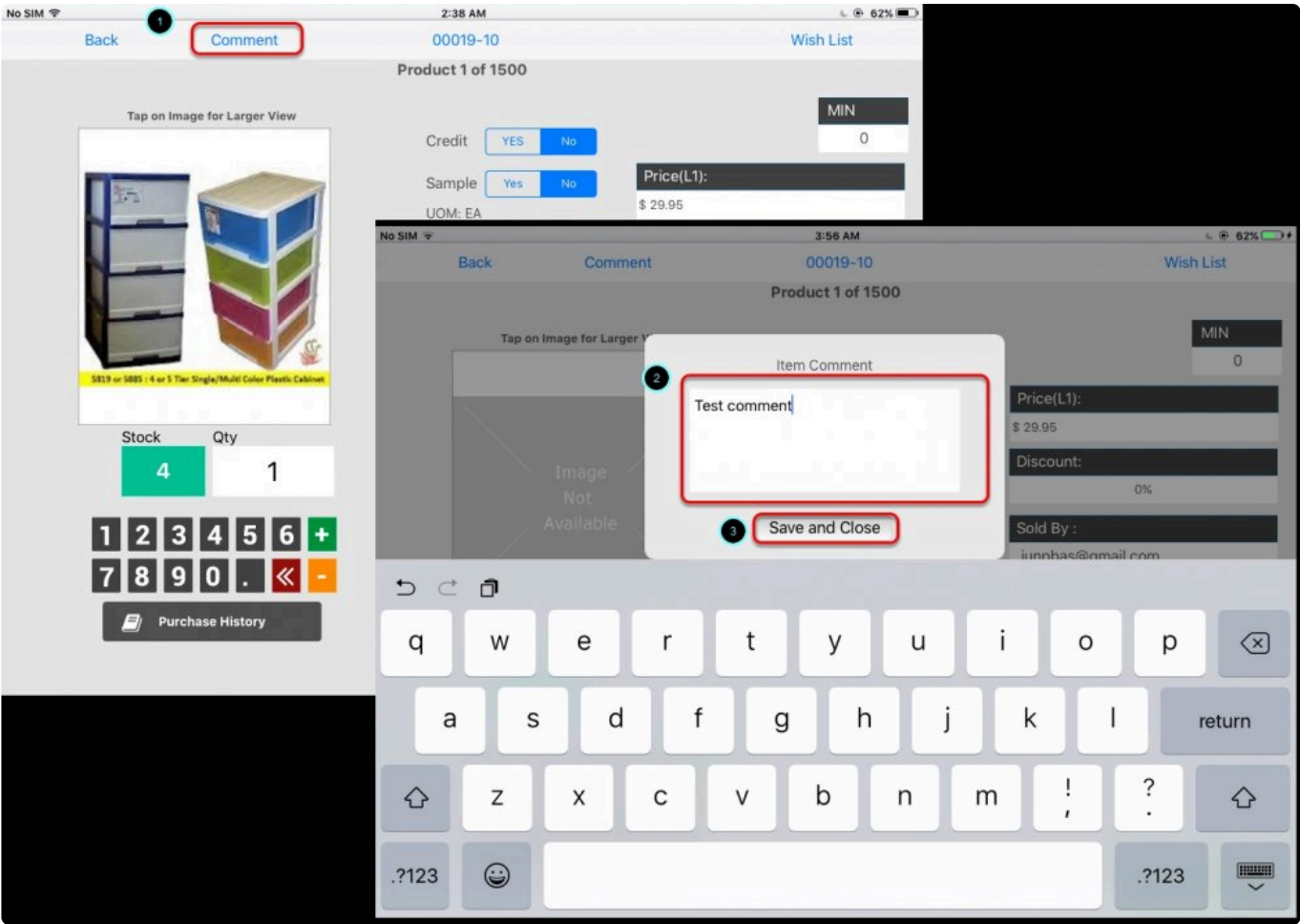
1 2 3 4 5 6 +

7 8 9 0 . << -

 Purchase History

 Add to Order

A comment on an item can also be added by tapping on comment on top, type in the comment and then tap on save and close.



COMPLETING AN ORDER

To complete an order, Tap on the shopping cart.

No SIM 2:38 AM 62%

Order for: 3M

prism by barcodeapps
















PRISM CORPORATION

Customers Orders **Products** Catalogs Settings Reports Sign Out

19661

Go to Categories Item Code A Z Ascending

3

00019-10 \$ 29.95 1.0  6800 W54018 30 COMPARTMENT PLASTIC CABINET AND DRAWERS EA	00106-20 \$ 15.80 1.0  6800 W5331 240 PC NUTS	00121-20 \$ 9.80 1.0  6800 W5216 350 PC MACH LOCK	00121-30 \$ 9.98  6800 W5218 720 PC INT/EXT MACH WASHER SMALL DRAWER ASSORTMENT	00150-25 \$ 17.90  6800 W5342 106 PC SOCKET HEADS SMALL DRAWER ASSORTMENT
00165-10 \$ 35.22  451 PC PHILLIP HEAD MACHINE SCREW SMALL DRAWER ASSORT LIST 86.73	00165-25 \$ 9.10  6800 W5222 347 PC METRIC NUTS	00168-20 \$ 13.80  6800 W5220 200 PC HEX HEAD TEK SCREWS SMALL DRAWER ASSORTMENT	00191-10 \$ 32.25  301 PC COTTER PIN SMALL DRAWER ASSORT LIST 39.95	00191-20 \$ 15.80  6800 W5206 150 PC LARGE COTTER PIN SMALL DRAWER ASSORTMENT
00191-5 \$ 15.80  6800 W5204 1000 PC SMALL COTTER PIN SMALL DRAWER ASSORTMENT	00192-5 \$ 13.80  6800 W5210 150 PC HAIR PIN SMALL DRAWER ASSORTMENT	00193-10 \$ 23.80  6800 W5359 74 PC UNIVERSAL CLEVIS PIN SMALL DRAWER ASSORTMENT	00195-20 \$ 13.80  6800 W5340 120 PC SPRING PIN SMALL DRAWER ASSORTMENT	00195-40 \$ 15.80  6800 W5341 80 PC WOODRUFF KEY SMALL DRAWER ASSORTMENT

On the Order Summary window tap on Complete.

No SIM 2:38 AM 62%

Order for: 3M

prism by barcodeapps

PRISM CORPORATION

Customers Orders **Products** Catalogs Settings Reports Sign Out

Go to A Item Code

Number of Items # 3 Order Summary Order Number # 1

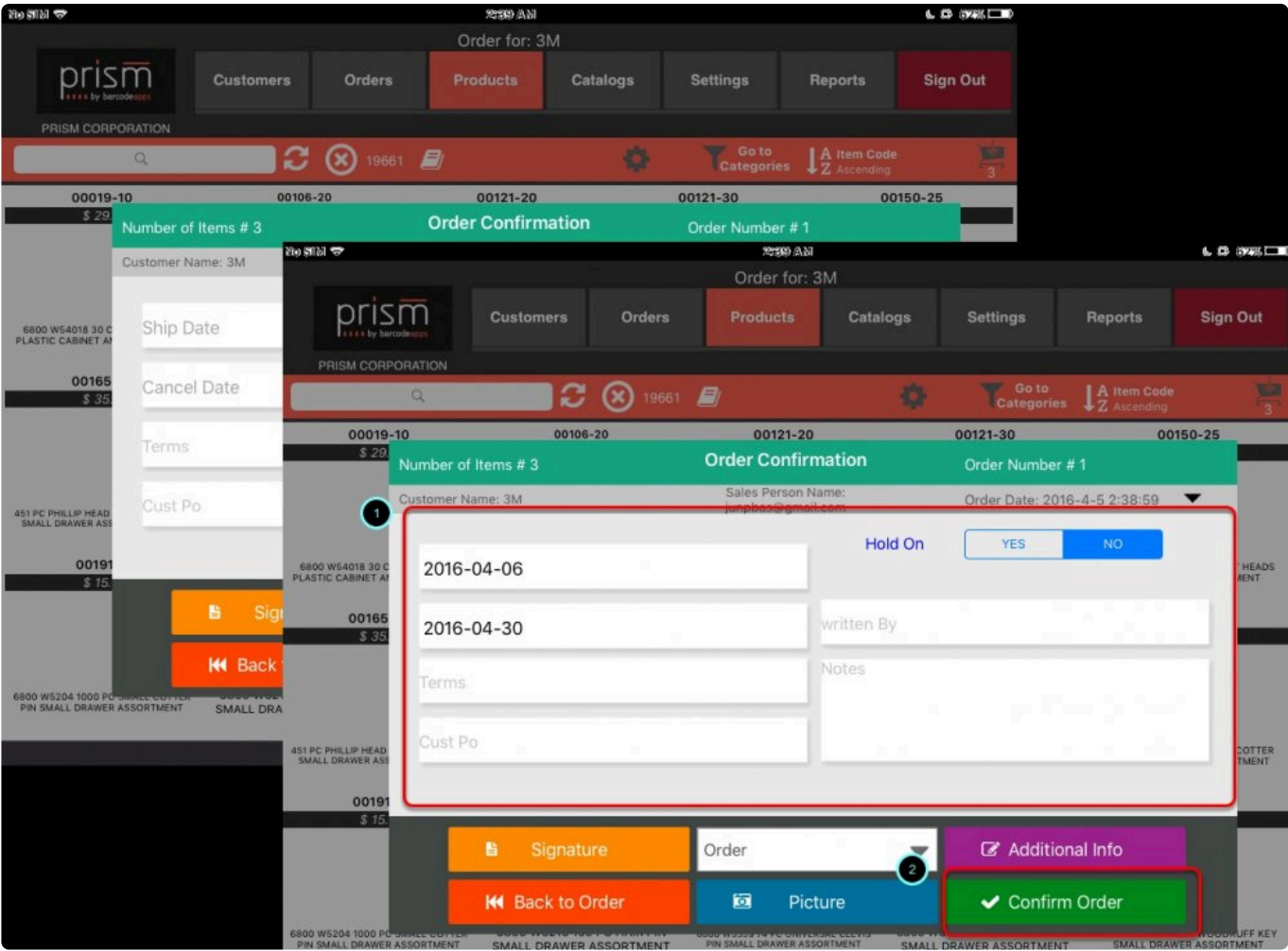
Customer Name: 3M Sales Person Name: junpbas@gmail.com Order Date: 2016-4-5 2:38:53

ID	Product Code	Description	Quantity	Unit Price	Total
1	00019-10	6800 W54018 30 COMPARTMENT PLA...	1.00	\$ 29.95	\$ 29.95
2	00106-20	6800 W5331 240 PC NUTS	1.00	\$ 15.80	\$ 15.80
3	00121-20	6800 W5216 350 PC MACH LOCK	1.00	\$ 9.80	\$ 9.80

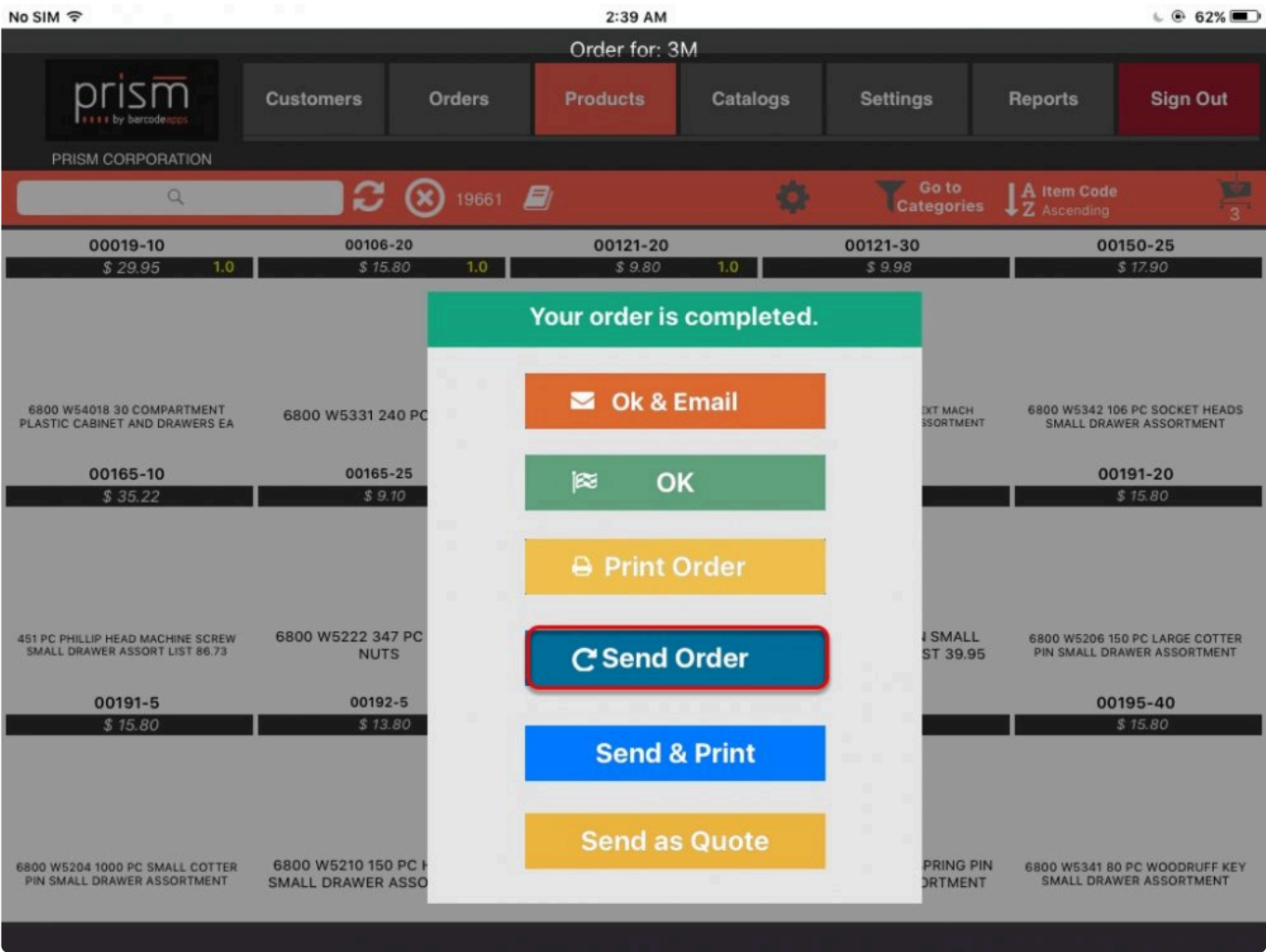
Order Total \$ 55.55

Back Show ordered products 0% Show Wholesale Price Complete

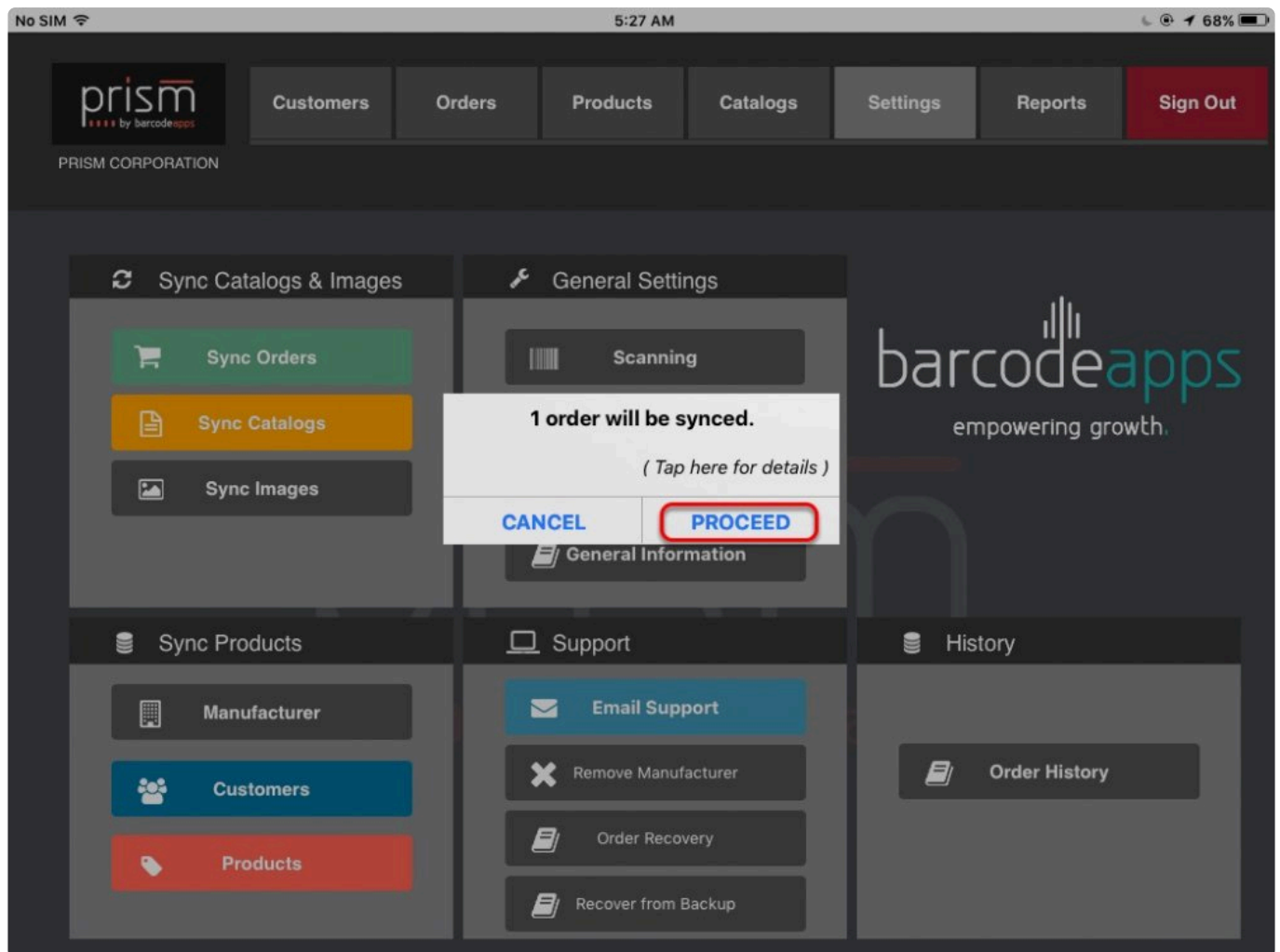
Fill out the information needed in the Order Confirmation window ,and then tap on Confirm Order.



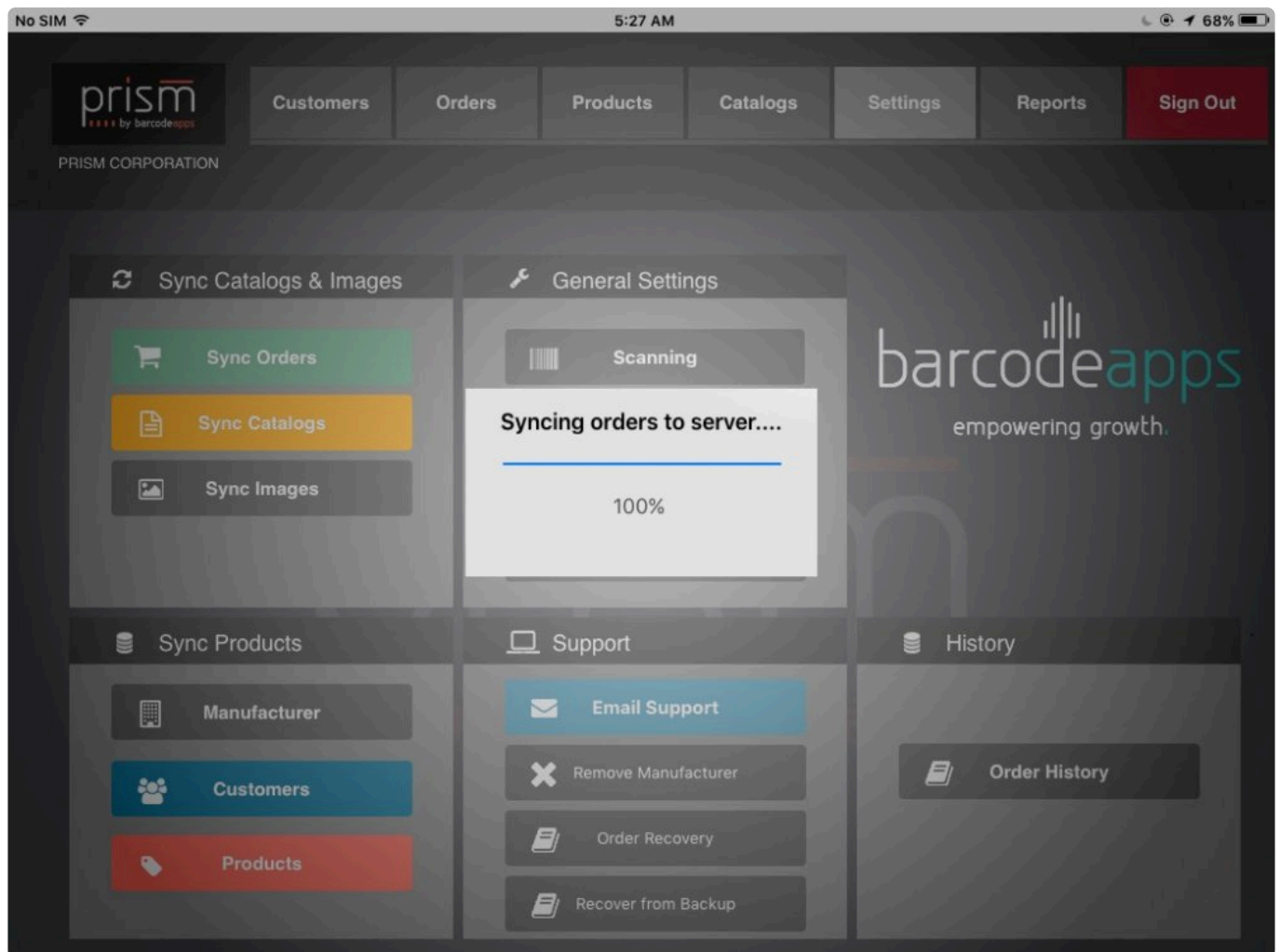
Tap on Send Order.



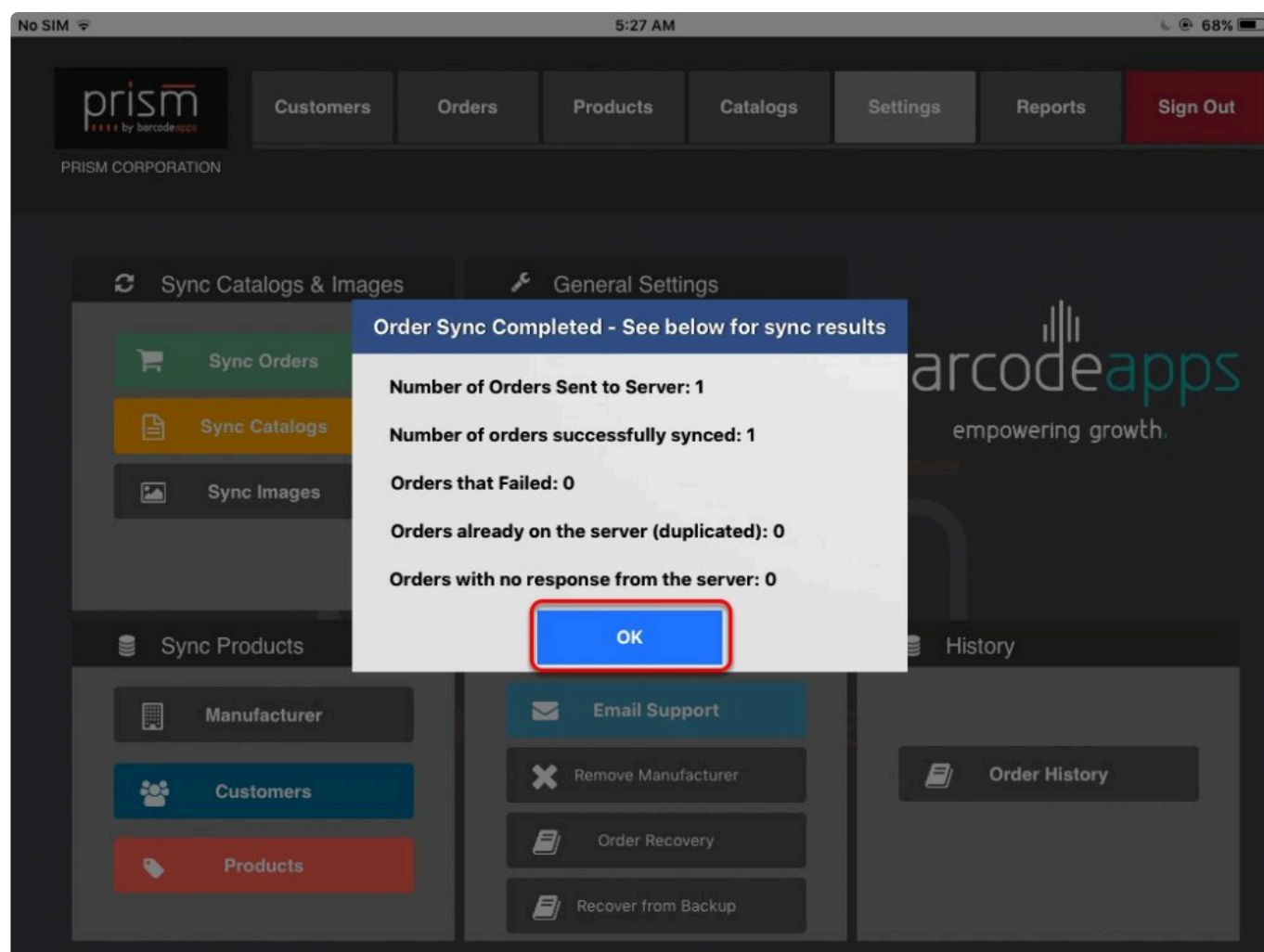
Tap on Proceed.



Wait for the sync to finish.



Check sync results (Make sure that there are no errors) and then click on Ok.

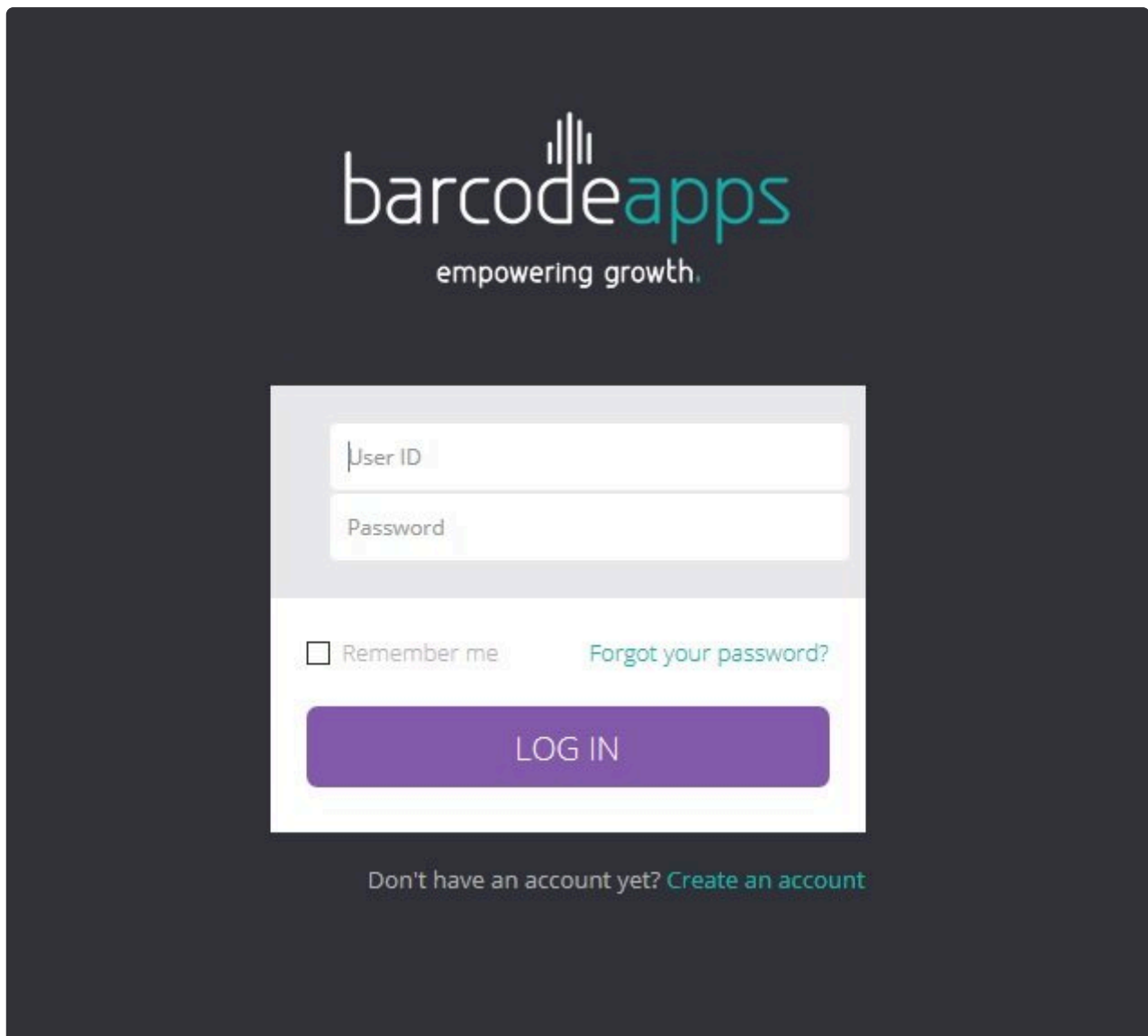


To learn and explore on how to manage your orders using the PRISM App. Please visit our support site.

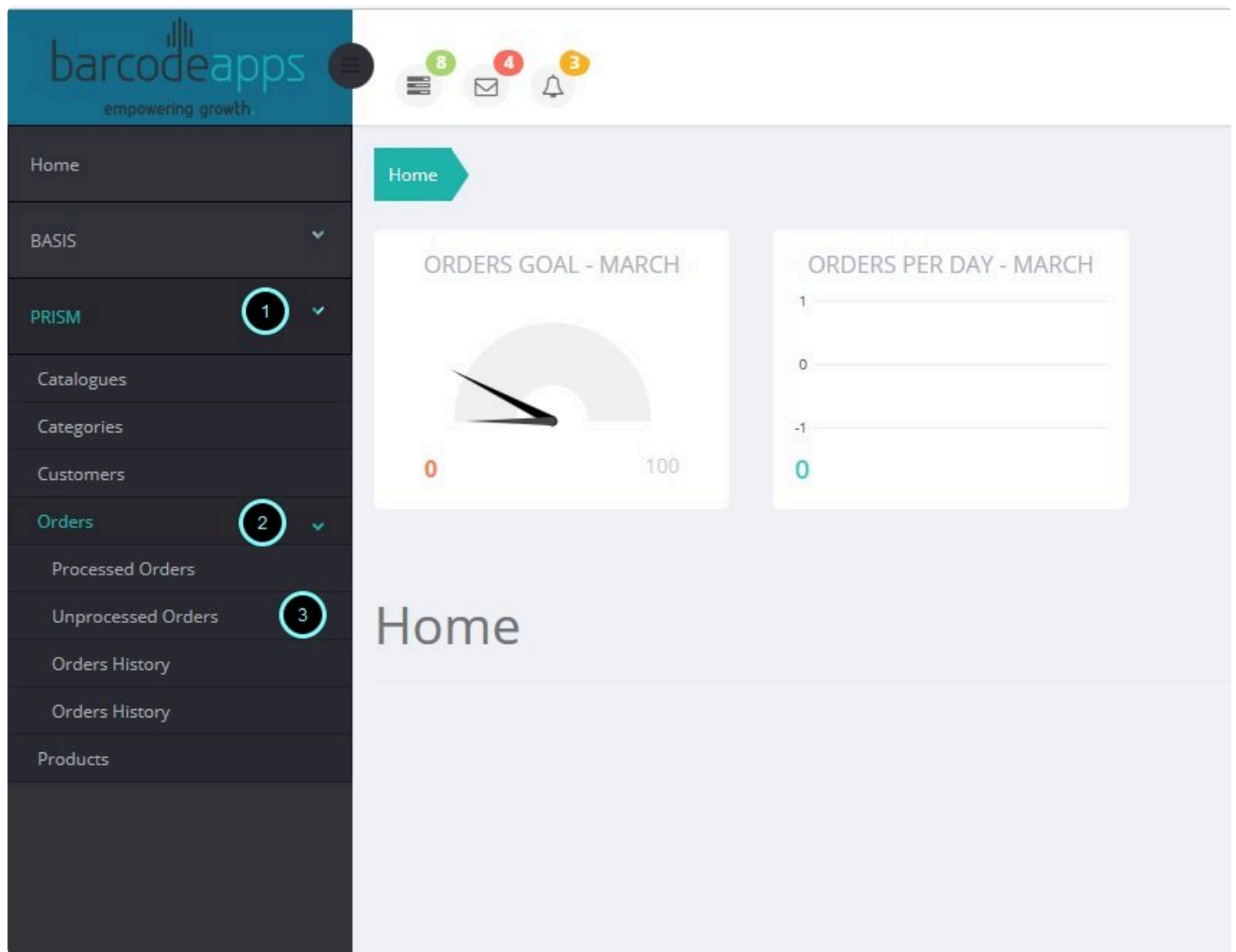
EXPORTING ORDER FROM PRISM JOOMLA WEBSITE TO SPIRE

To export the order created using the PRISM App iOS in the PRISM Joomla Website going to SPIRE.

Login to the PRISM Joomla Website using your admin credentials.



In the Control panel window, click on PRISM, Orders and the select Unprocessed Orders.

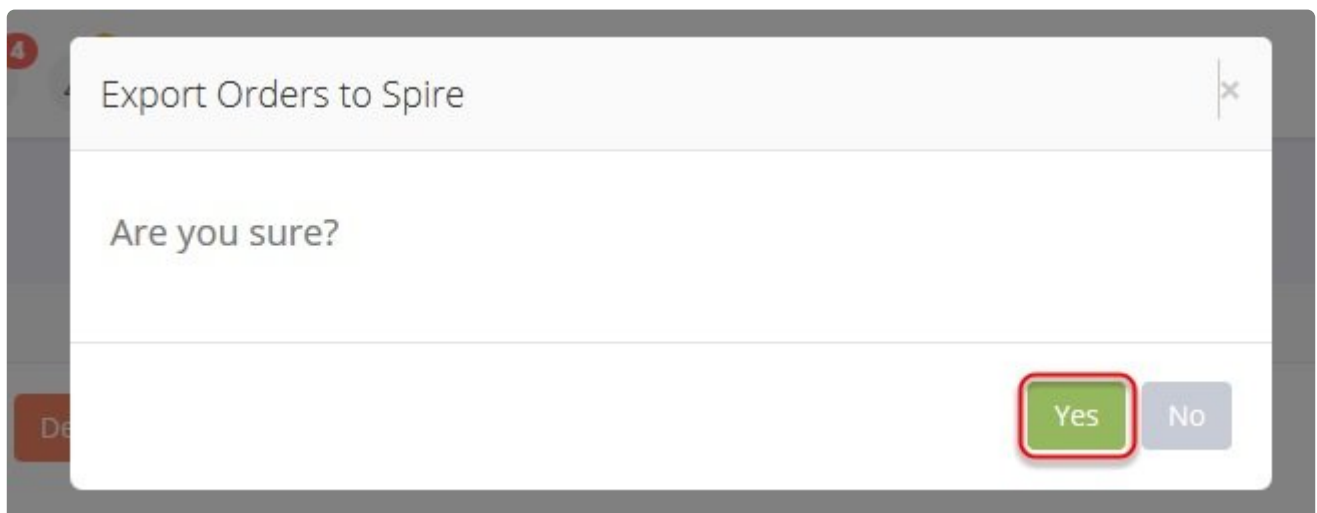


In the Unprocessed Orders Window. Select the order that needs to be exported by putting a check mark in the box just before the order number (Multiple selection can be done), and then tap on Export Orders to SPIRE.

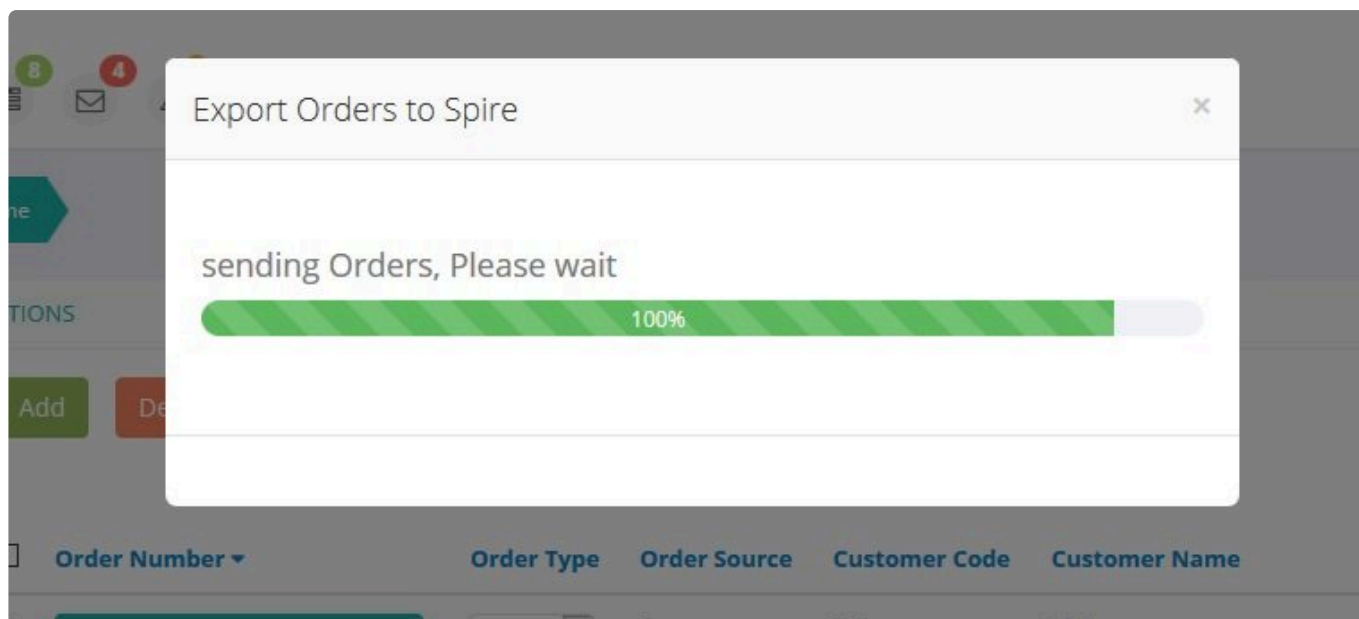
The screenshot shows the BarcodeApps web application interface. On the left is a dark sidebar with the 'barcodeapps' logo and navigation links for 'Home', 'BASIS', and 'PRISM'. The main content area has a top bar with 'Home', 'ACTIONS', 'FILTERS', and 'DOWNLOAD' tabs. Below these are three buttons: 'Add' (green), 'Delete' (orange), and 'Export Orders to Spire' (teal), with the last one highlighted by a red box. A table below contains order data. The first row is selected, indicated by a red box around its checkbox and a circled '1' next to it. The table has columns for Order Number, Order Type, Order Source, Customer Code, Customer Name, Order Date, RepCode, and Total.

<input type="checkbox"/>	Order Number	Order Type	Order Source	Customer Code	Customer Name	Order Date	RepCode	Total
<input checked="" type="checkbox"/>	PRI02-002-04-06-2016-4	OR	S	3M	3M	2016-04-05 12:24	PRI02-002	\$9.80
<input type="checkbox"/>	PRI02-002-04-05-2016-4	OR	S	185090	BUILDERS TRASH SERVICE	2016-04-04 17:17	PRI02-002	\$223.15

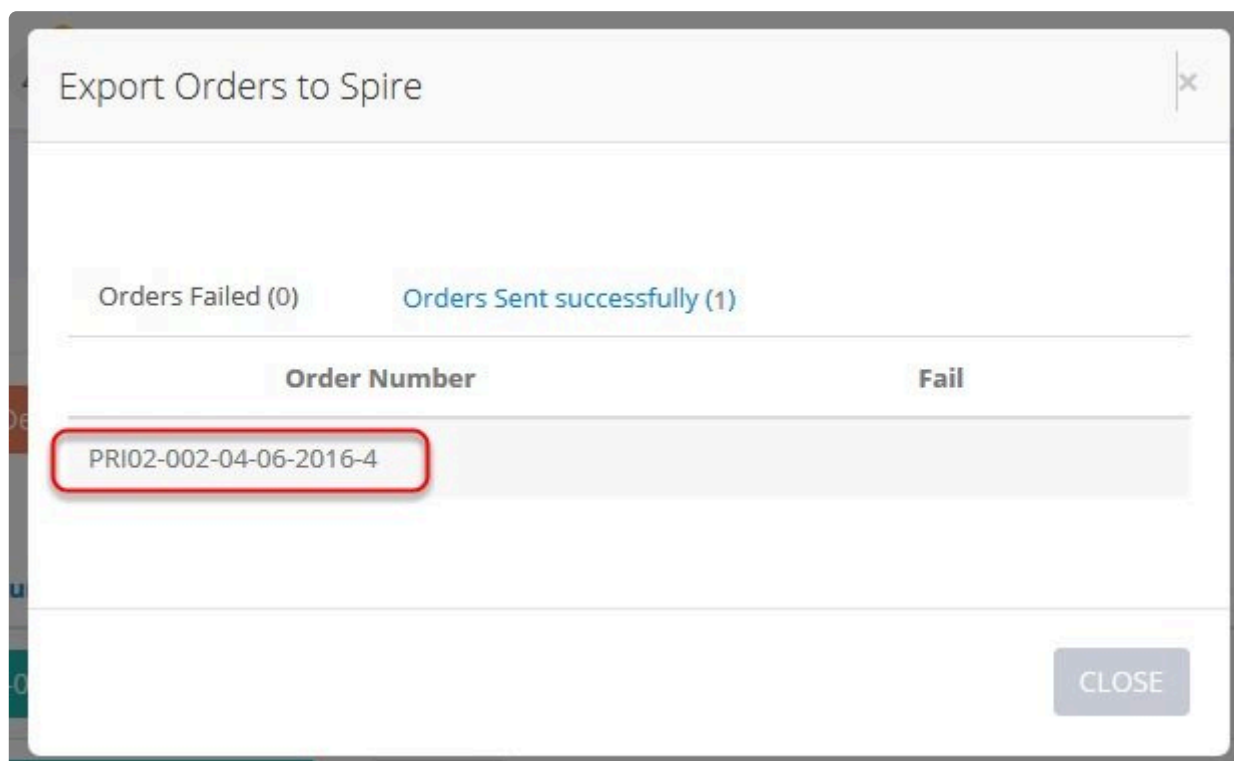
Click on Yes.



Wait for the sync to finish.

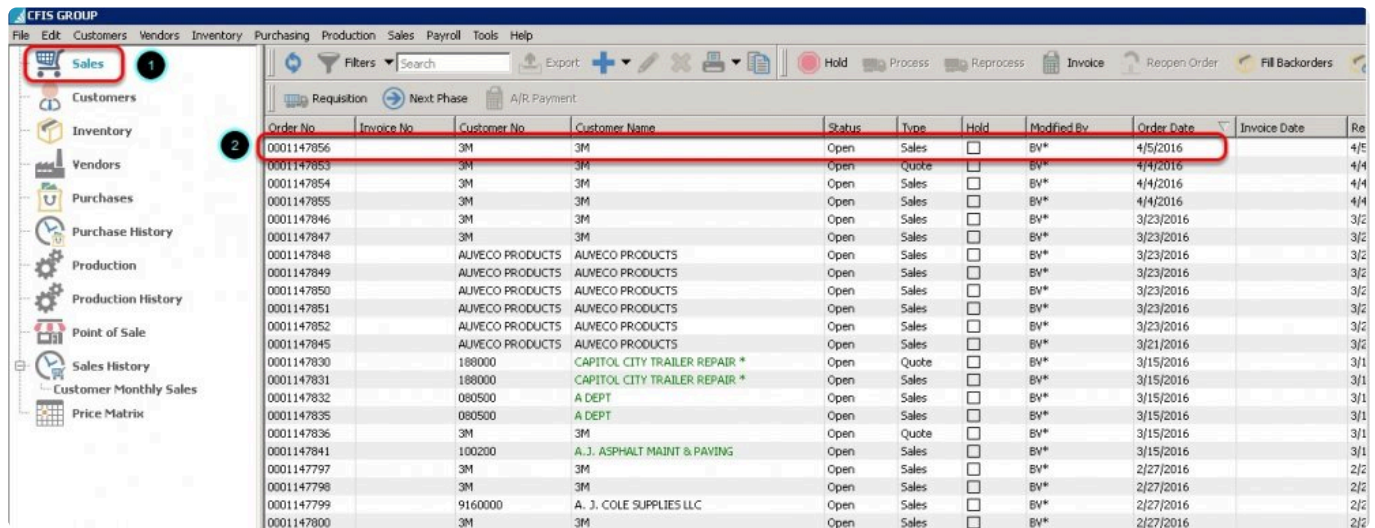


A summary will show if the orders were sent successfully or not. If there is no error, take note of the Order number and then go back to Spire to check if the Orders are exported.



CHECKING EXPORTED ORDER IN SPIRE

To check the order, click on Sales, and then click on the new order to check the Sales details.



Order No	Invoice No	Customer No	Customer Name	Status	Type	Hold	Modified By	Order Date	Invoice Date	Re
0001147856		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	4/5/2016		4/5
0001147853		3M	3M	Open	Quote	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147854		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147855		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147846		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147847		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147848		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147849		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147850		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147851		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147852		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147845		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/21/2016		3/2
0001147830		188000	CAPITOL CITY TRAILER REPAIR *	Open	Quote	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147831		188000	CAPITOL CITY TRAILER REPAIR *	Open	Sales	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147832		080500	A DEPT	Open	Sales	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147835		080500	A DEPT	Open	Sales	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147836		3M	3M	Open	Quote	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147841		100200	A. J. ASPHALT MAINT & PAVING	Open	Sales	<input type="checkbox"/>	BV*	3/15/2016		3/1
0001147797		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	2/27/2016		2/2
0001147798		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	2/27/2016		2/2
0001147799		9160000	A. J. COLE SUPPLIES LLC	Open	Sales	<input type="checkbox"/>	BV*	2/27/2016		2/2
0001147800		3M	3M	Open	Sales	<input type="checkbox"/>	BV*	2/27/2016		2/2

Order successfully exported to SPIRE.

Note:

1. The Ship Quantity will be set to zero for all orders coming from PRISM.
2. Comments tagged on an item will display underneath an item.
3. The Ref no will show that the order is by PRISM App (iOS/Android)

Sales - 0001147856 3M

View Compact Process Reprocess Invoice Next Phase Totals By Ordered Qty Requisition Deposits

Inventory is available to commit on this order. Ship Available Dismiss

Main Bill To Ship To Info Phase Communications Sales Orders Sales History User Defined Attachments Fill Order

Customer

Customer No 3M A/R Balance 0.00 Credit Limit Unlimited

PO No 3 Ref No By Prism Other Orders 0.00 Available Unlimited

Notes Salesperson 05 SUPPLIERS Territory 05

Shipping

Ship To 3M Ship Via BESTWAY Best way FOB Your dock

Contact

Name Phone Fax/Cell Email

Order Details

Open Sales

Order No 0001147856

Order Date 4/5/2016

Required Date 4/30/2016

Invoice No

Invoice Date

Repet None

Phase

Location

Profit Center

Insert Delete Comment Serial Numbers Add Job Header UCF Scan Items Fill Prices

Part No	Description	Order Qty	Ship Qty	B/O Qty	Disc	Unit Price	U/M	Conversion Factor	SlsTax	Vendor	Lev
00019-10	6900 WS4019-20 COMPARTMENT PLASTIC CABINET AND DRAWERS EA	1	0	1	0.0	29.95	EA	1 EA per EA			
00106-20	6000 WS001-240 PC NUTS & BOLTS SMALL DRAWER ASSORTMENT	1	0	1	0.0	15.80	EA	1 EA per EA			
00121-20	6800 WS216-350 PC MACH LOCK & PLATS SMALL DRAWER ASSORTMENT	1	0	1	0.0	9.80	FA	1 FA per FA			

Available 4.000 On Hand 4.000 Committed 0.000 Backorder 11.000 On Order 0.000 Expected

Total Weight 0.0 Discount 0.0 % 0.00 Subtotal 0.00

Freight 0.00 Sales Tax 0.00

0.00

Created by BV* on 4/5/2016 11:23:39 AM Modified by BV* on 4/5/2016 11:23:39 AM

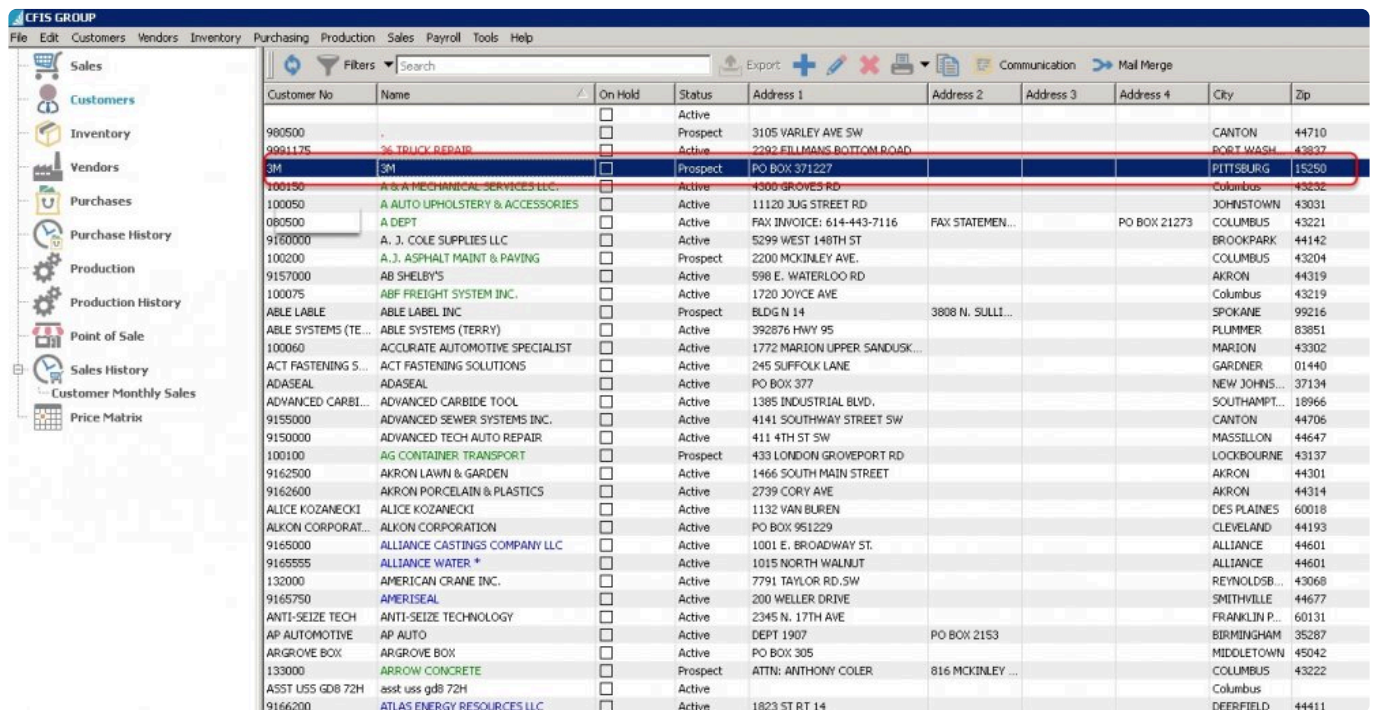
6.4.5. Ea. Spire PRISM Sales Order Export For Bill To And Ship To Orders

This knowledge base article will show users how spire users can export Bill to and Ship to Orders.

SALES EXPORT FOR BILL TO AND SHIP TO ORDERS

Before getting started, Spire users have to check first what is the bill to and ship to information of the customer.

This can be done by double clicking on the customer from the customers console.



Customer No	Name	On Hold	Status	Address 1	Address 2	Address 3	Address 4	City	Zip
980500		<input type="checkbox"/>	Active	3105 VARLEY AVE SW				CANTON	44710
9991175	3% TRUCK REPAIR	<input type="checkbox"/>	Prospect	2292 ELLMANS BOTTOM ROAD				PORT WASH	43037
3M	3M	<input type="checkbox"/>	Prospect	PO BOX 371227				PITTSBURG	15250
100150	A & A MECHANICAL SERVICES LLC.	<input type="checkbox"/>	Active	1500 GROVES RD				Columbus	43232
100050	A AUTO UPHOLSTERY & ACCESSORIES	<input type="checkbox"/>	Active	11120 JUG STREET RD				JOHNSTOWN	43031
080500	A DEPT	<input type="checkbox"/>	Active	FAX INVOICE: 614-443-7116	FAX STATEMEN...		PO BOX 21273	COLUMBUS	43221
9160000	A. J. COLE SUPPLIES LLC	<input type="checkbox"/>	Active	5299 WEST 146TH ST				BROOKPARK	44142
100200	A. J. ASPHALT MAINT & PAVING	<input type="checkbox"/>	Prospect	2200 MCKINLEY AVE.				COLUMBUS	43204
9157000	AB SHELBY'S	<input type="checkbox"/>	Active	598 E. WATERLOO RD				AKRON	44319
100075	ABF FREIGHT SYSTEM INC.	<input type="checkbox"/>	Active	1720 JOYCE AVE				Columbus	43219
ABLE LABEL	ABLE LABEL INC	<input type="checkbox"/>	Prospect	BLDG N 14	3808 N. SULLI...			SPOKANE	99216
ABLE SYSTEMS (TE...	ABLE SYSTEMS (TERRY)	<input type="checkbox"/>	Active	392876 HWY 95				PLUMMER	83851
100060	ACCURATE AUTOMOTIVE SPECIALIST	<input type="checkbox"/>	Active	1772 MARION UPPER SANDUSK...				MARION	43302
ACT FASTENING S...	ACT FASTENING SOLUTIONS	<input type="checkbox"/>	Active	245 SUFFOLK LANE				GARDNER	01440
ADASEAL	ADASEAL	<input type="checkbox"/>	Active	PO BOX 377				NEW JOHNS...	37134
ADVANCED CARBI...	ADVANCED CARBIDE TOOL	<input type="checkbox"/>	Active	1385 INDUSTRIAL BLVD.				SOUTHAMPT...	18966
9155000	ADVANCED SEWER SYSTEMS INC.	<input type="checkbox"/>	Active	4141 SOUTHWAY STREET SW				CANTON	44708
9150000	ADVANCED TECH AUTO REPAIR	<input type="checkbox"/>	Active	411 4TH ST SW				MASSILLON	44647
100100	AG CONTAINER TRANSPORT	<input type="checkbox"/>	Prospect	433 LONDON GROVEPORT RD				LOCKBOURNE	43137
9162500	AKRON LAWN & GARDEN	<input type="checkbox"/>	Active	1466 SOUTH MAIN STREET				AKRON	44301
9162600	AKRON PORCELAIN & PLASTICS	<input type="checkbox"/>	Active	2739 CORY AVE				AKRON	44314
ALICE KOZANECKI	ALICE KOZANECKI	<input type="checkbox"/>	Active	1132 VAN BUREN				DES PLAINES	60018
ALKON CORPORAT...	ALKON CORPORATION	<input type="checkbox"/>	Active	PO BOX 951229				CLEVELAND	44193
9165000	ALLIANCE CASTINGS COMPANY LLC	<input type="checkbox"/>	Active	1001 E. BROADWAY ST.				ALLIANCE	44601
9165555	ALLIANCE WATER *	<input type="checkbox"/>	Active	1015 NORTH WALNUT				ALLIANCE	44601
132000	AMERICAN CRANE INC.	<input type="checkbox"/>	Active	7791 TAYLOR RD.SW				REYNOLDSB...	43068
9165750	AMERISEAL	<input type="checkbox"/>	Active	200 WELLER DRIVE				SMITHVILLE	44677
ANTI-SEIZE TECH	ANTI-SEIZE TECHNOLOGY	<input type="checkbox"/>	Active	2345 N. 17TH AVE				FRANKLIN P...	60131
AP AUTOMOTIVE	AP AUTO	<input type="checkbox"/>	Active	DEPT 1907	PO BOX 2153			BIRMINGHAM	35287
ARGROVE BOX	ARGROVE BOX	<input type="checkbox"/>	Active	PO BOX 305				MIDDLETOWN	45042
133000	ARROW CONCRETE	<input type="checkbox"/>	Prospect	ATTN: ANTHONY COLER	816 MCKINLEY ...			COLUMBUS	43222
ASST USS GD8 72H	asst uss gd8 72H	<input type="checkbox"/>	Active					Columbus	
9166200	ATLAS ENERGY RESOURCES LLC	<input type="checkbox"/>	Active	1823 ST RT 14				DEERFIELD	44411

On the contact information window, the Bill to and the Ship to information can now be verified.

Customer - 3M

Customer No: 3M Name: 3M **COMPANY NAME** ☐ On Hold Status: Prospect Foreground: Background:

Addresses | Billing | General | Sales Orders | Sales History | Accounts Receivable | Price Matrix

Default: Billing Address

BILL TO INFORMATION

3M-MEDELLIN

Address: PO BOX 371227
Map:
City: PITTSBURG
Zip: 15250 State: PA
Country:
Phone: (800) 472-1190 Ext. #
Fax: (800) 262-6329 #

Hold Address

Contact #1 Contact #2 Contact #3

Name: TYLER SINGLETON
Phone: () - Ext. #
Fax/Cell: () - #
Email:
Internet Addresses
Email: >
Website: >

Created by RM on 7/11/2014 8:55:07 AM Modified by BV* on 2/25/2016 11:28:28 AM

Customer - 3M

Customer No: 3M Name: 3M ☐ On Hold Status: Prospect Foreground: Background:

Addresses | Billing | General | Sales Orders | Sales History | Accounts Receivable | Price Matrix

Default: Billing Address

SHIP TO INFORMATION

3M-MEDELLIN

Name: 3M medellin Poblado

Address: 1234 Poblado
Map:
City: Medallo
Zip: State: OH
Country:
Phone: () - Ext. #
Fax: () - #

Hold Address

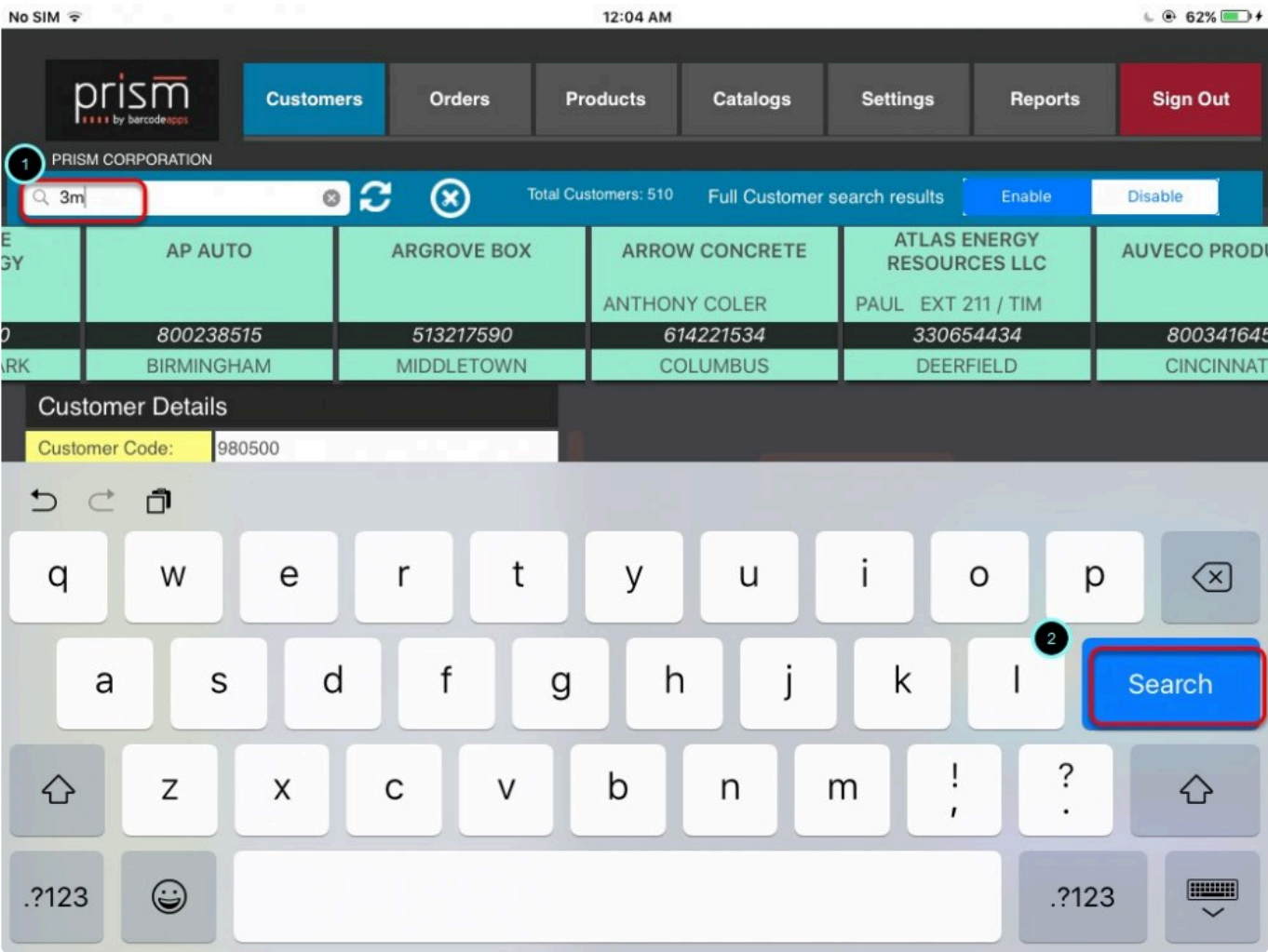
Contact #1 Contact #2 Contact #3

Name:
Phone: () - Ext. #
Fax/Cell: () - #
Email:
Internet Addresses
Email: >
Website: >

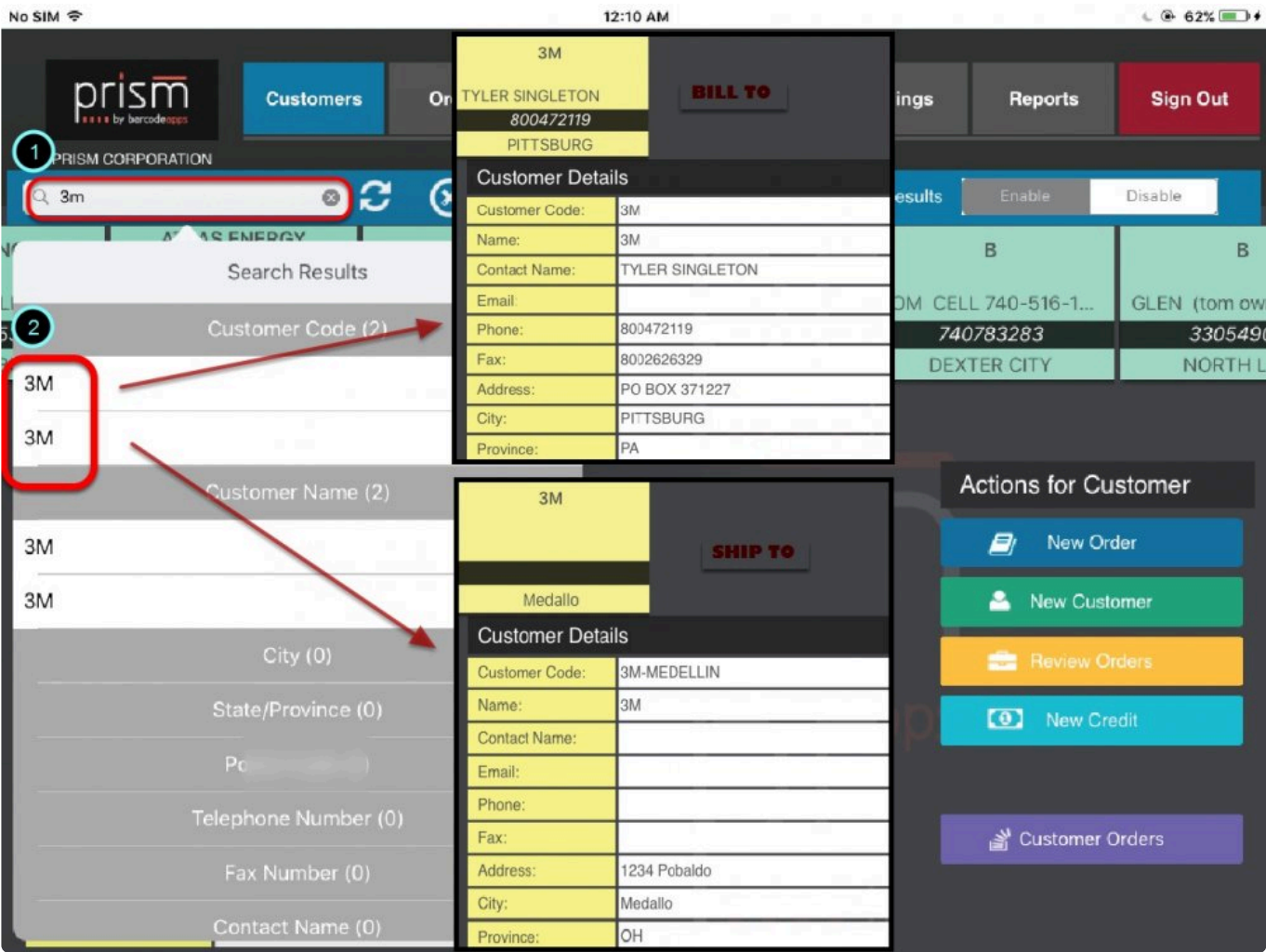
Created by RM on 7/11/2014 8:55:07 AM Modified by BV* on 2/25/2016 11:28:28 AM

Once the bill to and ship to information are verified. We can now search for those information using the PRISM App and start creating an Order.

To search for a customer. Just tap on the search field, type in the needed information and then Tap on search.



We can now proceed on submitting an Order for the Customer. ([Please see Managing an Order from PRISM to Spire](#))



SAMPLE BILL TO ORDER

Sample order created in PRISM for the Bill to information .

Sales - 0001147860 3M

View Compact Process Reprocess Invoice Next Phase Totals By Ordered Qty Requisition Deposits

Main Bill To Ship To Info Phase Communications Sales Orders Sales History User Defined Attachments Fill Order

Customer

Customer No A/R Balance Credit Limit

PO No Ref No Other Orders Available

Notes Salesperson SUPPLIERS Territory

Shipping

Ship To Ship Via Best way FOB

Contact

Name Phone Fax/Cell Email

Order Details

Open Sales

Order No

Order Date

Required Date

Invoice No

Invoice Date

Repeat

Phase

Location

Profit Center

Table

Part No	Description	Order Qty	Ship Qty	B/O Qty	Disc	Unit Price	U/M	Conversion Factor	SlsTax	Vendor	Lev
00150-25	6800 WS342 106 PC SOCKET HEADS SMALL DRAWER ASSORTMENT	1	0	1	0.0	17.90	EA	1 EA per EA			
Test for bill to											

Available On Hand Committed Backorder On Order Expected

Total Weight Discount 0.00

Freight

Subtotal

Sales Tax

0.00

Created by BV* on 4/6/2016 12:42:12 PM Modified by BV* on 4/6/2016 12:42:12 PM

SAMPLE SHIP TO ORDER

Sample order created in PRISM for the Ship to information. The Image below shows that the Shipping section contains the ship to information.

Sales - 0001147861 3M

View Compact Process Reprocess Invoice Next Phase Totals By Ordered Qty Requisition Deposits

Inventory is available to commit on this order. Ship Available Dismiss

Main Bill To Ship To Info Phase Communications Sales Orders Sales History User Defined Attachments Fill Order

Customer

Customer No 3M A/R Balance 0.00 Credit Limit Unlimited

PO No Ref No By Prism Other Orders 0.00 Available Unlimited

Notes Salesperson 05 SUPPLIERS Territory 05

Order Details

Open Sales

Order No 0001147861

Order Date 4/6/2016

Required Date 4/6/2016

Invoice No

Invoice Date

Repeat None

Phase

Location

Profit Center

Shipping

Ship To 3M-MEDELLIN 3M medellin Poblado Ship Via BESTWAY Best way FOB Your dock

Contact

Name Phone Fax/Cell Email

Insert Delete Comment Serial Numbers Add Job Header UDF Scan Items Fill Prices

Part No	Description	Order Qty	Ship Qty	B/O Qty	Disc	Unit Price	U/M	Conversion Factor	SlsTax	Vendor	Lev
00195-20	6800 WS340 120 PC SPRING PIN SMALL DRAWER ASSORTMENT	15	0	15	0.0	13.80	EA	1 EA per EA			
	Test for ship to										

Available 4.000 On Hand 4.000 Committed 0.000 Backorder 21.000 On Order 0.000 Expected

Total Weight 0.0 Discount 0.0 % 0.00 Subtotal 0.00

Freight 0.00 Sales Tax 0.00

0.00

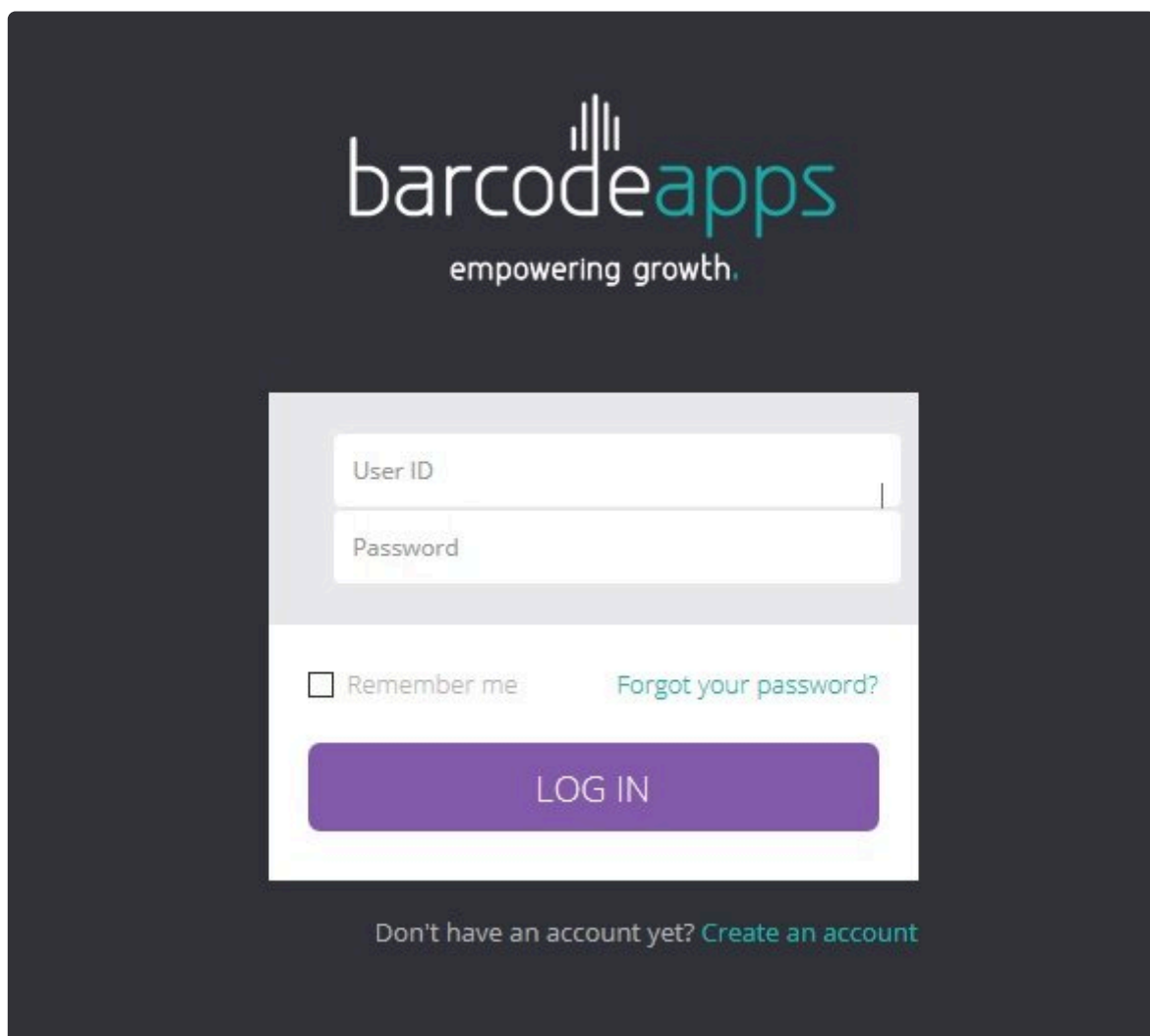
Created by BV* on 4/6/2016 12:42:14 PM Modified by BV* on 4/6/2016 12:42:14 PM

6.4.6. F. PRISM Order Type Selection From The Portal And Export Quotes To Spire

This knowledge base will guide Spire users to send their orders as quotes using the [PRISM Joomla Website](#).

SENDING ORDER AS QUOTES

To send an order as a Quote. Login to the PRISM Joomla Website using your admin credentials.

The image shows a login form for BarcodeApps. At the top, the logo "barcodeapps" is displayed in white and teal, with the tagline "empowering growth." below it. The login form is a white box with a light gray border. It contains two input fields: "User ID" and "Password". Below these fields is a checkbox labeled "Remember me" and a link "Forgot your password?". A large purple button labeled "LOG IN" is positioned below the checkbox. At the bottom of the form, there is a link "Don't have an account yet? Create an account".

barcodeapps
empowering growth.

User ID

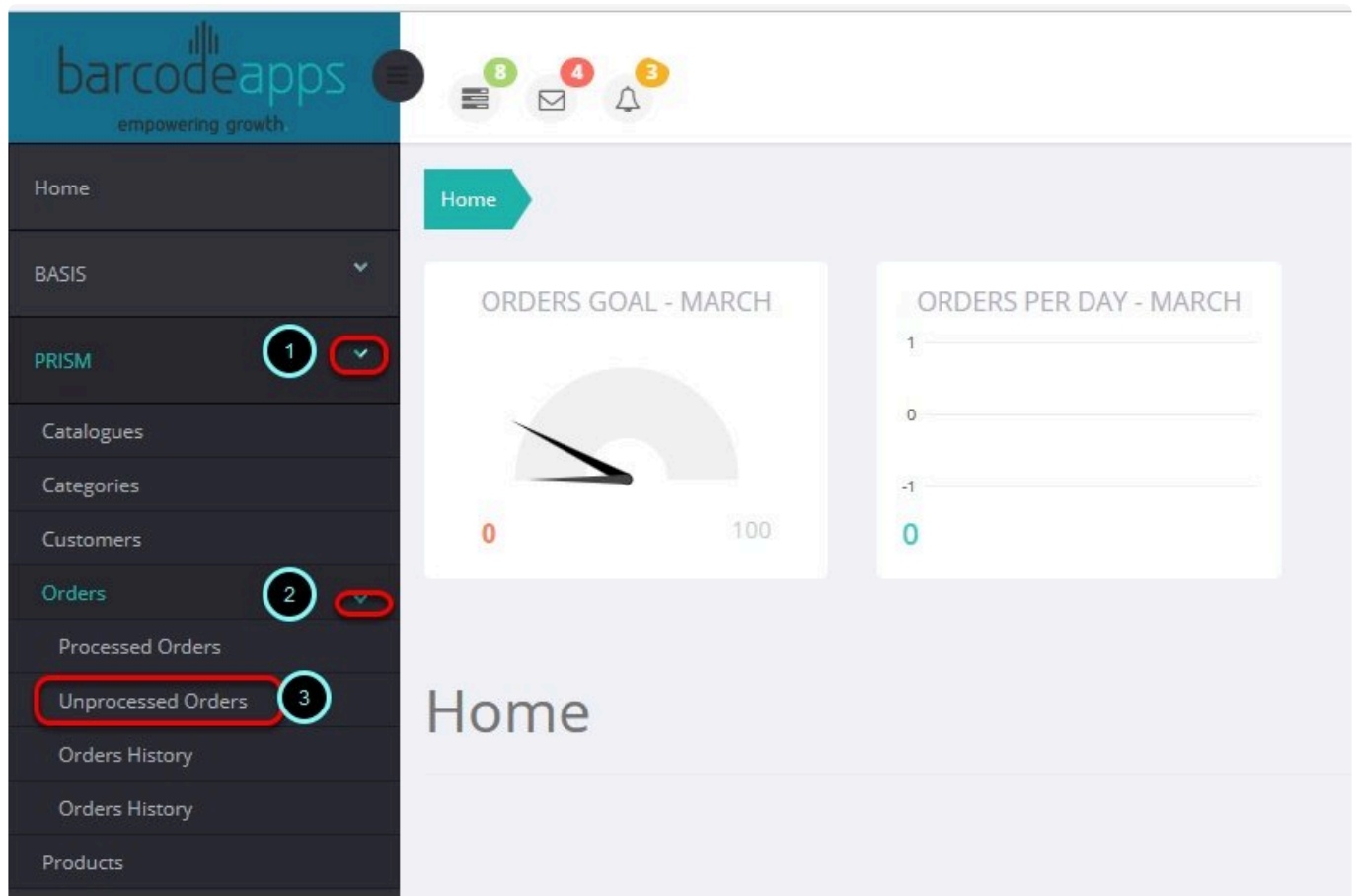
Password

☐ Remember me [Forgot your password?](#)

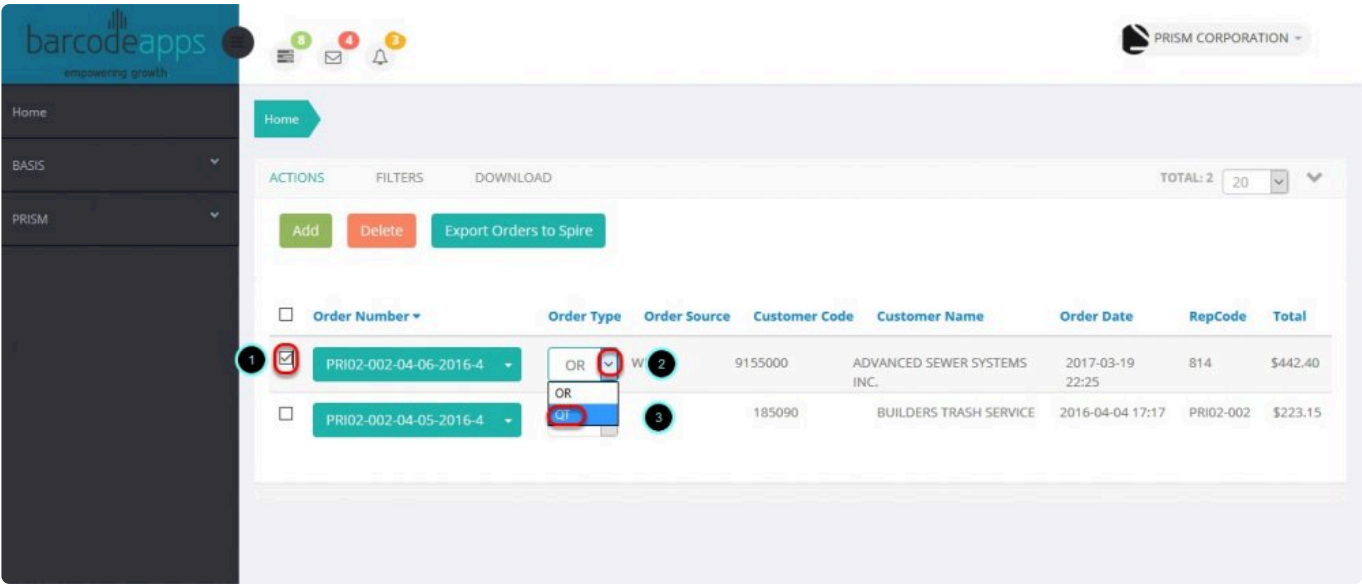
LOG IN

Don't have an account yet? [Create an account](#)

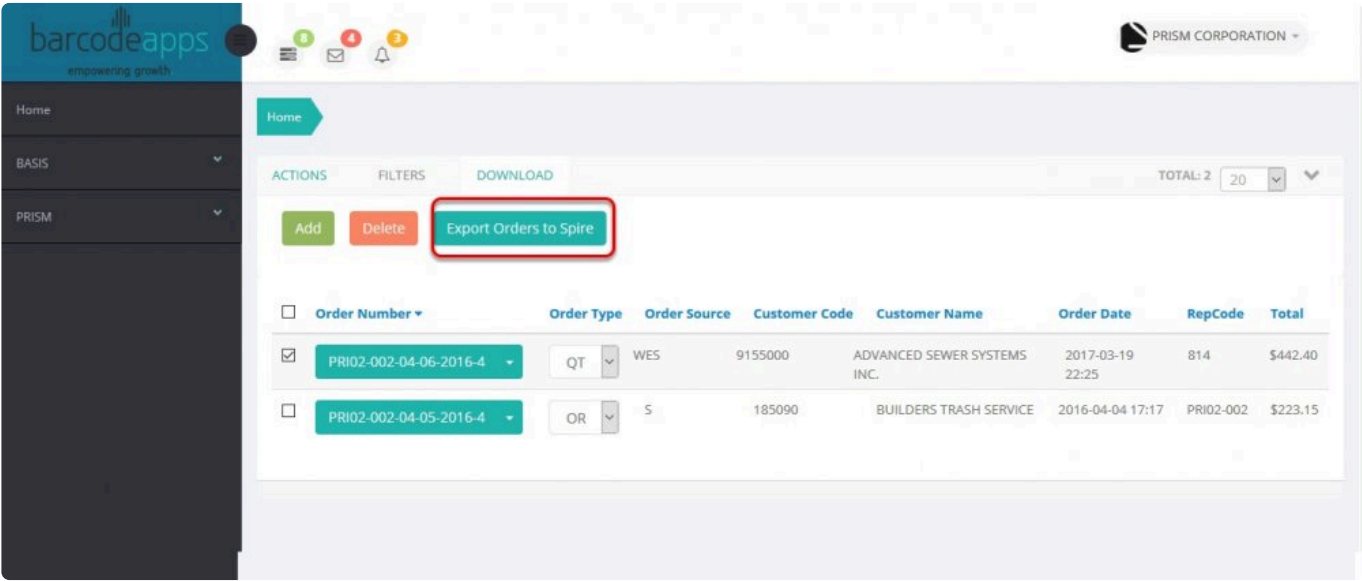
In the Control panel window, click on PRISM, Orders and the select Unprocessed Orders.



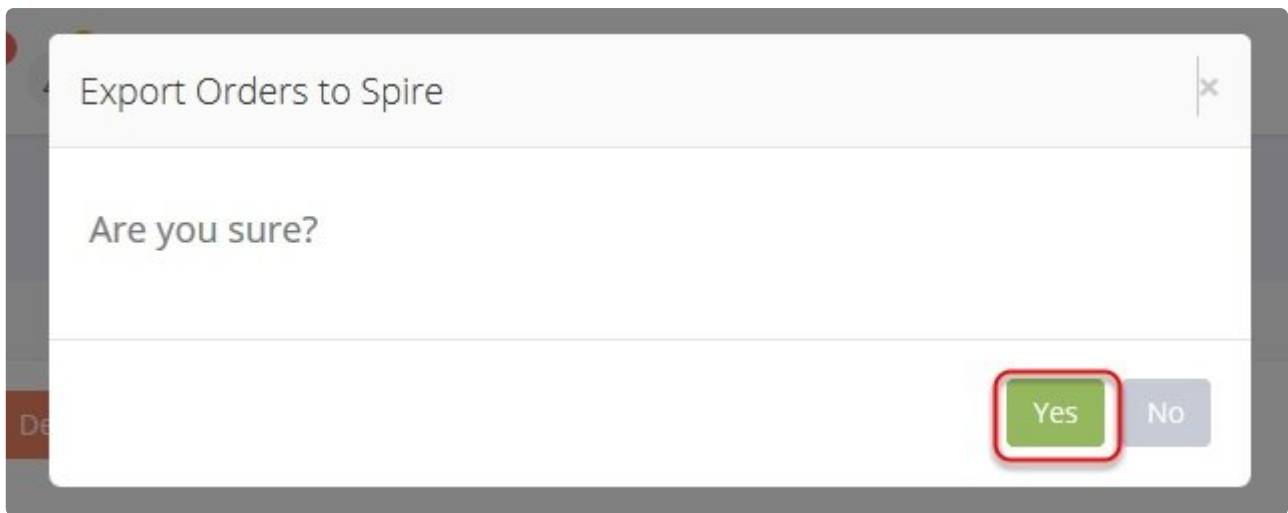
Select the order by putting a check mark in the box just before the order number, click on the drop down under the Order Type and then select OT.



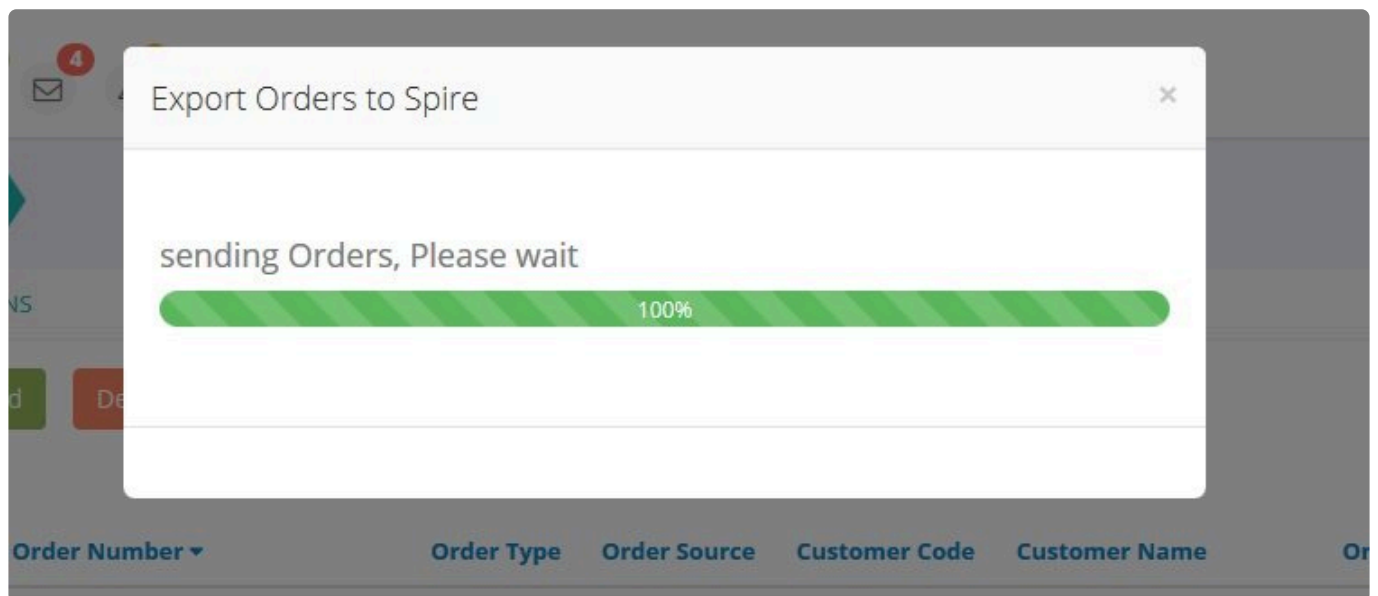
Click on Export to Spire



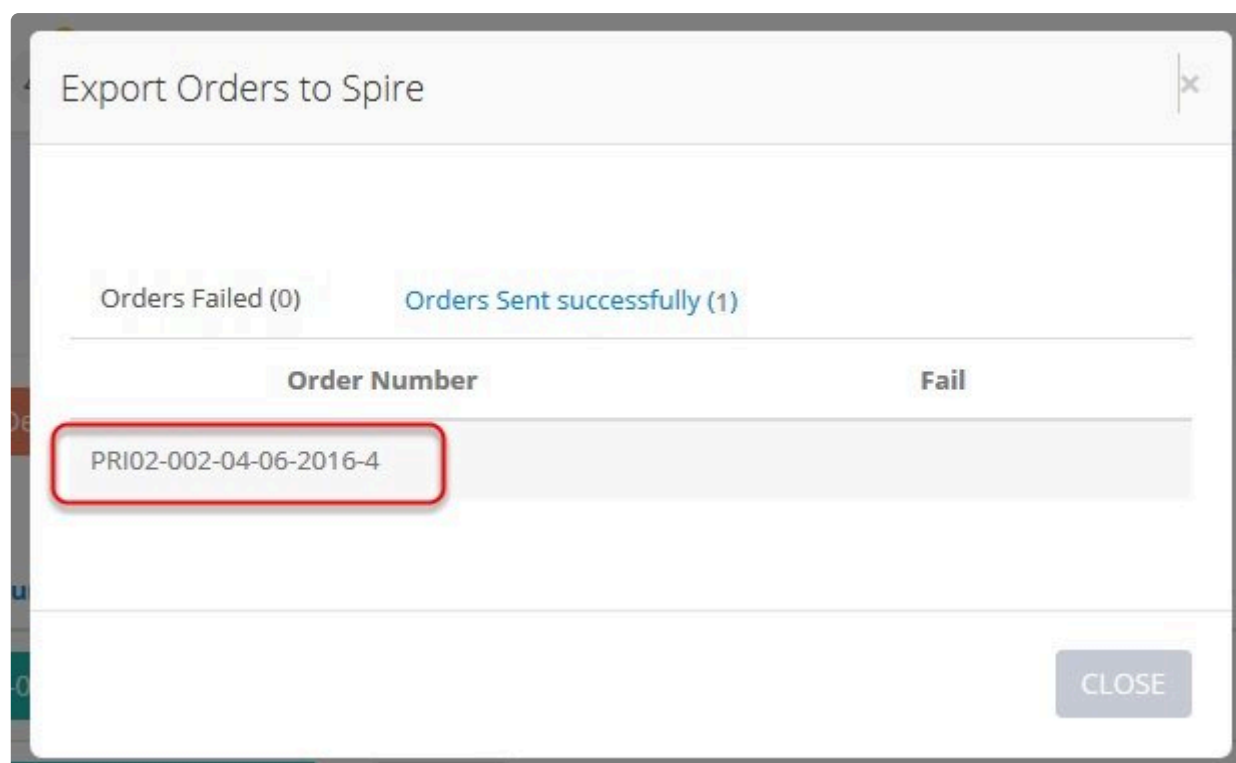
Click on Yes.



Wait for the sync to finish.



A summary will show if the orders were sent successfully or not. Now take note of the Order number for reference and go back to Spire to check the order.



Order successfully sent as quote. To view full details , double click on the order.

CFIS GROUP										
File Edit Customers Vendors Inventory Purchasing Production Sales Payroll Tools Help										
Sales										
Customers										
Inventory										
Vendors										
Purchases										
Purchase History										
Production										
Production History										
Point of Sale										
Sales History										
Customer Monthly Sales										
Price Matrix										
Filters Search Export + - Hold Process Reprocess Invoice Reopen Order Fill Backorders										
Requisition Next Phase A/R Payment										
Order No	Invoice No	Customer No	Customer Name	Status	Type	Hold	Modified by	Order Date	Invoice Date	Re
0001147862		9155000	ADVANCED SEWER SYSTEMS INC.	Open	Quote	<input type="checkbox"/>	BV*	4/6/2016		4/6
0001147861	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/6/2016		4/6
0001147860	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/6/2016		4/6
0001147859	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/5/2016		4/5
0001147858	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/5/2016		4/5
0001147857	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/5/2016		4/5
0001147856	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/5/2016		4/5
0001147855	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147854	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147853	3M	3M		Open	Quote	<input type="checkbox"/>	BV*	4/4/2016		4/4
0001147852		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147851		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147850		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147849		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147848		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147847	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147846	3M	3M		Open	Sales	<input type="checkbox"/>	BV*	3/23/2016		3/2
0001147845		AUVECO PRODUCTS	AUVECO PRODUCTS	Open	Sales	<input type="checkbox"/>	BV*	3/21/2016		3/2
0001147844	100075	ABF FREIGHT SYSTEM INC.		Open	Sales	<input type="checkbox"/>	BV*	2/22/2016		2/2
0001147843	100075	ABF FREIGHT SYSTEM INC.		Open	Sales	<input type="checkbox"/>	BV*	2/22/2016		2/2
0001147842	100075	ABF FREIGHT SYSTEM INC.		Open	Sales	<input type="checkbox"/>	BV*	2/22/2016		2/2
0001147841	100200	A.J. ASPHALT MAINT & PAVING		Open	Sales	<input type="checkbox"/>	BV*	3/15/2016		3/1

Order sent as quote by PRISM.

Quote - 0001147862 ADVANCED SEWER SYSTEMS INC.

View Compact Process Reprocess Invoice Next Phase Totals By Ordered Qty Requisition Deposits

Main Bill To Ship To Info Phase Communications Sales Orders Sales History User Defined Attachments Fill Order

Customer

Customer No 9155000 ADVANCED SEWER SYSTEMS INC. A/R Balance 0.00 Credit Limit Unlimited

PO No Ref No By Prism Other Orders 0.00 Available Unlimited

Notes Salesperson 814 CHRIS GIVINS Territory 20

Shipping

Ship To ADVANCED SEWER SYSTEMS INC. Ship Via BESTWAY Best way FOB Your dock

Contact

Name Phone Fax/Cell Email

Order Details

Open Quote

Order No 0001147862

Order Date 4/6/2016

Required Date 4/6/2016

Invoice No

Invoice Date

Repeat None

Phase

Location

Profit Center

Insert Delete Comment Serial Numbers Add Job Header UDF Scan Items Fill Prices

Part No	Description	Order Qty	Disc	Unit Price	U/M	Conversion Factor	LocTax	SlsTax	Vendor	Levy	Ext Price
00106-20	6800 W5331 240 PC NUTS & BOLTS SMALL DRAWER ASSORTMENT	14	0.0	15.80	EA	1 EA per EA					221.20
00191-5	6800 W5204 1000 PC SMALL COTTER PIN SMALL DRAWER ASSORTMENT	14	0.0	15.80	AST	1 AST per AST					221.20

Available 6.000 On Hand 6.000 Committed 0.000 Backorder 11.000 On Order 0.000 Expected

Total Weight 0.0 Discount 0.0 % 0.00 Subtotal 442.40

Freight 0.00 Sales Tax 28.76 471.16

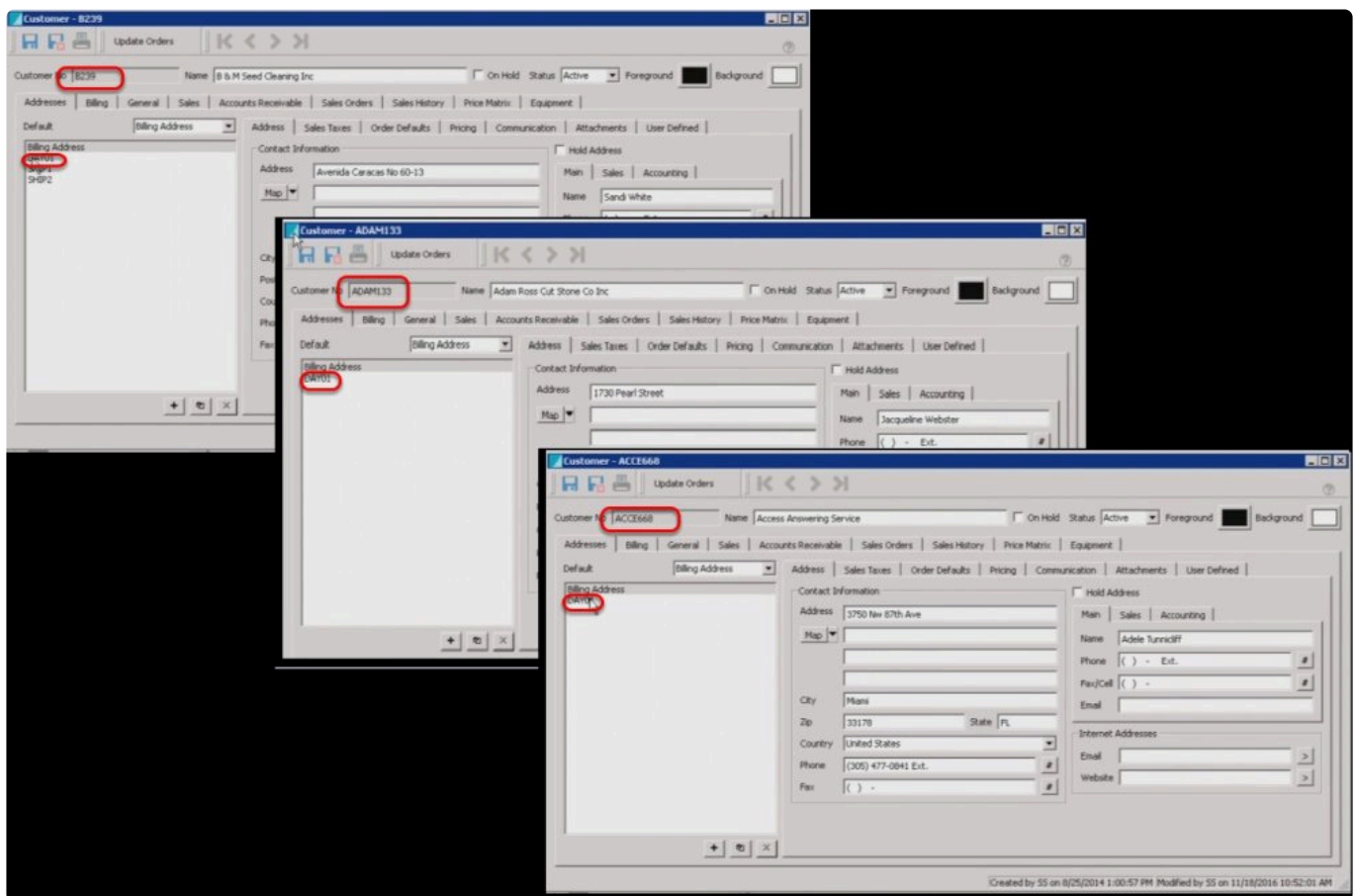
Created by BV* on 4/6/2016 1:34:22 PM Modified by BV* on 4/6/2016 1:34:22 PM

6.4.7. E. Ship to Information Explained

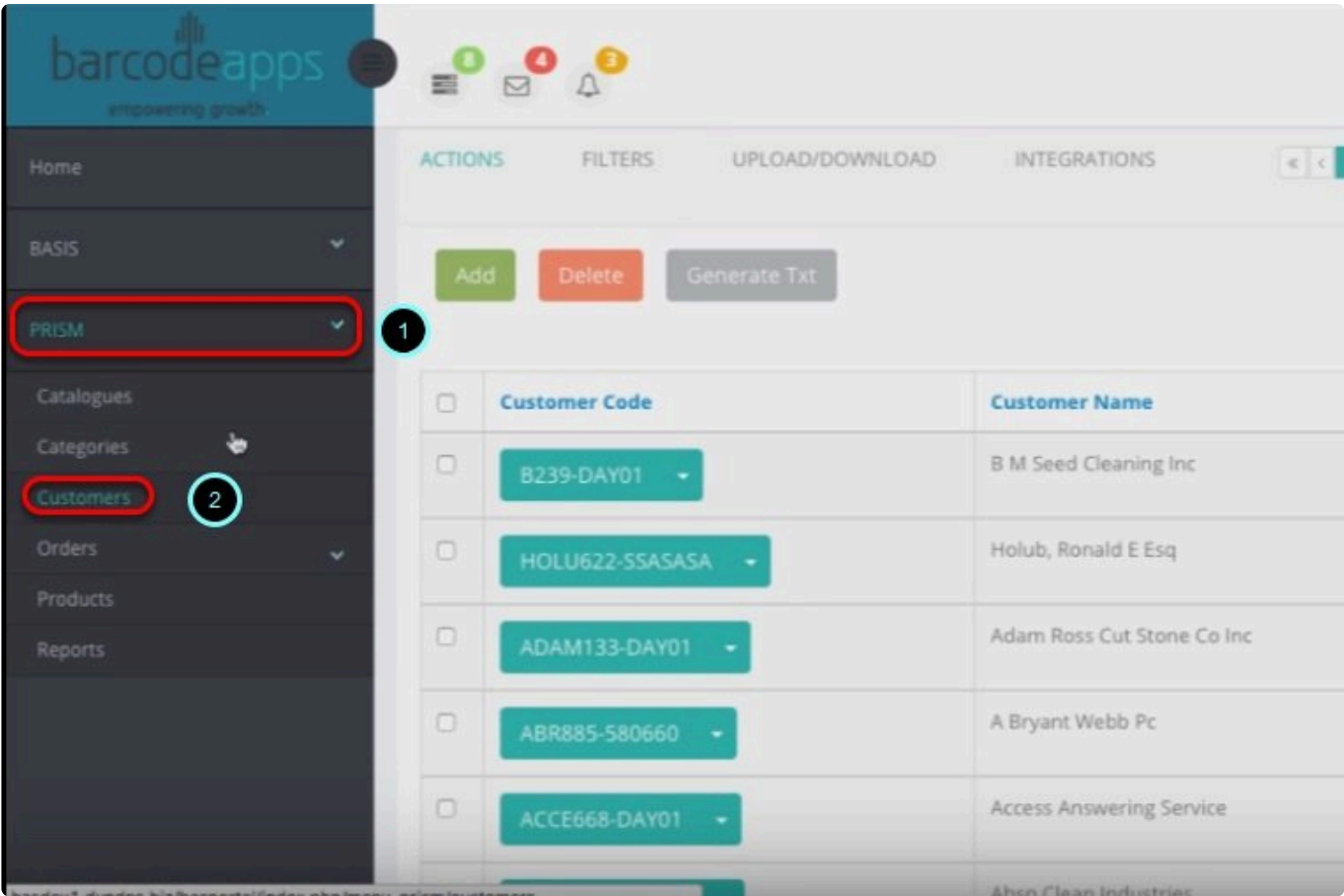
This knowledge base article is a reference guide for End Users to understand how the **SHIP TO** information in **SPIRE** works with **PRISM**.

SHIP TO INFORMATION

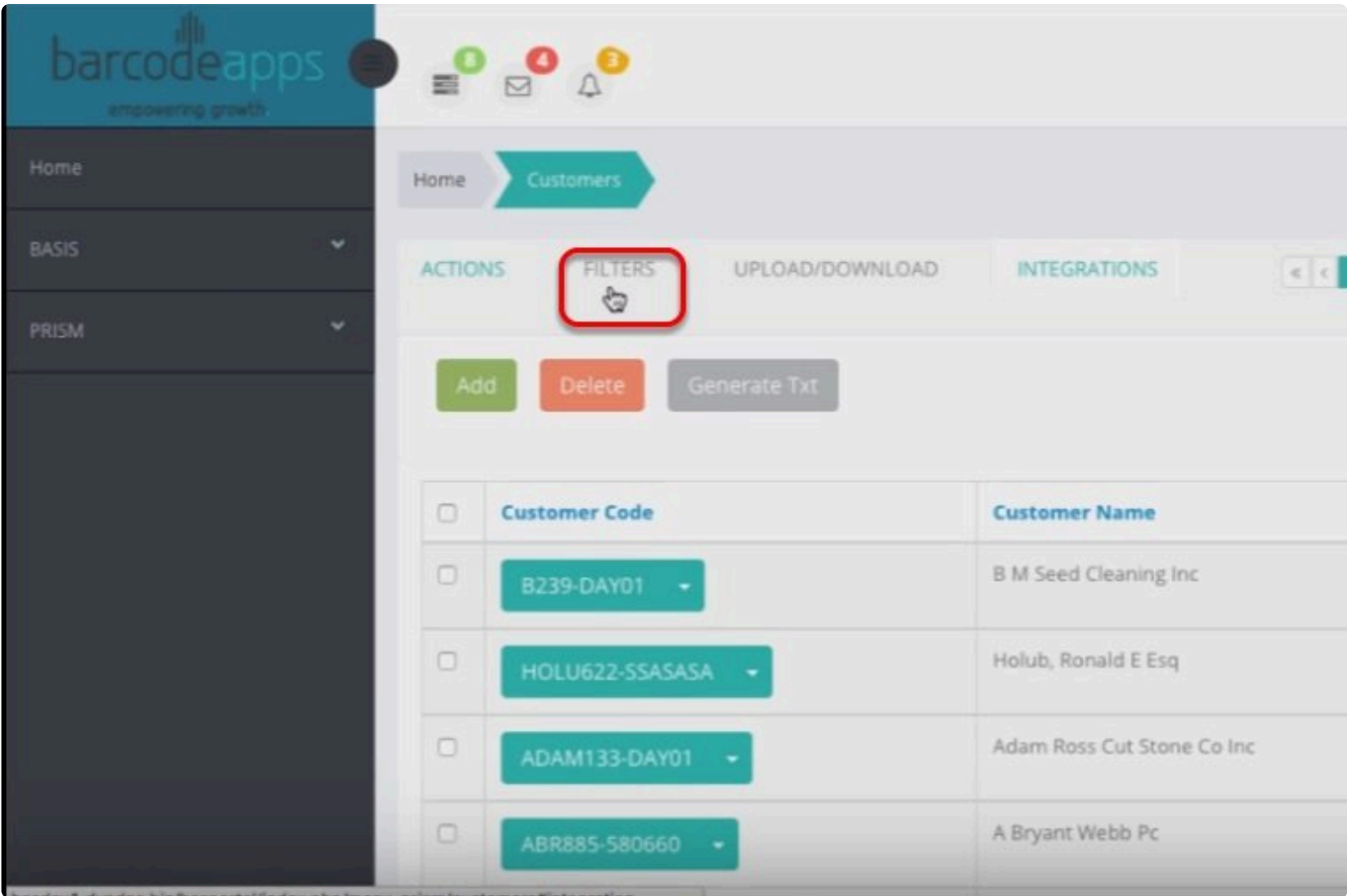
Before getting started, SPIRE has a feature where the **SHIP TO** information can be used on multiple customers. The illustration below shows an example of SHIP TO information associated with a customer in SPIRE.



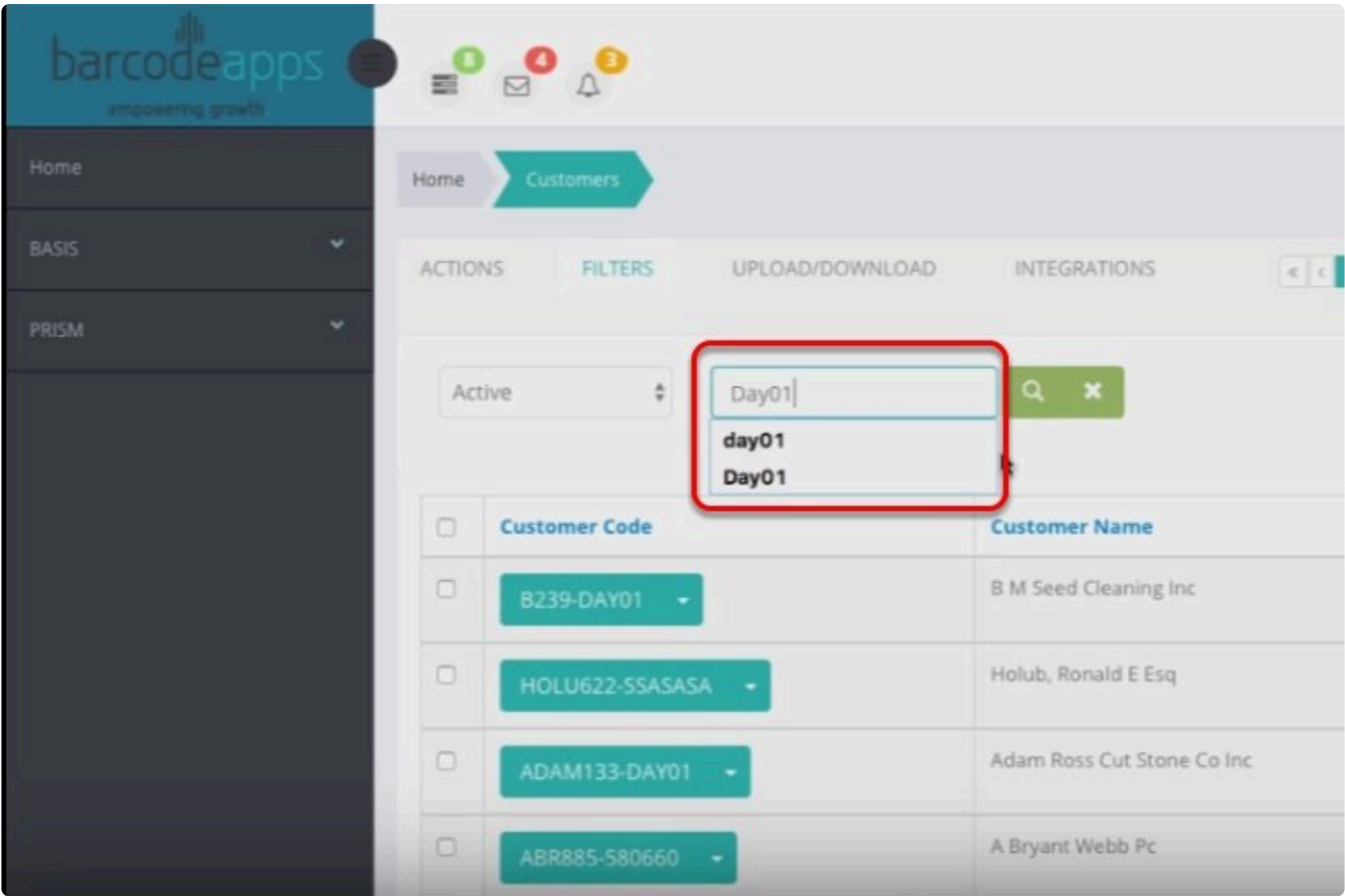
Using the PRISM Admin Portal we can validate multiple ship to information just by searching the SHIP TO Code via search filter . We can do this by clicking on PRISM and then Customers



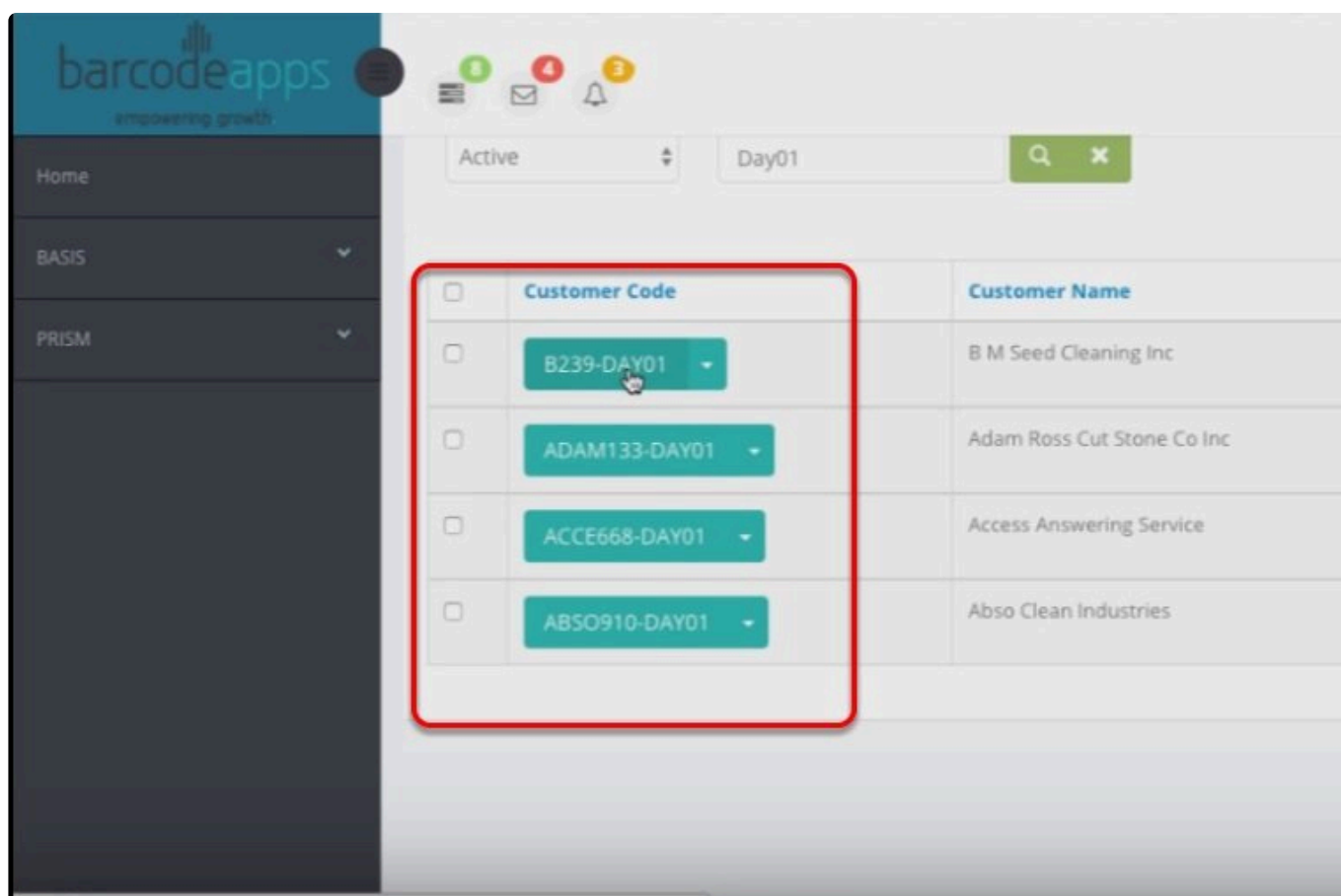
Click on Filters



Type in the Ship to Code (Day01) and then click on the magnifying glass or hit enter.



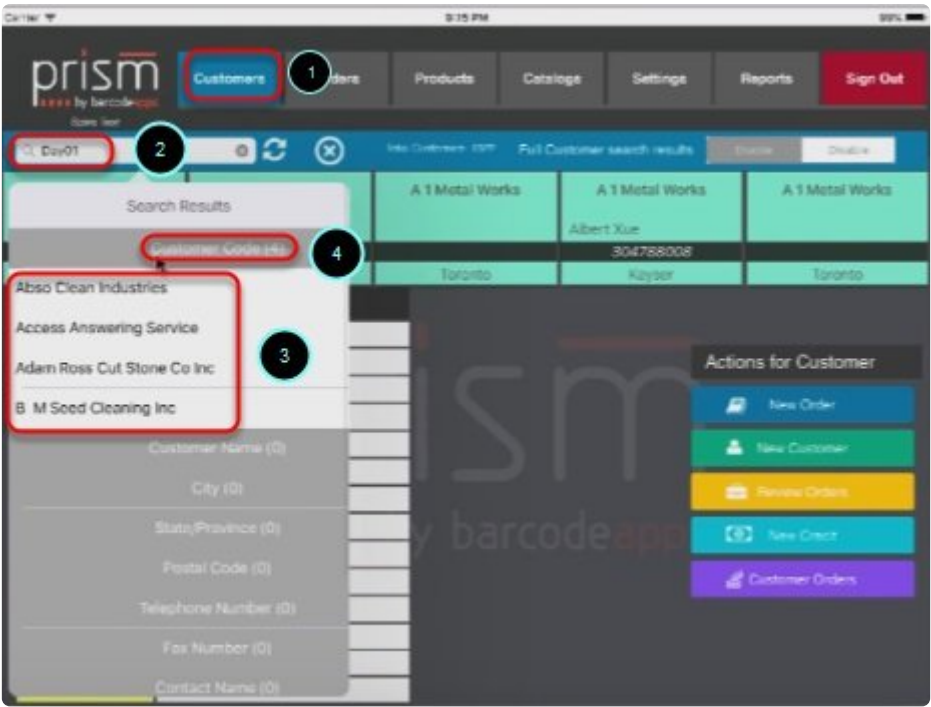
The PRISM Portal will now show all the customer code that have the SHIP TO information defined on the search.



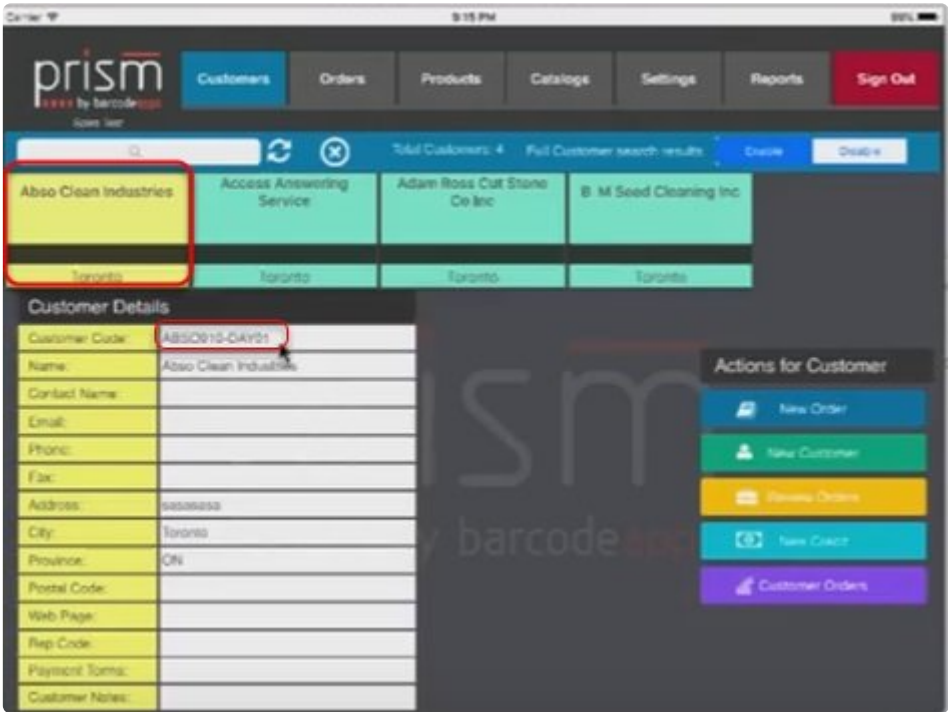
* Note that all customer codes that is associated with a ship to information will be hyphenated with the ship to code (eg. B239-DAY01, ADAM133-DAY01, ACCE668-DAY01....)

SEARCHING FOR SHIP TO INFORMATION USING THE PRISM APP

Using the PRISM App. Tap on Customers and then search for the SHIP TO Code. Results should show on the Customer Code Section. To view all Tap on Customer Code.



This will display all the customer that has the ship to information associated with it.



Another way to determine if the customer has a ship to information is to tap and hold the customer. This will show the ship to information associated with the customer. To show more information about the ship to, tap on view.

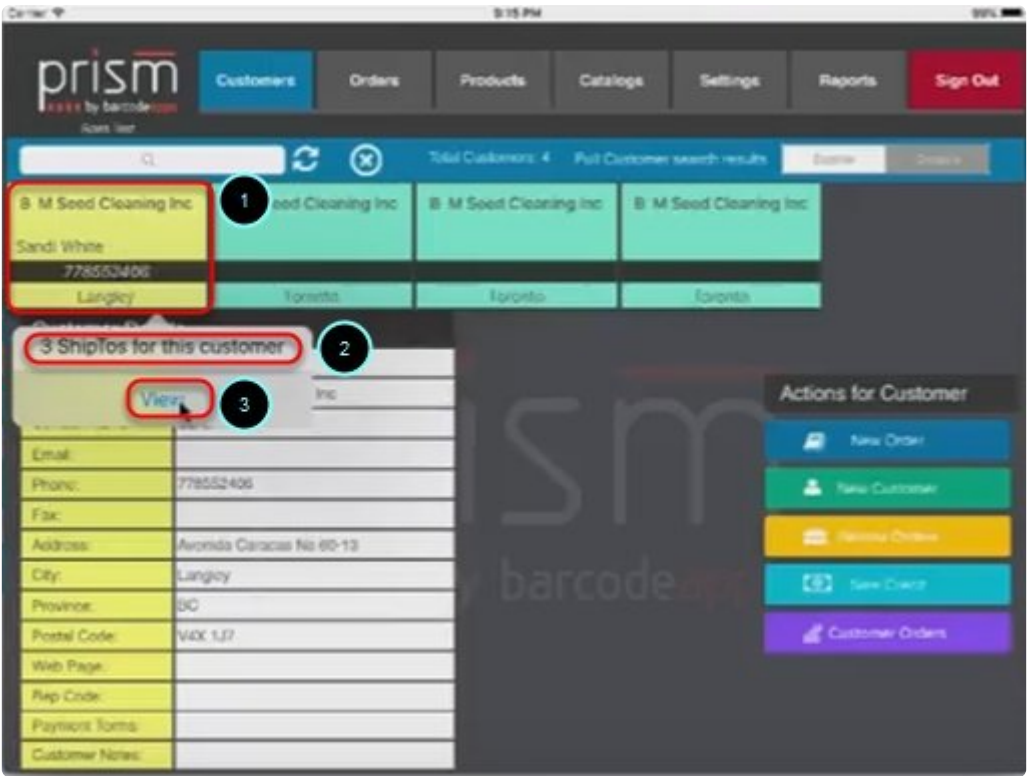
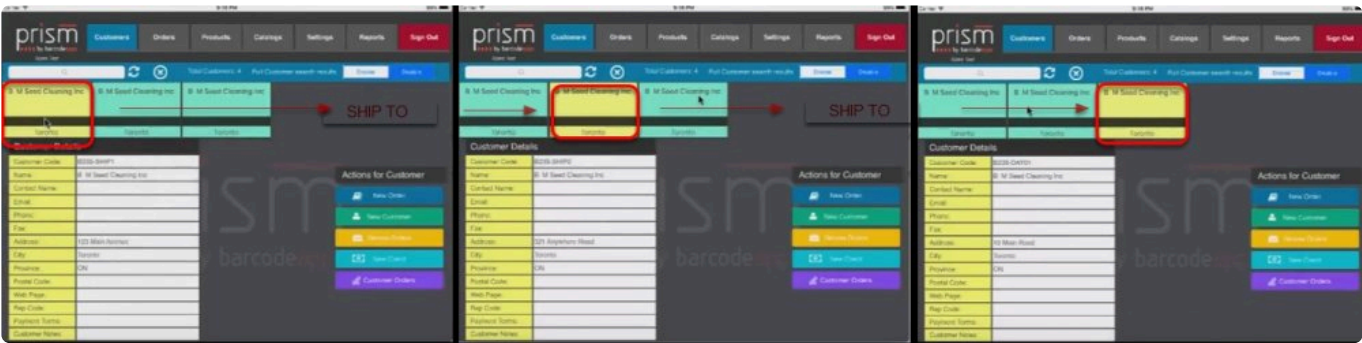


Illustration below shows an example of the ship to information associated with customer B & M Seed Cleaning Inc



SAMPLE SHIP TO ORDER

Illustration below shows a sample order using a customer's ship to information.

1 ORDER DETAIL INSIDE THE PRISM ADMIN PORTAL

Order Number	Type	Source	Code	Customer Name	Order Date	RepCode	Total
SPI03-580g1660-12-04-2016-1	OR	5	B239-DAY01	B M Seed Cleaning Inc	2016-12-04 21:17	SPI03-580g1660	\$0.00

2 ORDER DETAIL INSIDE THE SPIRE ADMIN TOOL

Order No	Customer No.	Customer Name	Status	Type	Hold	Order Date
0000057971	ACCE668	Access Answering Service	Open	Quote		8/12/2016
0000057972	A1993	A 1 Metal Works	Open	Quote		7/21/2016
0000057969	A1992	A 1 Metal Works	Open	Quote		7/7/2016
0000000002	JACK225	Jackson Fitness Center	Open	Sales Order		2/20/2015
0000000004	JACK225	Jackson Fitness Center	Processed	Sales Order		2/20/2015
0000800362	B239	B & M Seed Cleaning Inc	Open	Sales Order		12/4/2016
0000000004	A1993	Access Answering Service	Open	Sales Order		12/3/2016
0000800360	ADAM133	Adam Ross Cut Stone Co Inc	Open	Sales Order		12/3/2016
0000800359	ABSO910	Abso Clean Industries	Open	Sales Order		12/1/2016
0000800358	A1948	A 1 Party Pleasers	Processed	Sales Order		11/30/2016
0000800357	A309	A & L Business Services	Open	Sales Order		11/30/2016
0000800356	A1948	A 1 Party Pleasers	Open	Sales Order		11/30/2016

3

Customer

Customer No: 2090 B & M Seed Cleaning Inc AR Balance: 0.00 Credit Limit: Unlimited

PO No: Reference No: By Print: Other Orders: 0.00 Available: Unlimited

Notes: Salesperson: Territory:

Shipping

Ship To: DAY01 Marcus Ship Via: FOB

Contact

Name: Phone: Fax/Cell: Email:

Order Details

Open Sales Order: 0000800362

Order No: 0000800362

Order Date: 12/4/2016

Required Date: 12/4/2016

Invoice No: Invoice Date: Repeat: Phase:

Part No	Description	Order Qty	Ship Qty	B/O Qty	Discount %	Unit Price	Current Cost	Average Cost
[RAW] PPBARGYB48PK	PP Bar Greek Yog	1.00	0.00	1.00	0.00	0.00	278.70	278.70
[RAW] PPBARGYB48PK	PP Bar Greek Yog	1.00	0.00	1.00	0.00	0.00	278.70	278.70
[RAW] PPBSFFVC	PP Body Shaping ...	1.00	0.00	1.00	0.00	0.00	7.50	7.50
[RAW] PPBSFFVC	PP Body Shaping ...	1.00	0.00	1.00	0.00	0.00	7.50	7.50
[RAW] PPBSFFVC	PP Body Shaping ...	1.00	0.00	1.00	0.00	0.00	7.50	7.50

1. Showing the order inside the PRISM Admin Portal

2. Showing the order imported from PRISM to SPIRE
3. Showing the order details in SPIRE using the Ship to information (DAY01)

BarcodeApps © 2017

6.4.8. F. How To Import Categories From Spire

This knowledgebase article will guide PRISM SPIRE users on how they can import categories from Spire on the Joomla portal.

Login to the Joomla portal using your PRISM credentials.

Select your manufacturer.

Click on the PRISM menu > go to Settings > Other Options.

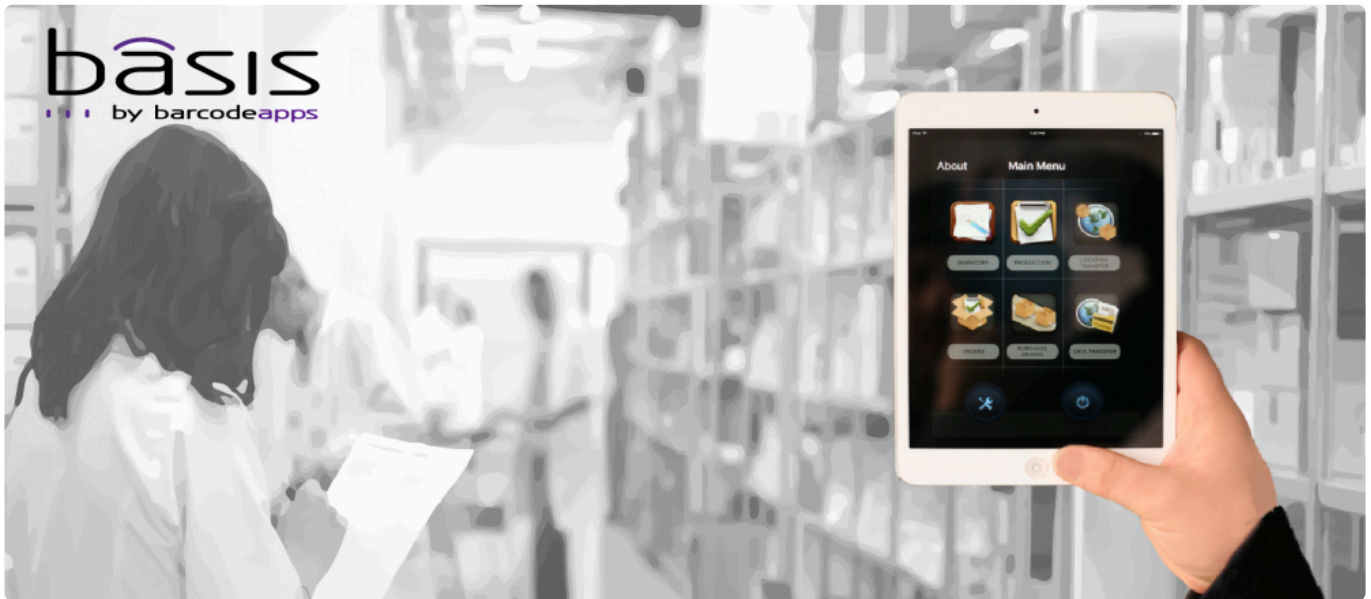
Click on Generate Categories from Products.

Click Yes.

You should see a prompt once the categories generated successfully.

Lastly, go to PRISM > Categories and check if the categories have imported.

7. BASIS



OVERVIEW

BASIS is a complete inventory management solution designed for iOS and Windows Mobile devices. BASIS integrates quickly and seamlessly with your existing business system, and is simple to use. From label printing to full barcode scanning support, BASIS has everything that could be needed in a warehouse management application, at a competitive price.

Easy to use

- Increases efficiency in your inventory management
- Increased speed of warehouse operations
- Improves productivity of the warehouse staff
- Integrates with several back-office accounting systems

7.1. I. DESKTOP



7.1.1. A. OVERVIEW

BASIS DESKTOP

- Complete inventory management solution
- Wide range of reporting, many incorporating printed barcodes
- Internet connection allows wireless, remote location scanning and data transfer to the server via Web Services
- Uploads / downloads all information to and from an accounting package in seconds
- User-friendly interface

7.1.1.1. i. System Requirements

System Requirements

Recommended system requirements for BASIS Desktop

SERVER AND WORKSTATIONS
Windows 7 or newer
20 GB hard drive space
8 GB ram
MS Office Access 2007 or newer 32 bit only
SQL Server Express 2012 and SQL Studio 2012

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7.1.2. B. INVENTORY

- [I. Inventory Import](#)
- [II. Inventory Counting](#)
- [IV. Other Functions](#)
- [V. Final Steps](#)

7.1.2.1. I . Inventory Import

This knowledge base article will guide users on how to import their inventory to BASIS DESKTOP from the accounting package.

IMPORTING INVENTORY

To import an inventory from the accounting package. Login to the BASIS DESKTOP using your admin credentials




Click on Data Transfer



WAREHOUSE IMPORT

Before we start importing our products. Basis needs to be sync with the warehouses inside the accounting package.

To sync with the warehouses. Tick on the warehouses option and then click on Import.

 Import ✕

Import

Integration
BusinessVision 7

DSN
PRISM

MODULES

☒ Warehouses 1 ...

☐ All Warehouses (for importing options)
'00' ...

☐ Products ...

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESSInfo ☐ Additional Info ☒ Update Location ☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7) ...

☐ Sales Orders ...
☒ Delete All ☒ Committed quantities only ☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids

☐ Purchase Orders **Importing headers...** 0
☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today


☐ Customers ...
☒ BV7 ☐ Delete All ☐ Updated Only ..

☐ Vendors ...
☐ Delete All ☐ Updated Only ..

☐ Production Orders from BVE **Importing headers...** 0

Import

2



A notification will show once the warehouse import is completed , just click on Ok

The screenshot shows the 'Import' window in BarcodeApps. The 'Integration' is set to 'BusinessVision 7' and the 'DSN' is 'PRISM'. Under the 'MODULES' section, the 'Warehouses' checkbox is selected, and a red box highlights the 'Done' button next to it, with a circled '1' indicating the first step. Below this, there are checkboxes for 'All Warehouses (for importing options)', 'Products', 'Update Pricing?', 'Delete Before Import' (checked), 'Workbook', 'BVESSInfo', 'Additional Info', 'Update Location' (checked), and 'Set Non Serialized Items as Lot numbered'. There are also sections for 'Serial Numbers (BV7)', 'Sales Orders', 'Purchase Orders', 'Customers', 'Vendors', and 'Production Orders from BVE'. A confirmation dialog box titled 'BASIS' is overlaid on the window, displaying the message 'Import Completed. If any issues please review the logs from the settings form'. The dialog has an 'OK' button highlighted with a red box and a circled '2' indicating the second step. At the bottom left is an 'Import' button, and at the bottom right is a button with a plus icon.

PRODUCT IMPORT

Now we have the warehouses synced. We can now start importing the product inventory.

There are two options to import your inventory

1. First option is to import inventory from all warehouses. To do this, just tick on All warehouse and then click on Import.

Import

Integration

BusinessVision 7

DSN

PRISM

MODULES

Warehouses

Done

☒ All Warehouses (for importing options)

1

Products

...

Update Pricing ?

☒ Delete Before Import

Workbook

BVESSInfo

Additional Info

☒ Update Location

Set Non Serialized Items as Lot numbered

Serial Numbers (BV7)

...

Sales Orders

...

☒ Delete All

☒ Committed quantities only

☐ Download committed

☐ Requ. today

☐ Requ. up to Today

☐ by Phase

☒ Reassign all skids

Purchase Orders

Importing headers...

0

☒ Delete All

☐ Issued Only

☐ Download partial received POs

☐ Expected Today

☐ Expected up to Today

Customers

...

☒ BV7

☐ Delete All

☐ Updated Only

..

Vendors

...

☐ Delete All

☐ Updated Only

..

Production Orders from BVE


Importing headers...

0

Import

2

2. Second option is to import inventory from a selected warehouse. To do a selective warehouse import . click on the browse button.

 Import ✕

Import


Integration
BusinessVision 7

DSN
PRISM

MODULES

☐ Warehouses **Done**

☐ All Warehouses (for importing options)



☐ Products ...

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESSInfo ☐ Additional Info ☒ Update Location
☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7) ...

☐ Sales Orders ...

☒ Delete All ☒ Committed quantities only ☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids

☐ Purchase Orders **Importing headers...** **0**

☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today

☐ Customers ...

☒ BV7 ☐ Delete All ☐ Updated Only ..


☐ Vendors ...

☐ Delete All ☐ Updated Only ..

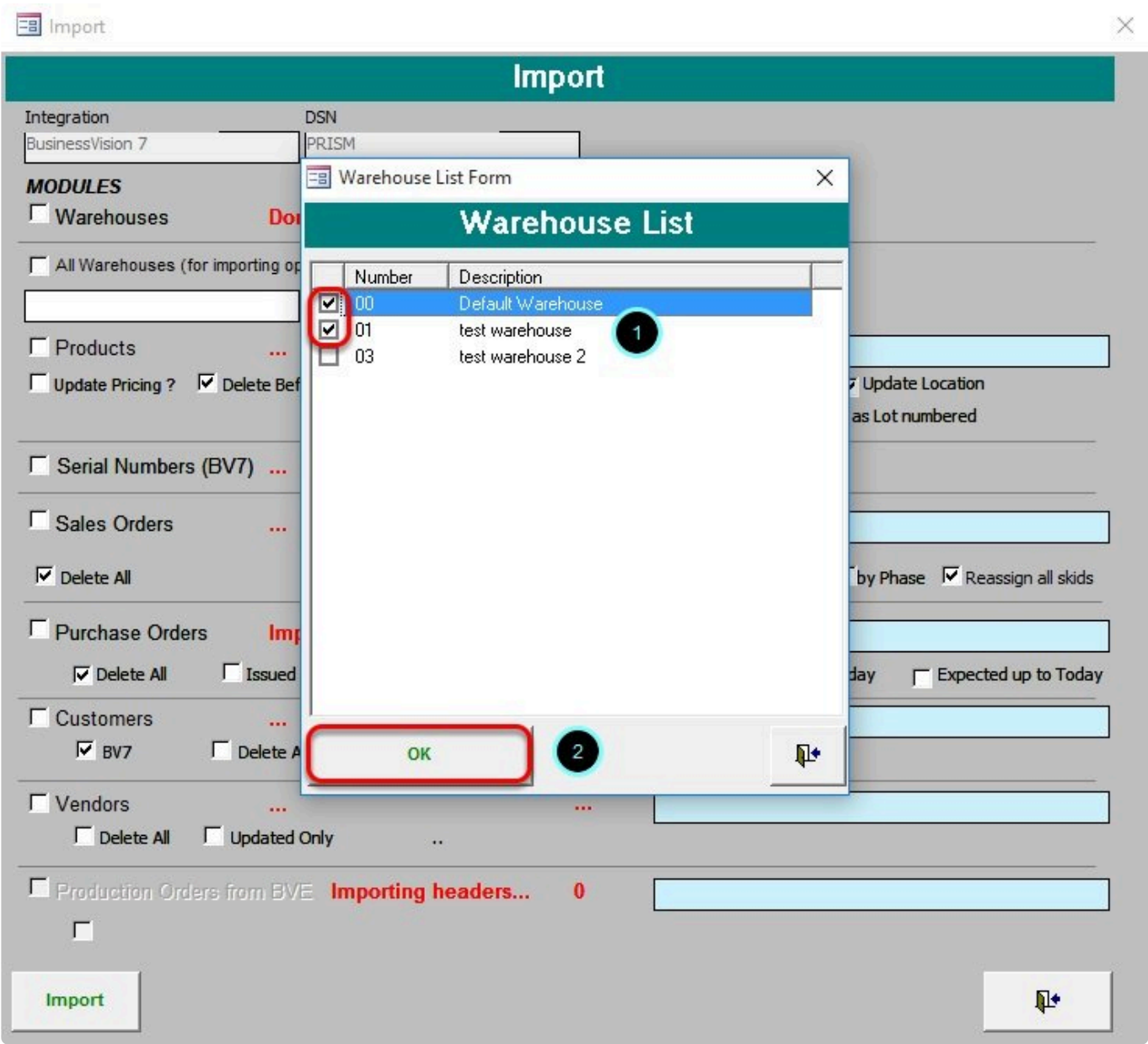
☐ Production Orders from BVE **Importing headers...** **0**

☐

Import



Select the warehouse(s) to be included on the list and the click on Ok



Tick on products and review import option, once finish, click on Imports.

Import

×

Import

Integration
BusinessVision 7

DSN
PRISM

MODULES

☐ Warehouses **Done**

☐ All Warehouses (for importing options)
'00', '01' ...

☒ Products

1

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESInfo ☐ Additional Info ☒ Update Location ☐ Set Non Serialized Items as Lot numbered

2

☐ Serial Numbers (BV7) ...

☐ Sales Orders

☒ Delete All ☒ Committed quantities only ☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids

☐ Purchase Orders **Importing headers... 0**

☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today

☐ Customers

☒ BV7 ☐ Delete All ☐ Updated Only ..

☐ Vendors

☐ Delete All ☐ Updated Only ..

☐ Production Orders from BVE **Importing headers... 0**

☐

Import

3

✿ By default “Delete Before Import” and “Update Location” are enabled.

Click on Yes

Import

Import

Integration

BusinessVision 7

DSN

PRISM

MODULES

☐ Warehouses

...

☐ All Warehouses (for importing options)

'00', '01'

...

☒ Products

...

☐ Update Pricing ?

☒ Delete Before Import

☐ Workbook

☐ BVESSInfo

☐ Additional Info

☒ Update Location

☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7)

...

☐ Sales Orders

☒ Delete All

☐ Purchase Orders

☒ Delete All

☐ Customers

☒ BV7

☐ Vendors

☐ Delete All

☐ Updated Only

..

☐ Production Orders from EVE

Importing headers...

0

Import

BASIS

?

Import Products : Product data will be imported to BASIS!
It may take long time depending on your records number. Do you want to continue?

Yes

No

Click on Yes

Import

Integration: BusinessVision 7 DSN: PRISM

MODULES

☐ Warehouses ...

☐ All Warehouses (for importing options)

'00', '01'

☒ Products **Deleting from local...** 0

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESSInfo ☐ Additional Info ☒ Update Location

☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7) ...

☐ Sales Orders ...

☒ Delete All

☐ Purchase Orders

☒ Delete All

☐ Customers

☒ BV7

☐ Vendors ...

☐ Delete All ☐ Updated Only ..

☐ Production Orders from BVE **Importing headers...** 0

☐

☐ Reassign all skids

Expected up to Today

BASIS

Do you want to clear and update this warehouse only (Y or all N or Cancel)

Import

Click on Yes

Import

Integration

BusinessVision 7

DSN

PRISM

MODULES

☐ Warehouses

...

☐ All Warehouses (for importing options)

'00', '01'

...

☒ Products

Done

102

☐ Update Pricing ?

☒ Delete Before Import

☐ Workbook

☐ BVESSInfo

☐ Additional Info

☒ Update Location

☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7)

...

...

☐ Sales Orders

...

☒ Delete All

☐ Co BASIS

☐ Do

by Phase

☒ Reassign all skids

☐ Purchase Orders

Importing

☒ Delete All

☐ Issued Only

ed Today

☐ Expected up to Today

☐ Customers

...

☒ BV7

☐ Delete All

☐ Vendors

...

...

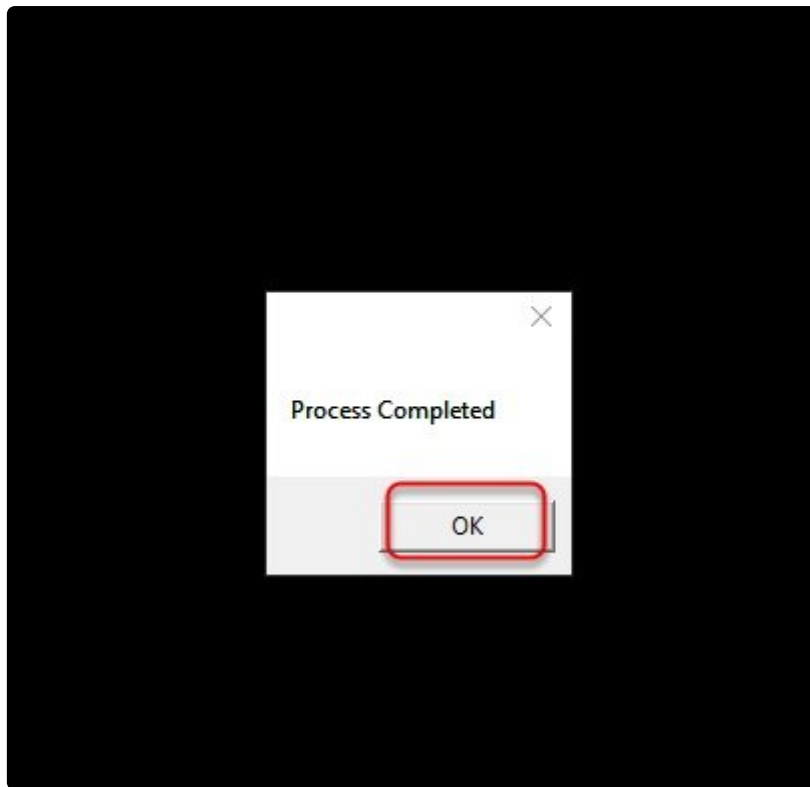
☐ Production Orders from BVE

Importing headers...

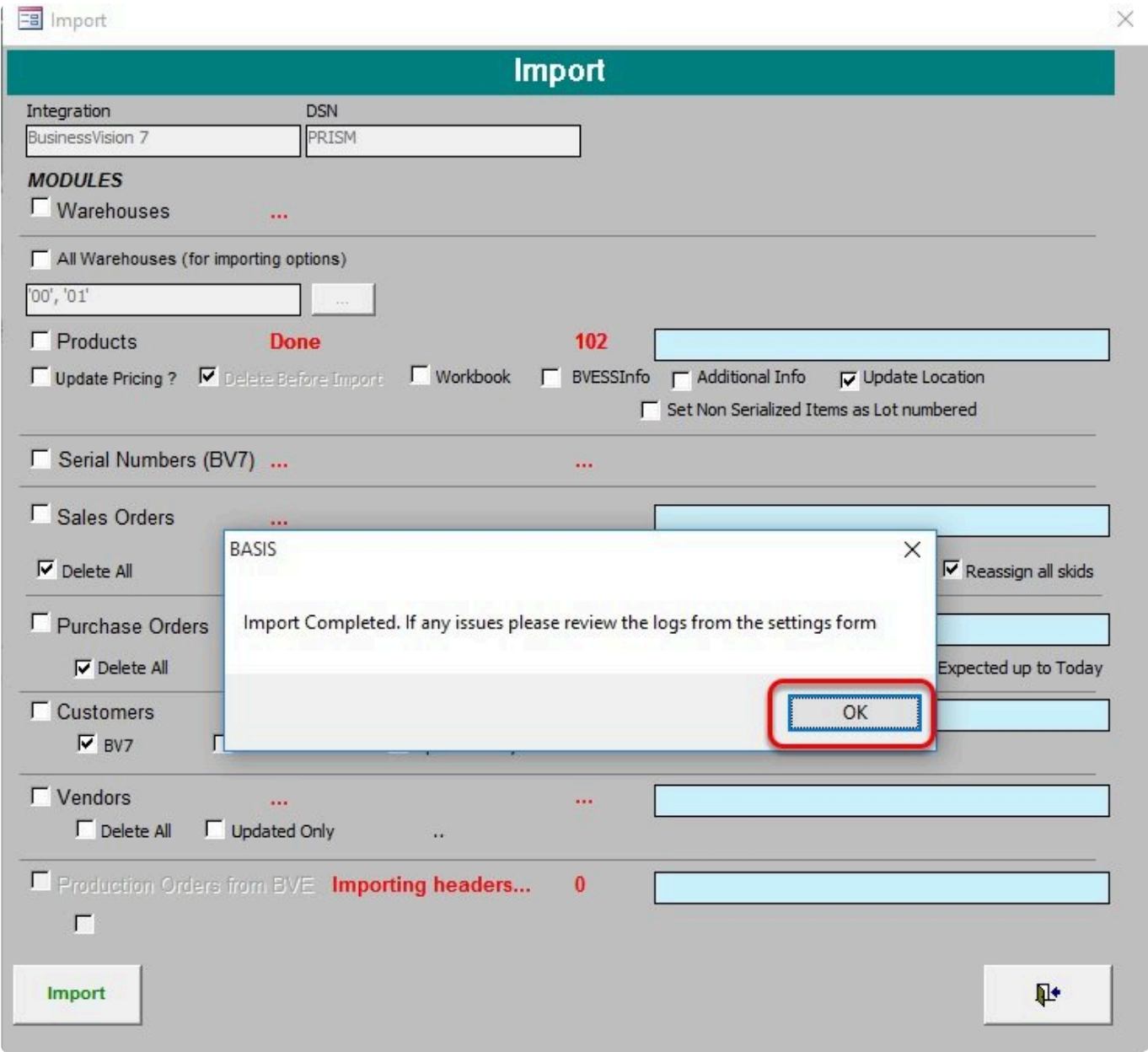
0

Import


Click on Ok



Click on Ok



The total number of imported product will show on the import products panel.

 Import ✕


Import

Integration
BusinessVision 7

DSN
PRISM

MODULES
☐ Warehouses ...
☐ All Warehouses (for importing options)
'00', '01' ...
☐ Products **Done** **1** **102** ...
☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESInfo ☐ Additional Info ☒ Update Location
☐ Set Non Serialized Items as Lot numbered
☐ Serial Numbers (BV7) ...
☐ Sales Orders ...
☒ Delete All ☒ Committed quantities only
☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids
☐ Purchase Orders **Importing headers...** **0** ...
☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today
☐ Customers ...
☒ BV7 ☐ Delete All ☐ Updated Only ..
☐ Vendors ...
☐ Delete All ☐ Updated Only ..
☐ Production Orders from EVE **Importing headers...** **0** ...
☐

Import



To view a more detailed imported products. From the Basis Main window click on Inventory.



Now all products imported should appear on the master inventory list .

[Online Instructions](#)

IMPORTED INVENTORY LIST

Search by: Code / Desc / UPC/Loc
 (Double click to cancel filter)

WH	Code	Description	U.O.M	UPC	On Hand	Price 1	Price 2	Serialized	Lot#	Location	Conv.Fac	Rcde	Allow FRACTIONAL Qty
00	CD-204	Compact Disk Player with Autoskip	EA	CD-204	210			0		Row23	1		1
01	CD-204	Compact Disk Player with Autoskip	EA	CD-204	0			0		Row23	1		1
00	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	418			0		Row16	1		1
01	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	0			0		Row16	1		1
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	166			0		bin	1		1
01	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	0			0		bin	1		1
00	EQ-1245	Equalizer (7 band)	EA	EQ-1245	147			0		Row10	1		1
01	EQ-1245	Equalizer (7 band)	EA	EQ-1245	0			0		Row10	1		1
00	EQ-1800	Equalizer (10 band)	EA	EQ-1800	150			0		Row11	1		1
01	EQ-1800	Equalizer (10 band)	EA	EQ-1800	0			0		Row11	1		1
00	FCB-250	Finished cabinet for SP-250	EA	FCB-250	50			0		whse	1		1
01	FCB-250	Finished cabinet for SP-250	EA	FCB-250	0			0		whse	1		1
00	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	141			1		Row 8	1		1
01	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	0			1		Row 8	1		1
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	102			1		row 8	1		1
01	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	0			1		row 8	1		1
00	GR-250	Speaker Grill for SP-250	EA	GR-250	95			0		whse	1		1
01	GR-250	Speaker Grill for SP-250	EA	GR-250	0			0		whse	1		1
00	MCB-250	Entertainment Center	EA	MCB-250	89			0		whse	1		1
01	MCB-250	Entertainment Center	EA	MCB-250	0			0		whse	1		1
00	MD46	6" Midrange Cone Speaker	EA	MD46	70			0		shelf	1		1
01	MD46	6" Midrange Cone Speaker	EA	MD46	0			0		shelf	1		1
00	N142	Screws for Speakers (SP-250)	EA	N142	1380			0		bin 8	1		1
01	N142	Screws for Speakers (SP-250)	EA	N142	0			0		bin 8	1		1
00	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	226.5			0		whse	1		1
01	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	0			0		whse	1		1
00	PCM3550	Personal Hand-held Organizer	EA	PCM3550	176			0		lock2	1		1
01	PCM3550	Personal Hand-held Organizer	EA	PCM3550	0			0		lock2	1		1
00	PCM8420	Personal Organizer	EA	PCM8420	131			0		lock2	1		1
01	PCM8420	Personal Organizer	EA	PCM8420	0			0		lock2	1		1
00	PRCB-250	Unfinished Speaker Cabinet	EA	PRCB-250	59			0		whse	1		1
01	PRCB-250	Unfinished Speaker Cabinet	EA	PRCB-250	0			0		whse	1		1
00	PS-2	Small Plastic Bag 2	EA	PS-2	100			0		shelf	1		1

Inventory Counting

Inventory Scanning

Print Barcodes

Copy / Updates Products between Warehouses

Additional Info

Get from Cloud

Send To Cloud

Use API

Print

Skid Labels

Label Setup

Copy codes to UPC for Primary

Format xx-xxxxxx to barcode

Barcodes Missing

7.1.2.2. II. Inventory Counting

This knowledge base article will show users the process of inventory counting using BASIS.

The Process includes:

- Inventory Review
- Reports
- Making adjustment
- Other functions
 - Recount sheets
- Final steps
 - Uploading
 - Adjusting the master locations

7.1.2.2.1. a. Inventory Review

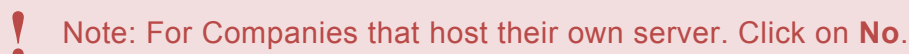
To Start the inventory review using Basis we have to make sure that all product items are imported from the accounting package. (please see [Inventory Import](#))

Once all Product are imported. Click on Inventory from the BASIS main window.

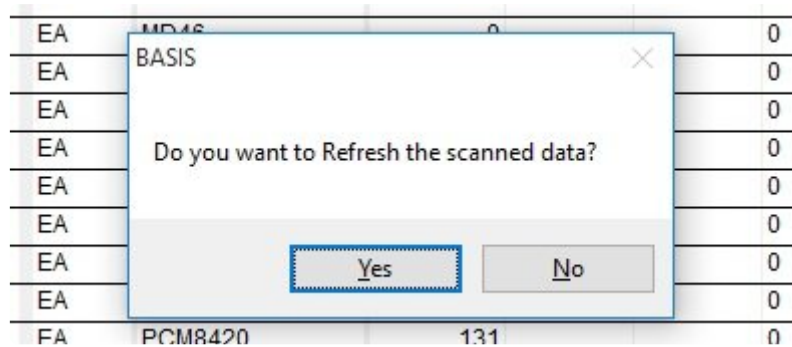


Click on Inventory Counting

Click on Yes to Import Inventory to Basis Cloud Server



Click on Yes to refresh scanned data



Click on the drop down menu and select a warehouse.

Inventory Counting

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image PDF Instructions

☐ All Warehouses Start/Stop BV Inventory Time Inventory Started 14/06/2016 9:53:53 AM Counter Location No Locations > 1000 Refresh

WH 00 Item 1 Product Code Search Reset Remove from Image Add Initial

00 2 Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0				R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0				R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Replace BV Locations with Locations listed above

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Export Type BV Division 000

Export To BV

Add Items not scanned to Inventory List Inventory History CLEAN UP ALL TABLES

Skid/Reset Expiry SN Report

Bypass Committed

se for which you are starting an image. you MUST start an image to do an inventory If adding a filter select YES when prompted to use filtered

Click on CLEAN UP ALL TABLES and click on YES when prompted to remove any existing image

Online Instructions **Scanned Items Only** Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses **Start/Stop BV Inventory** Time Inventory Started **14/06/2016 9:53:53 AM** Counter Location No Locations > 1000 **Refresh**

WH Item Product Code **Search** **Reset** **Remove from Image** **Add Initial**

Reports **Report** **Add Manually** **Delete**

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0		✓		R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0		✓		R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

☐ Replace BV Locations with Locations listed above **SBNU** **Recount Sheets** **Apply** **By \$**

Adjust Count by Location **Add Items to Master Location Table** **Check Old Locations**

Update BV Loc. **Missing Lots** **Missing Serial** **Sum Lot Numbers**

☐ UpLoad SN With Qty **Add to master** **UOM**

Export Type **Export To BV** **Division**

Add Items not scanned to Inventory List **Inventory History** **CLEAN UP ALL TABLES** **Skid/Reset Expiry** **SN Report** **Bypass Committed**

to Inventory List **History** **ALL TABLES**

SN Report

You MUST start an image to do an inventory
If adding a filter select YES when prompted to use filtered

Once all is cleared. An image/snapshot can now be recreated.

[Online Instructions](#)[Scanned Items Only](#)[Remove committed from image](#)

Inventory Counting

[PDF Instructions](#)

☐ All Warehouses
00

Time Inventory Started
14/06/2016 9:53:53 AM

Counter
Location
No Locations > 1000

WH
00

☐ B
☐ S
☐ E

Item

☐ B
☐ S
☐ E

Product Code

Reports

[WH](#)[Code](#)[Description](#)[UOM](#)[OnHand](#)[Counted Qty](#)[Location](#)[SN](#)[Lot](#)[Weigh](#)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:

Record: 1 of 1

No Filter

Search

☐ Replace BV Locations with Locations listed above

☐ UpLoad SN With Qty

Export Type
BVDouble click to enable
Division
000☐ Bypass CommittedYou MUST start an image to do an inventory
If adding a filter select YES when prompted to use filtered

7.1.2.2.1.1. i. Image Review

IMAGE/SNAPSHOT REVIEW

Two types of Images can be created which will be applicable for any inventory scenario

1. **Full Inventory Image** – this image contains all list of inventory.

To create a full inventory image . Make sure that there is nothing defined on the filters before clicking on Start Inventory.

The screenshot shows the 'Inventory Counting' interface. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', 'Remove committed from image', and 'PDF Instructions'. Below these, there are fields for 'All Warehouses' (set to '00'), 'Time Inventory Started' (set to '15/06/2016 5:35:39 AM'), 'Location' (set to 'No Locations'), and a 'Counter' field. A 'START INVENTORY' button is highlighted with a red box. Below this, there are fields for 'Item' and 'Product Code', both highlighted with a red box. There are also 'Search', 'Reset', 'Remove from Image', and 'Add Initial' buttons. At the bottom, there are 'Add Manually' and 'Delete' buttons, and a table with columns: WH, Code, Description, UOM, OnHand, Counted Qty, Location, SN, Lot, Weig.

This will tell basis that all items will be included on the inventory count.

2. **Cycle Inventory Image** – this image is a collection predefined items from an inventory.

To create a cycle inventory image. Just type in a search string on the item or products field and then click on START INVENTORY

The screenshot shows the 'Inventory Counting' interface. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', 'Remove committed from image', and 'PDF Instructions'. Below these, there are fields for 'All Warehouses' (set to '00'), 'Time Inventory Started' (set to '15/06/2016 5:35:39 AM'), 'Location' (set to 'No Locations'), and a 'Counter' field. A 'START INVENTORY' button is highlighted with a red box. Below this, there are fields for 'Item' and 'Product Code'. The 'Item' field contains the text 'ST' and is highlighted with a red box. There are also 'Search', 'Reset', 'Remove from Image', and 'Add Initial' buttons. At the bottom, there are 'Add Manually' and 'Delete' buttons, and a table with columns: WH, Code, Description, UOM, OnHand, Counted Qty, Location, SN, Lot, Weig.

In our example: We ticked on "B: (begins) and typed in "ST" on the item field which means that all items

that
 BEGINS with ST will be included in the Inventory.

The screenshot shows the 'Inventory Counting' interface. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', and 'Remove committed from image'. The 'Scanned Items Only' tab is active. Below the tabs, there is a 'START INVENTORY' button. To the right of this button, the 'Time Inventory Started' is displayed as '15/06/2016 5:51:11 AM'. There is also a 'Counter' field and a 'Location' dropdown menu. A 'Refresh' button is located to the right of the 'Location' dropdown. Below these fields, there is a 'WH' dropdown menu set to '00', an 'Item' dropdown menu set to 'ST', and a 'Product Code' dropdown menu. There are also 'Search', 'Reset', 'Remove from Image', and 'Add Initial' buttons. Below these buttons, there is a 'Reports' dropdown menu set to 'Discrepancy - Scanned Items', a 'Report' button, and 'Add Manually' and 'Delete' buttons. At the bottom, there is a table with the following columns: 'WH', 'Code', 'Description', 'UOM', 'OnHand', 'Counted Qty', 'Location', 'SN', 'Lot', 'Weigh', and 'R'. The table contains the following data:

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh	R
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1				R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2				R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4				R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9				R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin				R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor				R

After the image is created. We can now start the Inventory by clicking on START INVENTORY.

The screenshot shows the 'Inventory Counting' interface. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', and 'Remove committed from image'. The 'Scanned Items Only' tab is active. Below the tabs, there is a 'START INVENTORY' button. To the right of this button, the 'Time Inventory Started' is displayed as '15/06/2016 5:51:11 AM'. There is also a 'Counter' field and a 'Location' dropdown menu. A 'Refresh' button is located to the right of the 'Location' dropdown. Below these fields, there is a 'WH' dropdown menu set to '00', an 'Item' dropdown menu set to 'ST', and a 'Product Code' dropdown menu. There are also 'Search', 'Reset', 'Remove from Image', and 'Add Initial' buttons. Below these buttons, there is a 'Reports' dropdown menu set to 'Discrepancy - Scanned Items', a 'Report' button, and 'Add Manually' and 'Delete' buttons. At the bottom, there is a table with the following columns: 'WH', 'Code', 'Description', 'UOM', 'OnHand', 'Counted Qty', 'Location', 'SN', 'Lot', 'Weigh', and 'R'. The table contains the following data:

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh	R
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1				R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2				R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4				R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9				R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin				R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor				R

7.1.2.2.2. b. Counting

This knowledge base article will guide users on how to use BASIS during the Inventory counting process.

Once all items have been consolidated via an image loaded in BASIS. The inventory count can now start.

To start the inventory count using the BASIS desktop. We recommended that we generate an inventory list that has a ZERO count prior the counting so that a real time monitoring can be achieved during the counting process.

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **START INVENTORY** Time Inventory Started Counter Location No Locations > 1000 Refresh

WH 00 Item a Product Code Search Reset Remove from Image Add Initial

Reports Not Scanned Items Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204		EA		0				R
00	CD-800		EA		0				R
00	EN-BATD		PK		0				R
00	EQ-1245		EA		0				R
00	EQ-1800		EA		0				R
00	FCB-250		EA		0	whse			R
00	FX-280		EA		0	Row 8			R
00	FX-500		EA		0	Row 8			R
00	GR-250		EA		0	whse			R
00	MCB-250		EA		0	whse			R
00	MD46		EA		0	shelf			R
00	N142		EA		0	bin 8			R
00	P1210A		EA		0	whse			R
00	PCM3550		EA		0	lock2			R
00	PCM8420		EA		0	lock2			R
00	PRCB-250		EA		0	whse			R
00	PS-2		EA		0	shelf			R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Export Type BV Double click to enable **Export To BV** Division 000

Add Items not scanned to Inventory List Inventory History **CLEAN UP ALL TABLES** Skid/Reset Expiry SN Report Bypass Committed

NOTES ON CREATING INVENTORY LIST WITH ZERO COUNT.

1. If using a full inventory Image: After creating a [full inventory image](#). Click on Add items not scanned to Inventory list.
2. If using a cycle count inventory image: After creating a [cycle count inventory image](#). Click on Scanned items only once all items are added.

It's also a best practice that the counters has a list of the items to be counted. This can be obtained by giving a print out copy of a recount sheet before hand . ([SEE RECOUNT SHEET for details](#))

Sample recount sheet

Recount Sheet

By: _____

Location	Qtt	Lot/Serial	Exp Dte	In BASIS
Wh 00	Part CD-204	Compact Disk Player with Autoskip		
Count 0	Expected	210	Shortage:	<input type="text" value="-210"/>
Row23				0
				210
Wh 00	Part CD-800			
Count	Expected		Shortage:	<input type="text"/>
Row16				418
				0
Wh 00	Part EQ-1245			
Count	Expected		Shortage:	<input type="text"/>
Row10				147
				0
Wh 00	Part EQ-1800	Equalizer (10 band)		
Count 0	Expected	150	Shortage:	<input type="text" value="-150"/>
Row11				0
				150
Wh 00	Part FCB-250	Finished cabinet for SP-250		
Count 0	Expected	50	Shortage:	<input type="text" value="-50"/>
whse				0
				50
Wh 00	Part FX-280	All-in-one Printer/Scanner/Copier		
Count 0	Expected	141	Shortage:	<input type="text" value="-141"/>
Row 8				0
				141
Wh 00	Part FX-500			
Count	Expected		Shortage:	<input type="text"/>
row 8				102
				0
Wh 00	Part GR-250			
Count	Expected		Shortage:	<input type="text"/>
whse				95
				0
Wh 00	Part MCB-250			
Count	Expected		Shortage:	<input type="text"/>
whse				89
				0
Wh 00	Part MD46			
Count	Expected		Shortage:	<input type="text"/>
shelf				70
				0

Sunday, 19 June 2016

Page 1 of 2

INVENTORY COUNT

Using the BASIS App and the scanners, we can now start scanning items from one location to another. To Monitor the progress just click on refresh and then click on YES on the notification window (NO if Self Hosted) to update the Inventory inside the BASIS Desktop.

Inventory Counting

Online Instructions | Scanned Items Only | Remove committed from image | PDF Instructions

☐ All Warehouses | **START INVENTORY** | Time Inventory Started | Counter | Location | No Locations | > 1000 | **Refresh**

WH: 00 | Item: | Product Code: | Search | Reset | Remove from Image | Add Initial

Reports: Not Scanned Items | Report | Add Manually | Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0	Row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0	Row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0	bin			R
00	EQ-1245	Equalizer (7 band)	EA	147	0	Row10			R
00	EQ-1800	Equalizer (10 band)	EA	150	0	Row11			R
00	FCB-250	Finished cabinet for SP-250	EA	50	0	whse			R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0	Row 8			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0	row 8			R
00	GR-250	Speaker Grill for SP-250	EA	95	0	wrhse			R
00	MCB-250	Entertainment Center	E						R
00	N142	Screws for Speakers (SP-250)	E						R
00	PCM3550	Personal Hand-held Organizer	E						R
00	PCM8420	Personal Organizer	E						R
00	PRCB-250	Unfinished Speaker Cabinet	E						R
00	RC2400	Receiver - 100 watts	E						R
00	RC4850	Receiver - 220 watts	E						R
00	RCA-R	RCA Stereo CD Clock Radio	E						R
00	UAC-300	Recoton Universal AC Adapter	EA	112	0	bin			R

Location and other information (item specific)

WH: 00 | Part No: | QTY: | Locations: | Serial / Lot No: | Exp Date: | SkidID: |

Record: 1 of 1 | No Filter | Search

Export Type: BV | Double click to enable | **Export To BV** | Division: 000

Add Items not scanned to Inventory List | **Inventory History** | **CLEAN UP ALL TABLES** | **Skid/Reset Expiry SN Report** | **Update data from the barcode scanners**

Image below showing partial results from the scan after a REFRESH.

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	209	row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			R
00	GR-250	Speaker Grill for SP-250	EA	95	95	whse			R
00	MCB-250	Entertainment Center	EA	89	88	whse			R
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			R
00	P1210A		EA		226	whse			R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			R
00	PCM8420	Personal Organizer	EA	131	130	lock2			R
00	PRCB-250		EA		59	whse			R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			R
00	SY-MINI	Sony MiniDisc Walkman Player/Recorder	EA	26	26	bin			R

Location and other information (item specific)						
WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-800		15 Row11			
00	CD-800		379 row16			
* 00						

Record: 1 of 2		No Filter	Search
----------------	--	-----------	--------

<input type="checkbox"/> Replace BV Locations with Locations listed above	SBNU	Recount Sheets
	Apply	By \$
Adjust Count by Location	Add Items to Master Location Table	Check Old Locations
Update BV Loc.	Missing Lots	Missing Serial
		Sum Lot Numbers
<input type="checkbox"/> UpLoad SN With Qty	Add to master	UOM

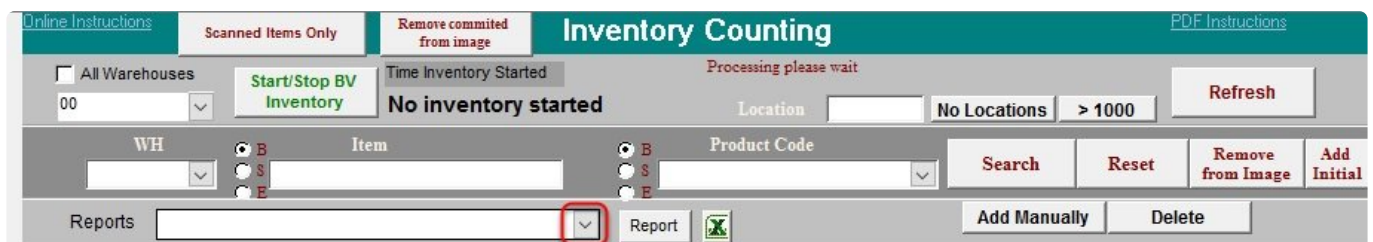
Once the count is finish we can now start generating reports to review the scanned items.

7.1.2.2.3. c. Reports

This knowledge base article will guide user on how to utilize the reporting tool inside the BASIS Desktop.

During the inventory session a report can be generated any time. This helps users make the necessary adjustments needed from the data gathered from the report. There are various reports that gives users different information related to the comparison between what users counted and what the system states you should have.

To generate a report . Click on the Drop down arrow



The screenshot displays the 'Inventory Counting' software interface. At the top, there are links for 'Online Instructions' and 'PDF Instructions'. Below these are tabs for 'Scanned Items Only' and 'Remove committed from image'. The main header 'Inventory Counting' is centered. The interface includes several input fields and buttons: 'All Warehouses' (checkbox), 'Start/Stop BV Inventory' (button), 'Time Inventory Started' (text), 'Processing please wait' (text), 'Location' (text), 'No Locations' (text), '> 1000' (text), and 'Refresh' (button). A status bar at the bottom indicates 'No inventory started'. The 'Reports' section at the bottom left has a dropdown menu highlighted with a red square. To the right of the dropdown are buttons for 'Search', 'Reset', 'Remove from Image', 'Add Initial', 'Add Manually', and 'Delete'.

Select a Report

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting**

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started **No inventory started**

WH ☐ B ☐ S ☐ E Item ☐ B ☐ S ☐ E Product Code

Reports

- Discrepancy - Scanned Items
- Discrepancy - Scanned Items with conversion
- Discrepancy By \$
- Discrepancy By Units
- Discrepancy With Serial/Lots
- DiscrepancyReportRetail
- Discrepancy - Scanned Items Non Zero
- Discrepancy - SN in BV and not in inventory
- Discrepancy - SN in inventory and not in BV
- Not Scanned Items
- Not Scanned Items by Product Code
- Inventory By Location
- Discrepancy - Skid
- Discrepancy- LotNoInBasis
- Discrepancy- LotNoInBVE
- Discrepancy Report Non 0 with locations

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date
00	CD				
00	EN				
00	EQ				
00	FC				
00	FX				
00	GR				
00	MC				
00	MD				
00	N1				
00	P1210A				
00	PCM3550			Personal Hand-held Organizer	
00	PCM8420			Personal Organizer	
00	PRCB-250				
00	STS-01MAN			Instruction Manual STS-01 Sound System	
00	SY-MINI			Sony MiniDisc Walkman Player/Recorder	

Location and other information (item specific)

Click on the Report Button

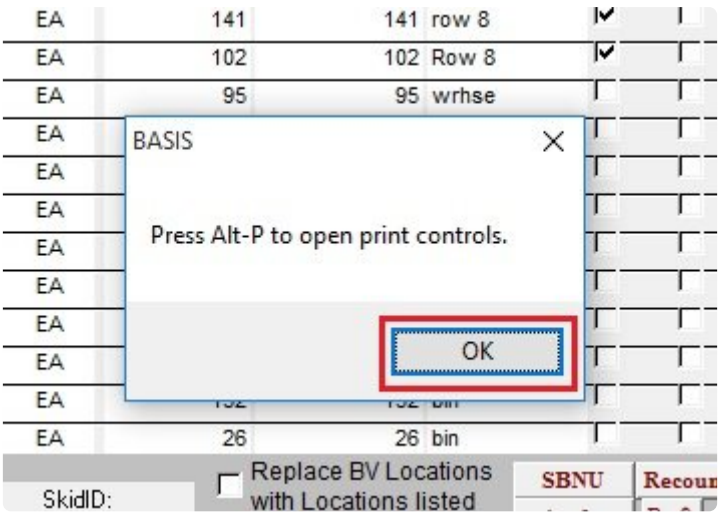
Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started **No inventory started** Processing please wait Location No Locations > 1000 **Refresh**

WH ☐ B ☐ S ☐ E Item ☐ B ☐ S ☐ E Product Code **Search** **Reset** **Remove from Image** **Add Initial**

Reports Discrepancy - Scanned Items **Report** **Add Manually** **Delete**

Click on OK to open the report in a new window.



SAMPLE of a SCANNED ITEMS DISCREPANCY REPORT

Donut Time Discrepancy Report

Monday, 20 June 2016

		Counted	4P OnHand	Disc.	OH-AP	Discr.\$	Location	UOM
Warehouse: 00		Counted	4P OnHand	Disc.	OH-AP	Discr.\$	Location	UOM
Sales Dept:								
CD-204	Compact Disk Player with Autoskip	209	210	- 1		-\$207	row23	EA
CD-800	Compact Disk Player - 5 disk capacity	394	418	- 24		-\$9,368	row18	EA
EN-8ATD	Energizer ACCU Rechargeable D Battery	166	166	0		\$0	bin	PK
EQ-1245	Equalizer (7 band)	147	147	0		\$0	row10	EA
EQ-1800	Equalizer (10 band)	150	150	0		\$0	Row11	EA
FCB-250	Finished cabinet for SP-250	50	50	0		\$0	whse	EA
FX-280	All-in-one (Printer/Scanner/Copier)	141	141	0		\$0	row8	EA
FX-600	Multifax, Printer, Copier, Scanner	102	102	0		\$0	Row8	EA
GR-250	Speaker Grill for SP-250	95	95	0		\$0	whse	EA
MCE-250	Entertainment Center	88	89	- 1		-\$193	whse	EA
MD46	6" Midrange Cone Speaker	69	70	- 1		-\$20	shelf	EA
NI 42	Screws for Speakers (SP-250)	1380	1380	0		\$0	bin 8	EA
P1210A	Semi-gloss resin paint (SP-250)	226	226.5	- 0.5		-\$19	whse	EA
PCM8550	Personal Hand-held Organizer	176	176	0		\$0	back2	EA
PCM8420	Personal Organizer	130	131	- 1		-\$501	back2	EA
PRCB-250	Unfinished Speaker Cabinet	59	59	0		\$0	whse	EA
PS-2	Sony Playstation 2	0	108	- 108		-\$17,037		EA
STS-01 MAN	Instruction Manual STS-01 Sound System	132	132	0		\$0	bin	EA
SY-MINI	Sony MiniDisc Walkman Player/Recorder	26	26	0		\$0	bin	EA

Based on Average Cost

Value of Counted Inventory \$456,072
 Value of AP Inventory \$483,416
 Difference Counted - AP -\$27,344

Based on Current Cost

Value of Counted Inventory \$446,911
 Value of AP Inventory \$473,178
 Difference Counted - AP -\$26,267

Grand Total:

Based on Average Cost

Value of Counted Inventory \$456,072
 Value of AP Inventory \$483,416
 Difference Counted - AP -\$27,344

Based on Current Cost

Value of Counted Inventory \$446,911
 Value of AP Inventory \$473,178
 Difference Counted - AP -\$26,267

Please create a Journal entry to reflect the variance in the Inventory valuation.

AP = Accounting Package

2 IMPORTANT REPORTS

- **DISCREPANCY – SCANNED ITEMS** – Shows you what you counted vs what is in BV for the scanned items. It will also include the cost from the discrepancy.
- **NOT SCANNED ITEMS** – Shows you items that do have an on-hand quantity in BV that did not get scanned.

OTHER REPORTS:

- DISCREPANCY – SCANNED ITEMS WITH CONVERSION -
- DISCREPANCY BY \$ -
- DISCREPANCY BY UNITS -
- DISCREPANCY WITH SERIAL/LOTS – Shows you what you counted vs what is in BV for the scanned items
- DISCREPANCY REPORT RETAIL
- DISCREPANCY – SCANNED ITEMS NON ZERO
- DISCREPANCY – SN IN BV AND NOT IN INVENTORY
- DISCREPANCY – SN IN INVENTORY AND NOT IN BV
- NOT SCANNED ITEMS BY PRODUCT CODE
- INVENTORY BY LOCATION
- DISCREPANCY – SKID
- DISCREPANCY – LOTNOINBASIS
- DISCREPANCY -LOTNOINBV
- DISCREPANCY REPORT WITH NON 0 LOCATIONS
- ON HOLD ITEMS
- EXCEPTION REPORT
- DISCREPANCY WITH COMMITTED
- DISCREPANCY NO DETAILS

EXPORTING REPORTS TO EXCEL

To export a report to excel. Select a report using the drop down menu

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory**

☐ All Warehouses 00 Start/Stop BV Inventory Time Inventory Started No inventory started

WH 00 Item B S E B S E

Reports Discrepancy - Scanned Items Report

Discrepancy - Scanned Items

Discrepancy - Scanned Items with conversion

Discrepancy By \$

Discrepancy By Units

Discrepancy With Serial/Lots

DiscrepancyReportRetail

Discrepancy - Scanned Items Non Zero

Discrepancy - SN in BV and not in inventory

Discrepancy - SN in inventory and not in BV

Not Scanned Items

Not Scanned Items by Product Code

Inventory By Location

Discrepancy - Skid

Discrepancy- LotNoInBasis

Discrepancy- LotNoInBVE

Discrepancy Report Non 0 with locations

WH CD-2

00 CD-2

00 EN-8

00 EQ-2

00 EQ-2

00 FCB

00 FX-2

00 FX-2

00 GR-2

00 MCB

00 MD4

00 N14

00 P1210A

00 PCM3550

00 PCM8420

00 PRCB-250

00 PS-2

00 STS 04MAN

Semi-gloss resin paint (SP-250)

Personal Hand-held Organizer

Personal Organizer

Unfinished Speaker Cabinet

Sony Playstation 2


Instruction Manual STS 04 Sound System

Click on The Excel Icon

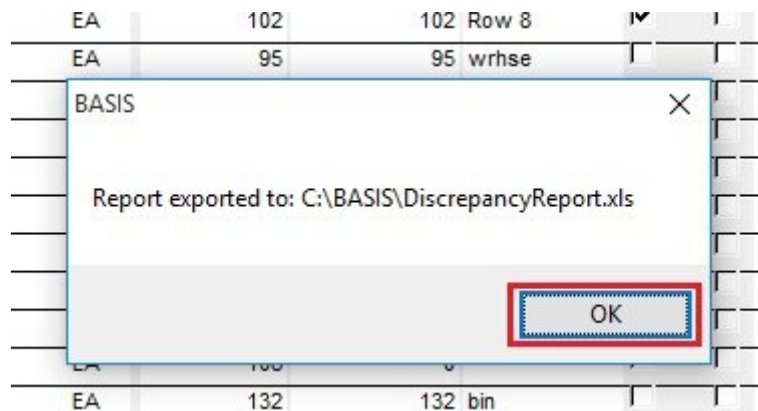
Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 Start/Stop BV Inventory Time Inventory Started No inventory started Counter Location No Locations > 1000 Refresh

WH 00 Item B S E B S E Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report  Add Manually Delete

This will open a notification showing the summary of the location of the file (C:\BASIS\]DiscrepancyReport.xls). Just click on OK to close.



PRINTING REPORTS

To print a report, Open the report then click on the report icon or do a CTRL + P to PRINT a report.

DiscrepancyReportQuery - BASIS

Monday, 30 Nov 2015

Item	Count	AP	Discrepancy	Location	UOM
CD-254	209	210	-1	Row 8	EA
CD-803	294	410	-116	Row 8	EA
SH-847D	166	166	0	Row 8	EA
EQ-1245	147	147	0	Row 8	EA
EQ-1800	180	180	0	Row 8	EA
PCB-250	80	80	0	Row 8	EA
FX-250	141	141	0	Row 8	EA
FX-400	102	102	0	Row 8	EA
GR-400	88	88	0	Row 8	EA
MCB-250	88	88	-1	Row 8	EA
MC-46	88	70	-18	Row 8	EA
NI-42	1380	1380	0	Row 8	EA
PI-210A	224	224	-16	Row 8	EA
PCN-850	176	176	0	Row 8	EA
PCN-840	130	131	-1	Row 8	EA
PCP-200	88	88	0	Row 8	EA
PD-2	0	100	-100	Row 8	EA
STB-01MAN	132	132	0	Row 8	EA
ST-MINI	28	28	0	Row 8	EA

Summary:

Based on Average Cost	Based on Current Cost
Value of Counted Inventory: \$436,072	Value of Counted Inventory: \$446,911
Value of AP Inventory: \$483,416	Value of AP Inventory: \$473,178
Difference Counted - AP: -\$27,344	Difference Counted - AP: -\$26,267

Grand Total:

Based on Average Cost	Based on Current Cost
Value of Counted Inventory: \$436,072	Value of Counted Inventory: \$446,911
Value of AP Inventory: \$483,416	Value of AP Inventory: \$473,178
Difference Counted - AP: -\$27,344	Difference Counted - AP: -\$26,267

Please create a Journal entry to reflect the variance in the Inventory valuation.
AP = Accounting Package

Page 1 of 1

7.1.2.2.4. d. Making Adjustments

This knowledge base article will guide user on how to make adjustments during an inventory session.

After reviewing the Discrepancy report. Making minor adjustments or modification on the Inventory may be needed to meet the Inventory targets

To make adjustments on an item select the item from the Inventory list.

✿ Note: that you can also use the search field. To do this, type in the string and click on search.

The screenshot shows the 'Inventory Counting' window. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', 'Remove committed from image', and 'PDF Instructions'. Below these, there are fields for 'All Warehouses' (set to 00), 'Start/Stop BV Inventory' (a green button), 'Time Inventory Started', and 'Counter' (set to 'No Locations > 1000'). A 'Refresh' button is on the right. In the center, there are input fields for 'Item' (containing 'cd'), 'Product Code', and a 'Search' button. Below these are buttons for 'Reset', 'Remove from Image', and 'Add Initial'. At the bottom, there is a 'Reports' dropdown set to 'Discrepancy - Scanned Items' and a 'Report' button. A table below shows inventory items:

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	209	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R

Once the item is selected the details should now show on the Location and Other information Section

The screenshot shows the 'Location and other information (item specific)' section. It features a table with columns: WH, Part No, QTY, Locations, Serial / Lot No, Exp Date, and SkidID. The table contains two rows for '00 CD-204' with quantities 9 and 200 at locations 'row16' and 'row23' respectively. Below the table is a 'Record' section showing '1 of 2' records. To the right, there are buttons for 'Replace BV Locations with Locations listed above', 'SBNU Apply', 'Recount Sheets By \$', 'Adjust Count by Location', 'Add Items to Master Location Table', 'Check Old Locations', 'Update BV Loc.', 'Missing Lots', 'Missing Serial', 'Sum Lot Numbers', 'UpLoad SN With Qty', 'Add to master', and 'UOM'. At the bottom, there is an 'Export Type' dropdown set to 'BV', a 'Double click to enable' button for 'Export To BV', a 'Division' dropdown set to '000', and a 'Bypass Committed' checkbox. There are also buttons for 'Add Items not scanned to Inventory List', 'Inventory History', 'CLEAN UP ALL TABLES', 'Skid/Reset Expiry SN Report', and a 'Bypass Committed' checkbox.

Now we can make adjustments on the following:

- QTY
- LOCATION
- SERIAL NUMBER/LOT NUMBER
- EXPIRY DATE
- SKID NUMBER

Once adjustments is done click on Adjust Count by Location to update the quantities scanned.



MANUALLY ADDING AN ITEM

Items not scanned during the inventory can be manually added on the list.

To manually add an item Click on “Add Manually”

Inventory - BASIS

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses **Start/Stop BV Inventory** Time Inventory Started Processing please wait **No inventory started** Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report **Add Manually** Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	208	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			#### R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			#### R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			#### R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			#### R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			#### R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			#### R
00	GR-250	Speaker Grill for SP-250	EA	95	95	wrhse			#### R
00	MCB-250	Entertainment Center	EA	89	88	wrhse			#### R
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			#### R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			#### R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226	wrhse			#### R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			#### R
00	PCM8420	Personal Organizer	EA	131	130	lock2			#### R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59	whse			#### R
00	PS-2	Sony Playstation 2	EA	108	0				#### R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			#### R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-204	8	row16			
00	CD-204	200	row23			
*	00					

Record: 1 of 2 No Filter Search

☐ Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

☐ UpLoad SN With Qty Add to master UOM

Select a warehouse

The screenshot shows the 'Decode Barcode' window. At the top, there's a 'Wh' dropdown menu with '00' selected. Below it, a list of warehouses is visible: '00 Default Wareh', '01 test warehouse', and '03 test warehouse'. To the right of this list is a button that says 'Scan the Item Barcode or enter the item Code'. Below the warehouse list is a 'Description' field. At the bottom, there are two input fields: 'UPC' with the value 'TV-5200' and 'Product' with the value 'TV-5200'. To the right of these fields is a 'SkidNo' field.

Type in the item code or click on the drop down to search for an item.

The screenshot shows the 'Decode Barcode' window with a search results table. The 'Wh' dropdown is set to '00'. The 'Barcode' field is empty, and the 'Code' field contains 'tp-350'. The 'Description' field is empty. The search results table has the following columns: Item Code, Description, and various attributes (UPC, Product, Quantity, Location, Serial/Lot#, UOM, Date, Conv. Fact). The table lists several items, including 'ST-30 Stand - 30" Speaker', 'ST-40 Stand - Universal Cube Speaker', 'STS-01 Home Sound System with MP3', 'STS-01MAN Instruction Manual STS-01 Sou', 'STS-02 Surround Sound Home Theater', 'SY-MINI Sony MiniDisc Walkman Player', 'TP-350 DVD Player/Hi-Fi VCR Combo', 'TP-560 Toshiba Progressive-Scan DVD', 'TV-2100 20" TV with Flat Picture Tube', 'TV-3600 36" DBX Stereo Color Televisio', 'TV-5200 52" Dolby Pro Logic Surround S', 'UAC-300 Recoton Universal AC Adapter', 'V1-2A Digital-VHS VCR with HDTV-Re', 'V1-4A Hi-fi Stereo 4 Head VCR', 'VAIO-24 Desktop PC with Intel Pentium', and 'XBX-123 XBOX LIVE'. The 'TV-5200' item is highlighted in the table. At the bottom of the window, there is an 'Accept' button and a button with a plus sign.

Define the Quantity, Location and other optional information such as Seria/Lot# , Skidno, Expiry can be used if its needed then Click on Accept to add the item.

Decode Barcode

Wh Scan the Item Barcode or enter the item Code

Barcode

Code

Description

UPC

Product

Quantity 1

Location

Serial/Lot#

UOM

Date

Conv. Fact

SkidNo Find

Expiry

52" Dolby Pro Logic Surround Sound TV

☒ Serialized ☐ Lot Numbered

2 **Accept**

Click on Refresh and click on Yes when Prompted (No if Self hosted) to update the inventory list.

[Online Instructions](#) [PDF Instructions](#)

Scanned Items Only Remove committed from image **Inventory Counting**

☐ All Warehouses Time Inventory Started Processing please wait

00 No inventory started Location No Locations > 1000

WH Item Product Code 1

Reports Report

WH	Code	Description	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Play	208	row23			R
00	CD-800	Compact Disk Play	394	row16			R
00	EN-BATD	Energizer ACCU F	166	bin			R
00	EQ-1245	Equalizer (7 band	147	row10			R
00	EQ-1800	Equalizer (10 band	150	Row11			R
00	FCB-250	Finished cabinet f	50	whse			R
00	FX-280	All-in-one Printer/	141	row 8			R
00	FX-500	Multi-fax. Printer. Copier. Scanner	102	Row 8			R

Do you want to import the data from the cloud?

2

List has now been updated

00	EQ-1800	Equalizer (10 band)	EA	150	150 Row11				R
00	FCB-250	Finished cabinet for SP-250	EA	50	50 whse				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141 row 8	✓			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102 Row 8	✓			R
00	GR-250	Speaker Grill for SP-250	EA	95	95 wrhse				R
00	MCB-250	Entertainment Center	EA	89	88 wrhse				R
00	MD46	6" Midrange Cone Speaker	EA	70	69 shelf				R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380 bin 8				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226 wrhse				R
00	PCM3550	Personal Hand-held Organizer	EA	176	176 lock2				R
00	PCM8420	Personal Organizer	EA	131	130 lock2				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59 whse				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132 bin				R
00	SY-MINI	Sony MiniDisc Walkman Player/Recorder	EA	26	26 bin				R
00	TV-5200		EA		12 ROW11				R

7.1.2.3. IV. Other Functions

This knowledge base article will show users other useful options that we can use during an inventory session.

7.1.2.3.1. a. Recount Sheet

RECOUNT SHEET

One of the added feature in BASIS is the Recount Sheet. A recount sheet is a feature from basis that will make the application generate a report that consolidates the number of items counted vs the actual number of items in the accounting package. The Layout of the report is also designed to make a recount efficient and effective.

Let's say the inventory counting is finish and the admin is still not happy with the results due to some discrepancy. We can send the counters back to the location with a recount sheet on hand for them to Double check the inventory.

Below is a sample of a recount sheet.

Recount Sheet					By: _____
Location	Qtt	Lot/Serial	Exp Dte	In BASIS	
Wh 00	Part CD-204	Compact Disk Player with Autoskip			
Count 0	Expected	210	Shortage:	<input type="text" value="-210"/>	
Row23				0	
Wh 00	Part CD-800				
Count	Expected		Shortage:	<input type="text"/>	
Row16				418	
				0	
Wh 00	Part EQ-1245				
Count	Expected		Shortage:	<input type="text"/>	
Row10				147	
				0	
Wh 00	Part EQ-1800	Equalizer (10 band)			
Count 0	Expected	150	Shortage:	<input type="text" value="-150"/>	
Row11				0	
Wh 00	Part FCB-250	Finished cabinet for SP-250			
Count 0	Expected	50	Shortage:	<input type="text" value="-50"/>	
whse				0	
Wh 00	Part FX-280	All-in-one Printer/Scanner/Copier			
Count 0	Expected	141	Shortage:	<input type="text" value="-141"/>	
Row 8				0	
Wh 00	Part FX-500				
Count	Expected		Shortage:	<input type="text"/>	
row 8				102	
				0	
Wh 00	Part GR-250				
Count	Expected		Shortage:	<input type="text"/>	
whse				95	
				0	
Wh 00	Part MCB-250				
Count	Expected		Shortage:	<input type="text"/>	
whse				89	
				0	
Wh 00	Part MD46				
Count	Expected		Shortage:	<input type="text"/>	
shelf				70	
				0	

Sunday, 19 June 2016 Page 1 of 2

To make a recount sheet. Click on the R button on each item that has to be added on the recount sheet.

[Online Instructions](#)
[Scanned Items Only](#)
[Remove committed from image](#)

Inventory Counting

[PDF Instructions](#)

☐ All Warehouses
 Start/Stop BV Inventory
Time Inventory Started
Processing please wait
No inventory started
Location
No Locations
> 1000
Refresh

WH
Item
Product Code
Search
Reset
Remove from Image
Add Initial

Reports
Report
Add Manually
Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autokip	EA	210	208	row23			
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			
00	GR-250	Speaker Grill for SP-250	EA	95	95	wrhse			
00	MCB-250	Entertainment Center	EA	89	88	wrhse			
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226	wrhse			
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			
00	PCM8420	Personal Organizer	EA	131	130	lock2			
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59	whse			
00	PS-2	Sony Playstation 2	EA	108	0				
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-204		8 row16			
00	CD-204	200	row23			
*	00					

☐ Replace BV Locations with Locations listed above
 SBNU
Recount Sheets
Apply
By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

☐ UpLoad SN With Qty
 Add to master
UOM

Record: 1 of 2
 No Filter
Search



Typically what we want to be added in here are the items that has a discrepancy during the count.

When done adding the items. Click on Recount Sheets

Online Instructions **Scanned Items Only** Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses **Start/Stop BV Inventory** Time Inventory Started **No inventory started** Processing please wait Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	208	row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			R
00	GR-250	Speaker Grill for SP-250	EA	95	95	wrhse			R
00	MCB-250	Entertainment Center	EA	89	88	wrhse			R
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226	wrhse			R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			R
00	PCM8420	Personal Organizer	EA	131	130	lock2			R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59	whse			R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-204		8 row16			
00	CD-204		200 row23			
*	00					

Record: 1 of 2 No Filter Search

☐ Replace BV Locations with Locations listed above **SBNU** **Recount Sheets** **Apply**

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

☐ UpLoad SN With Qty Add to master UOM

Sample Recount sheet of items with Discrepancy

Recount Sheet					By: _____
Location	Qtt	Lot/Serial	Exp Dte	In BASIS	
Wh 00	Part CD-204	Compact Disk Player with Autoskip			
Count 208	Expected	210	Shortage:	<input type="text" value="-2"/>	
row23		200			0
Row23					210
row16		8			0
Wh 00	Part CD-800				
Count	Expected	Shortage:	<input type="text"/>		
Row16					418
Row11		15			0
row16		379			0
Wh 00	Part MCB-250				
Count	Expected	Shortage:	<input type="text"/>		
whse					89
whse		88			0
Wh 00	Part MD46				
Count	Expected	Shortage:	<input type="text"/>		
shelf					70
shelf		69			0
Wh 00	Part P1210A	Semi-gloss resin paint (SP-250)			
Count 226	Expected	226	Shortage:	<input type="text" value="0"/>	
whse		226			0
whse					226
Wh 00	Part PCM8420	Personal Organizer			
Count 130	Expected	131	Shortage:	<input type="text" value="-1"/>	
lock2		130			0
lock2					131
Wh 00	Part P5-2				
Count	Expected	Shortage:	<input type="text"/>		
shelf					108
					0

Tuesday, 21 June 2016

Page 1 of 1

7.1.2.4. V. Final Steps

7.1.2.4.1. a. Uploading Data

This knowledge base article will guide users to upload the data to the accounting package once the Inventory is finish.

Once the final discrepancy report has been printed and approved by a supervisor prior to upload. The quantities on that report are the amounts that will now be posted to BV as your new inventory quantities on hand.



NOTE: IT IS STRONGLY RECOMMENDED AT THIS POINT TO TAKE A BACKUP OF THE ACCOUNTING PACKAGE AND BASIS FILES

Sample Final Discrepancy Report

Donut Time Discrepancy Report

Tuesday, 21 June 2016

Counted	AP	OnHand	Disc.	OH-AP	Discr.\$	Location	UOM	Converted	ConvertedBV
Warehouse: 00									
Counted	AP	OnHand	Disc.	OH-AP	Discr.\$	Location	UOM	Converted	ConvertedBV
Sales Dept:									
CD-204	Compact Disk Player with Autoskip	208	210	-2	-\$413	row23	EA	208	210
CD-800	Compact Disk Player - 5 disk capacity	394	418	-24	-\$9,368	row16	EA	394	418
EN-BATD	Energizer ACCU Rechargeable D Batteries	166	166	0	\$0	bin	PK	166	166
EQ-1245	Equalizer (7 band)	147	147	0	\$0	row10	EA	147	147
EQ-1800	Equalizer (10 band)	150	150	0	\$0	Row11	EA	150	150
FCB-250	Finished cabinet for SP-250	50	50	0	\$0	whse	EA	50	50
FX-280	All-in-one Printer/Scanner/Copier	141	141	0	\$0	row 8	EA	141	141
FX-500	Multi-fax, Printer, Copier, Scanner	102	102	0	\$0	Row 8	EA	102	102
GR-250	Speaker Grill for SP-250	95	95	0	\$0	whse	EA	95	95
MCB-250	Entertainment Center	88	89	-1	-\$193	whse	EA	88	89
MD46	6" Midrange Cone Speaker	69	70	-1	-\$20	shelf	EA	69	70
N142	Screws for Speakers (SP-250)	1380	1380	0	\$0	bin 8	EA	1380	1380
P1210A	Semi-gloss resin paint (SP-250)	226	226.5	-0.5	-\$19	whse	EA	226	226.5
PCM3550	Personal Hand-held Organizer	176	176	0	\$0	lock2	EA	176	176
PCM8420	Personal Organizer	130	131	-1	-\$501	lock2	EA	130	131
PRCB-250	Unfinished Speaker Cabinet	59	59	0	\$0	whse	EA	59	59
PS-2	Sony Playstation 2	108	108	0	\$0	shelf	EA	108	108
STS-01MAN	Instruction Manual STS-01 Sound System	132	132	0	\$0	bin	EA	132	132
SY-MINI	Sony MiniDisc Walkman Player/Recorder	26	26	0	\$0	bin	EA	26	26
TV-5200	52" Dolby Pro Logic Surround Sound TV	42	44	-2	-\$714	ROW12	EA	42	44

Based on Average Cost

Value of Counted Inventory \$487,895

Value of AP Inventory \$499,123

Difference Counted - AP -\$11,228

Based on Current Cost

Value of Counted Inventory \$477,964

Value of AP Inventory \$488,812

Difference Counted - AP -\$10,848

Page 1 of 2

UPLOADING DATA ON BV

To upload the data to the accounting package. Click on the Accounting Package Selection drop down menu and then select the accounting package.

2

WH

Part No

QTY

Locations

Serial / Lot No

Exp Date

SkidID:

00

P1210A

226 whse

* Accpac

BV

BVEss

QB

Re Excel

Ascii

Syspro

Accountmate

BV

No Filter

Search

There is no current filter.

Replace BV Locations with Locations listed above

SBNU

Recount Sheets

Apply

By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

UpLoad SN With Qty

Add to master

UOM

Export To BV

Division

000

...

Bypass Committed

Add Items not scanned to Inventory List

Inventory History

CLEAN UP ALL TABLES

Skid/Reset Expiry

SN Report

✿ NOTE: IF YOU NEED TO UPDATE SERIAL NUMBERS AS WELL, MAKE SURE THE Upd SN check box is Ticked

Replace BV Locations with Locations listed above

SBNU

Recount Sheets

Apply

By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

☒ UpLoad SN With Qty

Add to master

UOM

✿ NOTE: Tick on this option to update the LOCATION in the inventory files of the accounting package. (BV SPECIFIC)

42

42 ROW12

☒ Replace BV Locations with Locations listed above

Select Export to BV

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
▶ 00	CD-204		8 row16			
00	CD-204		200 row23			
* 00						

Record: 1 of 2

No Filter

Search

Replace BV Locations with Locations listed above

SBNU

Recount Sheets

Apply

By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Missing Lots

Missing Serial

Sum Lot Numbers

UpLoad SN With Qty

Add to master

UOM

Export Type

Export Dir: C:\BASIS\

File: inv2

Export to BVE

Export To

Division: 000

Add Items not scanned to Inventory List

Inventory History

CLEAN UP ALL TABLES

Skid/Reset Expiry

SN Report

Bypass Committed

✿ NOTE: IF OPTION IS GRAYED OUT. just double click on the label that says double click to enable

Double click to enable

Export To

Location and

QTY

8

Click Yes

Finished cabinet for SP-250	EA	50	50	wh
Speaker Grill for SP-250	EA	95	95	wrl
				88 wrl
				69 she
				1380 bin
				226 wrl
				176 locl
				130 locl
				59 wh
				108 she
Instruction Manual STS-01 Sound System	EA	132	132	bin

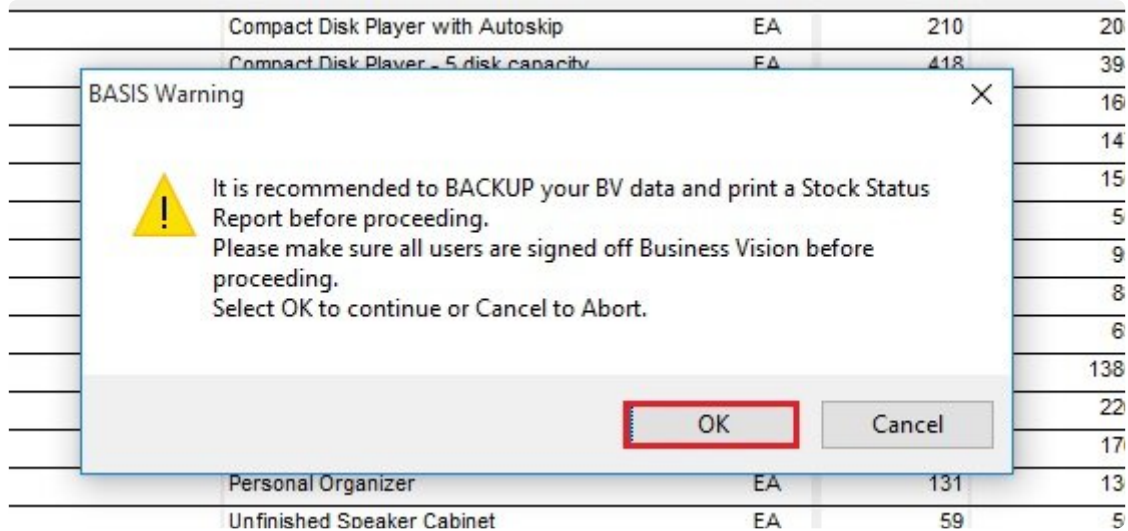
BASIS

Do you need to add items not scanned to inventory? Press cancel to abort. Do you wish to continue?

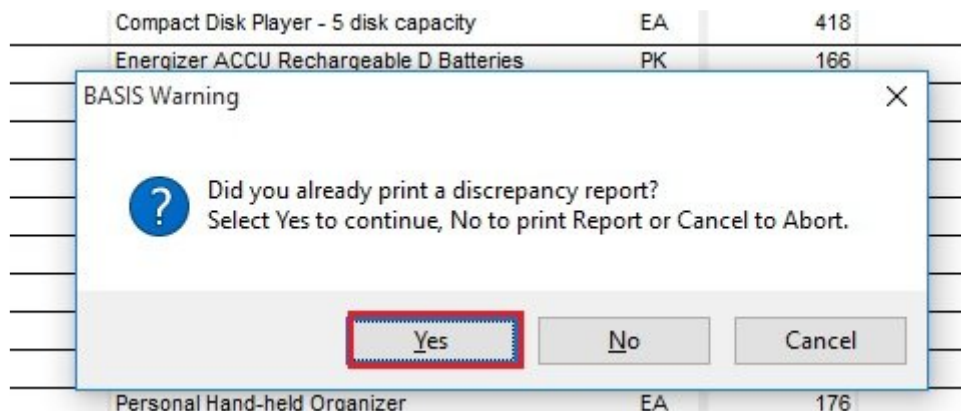
Yes

No

Click Ok

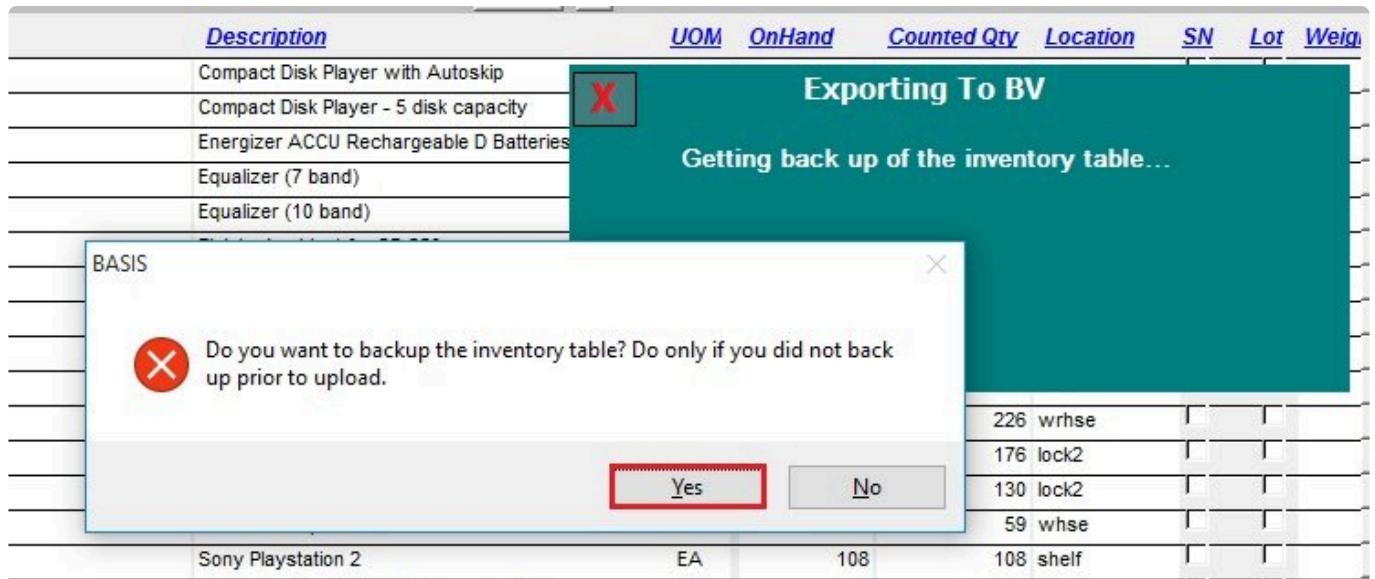


Click Yes

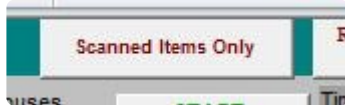


✿ Note: Clicking on No will automatically make BASIS Generate a Discrepancy Report.

Click on Yes



The Accounting package is now updated with the new inventory count. We can now open the accounting package to cross check if the changes took place or We can check the results straight from BASIS by taking another image (Inventory snapshot) of the scanned items from the accounting package. To get a snapshot just click on Scanned Items only



On hand quantity should now be equal to the Counted Quantity after getting the snapshot.

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh
00	CD-204	Compact Disk Player with Autoskip	EA	208	208	row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	394	394	row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	100	100	bin			R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			R
00	GR-250	Speaker Grill for SP-250	EA	95	95	whse			R
00	MCB-250	Entertainment Center	EA	88	88	whse			R
00	MD46	6" Midrange Cone Speaker	EA	69	69	shelf			R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226	226	whse			R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			R
00	PCM8420	Personal Organizer	EA	130	130	lock2			R

UPLOADING DATA ON BVES

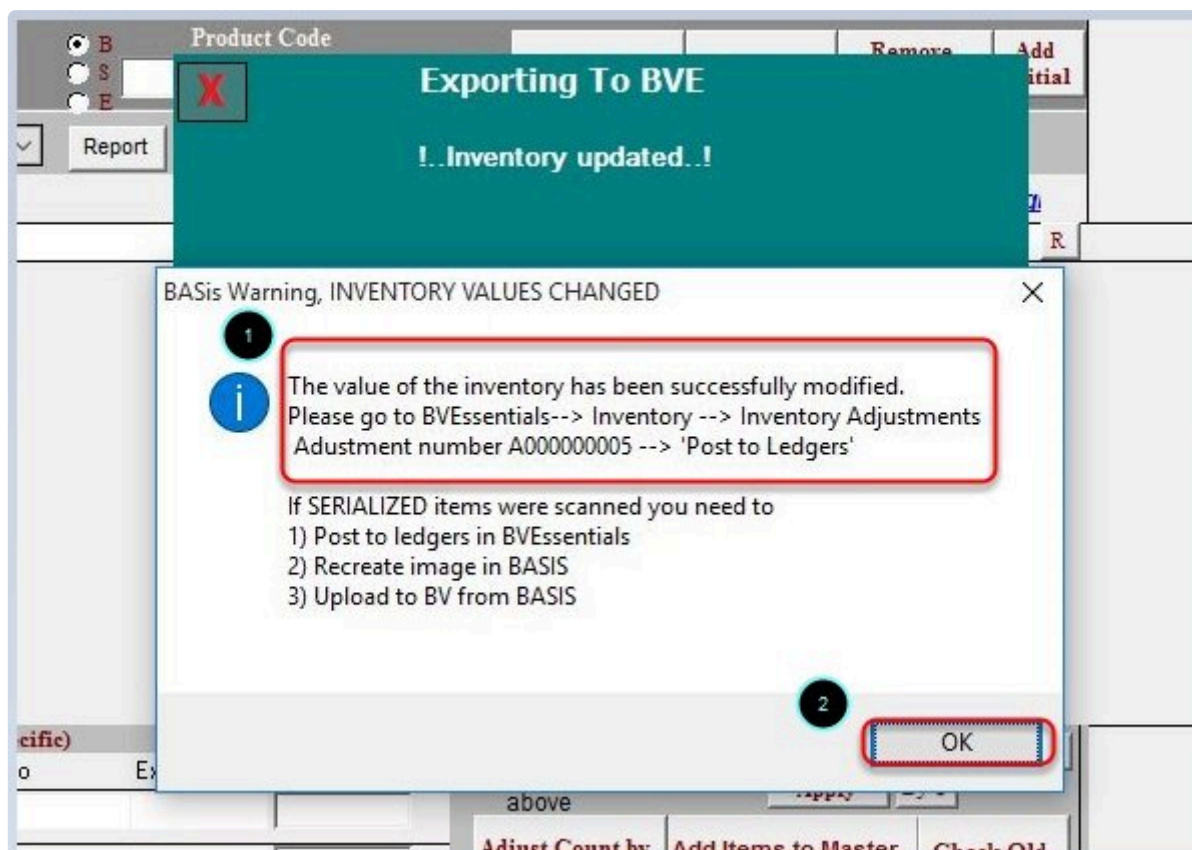
To upload the new inventory count. Click on the Export to BVE button

The screenshot shows the 'Inventory Counting' window. At the top, there are tabs for 'Online Instructions', 'Scanned Items Only', and 'Remove committed from image'. The main header is 'Inventory Counting'. Below this, there are various input fields and buttons. The 'Export to BVE' button is highlighted with a red box. Other buttons include 'START INVENTORY', 'Refresh', 'Search', 'Reset', 'Remove from Image', 'Add Initial', 'Add Manually', and 'Delete'. A table below shows inventory data for 'ST-10' with columns for WH, Code, Description, UOM, OnHand, Counted Qty, Location, SN, Lot, and Weig. At the bottom, there are more buttons like 'Export Type', 'Export to BVE', 'Export To BV', 'Add Items not scanned to Inventory List', 'Inventory History', 'CLEAN UP ALL TARI FS', 'Skid/Reset Expiry', and 'SN Report'.

Click on Yes.

The screenshot shows a 'BASIS Warning' dialog box. It contains a question mark icon and the text: 'Did you already print a discrepancy report? Select Yes to continue, No to print Report or Cancel to Abort.' Below the text are three buttons: 'Yes', 'No', and 'Cancel'. The 'Yes' button is highlighted with a red box.

Take note of the adjustment number and then click on OK



To make the adjustments in BVESS click on the Adjust Inventory module.



And then locate and open the adjustment form (A000000005) that BASIS created in BVESS.



Check and review the adjustment and then click on Post to Ledgers.

Inventory Adjust

Post to Ledgers Merge Linked Labels

Mode
☐ Receive Inventory ☒ Adjust Inventory

Date: 01/01/2012 Adjust No: A000000005

Supplier
 Reference No: Supplier:

Parts

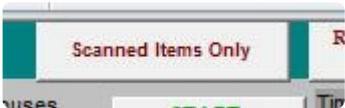
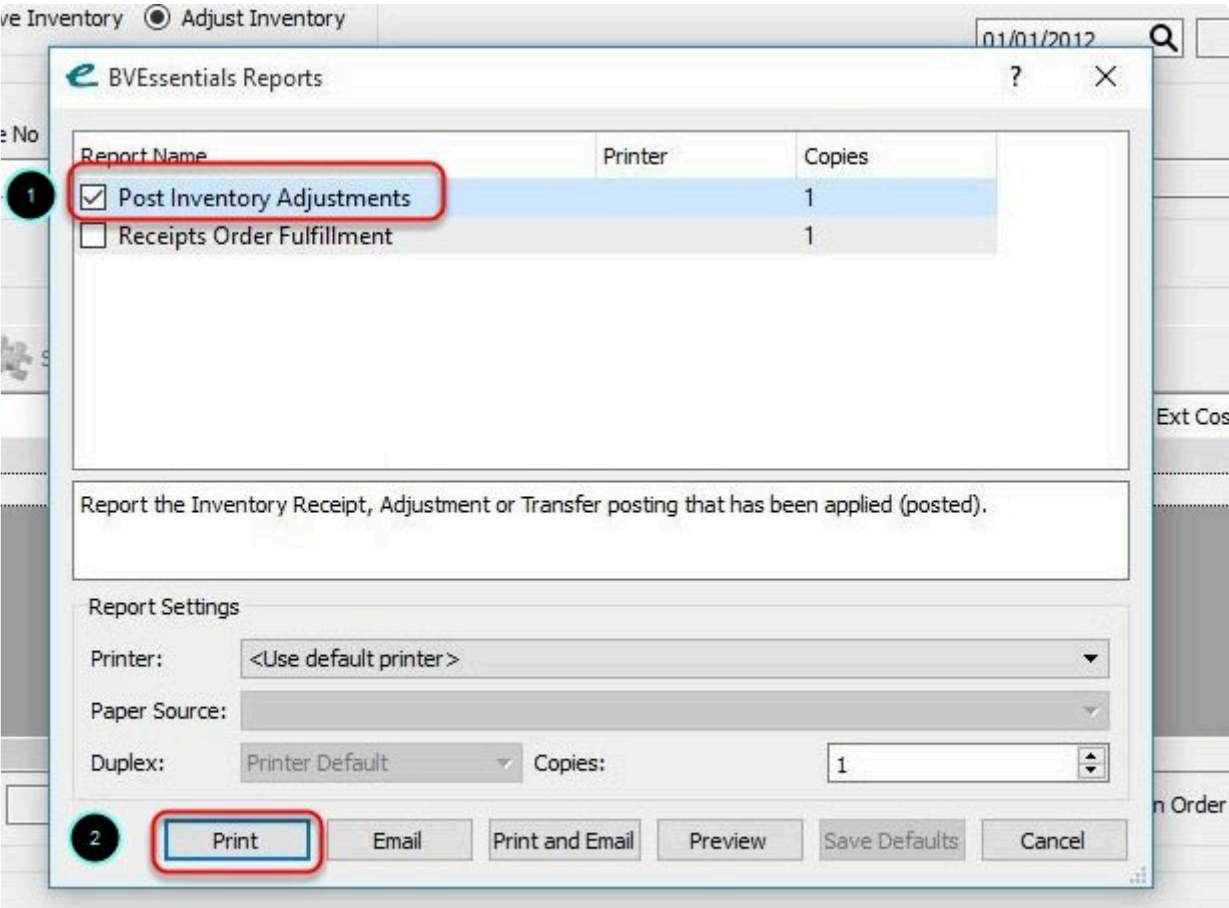
Serial Numbers

Part No	Description	Adjust Qty	Cost	UOM	Ext Cost	Base Ext Co
[00] ST-10	Stand - for mini speakers	-2.000	85.320	EA	-170.640	-170.640

Available: On Hand: Committed: Backorder: On Order:

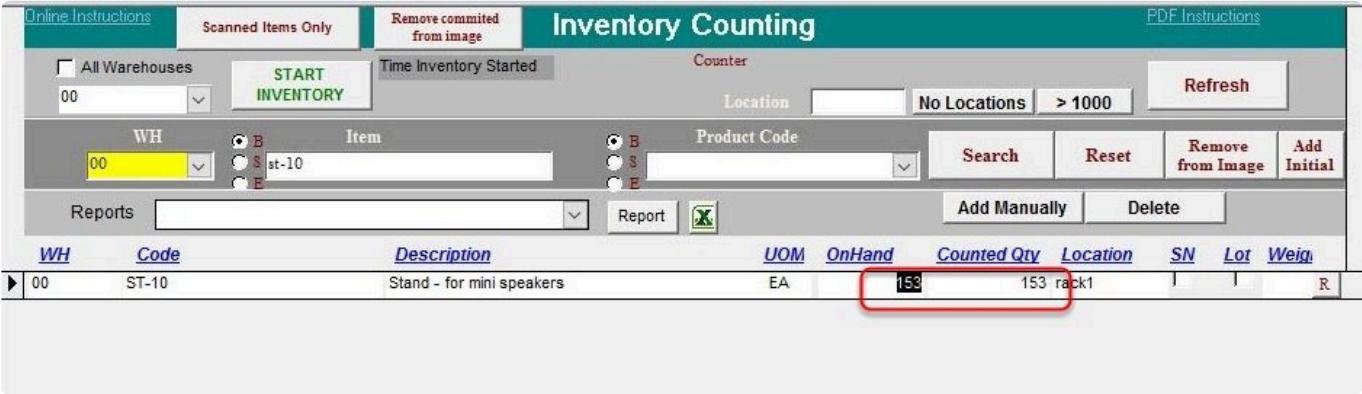
Notes:

To finalize the adjustment just select a report and then select the output (PRINT, EMAIL and PRINT / EMAIL). This will create the report and the adjustments will be carried out to BVES.



To check results in BASIS, click on  to get a snapshot of the current inventory count.

The On-hand and the Counted Qty should be equal once the adjustment is a success.



7.1.2.4.2. b. Adjusting Master Location

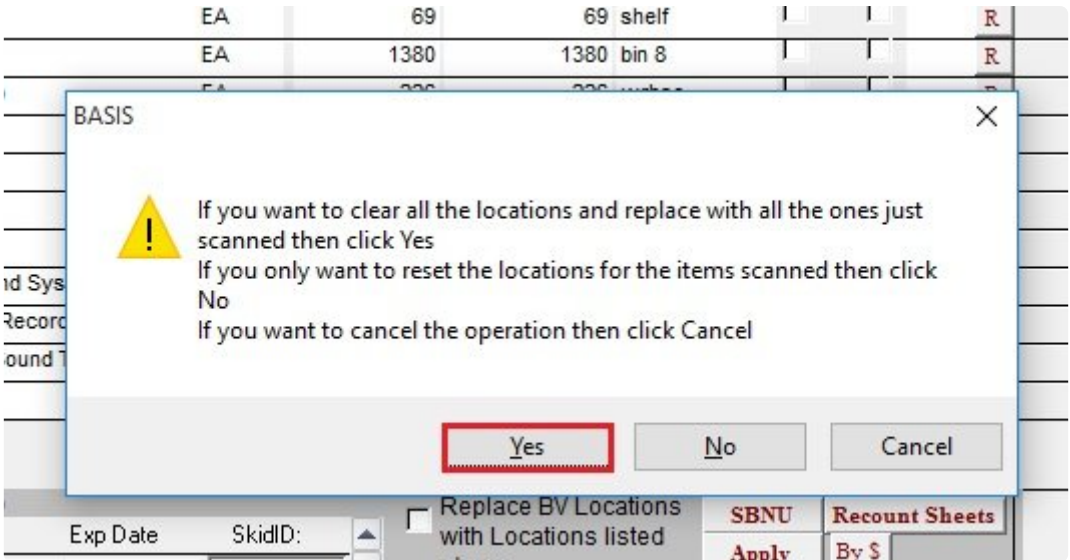
After an inventory update, the new locations of the items should be updated as well . To update the Master Location of the inventory. Click on Add Items to Master Location Table.

The screenshot shows the BarcodeApps interface with a table of inventory items. The table has columns: WH, Part No, QTY, Locations, Serial / Lot No, Exp Date, and SkidID. The first two rows show items with Part No CD-204. The first row has QTY 8 and Location row16. The second row has QTY 198 and Location row23. Below the table, there are buttons for 'Add Items not scanned to Inventory List', 'Inventory History', 'CLEAN UP ALL TABLES', 'Skid/Reset Expiry', and 'SN Report'. On the right side, there are buttons for 'Adjust Count by Location', 'Add Items to Master Location Table' (highlighted with a red box), 'Check Old Locations', 'Update BV Loc.', 'Missing Lots', 'Missing Serial', 'Sum Lot Numbers', 'UpLoad SN With Qty', 'Add to master', 'UOM', 'Export To BV', and 'Bypass Committed'.

Click Yes to update table on the accounting package

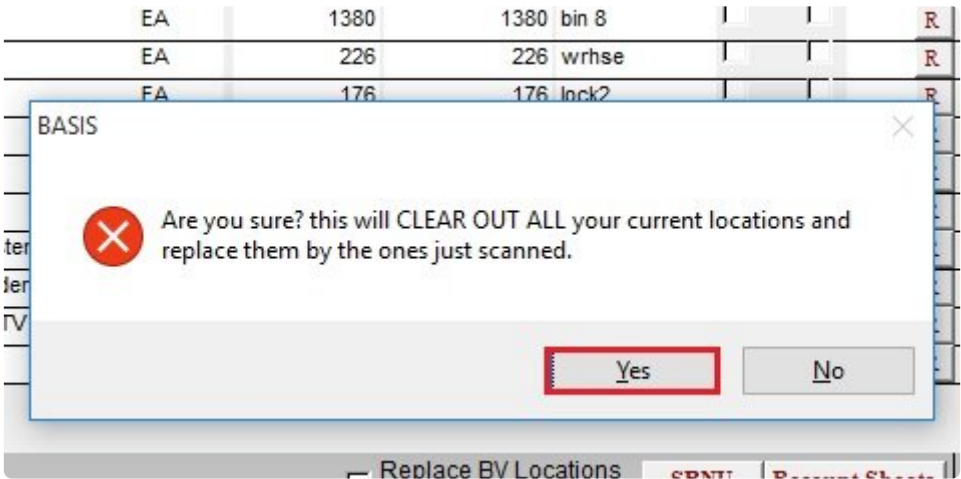
The screenshot shows a 'BASIS Warning' dialog box with a yellow warning icon. The text inside the dialog box says: 'Are you sure you want to replace the items in the Location table with the ones you just inventoried?'. There are two buttons at the bottom: 'Yes' (highlighted with a red box) and 'No'.

Click YES to Clear all locations

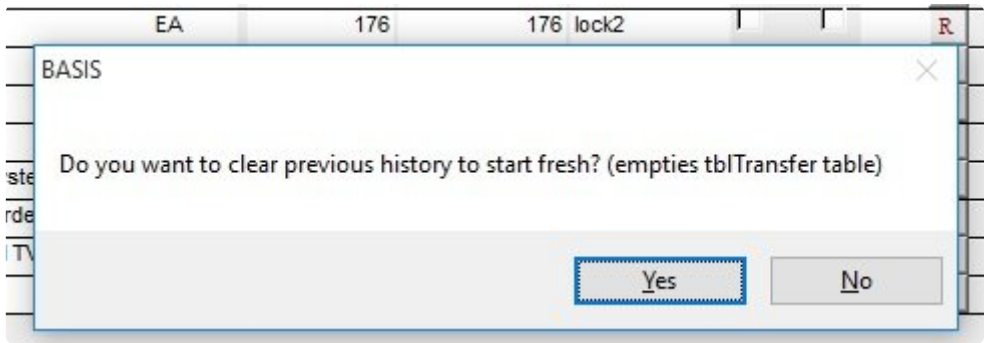


* Note : If you are doing a cycle count and only want to adjust the items scanned select NO

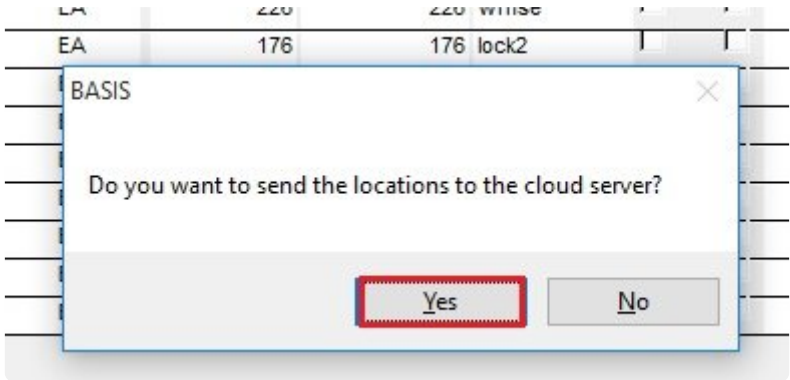
Click Yes



Click Yes



Click Yes to send data to cloud



✿ No if Self Hosted

MASTER LOCATION IS NOW UP TO DATE

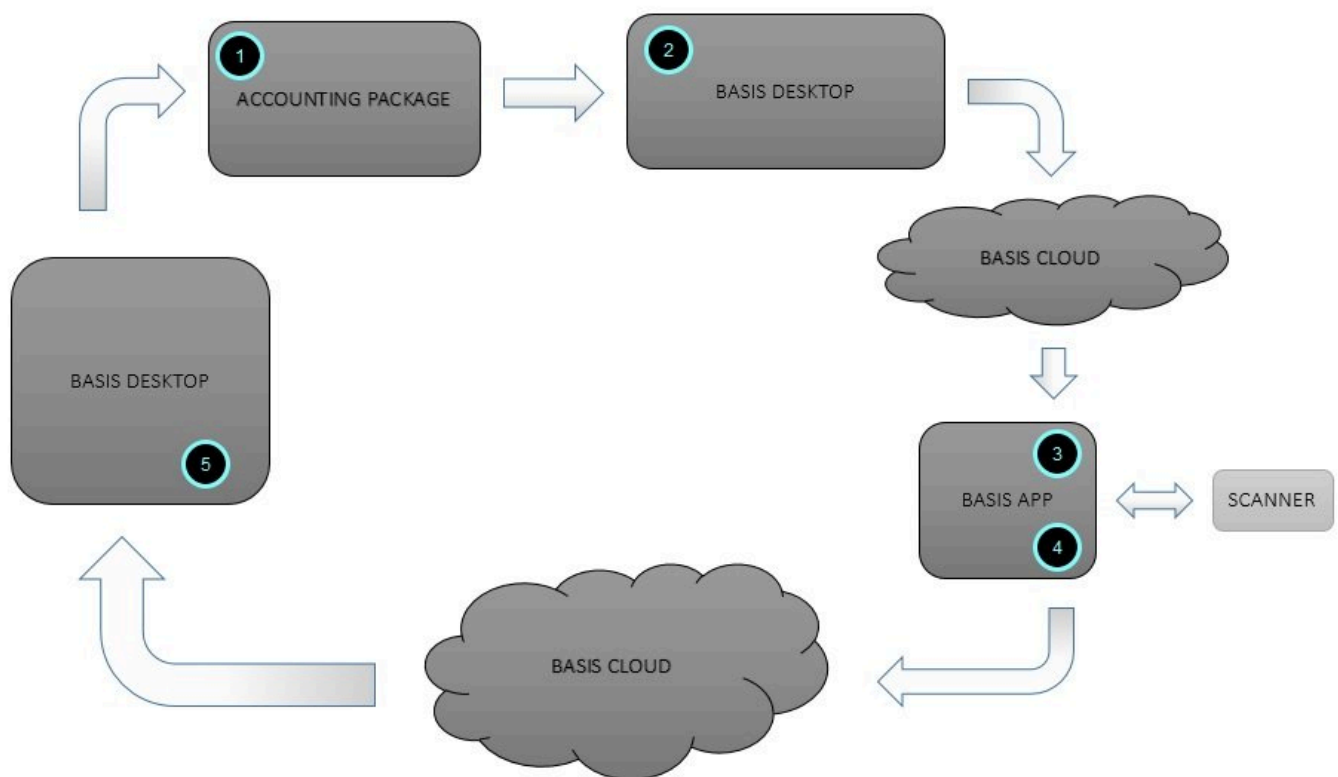
Get Data		Send Data		MASTER LOCATIONS FORM									
Product Code CD-204				Details		Compact Disk Player with Autostrip							
WH	STOCKCODE	Description	Total	WH	Loc	Code	Qty	SerialNumber	SkidID	INIQT	TY	EXPDate	
00	CD-204	Compact Disk Player with Autostrip	206	00	row16	CD-204	198			0			
00	CD-800	Compact Disk Player - 5 disk cap	375	00	row23	CD-204	8			0			
00	EN-BATD	Energizer ACCU Rechargeable D	152										
00	EQ-1245	Equalizer (7 band)	147										
00	EQ-1800	Equalizer (10 band)	150										
00	FCB-250	Finished cabinet for SP-250	50										
00	GR-250	Speaker Grill for SP-250	95										
00	MCB-250	Entertainment Center	88										
00	MD46	6" Midrange Cone Speaker	69										
00	N142	Screws for Speakers (SP-250)	1380										

7.1.3. C. ORDER ENTRY

The Order Entry is a feature from BASIS that lets the program manage orders inside the accounting package with real time inventory tracking of items shipped.

ORDER CYCLE

Image below shows an illustration how an order is processed with the help of Basis.



1. Order is created in the accounting package
2. Basis Downloads the order from the accounting package and sends it to the cloud.
3. The Basis App downloads the order details from the cloud server and scans the items to be shipped using a scanner.
4. The Basis App sends the new data back to the cloud
5. Basis desktop downloads the updated data and reconciles with the accounting package.

7.1.3.1. i. Importing Order

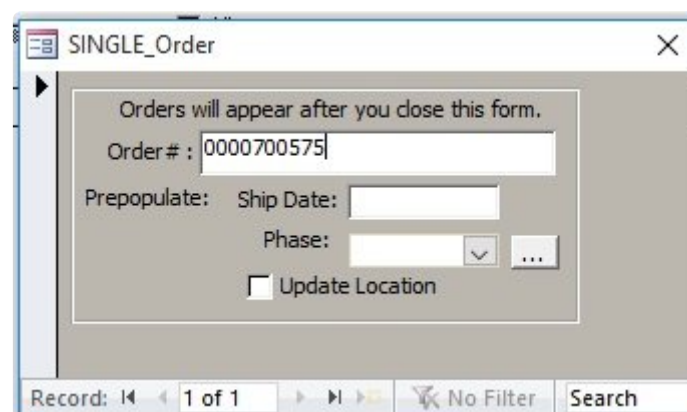
This knowledge base article will guide user on ways to import their orders to BASIS.

IMPORTING SINGLE ORDER

To import a single order. click on import single order from the sales order window



Type in the order number and then press enter.



✿ NOTE: Ship date and Phase are optional

Order should now be showing on the sales order window for processing.

IMPORTING ALL ORDERS

To import all orders from the accounting package. Click on Data Transfers



Tick on Sales Orders..

Import

Integration

BusinessVision 7

DSN

BVDATA

MODULES

Warehouses

...

All Warehouses (for importing options)

'00'

...

Products

...

...

Update Pricing ?

Delete Before Import

Workbook

BVESSInfo

Additional Info

Update Location

Set Non Serialized Items as Lot numbered

Serial Numbers (BV7)

...

...

Sales Orders

...

Committed quantities only

Download committed

Requ. today

Requ. up to Today

by Phase

Reassign all skids

PHASE_ID = 'TO PICK'

Delete All

Purchase Orders

Importing headers...

0

Delete All

Issued Only

Download partial received POs

Expected Today

Expected up to Today

Customers

...

...

BV7

Delete All

Updated Only

..

Vendors

...

...

Delete All

Updated Only

..

Production Orders from BVE

Importing headers...

0

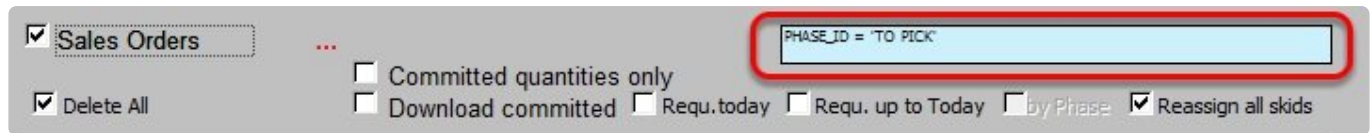
Import

✿ By default Delete All and Reassign all skids will be checked

p(banner important).NOTE:

FOR BVESSENTIALS the PHASE field should contain the value from which PHASE the order will be downloaded. e.g. TO PICK

FOR BV USERS this field can be left blank.

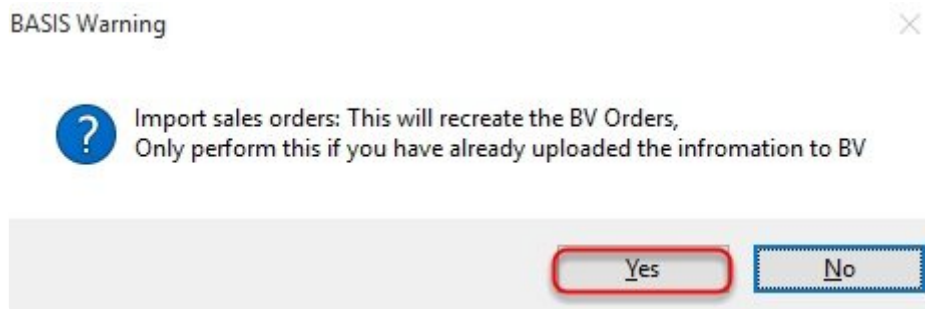


☒ Sales Orders
 ☐ Committed quantities only
 ☐ Download committed
 ☐ Requ. today
 ☐ Requ. up to Today
 ☐ by Phase
 ☒ Reassign all skids

PHASE_ID = TO PICK

☒ Delete All

Click Yes on the confirmation box.

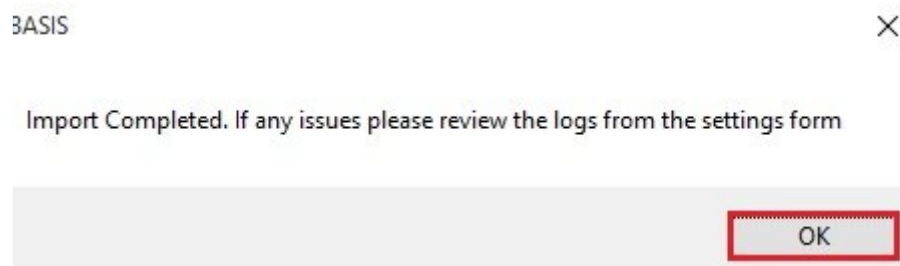


BASIS Warning

? Import sales orders: This will recreate the BV Orders,
 Only perform this if you have already uploaded the information to BV

Yes No

Click on Ok to complete the import



BASIS

Import Completed. If any issues please review the logs from the settings form

OK

AUTO IMPORT FEATURE

Basis has an auto import feature that is configured during the initial set up which by default configured to retrieve

the orders automatically every 10 minutes and uploads completed order back to the accounting package every

15 minutes.



NOTE:

FOR BVES :All orders imported to basis using the auto import feature will be place on hold so that enough time can be given to the admin to make some changes on the order before it gets uploaded back to the accounting package.

Export

Custom Toolbars

SALES ORDERS

Donut Time

Show only Completed orders

Show only updated orders

Show only On Hold Orders

Hide Completed orders

Get Data

Search By Number or Name

Search By Item Code

Double click to cancel

HH Selection

Reset

Hold

ASN

Delete

Tracking

Order No

Cust Code

Name

Date

Phase

Print

Printed

Status

Updated

To HH

Download

Complete

Reset

Hold

ASN

Delete

Tracking

0000700500	INTSYS	Integrated Sound Sol	05/06/2011									0						
0000700501	HARCOM	Hardy Computer Assoc	05/06/2011									0						
0000700504	ONTSND	Ontario Sound Empon	05/06/2011									0						
0000700505	HARNEW	Harris & Newland Inc	05/06/2011									0						
0000700506	NYAUDI	North York Audio Spe	10/06/2011									0						
0000700508	HARCOM	Hardy Computer Assoc	10/06/2011									0						
0000700510	JACSN	Jackson Electronics	11/06/2011									0						
0000700512	TORRAD	Toronto Radio Limite	14/06/2011									0						
0000700513	WHDIST	West Heights Distrib	14/06/2011									0						
0000700543	ACE	Ace Electronics	14/06/2011									0						
0000700546		Talbo Speakers	27/05/2016									0						
0000700547		Talbo Speakers	27/05/2016									0						

BarcodeApps © 2016

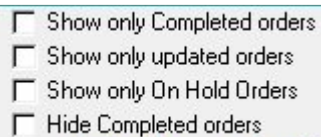
Page 1001 of 1305

7.1.3.2. ii. Reviewing Scanned Orders

This knowledge base article will guide user to review scanned orders using the basis desktop
After all scans are finish and the results are sent back to the cloud.

There are number of ways to retrieve and view the scanned items

- by pressing F5



- Using the show status options



- Click on Get data
- Let BASIS do it using the auto import feature.

Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

0000700575	ACME	Acme Electronics Cor	07/03/2016			0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000700576	TORRAD	Toronto Radio Limite	07/03/2016			0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700577	ACTECH	Access Technologies	07/04/2016			0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700578	TORRAD	Toronto Radio Limite	07/04/2016			0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GREEN	Completed Orders
ORANGE	Updated but not complete
YELLOW	On Hold Orders
NO HIGH LIGHT	Not Scanned

To review a scanned order just select the order from the scanned orders window and the details will show at the order details window

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

☐ Search By Number or Name
☐ Search By Item Code

Double click to cancel

HH Selection

☐ All
☐ Both
☐ All

☐ Reset All
☐ HOLD
☐ ASN
☐ Delete
☐ Tracking

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	Delete	Tracking
0000700575	ACME	Acme Electronics Cor	07/03/2016				0									Shio
0000700576	TORRAD	Toronto Radio Limite	07/03/2016				0									Shio
0000700577	ACTECH	Access Technologies	07/04/2016				0									Shio
0000700578	TORRAD	Toronto Radio Limite	07/04/2016				0									Shio

ORDERS WINDOW

Order Number: 0000700576

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report for: Report to XL

Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New Item	Upload	Location	Skid	Ser	Lot
1	00	SP-400-ST1	SP-400-ST1	Speakers - Power Bass Subwoofer	EA	9	10	0	9			shelf			Edt
2	00	ST-10	ST-10	Stand - for mini speakers	EA	15	13	0	15			Rack1			Edt
3	00	STS-02	STS-02	Surround Sound Home Theater System	EA	5	5	0	5			floor			Edt

ORDER DETAILS WINDOW

ord: 1 of 3

Import All Orders Import Single Order Upload to BVEssentials Create Orders BV Form Open Ship Form Print Barcodes Refresh Item Labels Send ASN to EDI ASN Report Update Locations Update Data to Carrier Upload Data From Carrier Import from MRA Export to MRA

SHIPPED QUANTITY will be color coded in order to verify if there is no discrepancy on the items and otherwise.

Order Number: 0000700576

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report for: Report to XL

Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New Item	Upload	Location	Skid	Ser	Lot
1	00	SP-400-ST1	SP-400-ST1	Speakers - Power Bass Subwoofer	EA	9	10	0	9			shelf			Edt
2	00	ST-10	ST-10	Stand - for mini speakers	EA	15	13	0	15			Rack1			Edt
3	00	STS-02	STS-02	Surround Sound Home Theater System	EA	5	5	0	5			floor			Edt

Record: 1 of 3

Import All Orders Import Single Order Upload to BVEssentials Create Orders BV Form Open Ship Form Print Barcodes Refresh Item Labels Send ASN to EDI ASN Report Update Locations Update Data to Carrier Upload Data From Carrier Import from MRA Export to MRA

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

7.1.3.3. iii. Making Changes

This knowledge base article will show users to modify scanned order from the sales order window in BASIS.

Orders can be edited before uploading an order back to the accounting package

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	Delete	Tracking
0000700575	ACME	Acme Electronics Cor	07/03/2016				0									
0000700576	TORRAD	Toronto Radio Limite	07/03/2016				0									
0000700577	ACTECH	Access Technologies	07/04/2016				0									
0000700578	TORRAD	Toronto Radio Limite	07/04/2016				0									

To edit an order just select the order from the Sales Order window.

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	Delete	Tracking
0000700575	ACME	Acme Electronics Cor	07/03/2016				0									
0000700576	TORRAD	Toronto Radio Limite	07/03/2016				0									
0000700577	ACTECH	Access Technologies	07/04/2016				0									
0000700578	TORRAD	Toronto Radio Limite	07/04/2016				0									

On the Order review window just click on the section the you plan to edit and after making the changes the order can be uploaded back to the accounting package.

Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New Item	Upload	Location	Skid	Ser	Lot	Edit
1	00	MD46	MD46	6" Midrange Cone Speaker	EA	22	19	0	22			shelf				Edit



Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Shipped Quantities.

7.1.3.4. iv. Uploading

This knowledge base article will guide user on how to upload the order back to the accounting package.

To upload the order back to the accounting package , select the order that you wish to upload.

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

☐ Search By Number or Name
☐ Search By Item Code

Double click to cancel

HH Selection

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	Delete	Tracking
0000700577	ACTECH	Access Technologies	07/04/2016	TO PICK	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shio
0000700578	TORRAD	Toronto Radio Limite	07/04/2016	TO PICK	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shio

Order Number: 0000700577

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
1	00		FCB-250	FCB-250	Finished cabinet for SP-250	EA	12	12	0	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	whse		<input type="checkbox"/>	Edit

FOR BVES: Click on the Upload to BVEssentials button.

Order Number: 0000700577

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select

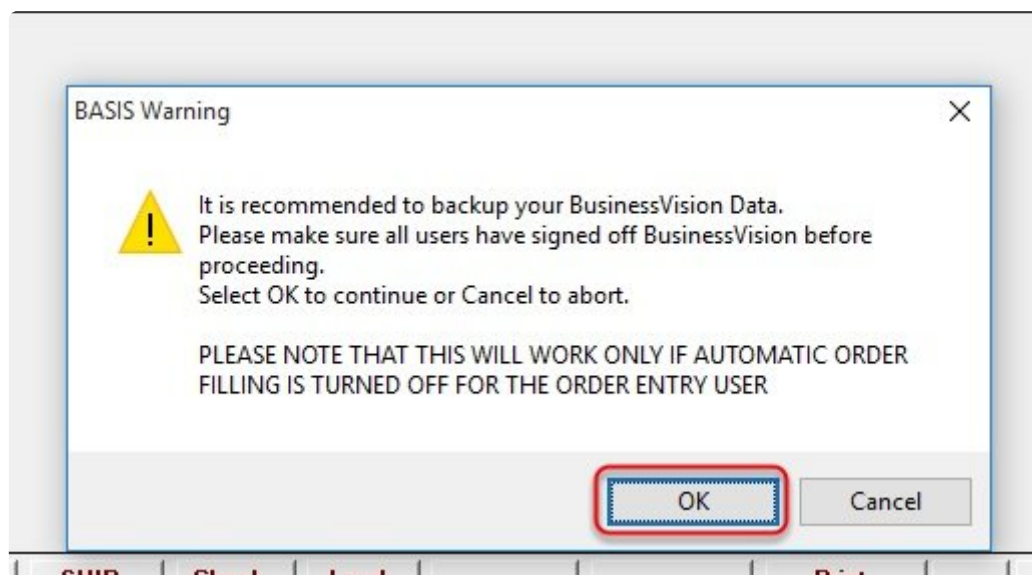
Skid	Line	WH	Item Code	Barcode	Description	U.C
	1	00	FCB-250	FCB-250	Finished cabinet for SP-250	E
*						

Record: 1 of 1 Unfiltered Search

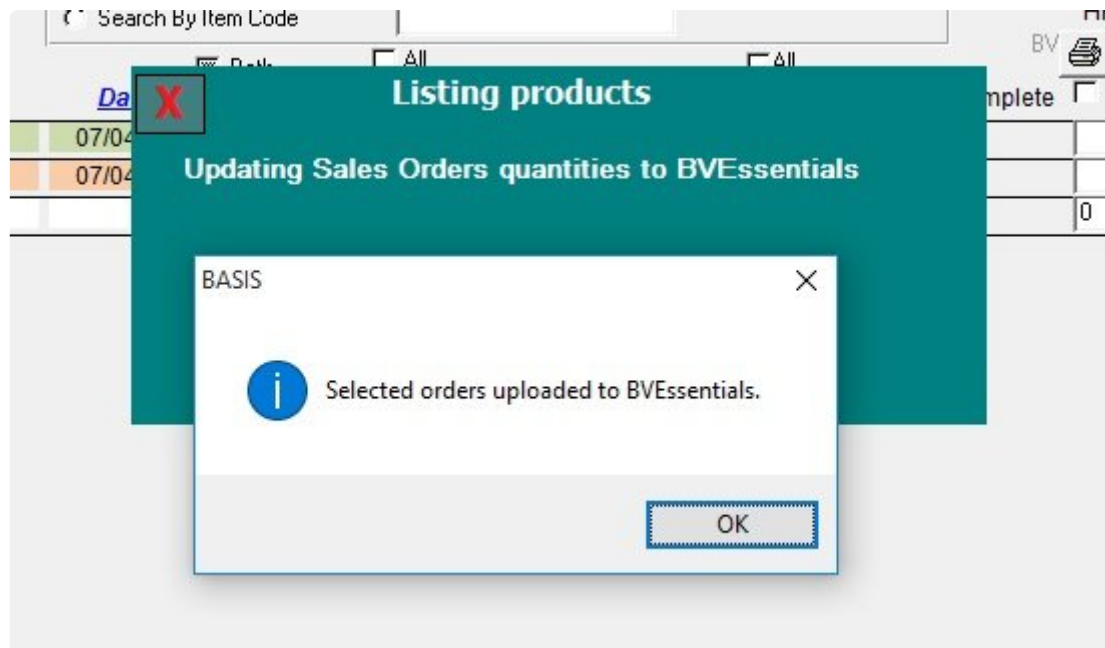
Import All Orders Import Single Order Upload to BVessentials Create Orders BV Form Open Ship Form Print Barcodes Refresh

Record: 1 of 2 No Filter Search

Click on OK



Click OK on the Prompt



Note : Orders successfully uploaded to BVESS will be erased out of the SALES ORDER WINDOW.

Now we can go back to BVESS and the uploaded order will show now as a “Processed Sales Order”

Sales - 0000700577 Access Technologies

This order has been processed and is read-only

Re-Open Order Dismiss

Main Bill To Ship To Info Phase Communication Sales History Sales Orders Attachments Fill Order Vehicle Info

Customer

Customer No ACTECH Access Technologies A/R Balance 23,313.72 Credit Limit 60,000.00

PO No Ref No 61 Other Orders 0.00 Available 36,686.28

Notes Salesperson Territory TC1

Shipping

Ship To Access Technologies Ship Via 03 Federal Express FOB Your Dock

Contact

Name Phone Fax/Cell Email

Order Details

Processed Sales Order

Order No 0000700577

Order Date 03/07/2016

Required Date / /

Invoice No

Invoice Date 03/07/2016

Repeat None

Phase

Items Rental

Insert Comment Serial Numbers Add Job Header Fill Backorders Prices

Part No	Description	Order Qty	Ship Qty	B/O Qty	Disc	Unit Price	Current Cost	U/M	Conversion Factor	G.S.T.
[00] FCB-250	Finished cabinet for SP-250	12	12	0	0.0	300.00	167.191	EA	1 EA per EA	<input checked="" type="checkbox"/>

Available 36,000 On Hand 50,000 Committed 14,000 Backorder 0,000 On Order 51,000 Expected 12/06/2011

Total Weight 0.0 Discount 0.0 % 0.00 Current GP 44.27 % 1,593.71 Subtotal 3,600.00

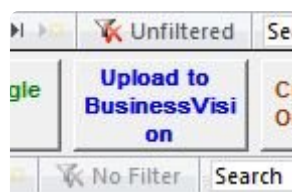
Freight 0.00 G.S.T. 180.00

3,780.00

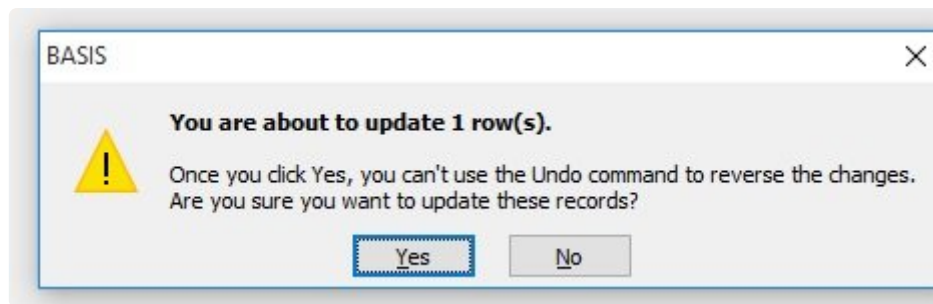
View Compact

Created by P on 03/07/2016 12:00:00 AM Modified by BV* on 04/07/2016 11:16:17 AM

FOR BV: Click on the Upload to Business Vision button.



Click on OK when prompted.



After the upload is done. We can now go back to BV to print the invoice and at the same time we can also check if the item(s) has been omitted from the inventory.

The screenshot shows the 'Inventory Details' window for warehouse '00' and part 'SAP90'. The description is 'Cables: Shielded Phono/RCA/6ft.'. The 'Summary' tab is selected. The 'Start at' field is set to '0000700501'. A table below shows two rows of inventory data, with the 'Order status' and 'Order qty.' columns highlighted by red boxes.

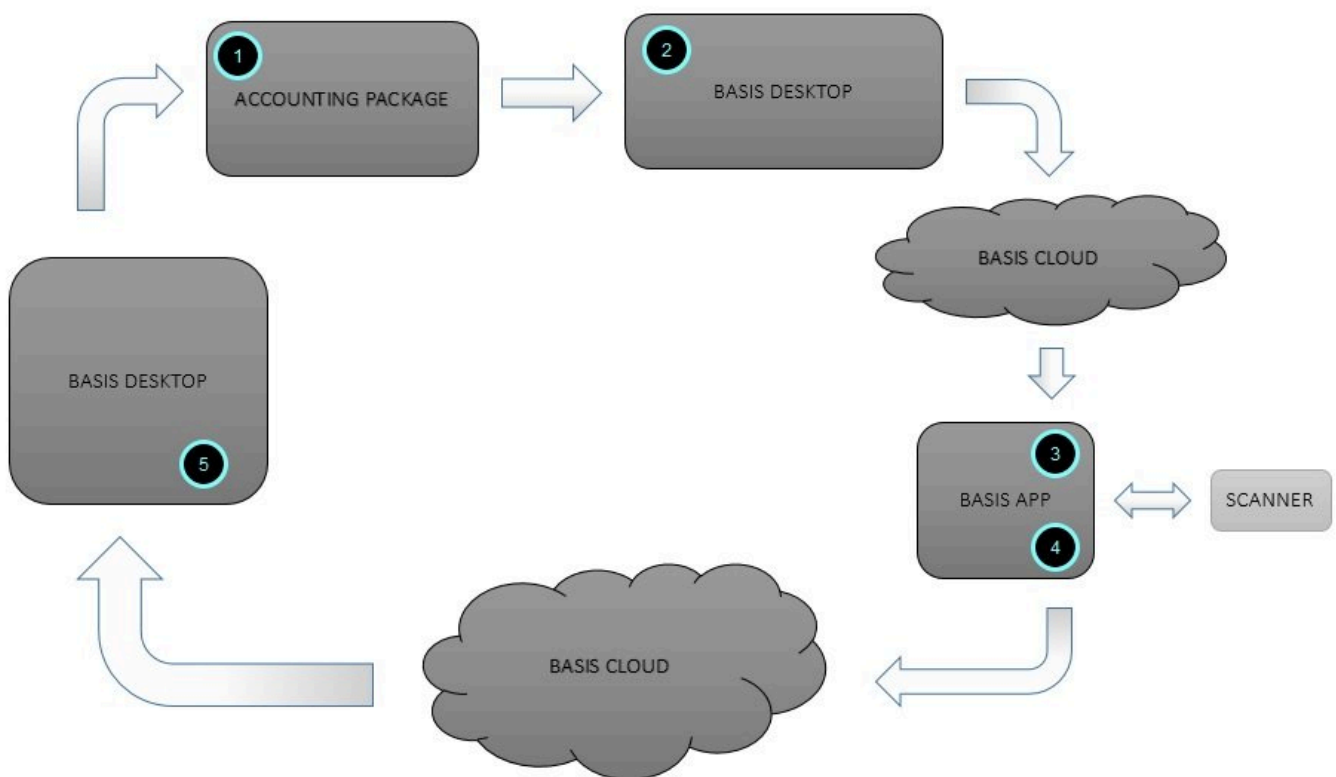
#	Order Number	Customer No.	Order Date	Line #	Order status	Order qty.	Sell UOM	Unit price	Extd. price
	0000700501	HARCOM	05-Jun-2011	001	Okay	6.00000	EA	12.00	72.00
	0000700505	HARNEW	05-Jun-2011	005	Okay	10.00000	EA	12.00	120.00

7.1.4. D. PURCHASE ORDER ENTRY

The Order Entry is a feature from BASIS that lets the program manage orders inside the accounting package with real time inventory tracking of received items.

PURCHASE ORDER CYCLE

Image below shows an illustration how a purchase order is processed with the help of Basis.



1. Order is created in the accounting package
2. Basis Downloads the order from the accounting package and sends it to the cloud.
3. The Basis App downloads the order details from the cloud server and scans the items received.
4. The Basis App sends the new data back to the cloud
5. Basis desktop downloads the updated data and reconciles with the accounting package.

7.1.4.1. i. Importing Purchase Order

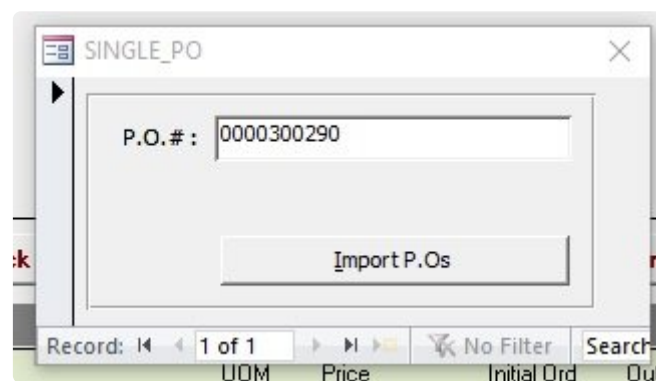
This knowledge base article will guide users on how to import a purchase order to the BASIS DESKTOP.

IMPORTING SINGLE PURCHASE ORDER

To import a single order , click on the Import Single P.Os button



Type in the Purchase Order Number then click on Import P.Os



The Purchase order should show now on the Purchase Order window. Clicking on the order will show the details on the purchase order details window.

PURCHASE ORDERS

Get Data Headers

☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All Delete All

1 **PO #** **Supp Code** **Name** **Date** **Print** **Printed** **Upload** **Download** **To HH** **Hold** **Order Complete** **Freight** **Duty** **By Weight** **Scan date**

0000300290	DAVELE	Davidson Electronics	04/06/2011	0000300290	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	1	<input checked="" type="checkbox"/> To Cloud
------------	--------	----------------------	------------	------------	--------------------------	--------------------------	--------------------------	--------------------------	-------------------------------------	--------------------------	--------------------------	--------	--------	---	--

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Duts	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300290	00	PCM3550	PCM3550	Personal Hand-held Organizer	EA	299	40	40	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300290	00	PCM8420	PCM8420	Personal Organizer	EA	450	60	60	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300290	00	STS-01	STS-01	Home Sound System with MP3 Dec	EA	1189	10	10	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300290	00	STS-01MAN	STS-01MAN	Instruction Manual STS-01 Soun	EA	15	7	7	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 4 ☐ Unfiltered Search

Status 0000300290 Importing Headers...

Excel Path

2

IMPORTING ALL PURCHASE ORDER

To import all purchase order click on the data transfer module from the main basis window



Tick on the Purchase Orders and then click on Imports.

Import

Integration: BusinessVision 7 DSN: BVDATA

MODULES

☐ Warehouses ...

☐ All Warehouses (for importing options)

00' ...

☐ Products ...

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESInfo ☐ Additional Info ☐ Update Location ☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7) ...

☐ Sales Orders ...

☒ Delete All ☐ Committed quantities only ☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids

☒ Purchase Orders **Importing headers...** 0

☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today

☐ Customers ...

☒ BV7 ☐ Delete All ☐ Updated Only ..

☐ Vendors ...

☐ Delete All ☐ Updated Only ..

☐ Production Orders from BVE **Importing headers...** 0

☐

Import 2

The total number of items should show once the import is completed

☒ Purchase Orders **Done** 52

☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today

To check the results just go bak to the Purchase Order module and the results should be showing on the main screen.

PURCHASE ORDERS

Get Data

Headers

☐ Show only updated purchase orders

Search (Number or Name or Date)

Double click to cancel

☐ Include PST in price calculations

☐ All

Delete All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date		
0000300274	CLASND	Clarence Sound Syete	10/06/2011	0000300274	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300288	INSSND	International Sound	11/06/2011	0000300288	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300290	DAVELE	Davidson Electronics	04/06/2011	0000300290	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300293	CLAIR	Clairons Specialty S	11/06/2011	0000300293	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300294	BOSAUD	Bosley Audio Supply	05/06/2011	0000300294	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300296	NATWIR	National Wire	10/06/2011	0000300296	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud

AUTO IMPORT FEATURE

Basis has an auto import feature that is configured during the initial set up which by default configured to retrieve

the orders automatically every 10 minutes and uploads completed order back to the accounting package every

15 minutes.

IMPORTING GROUP PO (FOR BV USERS ONLY)

Another feature for BV user is the Group PO functionality . Where you can combine multiple PO using an excel sheet. This allows users to group purchase orders making receving items more efficient and organize.

Before getting started. we have to make sure that the excel file has the correct format.

Here is a sample group excel file that have three PO (341364,341365,341366) listed on it. we named this as TESTPO.xls

TEST PO.xlsx - Excel

File Home Insert Draw Page Layout Formulas Data Review View Add-ins Tell me what you want to do

Clipboard Font Alignment Number Styles Cells

MS Sans Serif 8 A A Wrap Text General Normal Bad Good Neutral Insert Delete

	A	B	C	D	E	F	G	H	I	J	K	L
	CustomerNo	Cust Name	CustomerPO	EntryDate	DueDate	ShippingNo	ShippedDate	InvoiceNo	Inv Date	SerialNo	ItemNo	DescriptionMed
1	160017	Golden Tech Of Canada	341364	06/20/2016	07/26/2016	PS160706999	07/19/2016			GT1607R3B06370	PR200-MED-STD-ACF	Capi Medium Amadora Comflower
2	160017	Golden Tech Of Canada	341365	06/20/2016	07/26/2016	PS160706999	07/19/2016			GT1607FAS09618	PR200-MED-STD-ACF	Capi Medium Amadora Comflower
3	160017	Golden Tech Of Canada	341366	06/20/2016	07/26/2016	PS160706999	07/19/2016			GT1605FAS09430	PR200-MED-STD-ACF	Capi Medium Amadora Comflower
4	160017	Golden Tech Of Canada	341364	06/20/2016	07/26/2016	PS160706999	07/19/2016			GT1603FAP13060	PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl
5	160017	Golden Tech Of Canada	341365	04/25/2016	05/23/2016	PS160707254	07/19/2016			GT1603FAP15223	PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl
6	160017	Golden Tech Of Canada	341366	07/15/2016	08/19/2016	PS160706993	07/19/2016			GT1603FAP15228	PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl
7	160017	Golden Tech Of Canada	341366	05/16/2016	06/21/2016	PS160706995	07/19/2016			GT1606FAP02755	PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl
8	160017	Golden Tech Of Canada	341364	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1606FAP09882	PR501-JPT-STD-PST	Cloud Medium Large AutoDrive Porto Hazdenut
9	160017	Golden Tech Of Canada	341365	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1606FAP15452	PR501-JPT-STD-PST	Cloud Medium Large AutoDrive Porto Hazdenut
10	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1606FAP15466	PR505-MED-DSC-MC2	MaxiComfort Small AutoDrive Coil Springs Amadora Pearl DHV
11	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1506FAS10900	PR505-MED-DSC-MC2	MaxiComfort Small AutoDrive Coil Springs Amadora Pearl DHV
12	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1605FAS05541	PR505-MED-DSC-MC2	MaxiComfort Small AutoDrive Coil Springs Amadora Pearl DHV
13	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1605FAS05547	PR505-MED-DSC-MC2	MaxiComfort Small AutoDrive Coil Springs Amadora Pearl DHV
14	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016			GT1606FAP03556	PR505-MED-DSC-MC2	MaxiComfort Small AutoDrive Coil Springs Amadora Pearl DHV
15	160017	Golden Tech Of Canada	341366	06/27/2016	08/08/2016	PS160707022	07/19/2016					
16												
17												
18												

Sample screenshot of the Purchase order that is included in the group po. As you will see there are no UPC code on the item.

Sage BusinessVision Client-Server Edition - NEW COMPANY - [Purchase Order Details - 0000341364]

File Edit View Utilities Options Window Help

P.O. Number: 0000341364 Vendor No: TEST Order Number: Status: Issued Order Date: 01/21/17 Required Date: 01/21/17 Received date: 02/04/17

Item Details | Order Details | Address | Ship-To | Notes

Whse.	Part number	Description	Buy UOM	Order q
00	PR-CAPRI ACF	Capi Medium Amadora Comflower	EA	1.0000
00	PR-630 APE	PR630 Medium AutoDrive Amadora Pearl	EA	1.0000
00	PR-501JP PST	Cloud Medium Large AutoDrive Porto Hazdenut	EA	1.0000

Warehouse: 00 Part number: PR-501JP PST Description: Cloud Medium Large AutoDrive Porto Hazdenut

Details | Unit of Measure | Pricing | Extended | Info | Summary | Usage | S.O.s | S.O.s History | P.O.s | P.O. History | Receipts | Vendor Pricing | S

UOM Code: EA

Description: Quantity factor: 1.00000

☒ Buy unit of measure ☒ Sell unit of measure ☒ Allow fractional quantities in orders

UPC code: Location: Weight: 0.000

First step is to make sure that the part number are imported to basis. We can do this by clicking on Data transfer

Sage BusinessVision Client-Server Edition - NEW COMPANY - [Inventory Details - 00 -PR-501JP PST]

File Edit View Utilities Options Window Help

Warehouse: 00
Part number: PR-501JP PST Active
Description: Cloud Medium Large AutoDrive Porto Hazlenut

Details Unit of Measure Pricing Extended Info Summary Image S.O.s S.O.s History P.O.s P.O. History Receipts Vendor Pricing Serial Numbers Notes

UOM Code
EA

Details

Description
Quantity factor: 1.00000
☒ Buy unit of measure
☒ Sell unit of measure
☒ Allow fractional quantities in orders
UPC code
Location
Weight: 0.000

Select the warehouse, check on Products and then click on Import



Click on yes to sync all part numbers to cloud

Integration: BusinessVision 7 DSN: NEW

Import

MODULES

☐ Warehouses ...

☐ All Warehouses (for importing options)

...

☒ Products ...

☐ Update Pricing ? ☒ Delete Before Import ☐ Workbook ☐ BVESSInfo ☐ Additional Info ☐ Update Location ☒ Active Only

☐ Set Non Serialized Items as Lot numbered

☐ Serial Numbers (BV7) ...

☐ Sales Orders ...

☒ Delete All ☐ Committed quantities only ☐ Download committed ☐ Requ. today ☐ Requ. up to Today ☐ by Phase ☒ Reassign all skids

☐ Purchase Orders **Importing headers...** 0

☒ Delete All ☐ Issued Only ☐ Download partial received POs ☐ Expected Today ☐ Expected up to Today

☐ Customers ...

☒ BV7 ☐ Delete All ☐ Updated Only ..

☐ Vendors ...

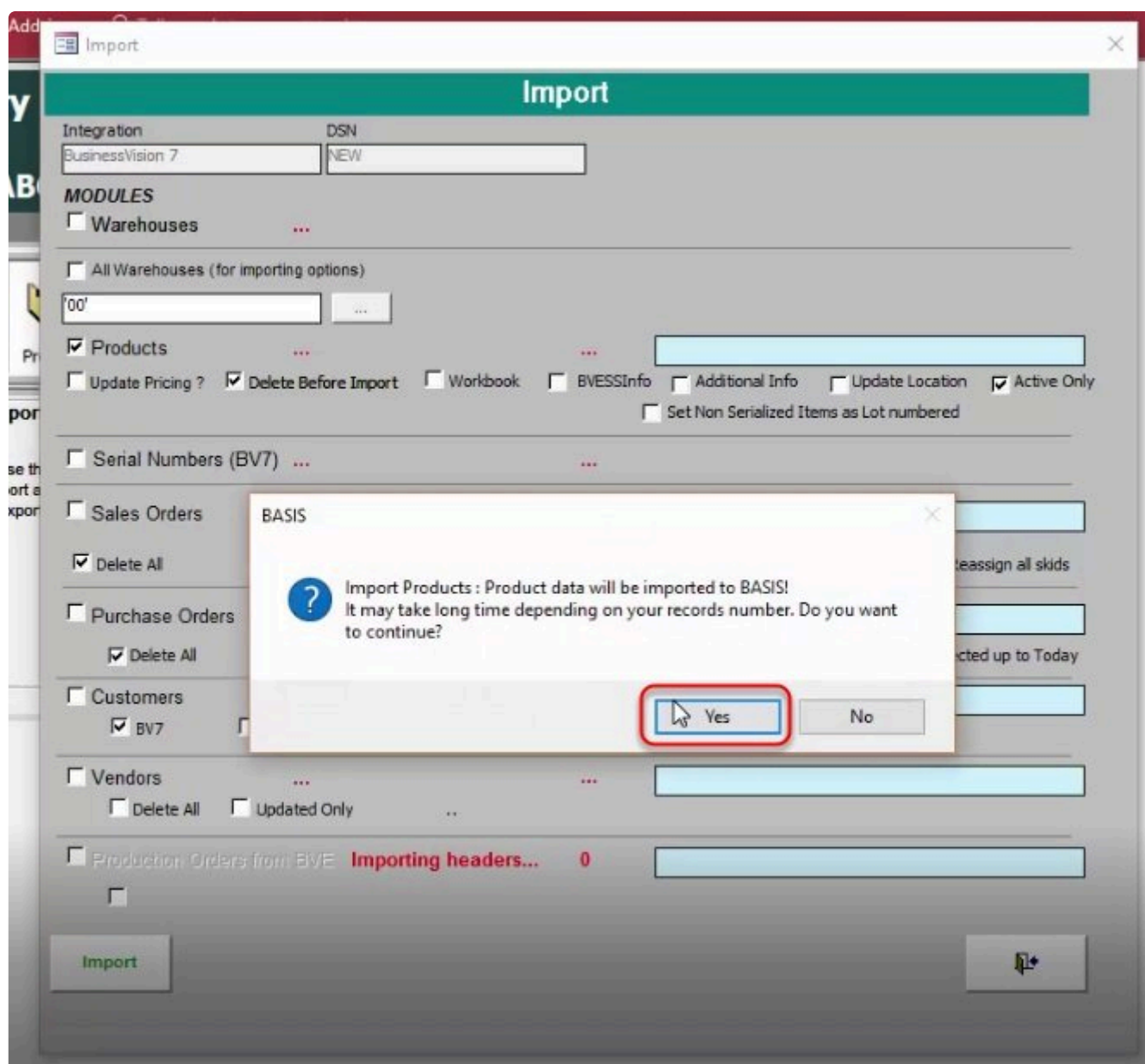
☐ Delete All ☐ Updated Only ..

☐ Production Orders from BVE **Importing headers...** 0

☐

Import

Second step is to import the PO's.

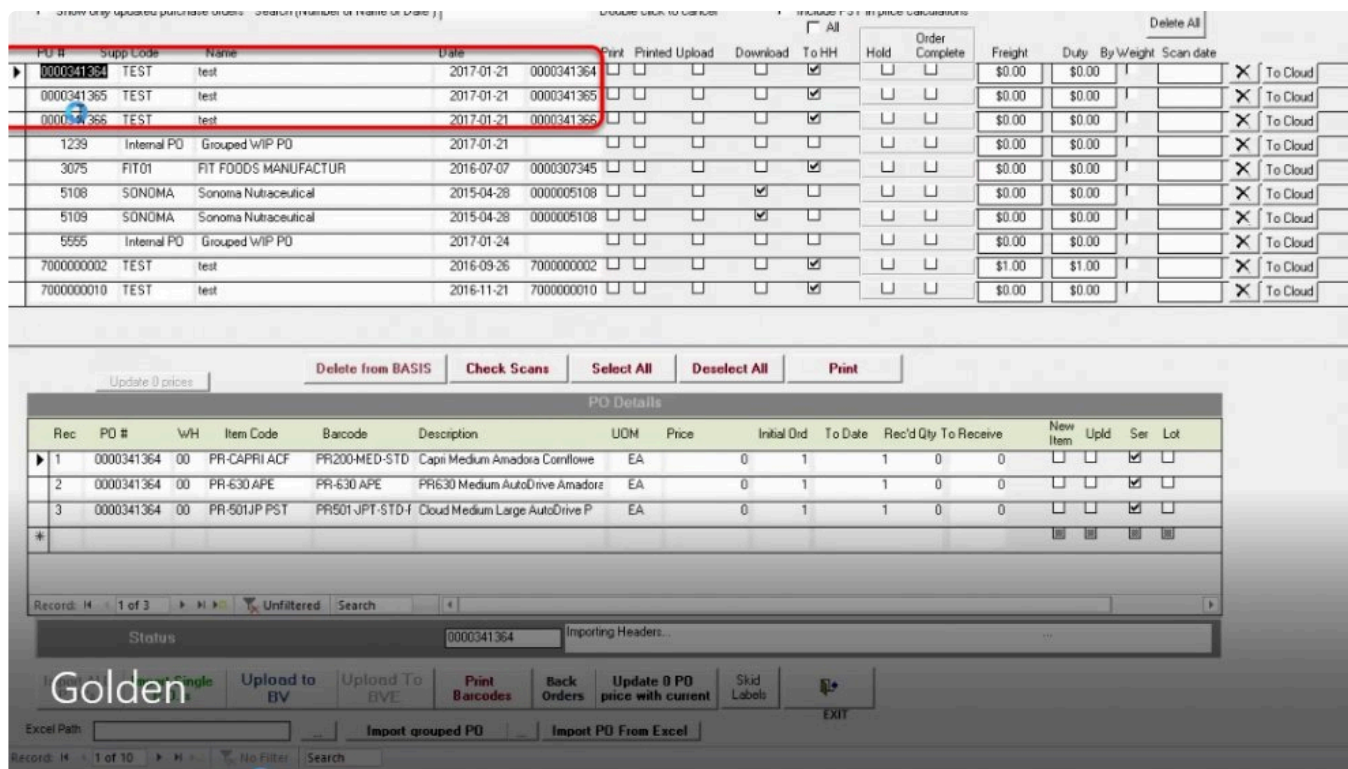


Note: This process is also automated (see auto import)

Once all import have completed we can begin the process of importing group PO



To begin the import click on the browse button.



Navigate to the location on where the excel file that contains the PO details is saved and then open the file.

PURCHASE ORDERS

Get Data Headers

☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date		
0000341364	TEST	test	2017-01-21	0000341364	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
0000341365	TEST	test	2017-01-21	0000341365	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
0000341366	TEST	test	2017-01-21	0000341366	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
1239	Internal PO	Grouped W/P PO	2017-01-21		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
3075	FIT01	FIT FOODS MANUFACTUR	2016-07-07	0000307345	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
5108	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
5109	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
5555	Internal PO	Grouped W/P PO	2017-01-21		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud
7000000002	TEST	test	2016-09-26	7000000002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$1.00	\$1.00		<input checked="" type="checkbox"/>	To Cloud
7000000010	TEST	test	2016-11-21	7000000010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/>	To Cloud

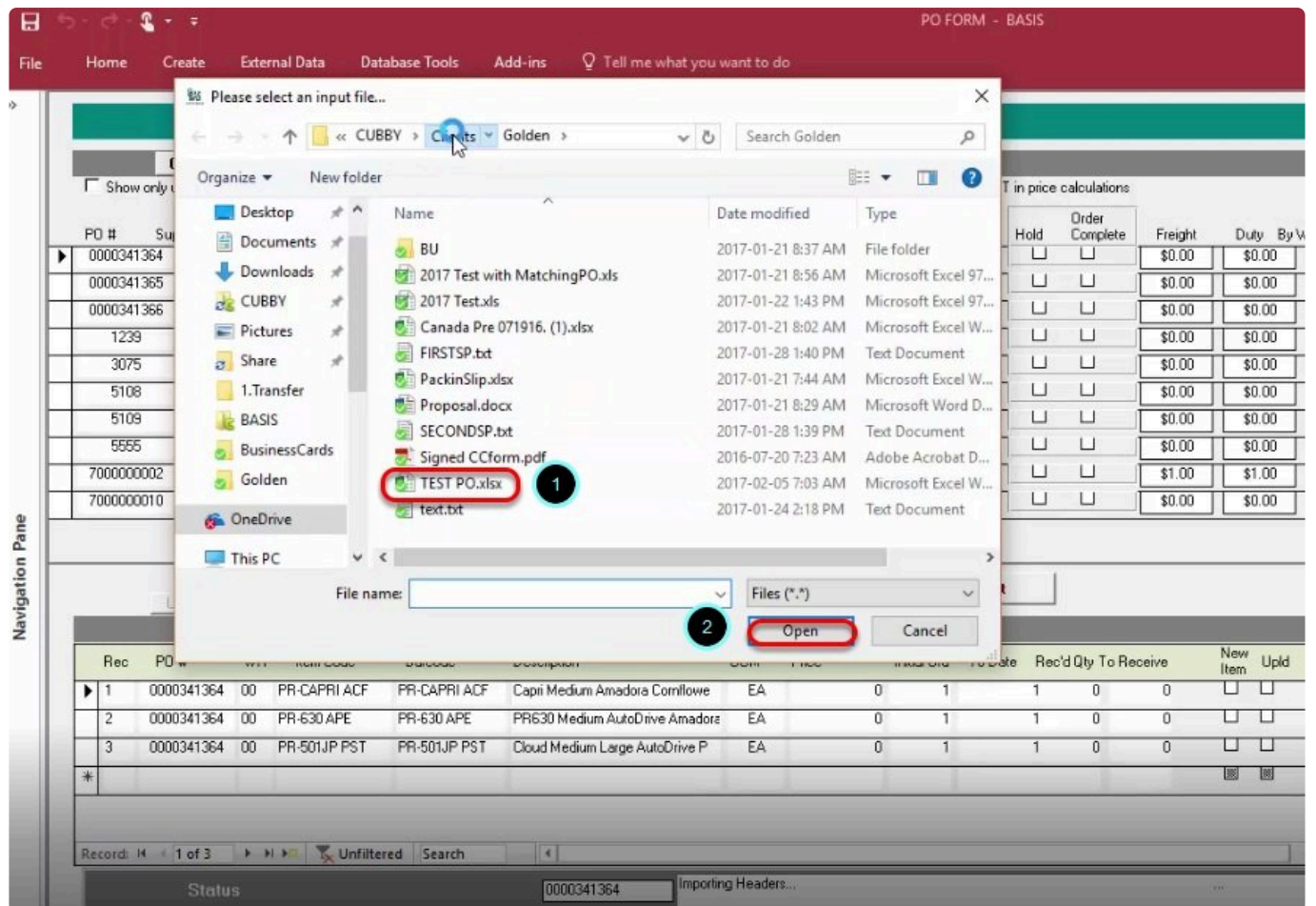
PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	To Date	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000341364	00	PR-CAPRI ACF	PR-CAPRI ACF	Cape Medium Amadora Cornflowe	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	0000341364	00	PR-630 APE	PR-630 APE	PR630 Medium AutoDrive Amadore	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	0000341364	00	PR-501JP PST	PR-501JP PST	Cloud Medium Large AutoDrive P	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+ <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>															

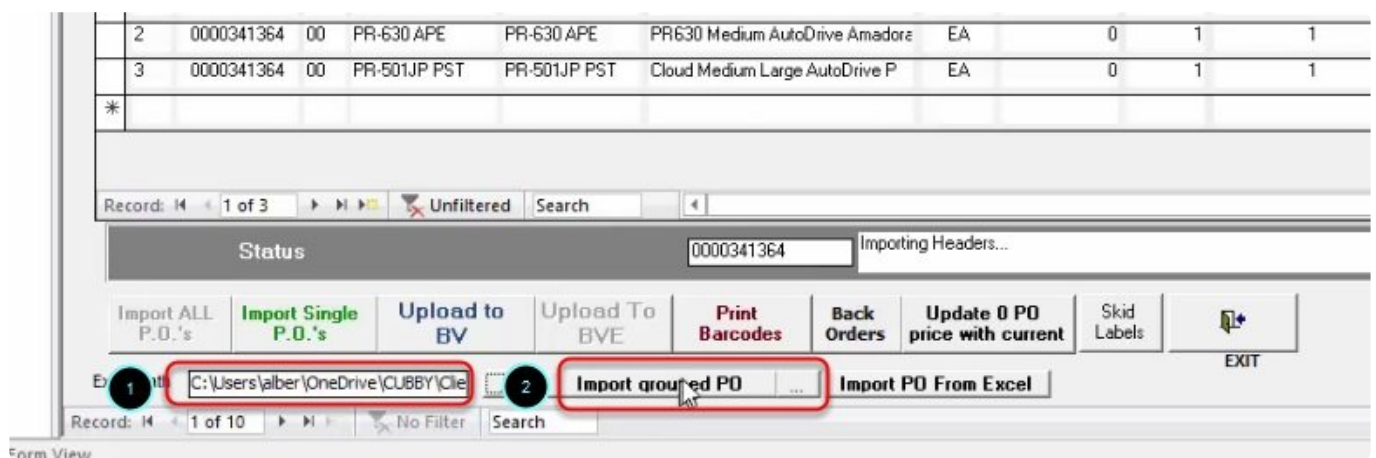
Record: 1 of 3 Search

Status 0000341364 Importing Headers...

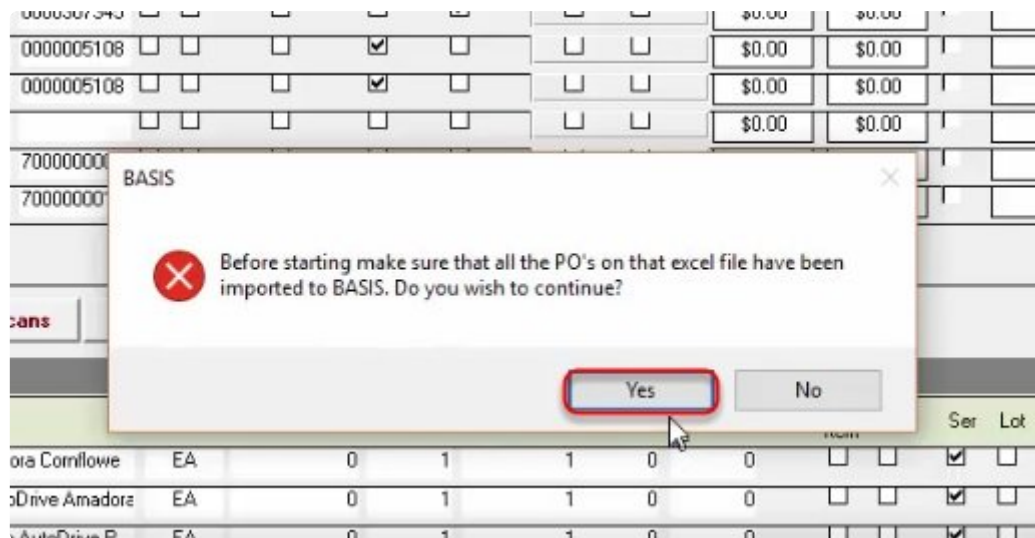
Excel Path



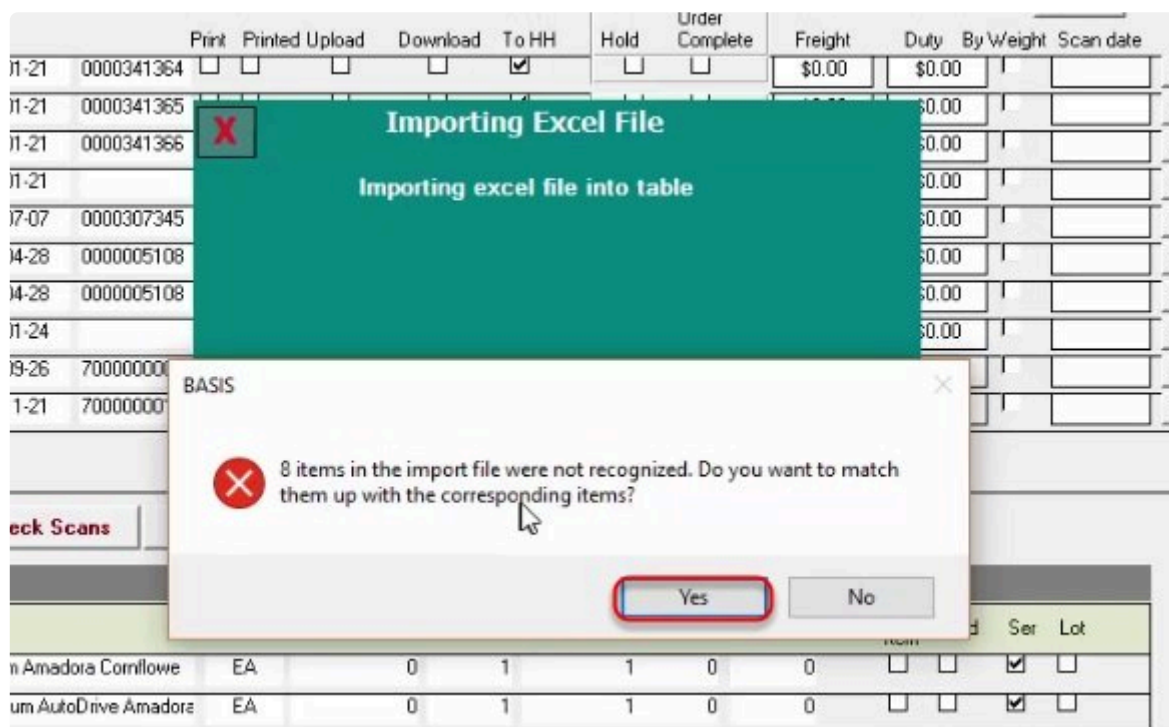
The excel path section should be filled now with the path location. we can now click on Import Grouped PO.



Click on Yes.



You will get a prompt that basis didn't recognize the items that is in the excel file. To match those items with the PO's that were imported in basis click on YES



This will show a window that has the list of Items that was recognize from the PO that is inside the excel file.



Definition
F11 – Part number
F12 – Product description
F3 – PO number

To start matching the part number select a Part number and then select on the drop down menu to show all items that are in the Excel file.



Select the item that matches the description of your item.

5	PR-CAPRI ACF	00	1	Capri Medium Amadora Cornflowe
8	PR-630 APE	00	1	PR630 Medium AutoDrive Amadora
5	PR-501JP PST	00	1	Cloud Medium Large AutoDrive P

note: 1 means that the item is active.

click on Match

Barcode Select

Find missing Corresponding barcodes

Click on the part number in the list to select it

F11	F12	F3
PR200-MED-STD-ACF	Capri Medium Amadora Cornflower	0000341364
PR200-MED-STD-ACF	Capri Medium Amadora Cornflower	0000341365
PR200-MED-STD-ACF	Capri Medium Amadora Cornflower	0000341366
PR501-JPT-STD-PST	Cloud Medium Large AutoDrive Porto Hazlenut	0000341364
PR501-JPT-STD-PST	Cloud Medium Large AutoDrive Porto Hazlenut	0000341365
PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl	0000341364
PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl	0000341365
PR630-MED-DSC-APE	PR630 Medium AutoDrive Amadora Pearl	0000341366

Record: 1 of 8

No Filter

Search

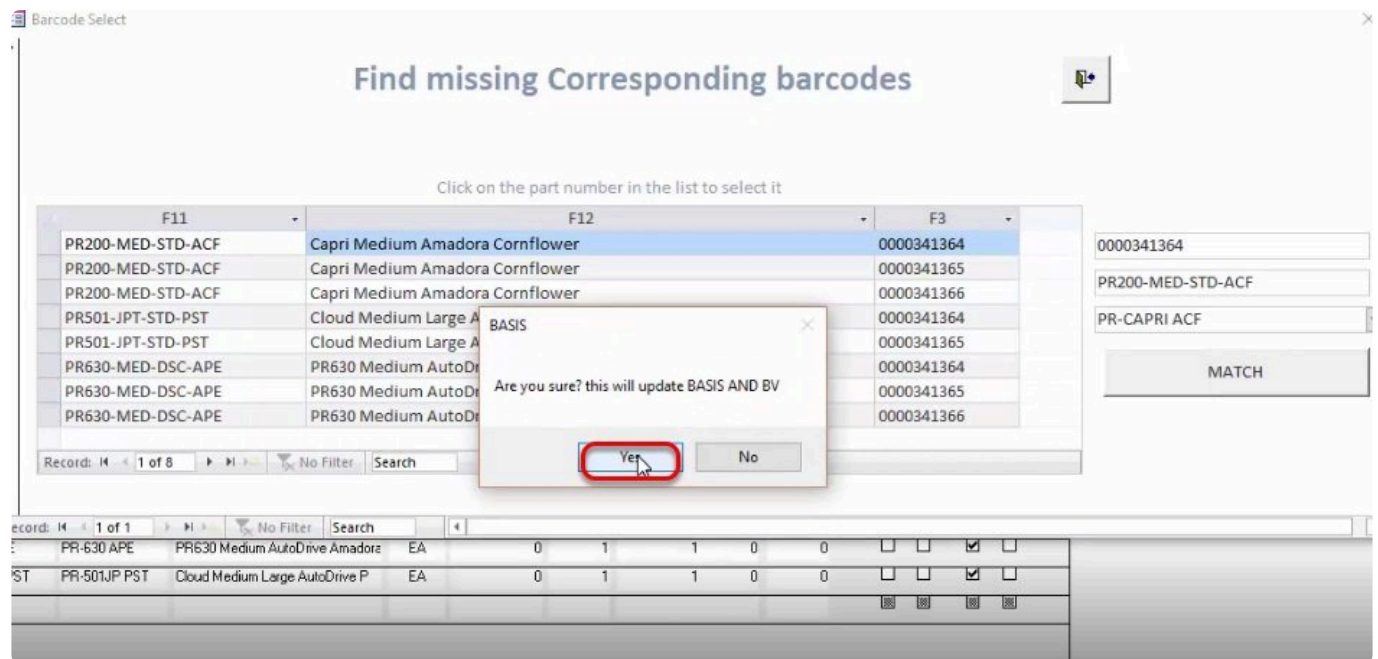
0000341364

PR200-MED-STD-ACF

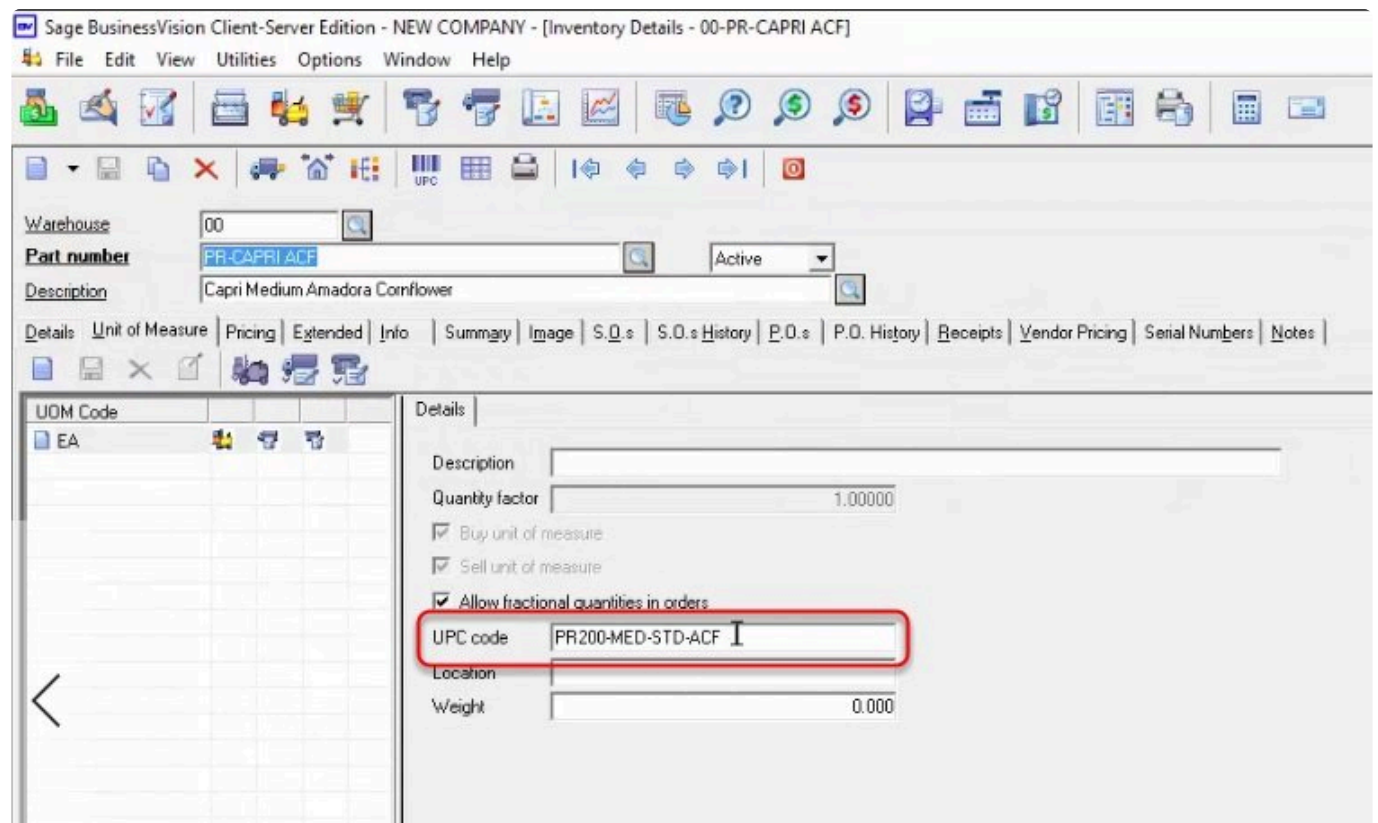
PR-CAPRI ACF

MATCH

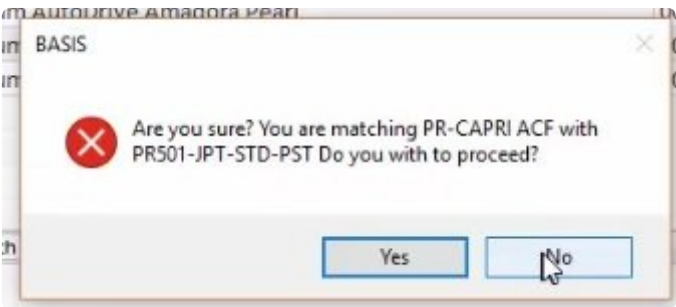
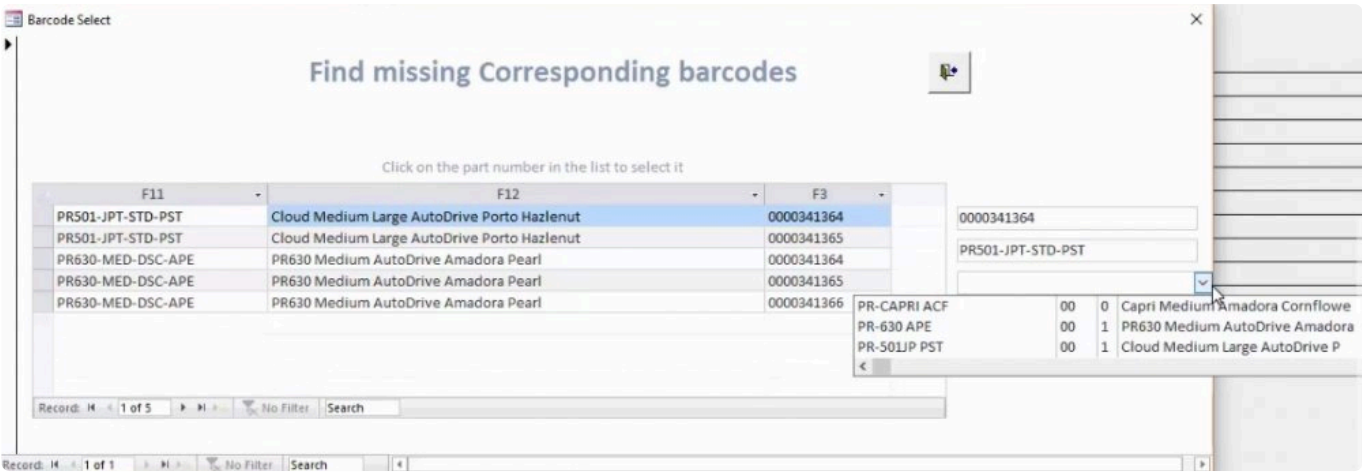
Click on yes to sync the items



To check the results we can go back to Business Vision and we should now see that the item has a UPC code



Repeat the same procedure till all items are matched.

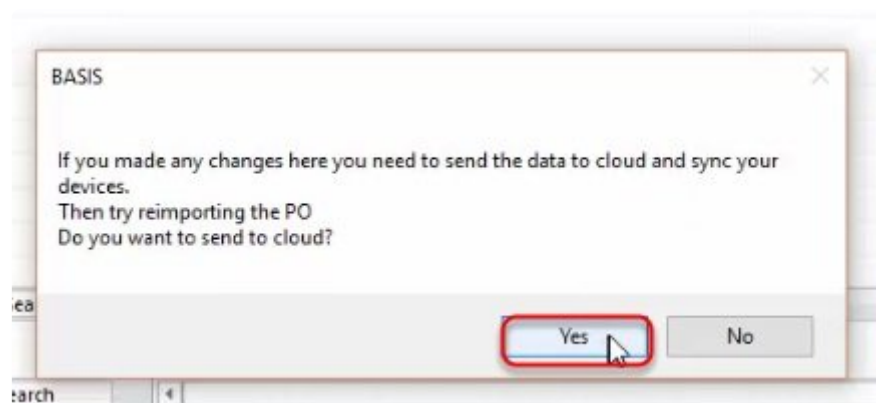


* Note: Going back to the same item that was matched earlier will now show it's zero and picking the same item will show a notification

The table should now be empty once finish. To end the process click on Exit.



Click on Yes to apply the changes to the cloud.



Third step is to create the group PO, To get started . click on Import group PO

PO FORM - BASIS

File Home Create External Data Database Tools Add-ins Tell me what you want to do

PURCHASE ORDERS

Get Data Headers

Show only updated purchase orders Search (Number or Name or Date) Double click to cancel Include PST in price calculations

☐ All ☐ Delete All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date	
0000341364	TEST	test	2017-01-21	0000341364	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
0000341365	TEST	test	2017-01-21	0000341365	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
0000341366	TEST	test	2017-01-21	0000341366	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
1239	Internal PO	Grouped WIP PO	2017-01-21		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
3075	FIT01	FIT FOODS MANUFACTUR	2016-07-07	0000307345	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
5108	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
5109	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
5555	Internal PO	Grouped WIP PO	2017-01-24		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud
7000000002	TEST	test	2016-09-26	7000000002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$1.00	\$1.00			X To Cloud
7000000010	TEST	test	2016-11-21	7000000010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			X To Cloud

Navigation Pane

Update 0 prices Delete from BASIS Check Scans Select All Deselect All Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	To Date	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000341364	00	PR-CAPRI ACF	PR-CAPRI ACF	Capri Medium Amadora Cornflowe	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	0000341364	00	PR-630 APE	PR-630 APE	PR630 Medium AutoDrive Amadora	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	0000341364	00	PR-501JP PST	PR-501JP PST	Cloud Medium Large AutoDrive P	EA	0	1	1	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*												<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 3 Unfiltered Search

Status 0000341364 Importing Headers...

Import ALL P.O.'s Import Single P.O.'s Upload to BV Upload To BVE Print Barcodes Back Orders Update 0 PO price with current Skip Labels EXIT

Excel Path: C:\Users\jaber\OneDrive\CLBBY\Cle Import grouped PO Import PO From Excel

Enter the Group PO number and then click on OK

Print	Printed	Upload	Download	To HH	Hold	Complete	Freight	Duty	By Weight	Sc
000341364	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000341365	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000341366	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000307345	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000005108	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
000000002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$1.00	\$1.00		
000000010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		

BASIS

Please Enter PO Number
Default will be WIP20170205
If you don't enter anything

12345

2

OK

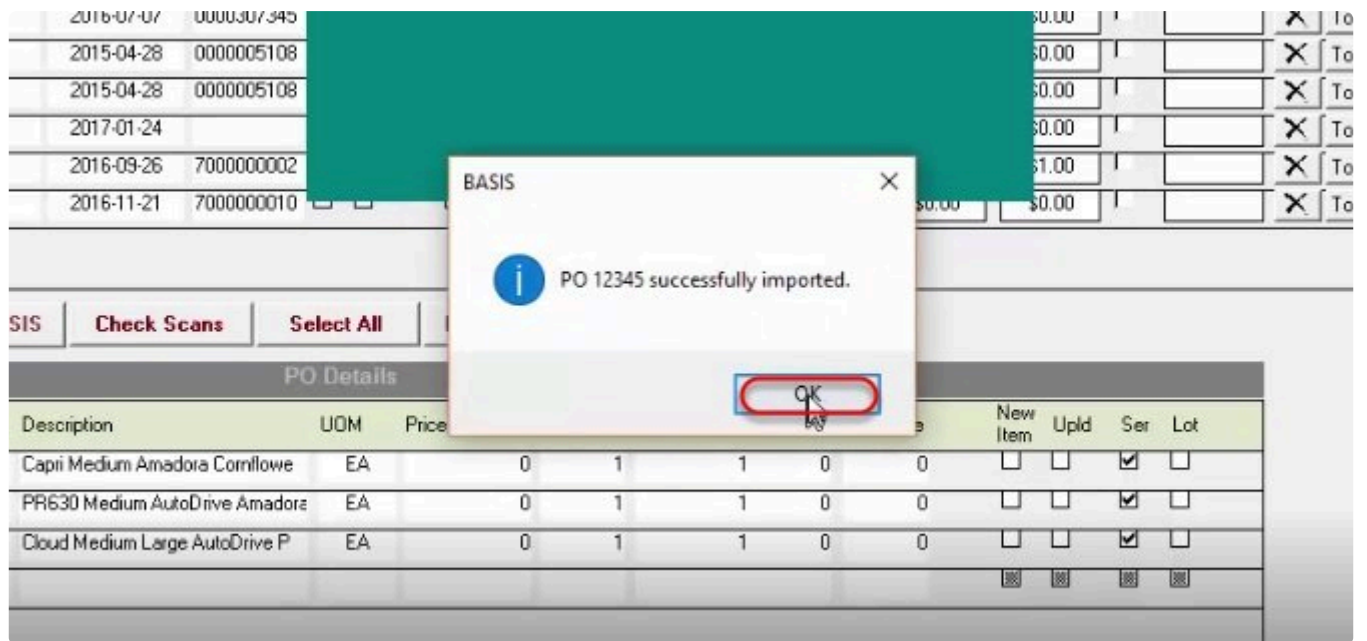
1

1

Cancel

Note: If you wish to leave it blank it will be defaulted to a system value (WIP20170205)

Click on OK



Now we have a group purchase order (12345) Select the group po and check if all items are included.

PO FORM - BASIS

File Home Create External Data Database Tools Add-ins Tell me what you want to do

PURCHASE ORDERS

Get Data Headers

Show only updated purchase orders Search (Number or Name or Date) Double click to cancel Include PST in price calculations Delete All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date
0000341364	TEST	test	2017-01-21	0000341364							\$0.00	\$0.00		
0000341365	TEST	test	2017-01-21	0000341365							\$0.00	\$0.00		
0000341366	TEST	test	2017-01-21	0000341366							\$0.00	\$0.00		
12345	Internal PO	Grouped WIP PO	2017-01-21								\$0.00	\$0.00		
1239	Internal PO	Grouped WIP PO	2017-01-21								\$0.00	\$0.00		
3075	FIT01	FIT FOODS MANUFACTUR	2016-07-07	0000307345							\$0.00	\$0.00		
5108	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108							\$0.00	\$0.00		
5109	SONOMA	Sonoma Nutraceutical	2015-04-28	0000005108							\$0.00	\$0.00		
5555	Internal PO	Grouped WIP PO	2017-01-24								\$0.00	\$0.00		
7000000002	TEST	test	2016-09-26	7000000002							\$1.00	\$1.00		
7000000010	TEST	test	2016-11-21	7000000010							\$0.00	\$0.00		

Update 0 prices Delete from BASIS Check Scans Select All Deselect All Print

PO Details

PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	To Date	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	12345	01	PR-501JP PST	PR501-JPT-STD-I Cloud Medium Large AutoDrive Por	EA	0	2	0	0	2				
2	12345	01	PR-505M MC2AD: PR505-MED-DSC	MaxComfort Small AutoDrive Coil S	EA	0	5	0	0	5				
3	12345	01	PR-630 APE	PR630-MED-DSC PR630 Medium AutoDrive Amadore	EA	0	4	0	0	4				
4	12345	01	PR-CAPRI ACF	PR200-MED-STD Capri Medium Amadora Cornflower	EA	0	3	0	0	3				

Records: 1 of 4 Unfiltered Search

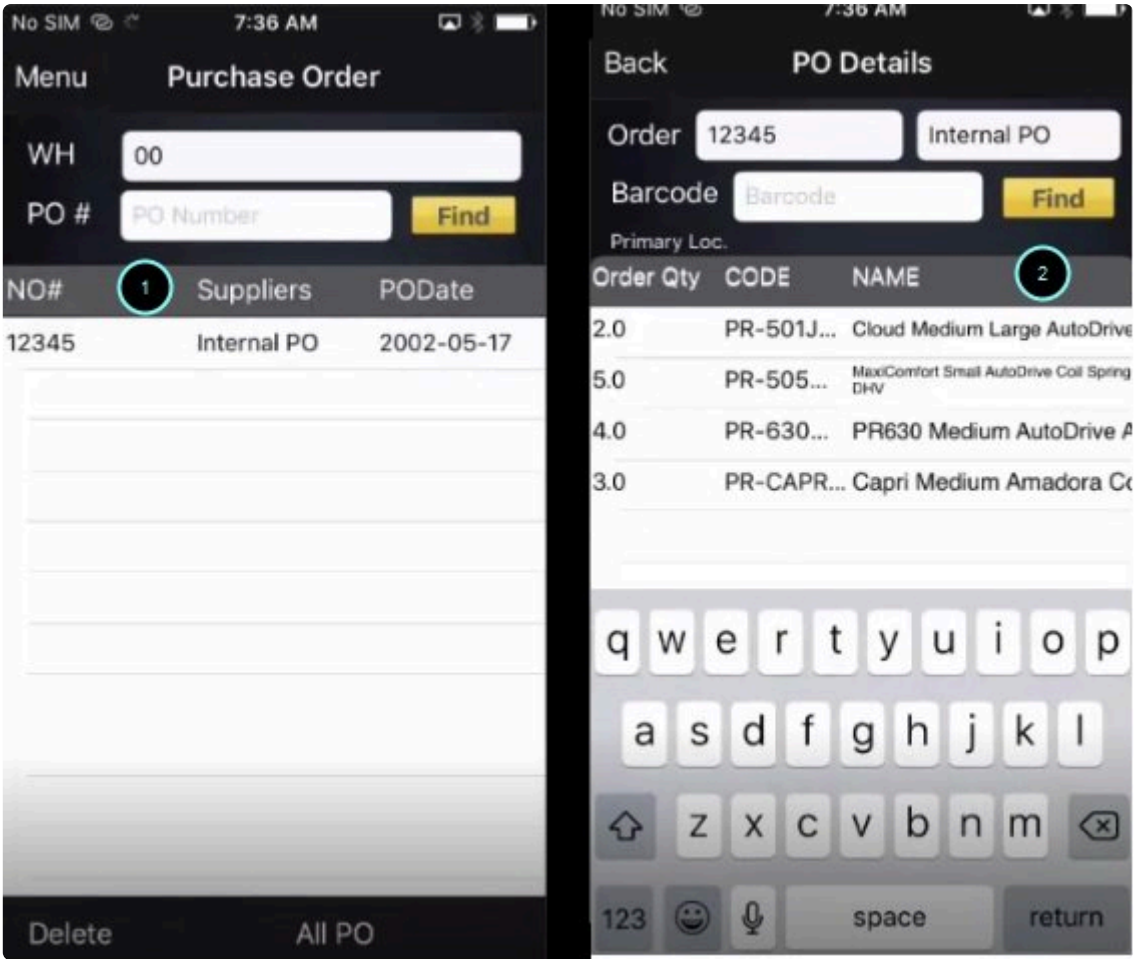
Status 12345 Importing Headers...

Import ALL P.O.'s Import Single P.O.'s Upload to BV Upload to BVE Print Barcodes Back Orders Update 0 PO price with current Skid Labels EXIT

Excel Path Import grouped PO Import PO From Excel

Record: 4 of 11 No Filter Search

Group PO should now be available on the BASIS App for items to be received ([see scanning po](#))



Once all items are received. we can now go back to the basis desktop to complete the sync

PO FORM - BASIS

FileHomeCreateExternal DataDatabase ToolsAdd-insTell me what you want to do

PURCHASE ORDERS

Get Data

Headers

Show only updated purchase orders

Search (Number or Name or Date)12345

Double click to cancel

Include PST in price calculations

All

Delete All

PO #

Supp Code

Name

Date

Print

Printed

Upload

Download

To HH

Hold

Order Complete

Freight

Duty

By Weight

Scan date

X

To Cloud

12345

Internal PO

Grouped WIP PO

2002-05-17

\$0.00

\$0.00

Update 0 prices

Delete from BASIS

Check Scans

Select All

Deselect All

Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	To Date	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	12345	01	PR-501JP PST	PR501-JPT-STD-I	Cloud Medium Large AutoDrive Pot	EA	0	2	0	2	0				
2	12345	01	PR-505M MC2 ADI	PR505-MED-DSC	MaxiComfort Small AutoDrive Coil S	EA	0	5	0	5	0				
3	12345	01	PR-630 APE	PR630-MED-DSC	PR630 Medium AutoDrive Amadora	EA	0	4	0	4	0				
4	12345	01	PR-CAPRI ACF	PR200-MED-STD	Capri Medium Amadora Cornflower	EA	0	3	0	3	0				
*															

Records: 1 of 4

Unfiltered

Search

4

Status

12345

Importing Headers...

Import ALL P.O.'s

Import Single P.O.'s

Upload to BV

Upload To BVE

Print Barcodes

Back Orders

Update 0 PO price with current

Skid Labels

EXIT

Excel Path

Import grouped PO

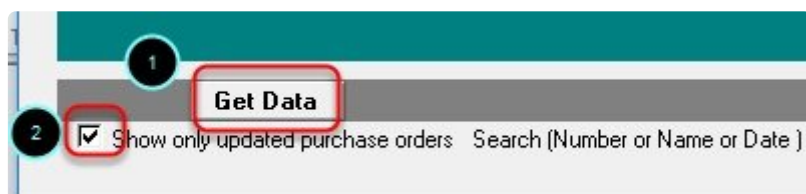
Import PO From Excel

7.1.4.2. ii. Reviewing Scanned Purchase Orders

This knowledge base article will guide user on how to review scanned purchase orders using the BASIS DESKTOP.

Reviewing Scanned Purchase Orders

To review scanned PO'S. click on the get data button to import the data from the cloud and then check the tick box "show only updated order" to filter all updated items.



Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

PURCHASE ORDERS

Get Data

Headers

☒ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All Delete All

PO #	Supp Code	Name	Date		Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By W/weight	Scan date		
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	To Cloud

GREEN	Scanned Purchase Orders
YELLOW	On Hold Purchase Orders
NO HIGH LIGHT	Not Scanned

to check the details just click on the order and the details will show on the bottom

Received quantity will also be color coded

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

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Another way to review scanned order is the check scans feature. To do this. Just select an order and then click on check scan.

This will show a more detailed result for each item scanned

SkidID														Discrepancy Review for Serial Numbers Uploading to PO													
PO #	Item Code	WH	Quantity	Scanned Qty	Serial No	Date	C	UOM	Exp Date	Location	DoneT	SkidID	Sc.	LN													
0000000286	FX-280	00	1	1	333142	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	123132	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	12223	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	22312	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	111111	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	1111	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	22222	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	33333	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	42232	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	23133	17/07/2016	0	EA			True			1													
0000000286	FX-280	00	1	1	2422	17/07/2016	0	EA			True			1													
0000000286	FX-500	00	1	1	33234	17/07/2016	0	EA			True			2													
0000000286	FX-500	00	1	1	221444	17/07/2016	0	EA			True			2													
0000000286	FX-500	00	1	1	32654	17/07/2016	0	EA			True			2													
0000000286	EN-BATD	00	5	5		17/07/2016	0	PK			True			3													
0000000286	PS-2	00	26	26		17/07/2016	0	EA			True			4													
0000000286	V1-4A	00	50	50		17/07/2016	0	EA			True			5													

Enter Order To Update

This Reports displays the data not yet uploaded for Serialized items After uploading the PO's to BV. check the POError Report. Delete Or Add Or Change Serial numbers here. Once You have corrected



Note: Items that are serialized will be separated from each other when using the check scans feature.

7.1.4.3. iii. Making Changes (PO)

This knowledge base article will show users to modify scanned purchase order from the purchase order window in BASIS.

Orders can be edited before uploading an order back to the accounting package

PURCHASE ORDERS

Get Data Headers

☒ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date		
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud

Update 0 prices

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Duts	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300287	00	CD-204	CD-204	Compact Disk Player with Autos	EA	200.07	38	1	37	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300287	00	CD-800	CD-800	Compact Disk Player - 5 disk c	EA	375.84	35	-1	36	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*												<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 2 Unfiltered Search

Status 0000300287 Importing Headers...

Excel Path

To edit an order just select the order from the Purchase Order window.

PURCHASE ORDERS

Get Data Headers

☒ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date		
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	I		<input checked="" type="checkbox"/>	To Cloud

On the Order review window just click on the section the you plan to edit and after making the changes the order can be uploaded back to the accounting package.

Update 0 prices

Delete from BASIS Check Scans Select All Deselect All Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300286	00	FX-280	FX-280	All-in-one Printer/Scanner/Cop	EA	185	27	0	27	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	0000300286	00	FX-500	FX-500	Multi-fax, Printer, Copier, Sc	EA	300	22	19	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	0000300286	00	EN-BATD	EN-BATD	Energizer ACCU Rechargeable D	PK	5.4	5	0	5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300286	00	PS-2	PS-2	Sony Playstation 2	EA	154.371	25	-1	26	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300286	00	V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	EA	206.453	50	0	50	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 5 Unfiltered Search

Status 0000300286 Importing Headers...

Import ALL P.O.'s Import Single P.O.'s Upload to BV Upload To BVE Print Barcodes Back Orders Update 0 PO price with current Skid Labels EXIT

Excel Path Import Data From Excel Import PO From Excel



Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Received Quantities.

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300286	00	FX-280	FX-280	All-in-one Printer/Scanner/Cop	EA	185	27	0	27	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	0000300286	00	FX-500	FX-500	Multi-fax, Printer, Copier, Sc	EA	300	22	19	3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	0000300286	00	EN-BATD	EN-BATD	Energizer ACCU Rechargeable D	PK	5.4	5	0	5	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300286	00	PS-2	PS-2	Sony Playstation 2	EA	154.371	25	-1	26	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300286	00	V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	EA	206.453	50	0	50	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To make changes to items that are serialized or lotted . select the order from the purchase order window and then click on Check Scan

PURCHASE ORDERS

Get Data Headers

☒ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All Delete All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date	
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>		<input checked="" type="checkbox"/> To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>		<input checked="" type="checkbox"/> To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input type="checkbox"/>		<input checked="" type="checkbox"/> To Cloud

Update 0 prices Delete from BASIS Check Scans Select All Deselect All Print

PO Details

On the Check Scan window, serialized item will be displayed separately and from there changes can be done on the serial no. field.

Discrepancy Review for Serial Numbers Uploading to PO

PO #	Item Code	WH	Quantity	Scanned Qty	Serial No	Date	C	UOM	Exp Date	Location	DoneT	SkidID	Sc.
0000300286	FX-280	00	1	1	1234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1235	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	12346	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	12234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	123521	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1245324	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	134234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	432132	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2423323	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1341332	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2431324	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2431322	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1243322	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2413242	17/07/2016	0	EA			True		





Enter Order To Update

This Reports displays the data not yet uploaded for Serialized items After uplodng the PO's to BV. check the POError Report. Delete Or Add Or Change Serial numbers here. Once You have corrected the errors enter the PO Number and Click OK, then re-upload to BV.

Record: 14 of 33 No Filter Search

To save the changes just type in the purchase number, click on recompile, and then click on the exit button to go back to the purchase order window.

SkidID													
Discrepancy Review for Serial Numbers Uploading to PO													
PO #	Item Code	WH	Quantity	Scanned Qty	Serial No	Date	C	UOM	Exp Date	Location	DoneT	SkidID	S
0000300286	FX-280	00	1	1	1234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1235	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	12346	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	12234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	12352123	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1245324	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	134234	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	432132	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2423323	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1341332	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2431324	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2431322	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	1243322	17/07/2016	0	EA			True		
0000300286	FX-280	00	1	1	2413242	17/07/2016	0	EA			True		



Enter Order To Update 0000300286

Recompile

Show ALL Info SN. Lot No and Location

This Reports displays the data not yet uploaded for Serialized items After uplodng the PO's to BV.
check the POError Report. Delete Or Add Or Change Serial numbers here. Once You have corrected
the errors enter the PO Number and Click OK, then re-upload to BV.

7.1.4.4. iv. Uploading (PO)

This knowledge base article will guide users on how to upload the purchase order back to the accounting package.

To upload the order back to the accounting package

FOR BVES

Once all items are received the update can now be sent back to the accounting package. To send the data back to the accounting package click on the UPLOAD to BVE button.

The screenshot shows the 'PO Details' window. At the top, there are buttons: 'Update 0 prices', 'Delete from BASIS', 'Check Scans', 'Select All', 'Deselect All', and 'Print'. Below these is a table with columns: Rec, PO #, WH, Item Code, Barcode, Description, UOM, Price, Initial Ord, Outs, Rec'd Qty, To Receive, New Item, Upd, Ser, and Lot. The table contains four rows of data. Below the table, there is a 'Status' section with a text box containing '0000300289' and the text 'Upload completed.' Below this, there are several buttons: 'Import ALL P.O.'s', 'Import Single P.O.'s', 'Upload to BV', 'Upload To BVE' (highlighted with a red box), 'Print Barcodes', 'Back Orders', 'Update 0 PO price with current', 'Skid Labels', and 'EXIT'. At the bottom, there is an 'Excel Path' field and two buttons: 'Import Data From Excel' and 'Import PO From Excel'.

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300289	00	CD-204	CD-204	Compact Disk Player with Autos	EA	185.25	50	1	49	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300289	00	EQ-1800	EQ-1800	Equalizer (10 band)	EA	95	42	-1	43	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300289	00	SP-500	SP-500	Home Theatre Speaker Package	EA	510.75	14	14	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300289	00	CD-800	CD-800	Compact Disk Player - 5 disk c	EA	405.908	8	0	8	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

the upload completed status will show once the upload is finish




This is a close-up of the 'Status' section from the previous screenshot. It shows a text box containing '0000300289' and the text 'Upload completed.' to its right. Below this, there are buttons: 'Print Barcodes', 'Back Orders', 'Update 0 PO price with current', 'Skid Labels', and 'EXIT'. The 'Upload To BVE' button is not visible in this close-up.

We can now go back to BVES to check and receive the purchase order

PO Number	Vendor	Vendor Name	Status	Order Date	Warehouse	Required Date	Received Date	Sub Total	Received Amount	Remaining Amount	Total	Reference No	FOB	Vendor Order Number	Buy
0000300264	CHIP	CHIP Radio Ir	Received	03/06/2011		06/06/2011	10/06/2011	2,950.00	2,050.00	900.00	2,384.25		OUR DOCK		Jen
0000300271	OPTSYS	Optimum Elec	Received	05/06/2011		08/06/2011	11/06/2011	27,314.00	25,214.00	2,100.00	29,424.10		OUR DOCK		
0000300274	CLASND	Clarence Sou	Issued	10/06/2011		12/06/2011	10/06/2011	23,335.38	0.00	23,335.38	235.40		OUR DOCK		
0000300284	AMCOMP	Amtron Comp	Standing	03/06/2011		06/06/2011	11/06/2011	5,652.20	0.00	5,652.20	6,386.99		OUR DOCK		
0000300286	EVPLAN	Evolution Plar	Standing	03/06/2011	00	06/06/2011	01/07/2011	25,803.93	0.00	25,803.93	29,299.69		OUR DOCK		
0000300287	CNCP	CNCP Music	Open	11/06/2011	00	30/06/2011	11/06/2011	20,757.06	0.00	20,757.06	23,488.25		OUR DOCK		
0000300288	INSSND	International	Open	11/06/2011		28/06/2011	11/06/2011	36,350.00	0.00	36,350.00	41,442.75		OUR DOCK		
0000300289	GRTAUD	Great Audio e	Standing	04/06/2011		08/06/2011	04/06/2011	23,650.26	0.00	23,650.26	27,077.35		OUR DOCK		
0000300290	DAVELE	Davidson Elec	Standing	04/06/2011		08/06/2011	04/06/2011	50,955.00	0.00	50,955.00	57,579.15		OUR DOCK		
0000300293	CLAIR	Clairons Spec	Standing	11/06/2011		30/06/2011	11/06/2011	75,970.65	0.00	75,970.65	86,355.33		OUR DOCK		
0000300294	BOSAUD	Bosley Audio	Standing	05/06/2011		05/06/2011	05/06/2011	51,350.40	0.00	51,350.40	58,364.95		OUR DOCK		

To do this open the purchase order and after validation that all is received. Just click on the receive button to complete the receiving of the PO.

Purchase Order - 0000300289 Great Audio Equipment






Refresh Prices  Close  Labels 

Main Address Ship To Info Purchase History Sales History Communication Receive Order

Vendor: Vendor No: GRTAUD Great Audio Equipment Notes: Vendor Order No:

General: Warehouse: 00 Ship To: ID: Ref No: Ship Via: 02 Buyer: FOB: OUR DOCK

Order Details: Status: Issued PO No: 0000300289 Order Date: 04/06/2011 Required Date: 08/06/2011 Last Received Date: / / Receive Date: 01/01/2012

Items:     

Part No	Description	Order Qty	To Qty	Receive Qty	Cost	Inventory Cost	UOM	HST (13%)	Ext Cost	Duty %	Duty	Freight %	Freight	Vendor Part
[00] CD-204	Compact Disk Player with Ai	50.000	0.000	49.000	185.250	185.250	EA	<input checked="" type="checkbox"/>	9,262.500	0.00	0.000	0.00	0.000	9SLR28
[00] EQ-1800	Equalizer (10 band)	42.000	0.000	43.000	95.000	95.000	EA	<input checked="" type="checkbox"/>	3,990.000	0.00	0.000	0.00	0.000	DT9
[00] SP-500	Home Theatre Speaker Pack	14.000	0.000	0.000	510.750	510.750	EA	<input checked="" type="checkbox"/>	7,150.500	0.00	0.000	0.00	0.000	SPK48
[00] CD-800	Compact Disk Player - 5 disc	8.000	0.000	1.000	405.908	405.908	EA	<input checked="" type="checkbox"/>	3,247.260	0.00	0.000	0.00	0.000	

FOR BV

To upload the updated purchase order back to BV, click on the UPLOAD to BV button.

PURCHASE ORDERS

Get Data Headers

☒ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All ☐ Order Complete ☐ Freight ☐ Duty ☐ By Weight ☐ Scan date

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date
0000300254	CHIP	CHIP Radio Inc.	03/06/2011			<input checked="" type="checkbox"/>					\$0.00	\$0.00		
0000300288	INSND	International Sound	11/06/2011			<input checked="" type="checkbox"/>					\$0.00	\$0.00		

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300288	00	CD-800	CD-800	Compact Disk Player - 5 disk c	EA	365	50	0	50	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	0000300288	00	EQ-1245	EQ-1245	Equalizer (7 band)	EA	51.25	40	0	40	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
3	0000300288	00	RC2400	RC2400	Receiver - 100 watts	EA	297	30	0	30	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
4	0000300288	00	RC4850	RC4850	Receiver - 220 watts	EA	357	20	0	20	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Records: 4 of 4 Search

Status: 0000300288 Importing Headers...

Excel Path:

the upload completed status will show once the upload is finish

Upload completed.

The order status should change now from open to receive.

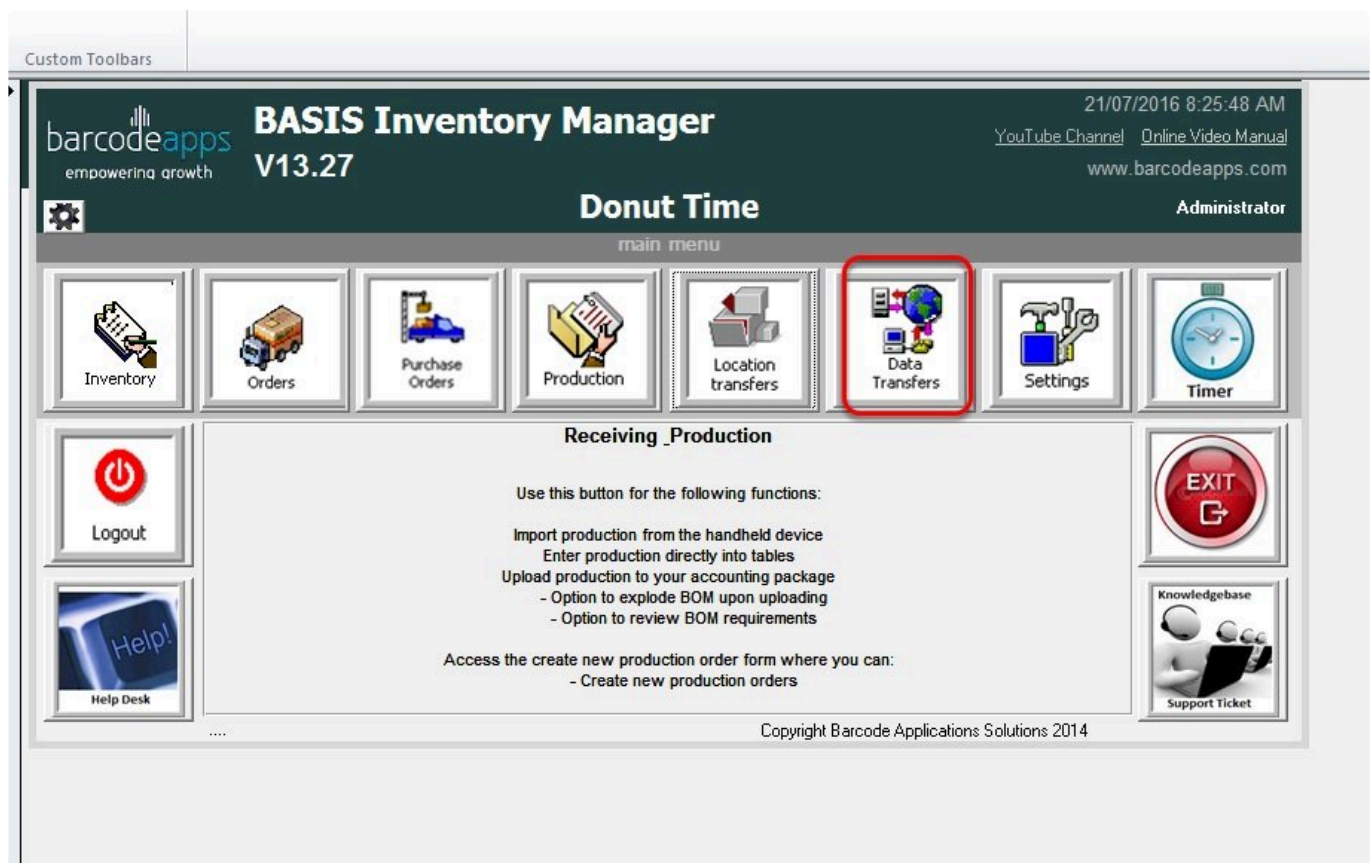
7.1.4.5. v. Location Master

After all item from a purchased order has been uploaded back to the accounting package. The locations of each item can now be managed using the location transfer module inside the BASIS DESKTOP

Location transfer module is capable of the following

- [i. Inventory Location review](#)
- [ii. Inventory source](#)
- [iii. Inventory count Adjustments](#)
- [iv. Inventory location Transfer](#)
- [v. Reports generation](#)

TO access the Location Master. Just click on the Location Master module for the main basis window.



The Master Location form should open and all scanned purchased order ready to be transferred should appear on the window.

Export

Custom Toolbars

Get Data Send Data **MASTER LOCATIONS FORM**

Product Code Details **FP Fill2**

WH	STOCKCODE	Description	Total	WH	Loc	Code	Qty	SerialNumber	SkidID	INIQT	Expr1	TempQty
00	CD-204	Compact Disk Player with Autosh	344									
00	CD-800	Compact Disk Player - 5 disk cap	495									
00	EN-BATD	Energizer ACCU Rechargeable D	5									
00	EQ-1245	Equalizer (7 band)	40									
00	EQ-1800	Equalizer (10 band)	85									
00	FCB-250	Finished cabinet for SP-250	-12									
00	FX-280	All-in-one Printer/Scanner/Copier	3									
00	FX-500	Multi-fax, Printer, Copier, Scanne	2									
00	MCB-250	Entertainment Center	97									
00	MD46	6" Midrange Cone Speaker	-19									

Transactions

Transaction Type Order No Item Code Serial No Skid ID Filter Reset Print Delete Items About to Expire in :

Ty	OrderId	Barcode	Code	SerialNo	WHF	LocFrom	WH	LocTo	Quant	Transferred	DDate	Time	Complete	ID	SkidID	WONO	PONO	INIQT	EDATE
O	0000300290	STS-01MAN	STS-01MAN		00	rec a	00	rec a	7	7	07/23/16	08:08 A	0	40				4	
O	0000300290	STS-01	STS-01		00	rec a	00	rec a	10	10	07/23/16	08:07 A	0	40				3	
O	0000300290	PCM8420	PCM8420		00	rec a	00	rec a	60	60	07/23/16	08:07 A	0	40				2	
O	0000300290	PCM3550	PCM3550		00	rec a	00	rec a	40	40	07/23/16	08:05 A	0	40				1	
O	0000300288	RC2400	RC2400		00		00		30	30	07/18/16	04:29 P	0	30				3	
O	0000300288	RC4850	RC4850		00		00		20	60	07/18/16	04:29 P	0	30				4	
O	0000300288	EQ-1245	EQ-1245		00		00		40	40	07/18/16	04:28 P	0	30				2	
O	0000300288	CD-800	CD-800		00		00		50	50	07/18/16	04:28 P	0	30				1	
O	0000300286	V1-4A	V1-4A		00		00		50	50	07/17/16	05:00 A	0	30				5	
O	0000300286	PS-2	PS-2		00		00		26	26	07/17/16	05:00 A	0	30				4	
O	0000300286	EN-BATD	EN-BATD		00		00		5	5	07/17/16	05:00 A	0	30				3	
O	0000300286	FX-500	FX-500	221444	00		00		1	1	07/17/16	05:00 A	0	30				2	

Check Scans Master Warehouse 00 From Whse To Total: Clear Temp Qty Clear Neq. Qty

Delete All Locations REFRESH Update BV for transfers Update BVE transfers Modify Qties by items Modify Qties by Location Tr. To XL Transfer Report Location Review Location Details Location By Item Details by Location Top 5 Locations XL

BVE Cash Sales Transfers Negative Skids Modify Transfers Modify or Find Skids

Daily Rpt Date (Format as above) 23/07/2016 11: Review Daily Report Review Backed Up Transactions Sum by Exp. To XL

Discrepancy List ClearZero's Update O.N. Recalc. ALL Recalc. Skids Load No Recalc. Item

7.1.4.5.1. i. Overall Review

This knowledge base will guide users on how to review purchase order items from the master location form.

All item locations received from a purchase order will reflect on the master locations form.



NOTE: to get real time results we can click on the **Get Data** button to retrieve the most latest scans

Get Data

To review received purchase orders. click on the item to show the details of the locations

MASTER LOCATIONS FORM

Product Code: CD-800

Details

WH	STOCKCODE	Description	Total	WH	Loc	Code	Qty	SerialNumber	SkidID	INIQT	EXPDate
00	CD-204	Compact Disk Player with Autorsk	344	00	row16	CD-800	380			0	
00	CD-800	Compact Disk Player - 5 disk cap:	495	00	row16	CD-800	13			0	
00	CD-800	Compact Disk Player - 5 disk cap:	495	00	row16	CD-800	102			0	
00	EQ-1245	Equalizer (7 band)	40								
00	EQ-1800	Equalizer (10 band)	85								
00	FCB-250	Finished cabinet for SP-250	-12								
00	FX-280	All-in-one Printer/Scanner/Copier	3								
00	FX-500	Multi-fax, Printer, Copier, Scanne	2								
00	MCB-250	Entertainment Center	97								
00	MD46	6" Midrange Cone Speaker	-19								

Transactions

Transaction Type	Order No	Item Code	Serial No	Skid ID	Filter	Reset	Print	Delete	Items About to Expire in :	Resend	Return Order
O	0000300288	CD-800	00	00					07/18/16		
O	0000300289	CD-800	00	00					04:28 P.0		
O	0000300287	CD-800	00	00					07/17/16		
O	0000300289	CD-800	00	00					04:17 A.0		
O	0000300289	CD-800	00	00					11:01 A.0		

and click on the drop down menu and select Purchase Orders (O) to filter all scanned purchase orders only.

Custom Toolbars

Get Data Send Data **MASTER LOCATIONS FORM** FP Fill2

Product Code Details

WH	STOCKCODE	Description	Total	WH	Loc	Code	Qty	SerialNumber	SkidID	INIQTY	Expr1	TempQty
00	CD-204	Compact Disk Player with Autorsk	344									
00	CD-800	Compact Disk Player - 5 disk cap	495									
00	EN-BATD	Energizer ACCU Rechargeable D	5									
00	EQ-1245	Equalizer (7 band)	40									
00	EQ-1800	Equalizer (10 band)	85									
00	FCB-250	Finished cabinet for SP-250	-12									
00	FX-280	All-in-one Printer/Scanner/Copier	3									
00	FX-500	Multi-fax, Printer, Copier, Scanne	2									
00	MCB-250	Entertainment Center	97									
00	MD46	6" Midrange Cone Speaker	-19									

Transactions

Transaction Type Order No Item Code Serial No Skid ID Filter Reset Print Delete Items About to Expire in : Resend Return Order

Ty	OrderId	Barcode	Code	SerialNo	WHF	LocFrom	WH	LocTo	Quant	Transferred	DDate	Time	Complete	ID	SkidID	WONO	PONO	INIQTY	EDATE
I			MAN	STS-01MAN	00	rec a	00	rec a	7	7	07/23/16	08:08 A	0	40				4	
S			STS-01		00	rec a	00	rec a	10	10	07/23/16	08:07 A	0	40				3	
T			PCM8420		00	rec a	00	rec a	60	60	07/23/16	08:07 A	0	40				2	
F			PCM3550		00	rec a	00	rec a	40	40	07/23/16	08:05 A	0	40				1	
P			RC2400		00		00		30	30	07/18/16	04:29 P	0	30				3	
			C4850		00		00		20	60	07/18/16	04:29 P	0	30				4	
			Q-1245		00		00		40	40	07/18/16	04:28 P	0	30				2	
DEL			CD-800		00		00		50	50	07/18/16	04:28 P	0	30				1	
O	0000300286	V1-4A	V1-4A		00		00		50	50	07/17/16	05:00 A	0	30				5	
O	0000300286	PS-2	PS-2		00		00		26	26	07/17/16	05:00 A	0	30				4	
O	0000300286	EN-BATD	EN-BATD		00		00		5	5	07/17/16	05:00 A	0	30				3	
O	0000300286	FX-500	FX-500	221444	00		00		1	1	07/17/16	05:00 A	0	30				2	

This will show all purchase orders associated with the item.

Transaction Type		Order No	Item Code	Serial No	Skid ID					Items About to Expire in :						Resend	Return Order		
O																			
Ty	OrderID	Barcode	Code	SerialNo	WHF	LocFrom	WH	LocTo	Quant	Transferred	DDate	Time	Complete	ID	SkidID	WONO	PONO	INIQT	EDATE
O	0000300289	CD-204	CD-204		00	rec a	00		49	49	07/23/16	03:49 P	0	40				1	
O	0000300289	CD-204	CD-204		00	rec a	00		49	49	07/17/16	04:48 A	0	30				1	
O	0000300287	CD-204	CD-204		00		00		37	37	07/17/16	04:16 A	0	30				1	
O	0000300289	CD-204	CD-204		00		00		50	50	07/09/16	11:02 A	0	20				1	

from here we can now have an idea from which purchase order the item came from.

7.1.4.5.2. iii. Making Adjustments

This knowledge base article will guide users on how they make an adjustment on the items from the master locations form using the BASIS desktop

Item quantity and location can be adjusted

To make an adjustment on an item quantity by item code . click on modify Qties by items

The screenshot displays the 'MASTER LOCATIONS FORM' interface. At the top, there are tabs for 'Get Data' and 'Send Data'. Below this, the 'Product Code' is set to 'CD-204'. The main table lists items with columns: WH, STOCKCODE, Description, Total, WH, Loc, Code, Qty, SerialNumber, SkidID, INIQT, and EXPDate. The item 'Compact Disk Player with Autorsk' is selected, showing a total of 393. Below the main table is a 'Transactions' section with columns: Transaction Type, Order No, Item Code, Serial No, Skid ID, and various transaction details. At the bottom, there are several buttons for actions like 'Delete All Locations', 'REFRESH', 'Update BV for transfers', 'Update BVE transfers', 'Modify Qties by items' (highlighted with a red box), 'Modify Qties by Location', 'Transfer Report', 'Location Review', 'Location Details', 'Location By Item', 'Details by Location', 'Top 5 Locations', 'Daily Rpt Date (Format as above)', 'Review Daily Report', 'Review Backed Up Transactions', 'Discrepancy List', 'ClearZero's', 'Update O.N.', 'Recalc. ALL', 'Recalc. Skids', 'Load No', and 'Recalc. Item'.

on the edit window. Define the Warehouse and the Product code and then press enter

Custom Toolbars

Modify Quantities By Item

1 WH# **00** 2 Product code **CD-204** Please select the item from the top left grid first

<u>Location</u>	<u>Qty</u>	<u>Date</u>	<u>Serial / Lot Number</u>	<u>Skid ID</u>	<u>Exp Date</u>
▶					

It should show now all items defined on the Filter. From here we can start making the changes on the quantity .

Modify Quantities By Item

WH# **00** Product code **CD-204** Please select the item from the top left grid first

<u>Location</u>	<u>Qty</u>	<u>Date</u>	<u>Serial / Lot Number</u>	<u>Skid ID</u>	<u>Exp Date</u>
▶ row21	157				
row23	150				



To apply the changes just click on exit button

To make an adjustment on an item quantity by location. Just select the option modify Qties by location.

Master Warehouse: 00 From Whse: To: Total:

Update BV for transfers | Update BVE transfers | Modify Qties by items | **Modify Qties by Location** | Tr. To XL Transfer Report

Transfers Upload | Negative Skids Missing Skids | Modify Transfers | Modify or Find Skids | ☒ ALL

Reports: Location Review | Location Details | Location By Item | Details by Location | Top 5 Locations | XL

Daily Rpt Date (Format as above) | Review Daily Report | Review Backed Up Transaction

by default the location filter will be blank thus it will show all items that has no location

Location Modify Form

Modify or Add Quantities By Location

1 Location: Select Cycle

From WHSE: To: Process

Whse	Part Number	Qty	Expiry Date	Serial / Lot Number	Skid ID	2 Location	Length	Width	Slab No	BPull
00	EN-BATD	5					#Name?	#Name?	#Name?	#Name?
00	FX-280	1	28/07/2019	12345			#Name?	#Name?	#Name?	#Name?
00	FX-280	1	28/07/2019	744525			#Name?	#Name?	#Name?	#Name?
00	FX-500	1		464646			#Name?	#Name?	#Name?	#Name?
00	FX-500	1		r			#Name?	#Name?	#Name?	#Name?
00	MCB-250	30					#Name?	#Name?	#Name?	#Name?
00	PS-2	25					#Name?	#Name?	#Name?	#Name?
00	ST-10	28					#Name?	#Name?	#Name?	#Name?
00	ST-25	24					#Name?	#Name?	#Name?	#Name?
00	ST-30	8					#Name?	#Name?	#Name?	#Name?
00	ST-40	79					#Name?	#Name?	#Name?	#Name?
00	V1-4A	50					#Name?	#Name?	#Name?	#Name?

NEW SAVE PRINT

Record: 14 1 of 12 No Filter Search

From here you can start adding the location of the items and changing the quantity if necessary.

Location Modify Form

Modify or Add Quantities By Location

Location

Select Cycle

From WHSE

To:

Process

Whse	Part Number	Qty	Expiry Date	Serial / Lot Number	Skid ID	Location	Length	Width	Slab No	BPull
00	FX-280	1	28/07/2019	12345			#Name?	#Name?	#Name?	#Name?
00	FX-280	1	28/07/2019	744525			#Name?	#Name?	#Name?	#Name?
00	FX-500	1		464646			#Name?	#Name?	#Name?	#Name?
00	FX-500	1		r			#Name?	#Name?	#Name?	#Name?
00	MCB-250	30				wrhse	#Name?	#Name?	#Name?	#Name?
00	PS-2	25					#Name?	#Name?	#Name?	#Name?
00	ST-10	28					#Name?	#Name?	#Name?	#Name?
00	ST-25	24					#Name?	#Name?	#Name?	#Name?
00	ST-30	8					#Name?	#Name?	#Name?	#Name?
00	ST-40	79					#Name?	#Name?	#Name?	#Name?
00	V1-4A	50					#Name?	#Name?	#Name?	#Name?

NEW

SAVE

PRINT

Record: 14 1 of 12 No Filter Search

To apply the changes just click on save and then exit.

1

2

NEW

SAVE

PRINT

1 of 12 No Filter Search

We can also filter the location. this will filter all item that are stored on the location defined.

Location Modify Form

Modify or Add Quantities By Location

Location

ROW23

Select Cycle

From WHSE

To:

Process

Whse	Part Number	Qty	Expiry Date	Serial / Lot Number	Skid ID	Location	Length	Width	Slab No	BPull
00	CD-204	150				row23				
	CD-204	78				row23				
	CD-204	92				row23				

1.

7.2. II. MOBILE DEVICE



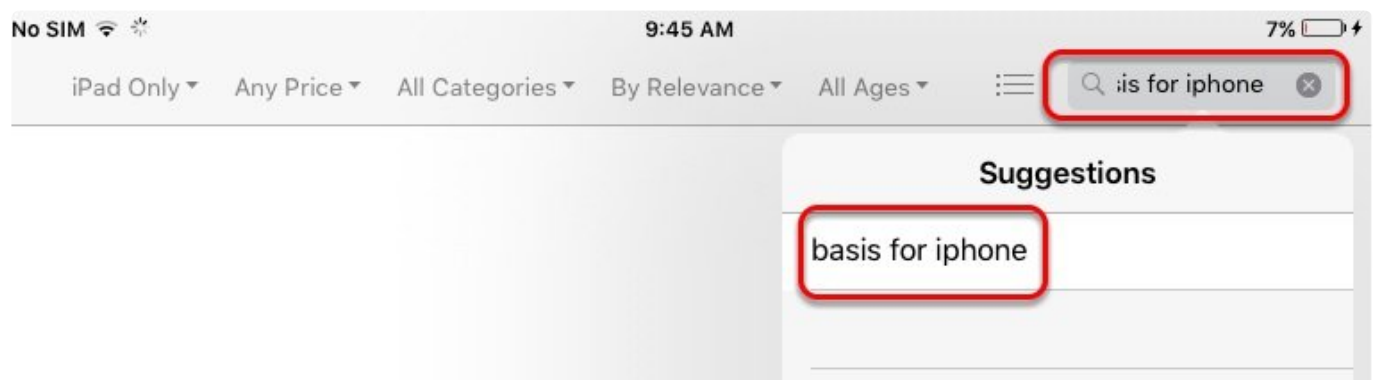
7.2.1. A. First Sync

This knowledge base article will guide user on how to get started with the BASIS App .

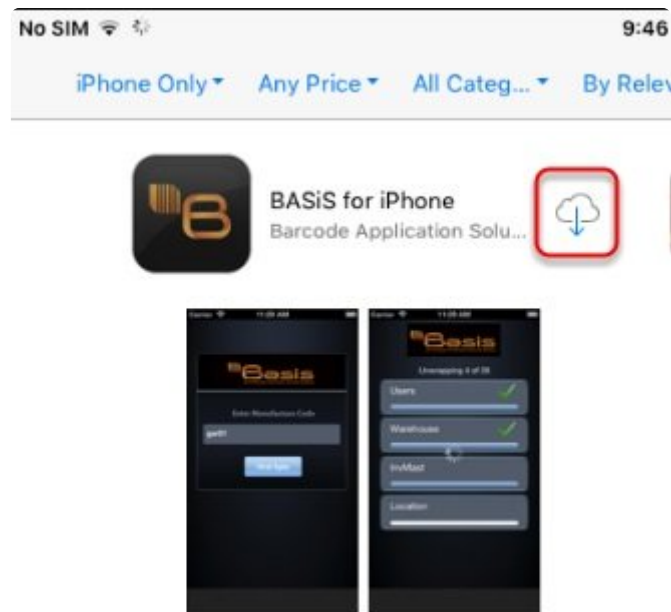
To get started. Download the BASIS App from Playstore



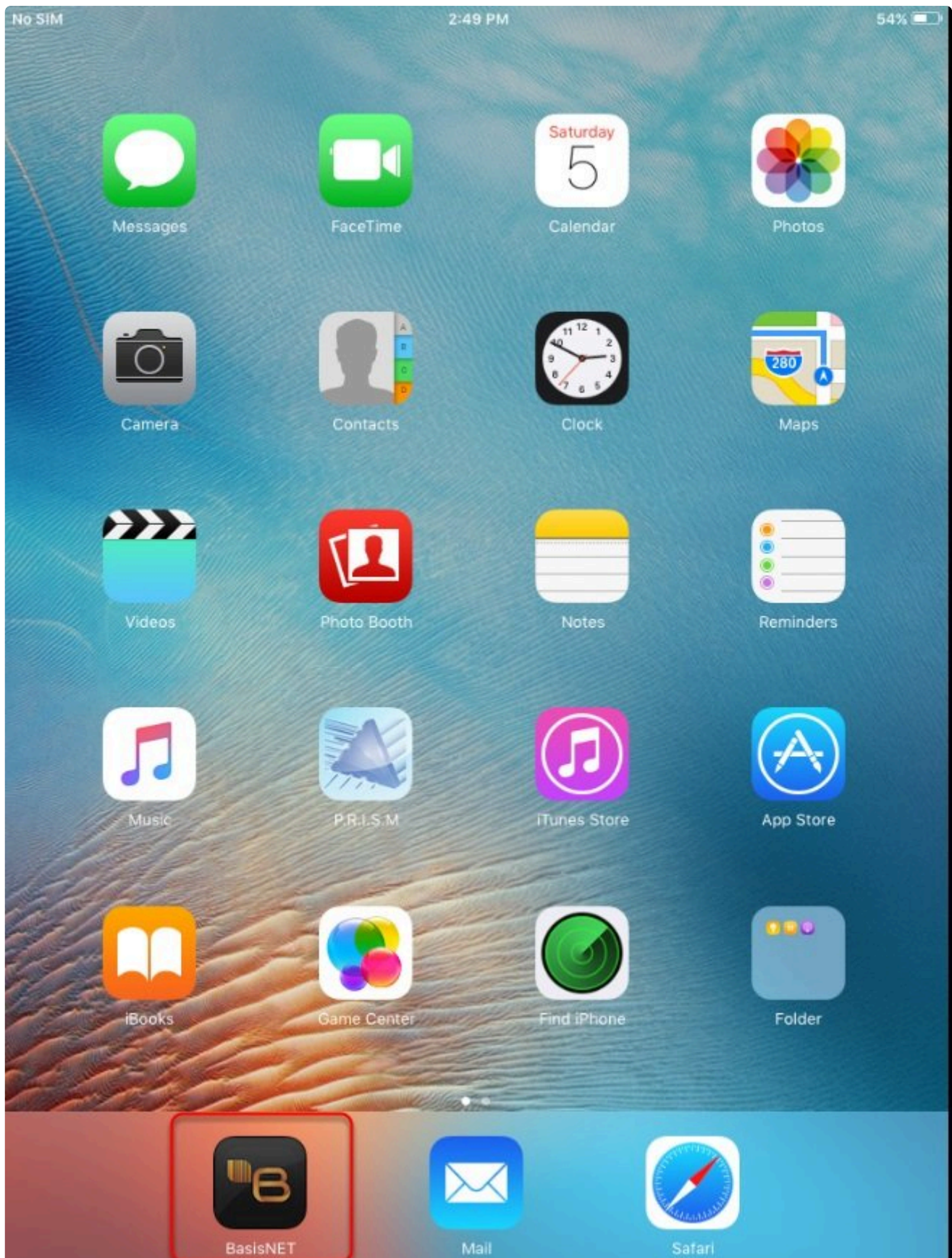
To download the App type in the keyword “ *BASIS for iPhone *” on the search field.



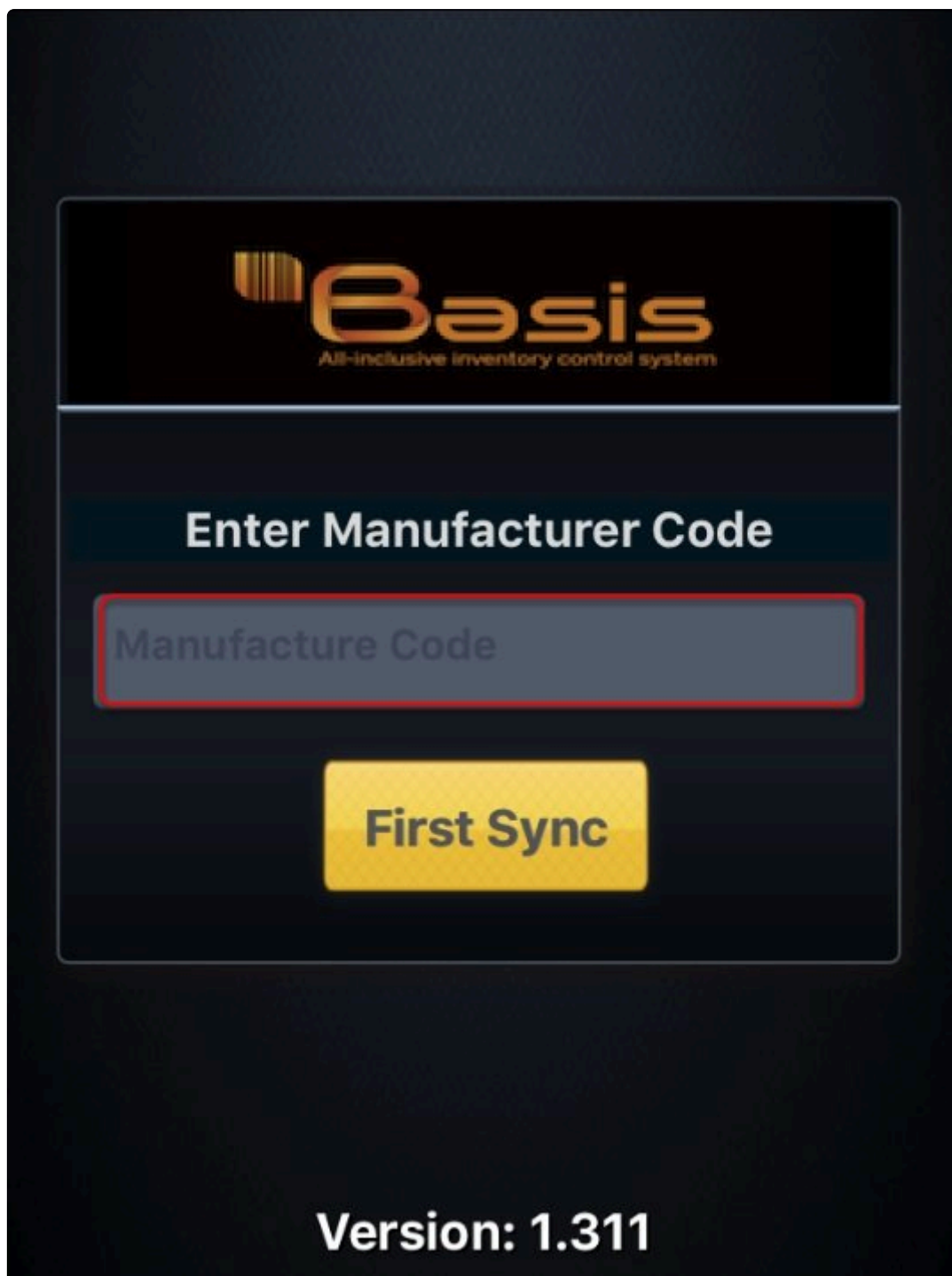
Now tap to download and install



Open the App

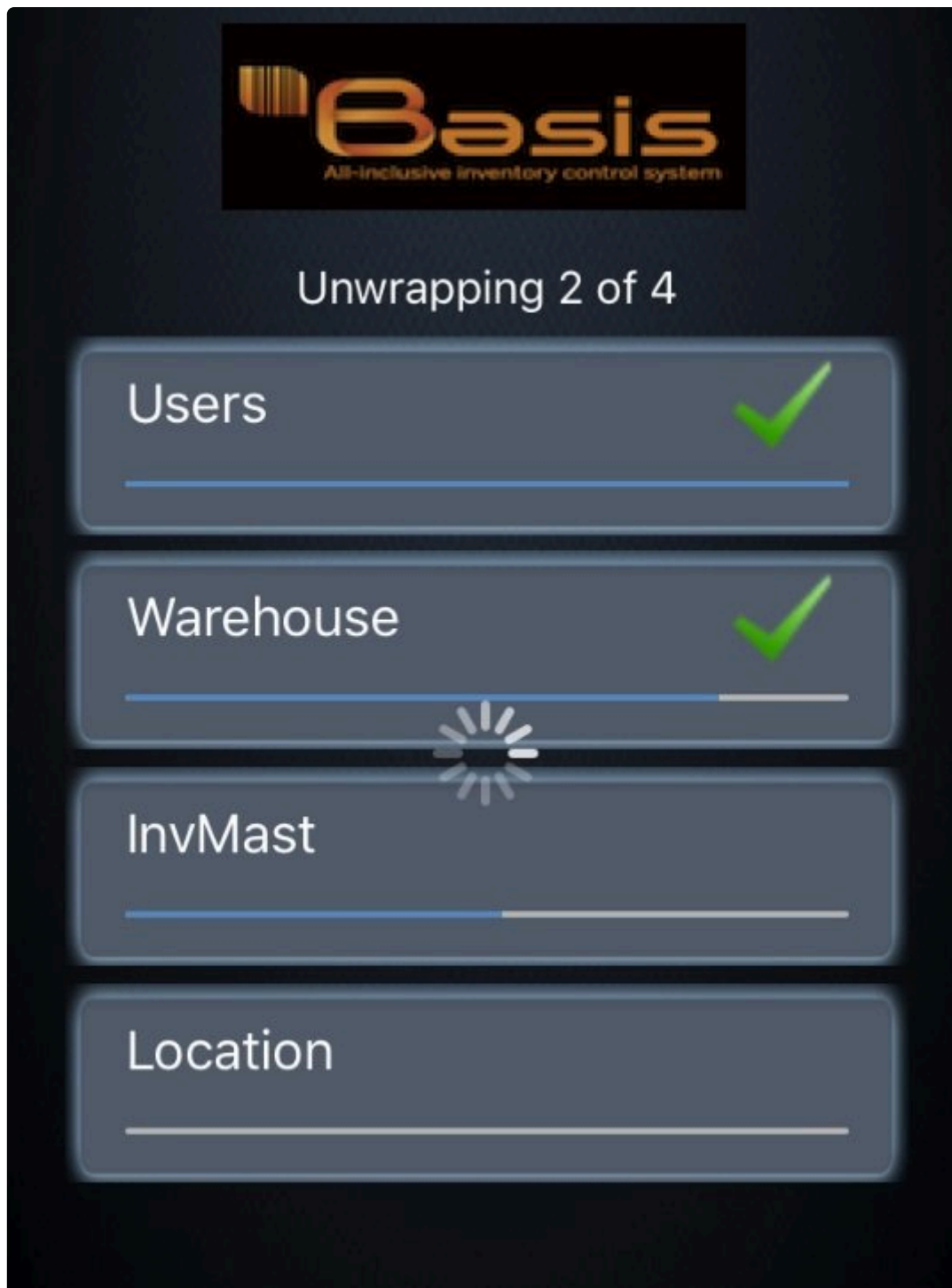


On the BASIS Initial Page Type in the Manuf Code and tap on First Sync



The screenshot shows the BASIS application interface. At the top, the BASIS logo is displayed with the tagline "All-inclusive inventory control system". Below the logo, the text "Enter Manufacturer Code" is centered. Underneath this text is a text input field with a red border, containing the placeholder text "Manufacture Code". Below the input field is a large yellow button with the text "First Sync". At the bottom of the screen, the text "Version: 1.311" is displayed.

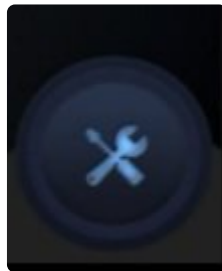
Congratulations! Now we have our First Sync.



7.2.2. B. SETTINGS

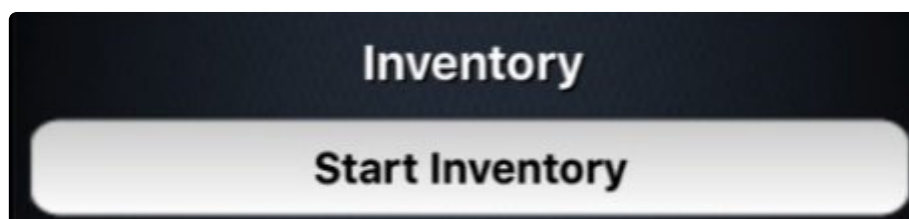
This knowledge base article will review the general settings inside the BASIS i OS.

To access settings. From the BASIS App main window tap on settings

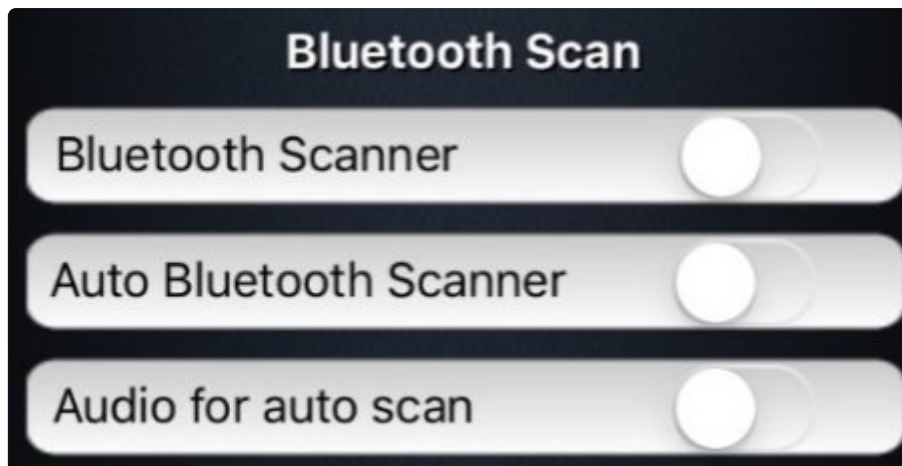


General settings

Start Inventory – tapping on this option will start a new inventory and will clear all existing count stored in the iPad.



Bluetooth Scan

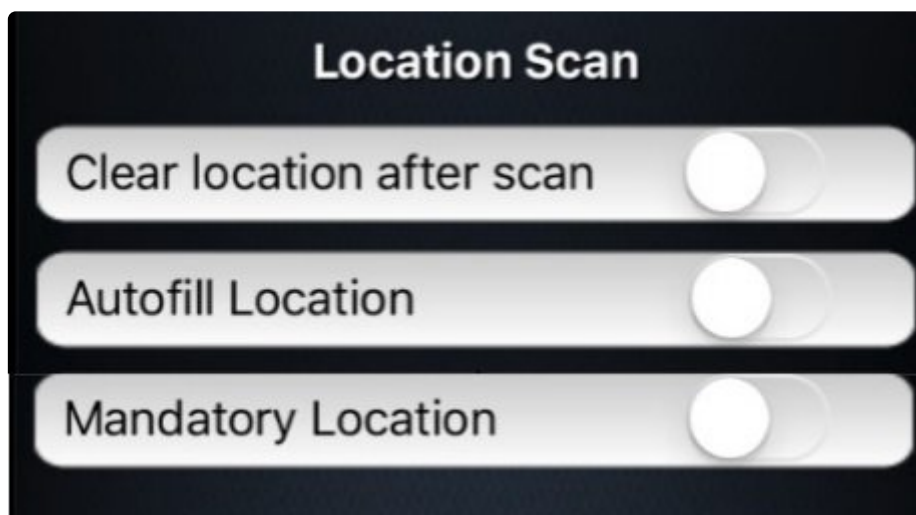


Bluetooth Scanner – enable to use wireless scan functionality via Bluetooth.

Auto Bluetooth Scanner – When enable the scanner will automatically scan an item once the barcode is captured; adding a quantity of 1 for each scan.

Audio for Auto Scan – when enabled the device produces a distinctive chirp sound.

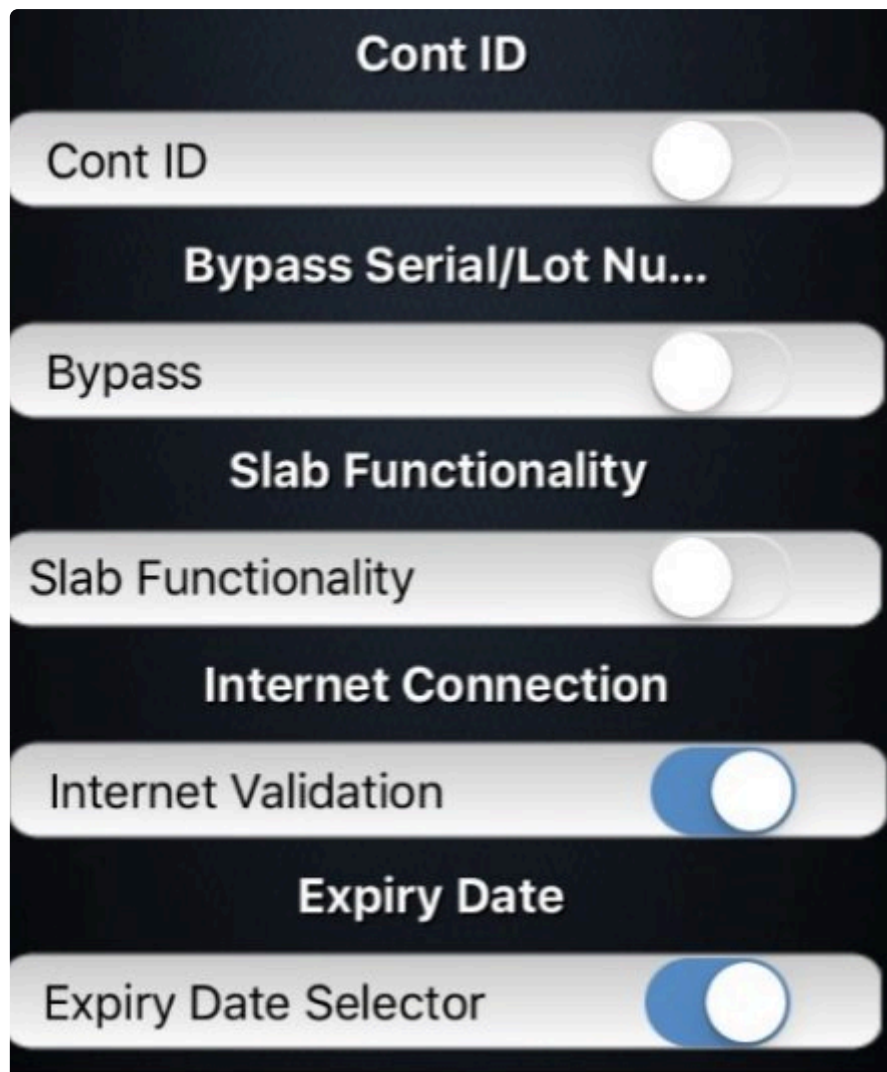
LOCATION SCAN



Clear Location after Scan – Location field will be cleared out after every scan.

Auto fill Location – when enabled. Basis uses the default location of the item.

Mandatory Location – When enabled all items scanned should have a location for it to be counted.



Cont ID – when enabled activates the SKID ID feature.

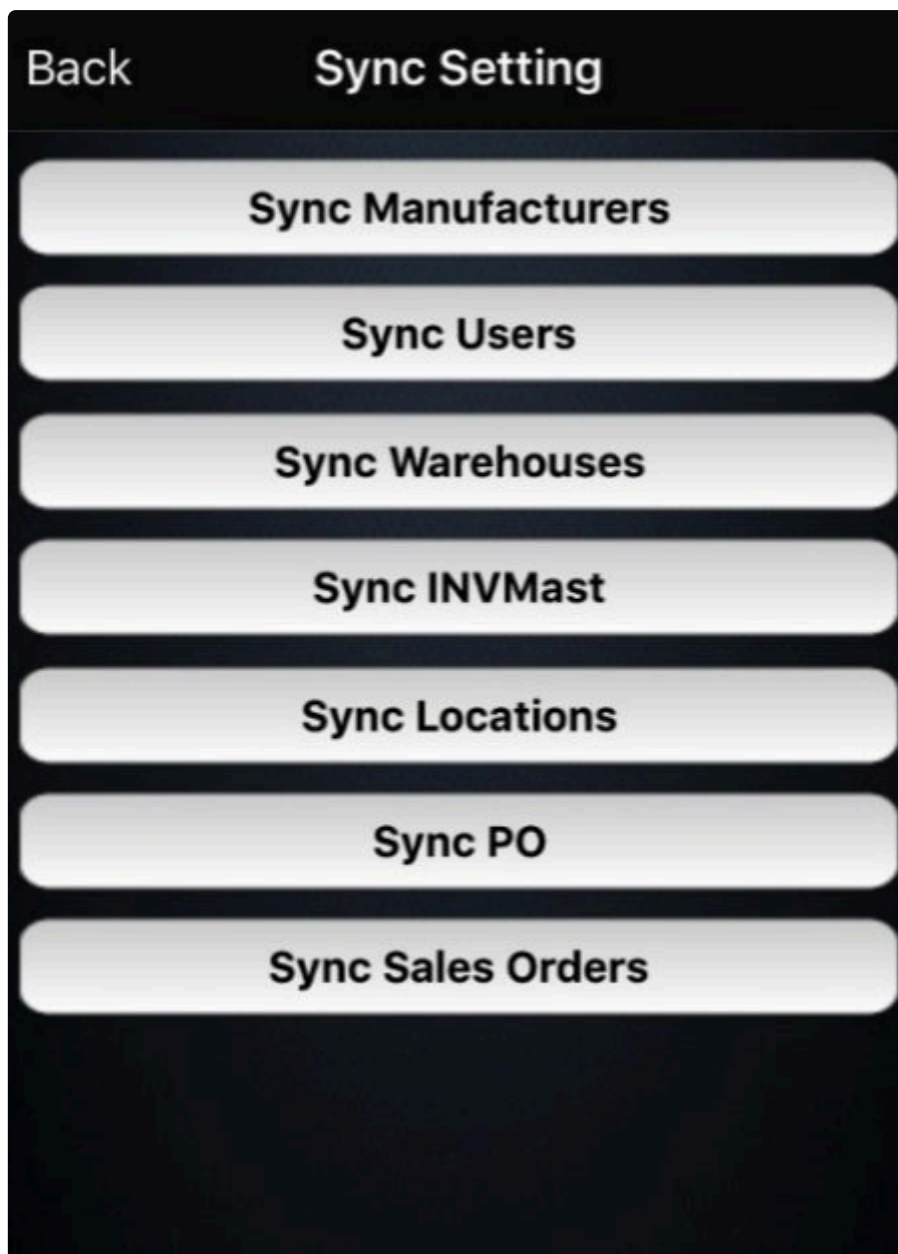
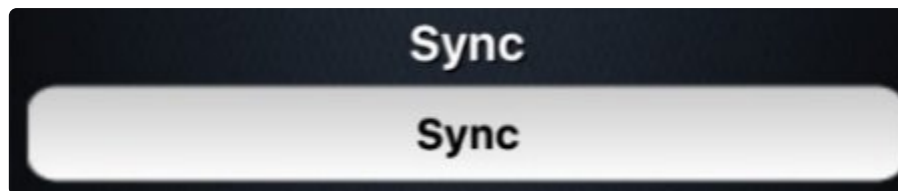
Bypass Serial / Lot numbered – If enable . Scanned serialized/lotted item will not ask for a serial/lot number.

Slab Functionality – Enables Slab Functionality

Internet Validation

Expiry Date Selector

Sync



Sync Manufacturer – tapping on this option will sync all global settings to the mobile device.

Sync User – Tapping on this option will sync all customers to the mobile device.

Sync Warehouse – Tapping on this option will sync all warehouse.

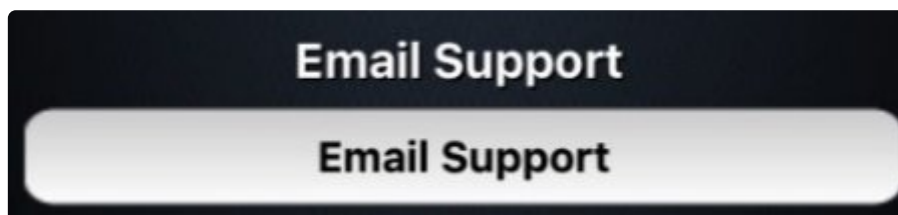
Sync INVMAST – Tapping on this option will sync the MASTER INVENTORY.

Sync Locations – Tapping on this option will sync all locations to the mobile device.

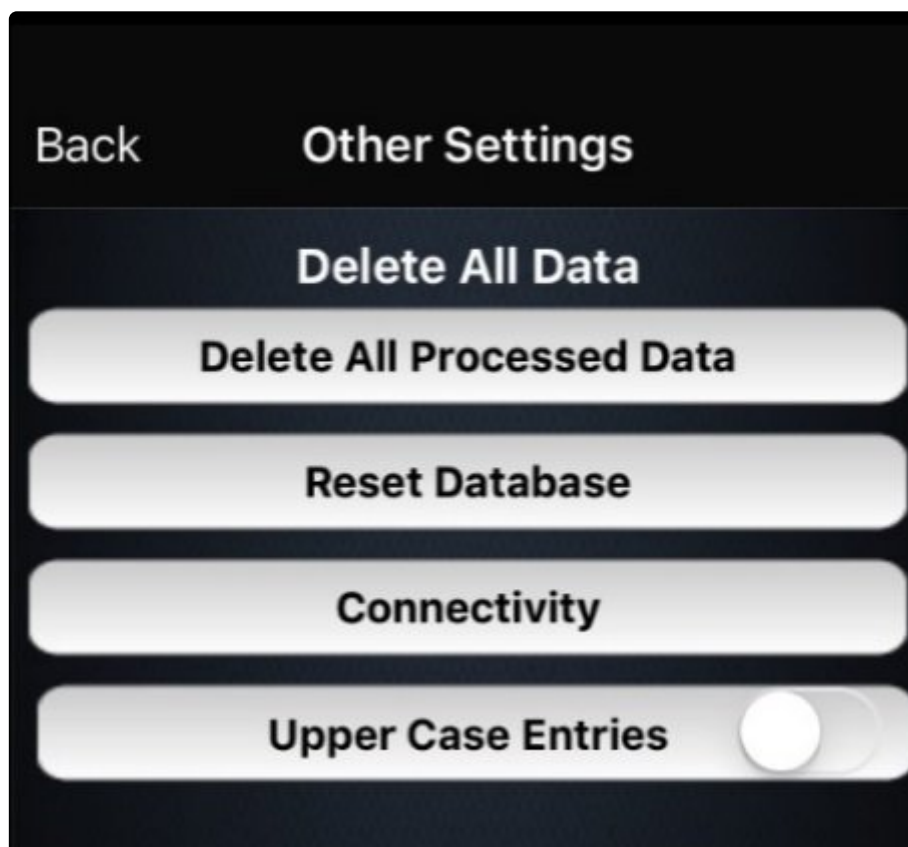
Sync PO – Tapping on this option will sync all Purchase Orders.

Sync Sales Order – Tapping on this option will sync all Sales Orders.

Email Support



Other settings



Delete All Processed Data

Reset Database

Connectivity

Upper Case Entries

BarcodeApps © 2016

7.2.3. C. INVENTORY MODULE

ia. Inventory Counting

INVENTORY COUNT WINDOW REVIEW

The screenshot shows the 'Inventory Count' window with the following elements and callouts:

- 1**: Auto BT toggle switch.
- 2**: Scanned 0 button.
- 3**: Next No. input field (value: 1).
- 4**: SCAN button.
- 5**: Location input field (placeholder: Scan or Enter Location).
- 6**: WH input field (value: 00).
- 7**: Item# input field (placeholder: Item Number).
- 8**: SEARCH button.
- 9**: DESC button.
- 10**: Code input field.
- 11**: Description input field.
- 12**: Serial Number input field.
- 13**: Exp Date input field.
- 14**: QTY input field (placeholder: Qty).
- 15**: Factor input field.
- 16**: UOM input field.

Buttons at the top: Back, Inventory Count, Settings. Buttons at the bottom: Accept.

1. **AUTO BT** – If enabled uses the fast mode scanning .
2. **SCANNED** – Tap on. To review scanned items . The
3. **NEXT NO.** – Scan Reference

4. **SCAN** – when tapped. Uses the iOS camera as a barcode scanner. Quite handy if there is no available scanner

though there are limitations.

5. **LOCATION** – Displays the location of an item when item is scanned. Location can be manually entered on this

field if needed.

6. **WH** – Displays the warehouse

7. **ITEM NUMBER (PART NUMBER)** – Display the part number of the item. Item can be manually entered on this field

if needed.

8. **SEARCH** – tap to search an item defined on the item number field.

9. **DESC** – search by description

10. **CODE** – Display the part number when an item is scanned or manually entered.

11. **DESCRIPTION** – Display the description of an item.

12. **SERIAL NUMBER** – Displays the serial number or the lot number of an item.

13. **EXP DATE** – Display the Expiration date of an item

14. **QTY** – Quantity of the item will be entered on this field after a scan.

15. **FACTOR** – shows the multiplier for the unit of measure. e.g. A Box that has a dozen of the item will show 12 as a

factor.

16. **UOM** – displays the unit of measure. e.g EA (each), FT (Feet), KG (Kilo). etc.

7.2.3.1. I. Inventory counting with Business Vision (BV)

This knowledge base article will guide users on how to run an inventory count using the BASIS App together with Sage Business Vision from start to finish.

IMPORTING INVENTORY DATA FROM BV

Online Instructions

IMPORTED INVENTORY LIST

Search by: Code / Desc / UPC/Loc

(Double click to cancel filter)

WH	Code	Description	U.O.M	UPC	On Hand	Price 1	Price 2	Serialized	Lot#	Location	Conv.Fac	Bcde	Allow FRACTIONAL Qty
00	CD-204	Compact Disk Player with Autoskip	EA	CD-204	208			0		row23	1	✓	1
00	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	393			0		row16	1	✓	1
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	100			0		bin	1	✓	1
00	EQ-1245	Equalizer (7 band)	EA	EQ-1245	147			0		row10	1	✓	1
00	EQ-1800	Equalizer (10 band)	EA	EQ-1800	150			0		Row11	1	✓	1
00	FCB-250	Finished cabinet for SP-250	EA	FCB-250	50			0		whse	1	✓	1
00	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	141			1		Row 8	1	✓	1
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	102			1		row 8	1	✓	1
00	GR-250	Speaker Grill for SP-250	EA	GR-250	95			0		whse	1	✓	1
00	MCB-250	Entertainment Center	EA	MCB-250	87			0		whse	1	✓	1
00	MD46	6" Midrange Cone Speaker	EA	MD46	69			0		shelf	1	✓	1
00	N142	Screws for Speakers (SP-250)	EA	N142	1380			0		bin 8	1	✓	1
00	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	226			0		whse	1	✓	1
00	PCM3550	Personal Hand-held Organizer	EA	PCM3550	176			0		lock2	1	✓	1
00	PCM8420	Personal Organizer	EA	PCM8420	130			0		lock2	1	✓	1
00	PRCB-250	Unfinished Speaker Cabinet	EA	PRCB-250	59			0		whse	1	✓	1
00	PS-2	Sony Playstation 2	EA	PS-2	108			0		shelf	1	✓	1
00	RC2400	Receiver - 100 watts	EA	RC2400	110			0		Row20	1	✓	1
00	RC4850	Receiver - 220 watts	EA	RC4850	180			0		sl 27	1	✓	1
00	RCA-R	RCA Stereo CD Clock Radio	EA	RCA-R	156			0		shelf	1	✓	1
00	SAP90	Cables: Shielded Phono/RCA/6ft.	EA	SAP90	130			0		Shelf	1	✓	1
00	SBX-250	Cardboard container for SP-250	EA	SBX-250	347			0		sl 19	1	✓	1
00	SP-101	Speakers - Bookshelf	PR	SP-101	84			0		Shelf	1	✓	1
00	SP-20	Speakers - 10" Bookshelf	PR	SP-20	120			0		Shelf	1	✓	1
00	SP-250	Speakers - Indoor/Outdoor	PR	SP-250	154			0		Floor	1	✓	1
00	SP-30	Speakers - Ceiling	PR	SP-30	139			0		Row 6	1	✓	1
00	SP-303	Speakers - Wharfedale Floor	PR	SP-303	166			0		Floor	1	✓	1
00	SP-400	Speakers - 3-Way Floor	PR	SP-400	155			0		Floor	1	✓	1

Inventory Counting

Inventory Scanning

Print Barcodes

Copy / Updates Products between Warehouses

Additional Info

Get from Cloud

Send To Cloud

Use API

Close Inventory Form

Print

Skid Labels

Label Setup

Copy codes to UPC for Primary

Format xx-xxxxxx to barcode

Barcodes Missing

Record: 1 of 51

Unfiltered


Search

To get started with the inventory count we have to make sure that the item inventory in business vision are imported to the BASIS DESKTOP ([see Importing Inventory](#)) .

Once all is imported we can now start with the SYNC

SYNC INVENTORY TO CLOUD



To sync the inventory to the cloud just click on the  button

The total number of items will be displayed in the confirmation box once the export is finish.

```
47 / 51
48 / 51
49 / 51
50 / 51
Done
Inventory UOM sync done
Please wait.....
```

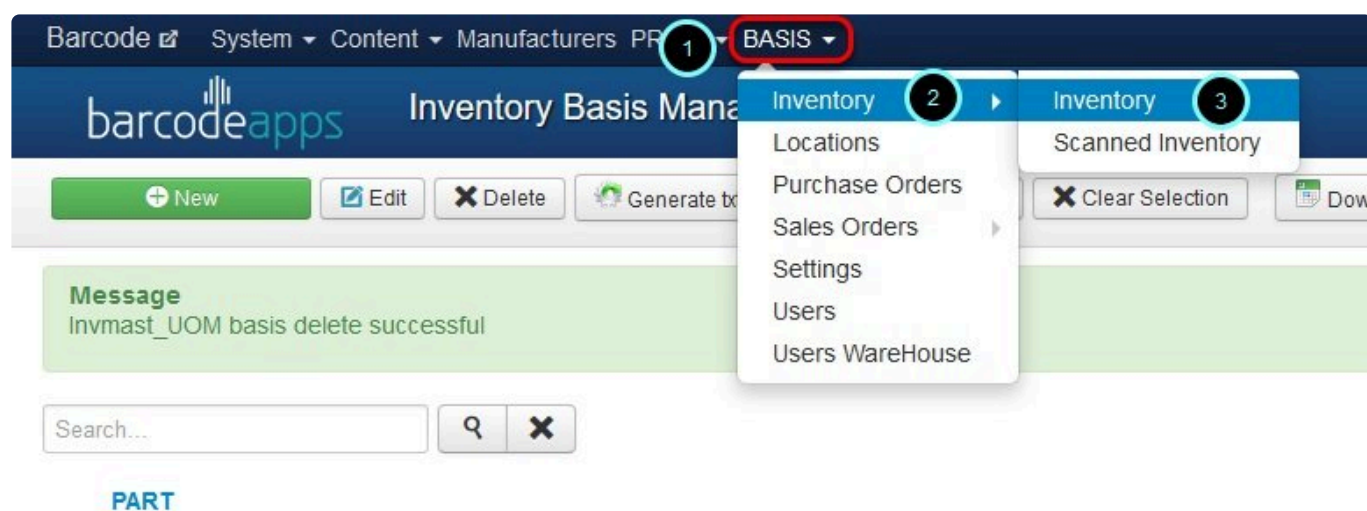
```
PRISM API Version : 1.2.119
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :BasisInvMast
PRISM Cloud> Action :uploadInvMast
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to JUNBARCODEAPPS\BASIS (BAR01)
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> Processing 51 records ...
```

We can also check if the inventory was successfully exported to the cloud (Joomla Website)

To check the cloud. Login using your admin credentials on the Joomla website.



Click on BASIS , Inventory, and then Inventory



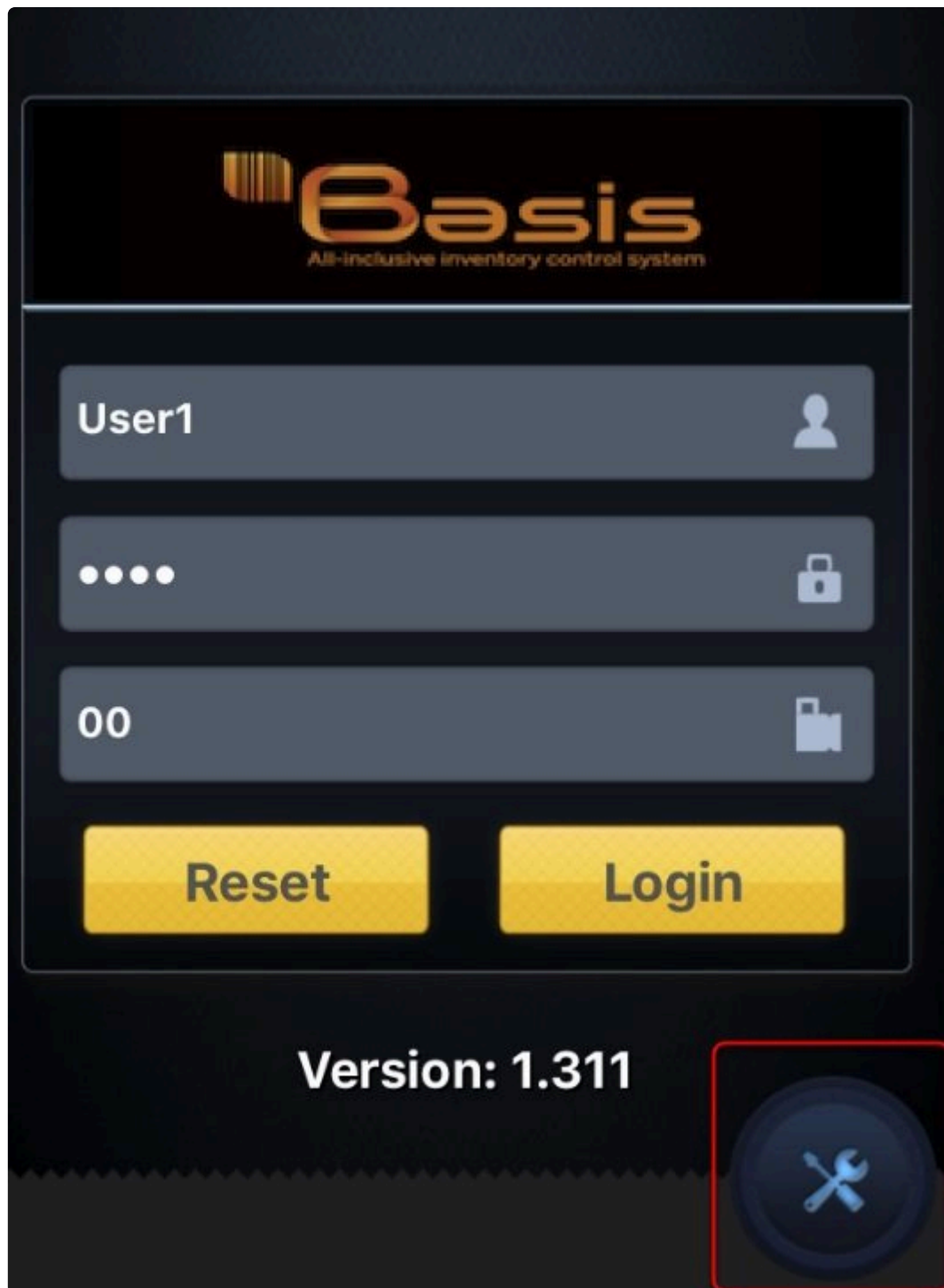
* note: Total number should match with the total uploaded item/s.



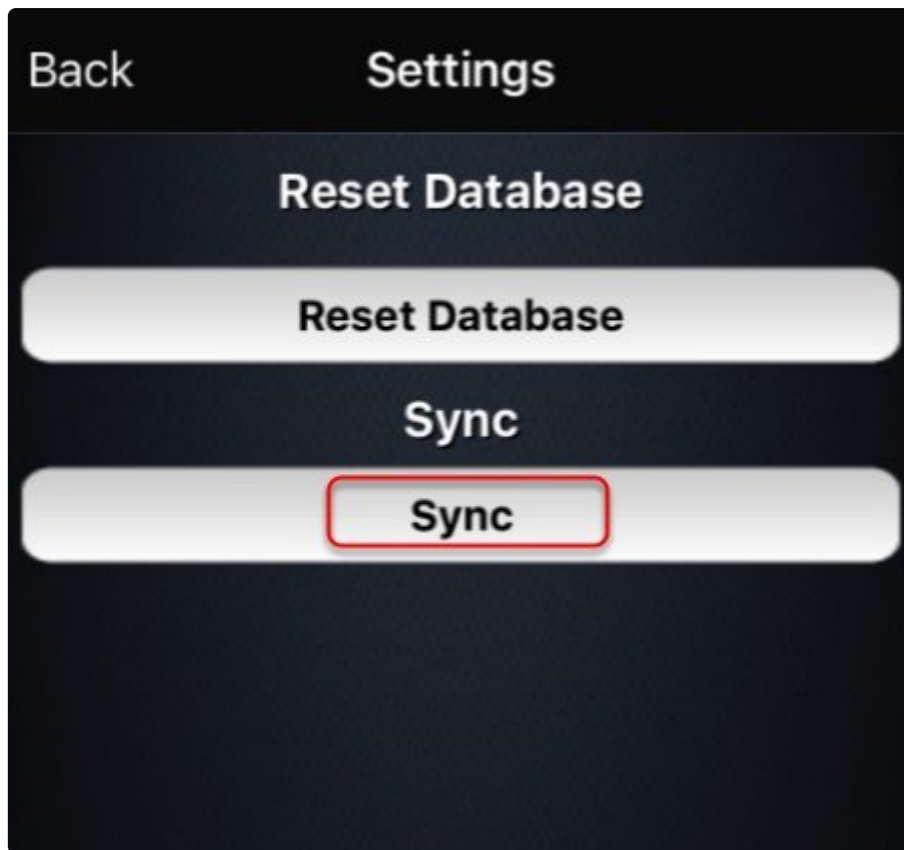
Once finish. We can now then run a sync on the BASIS App

SYNC INVENTORY TO MOBILE DEVICE

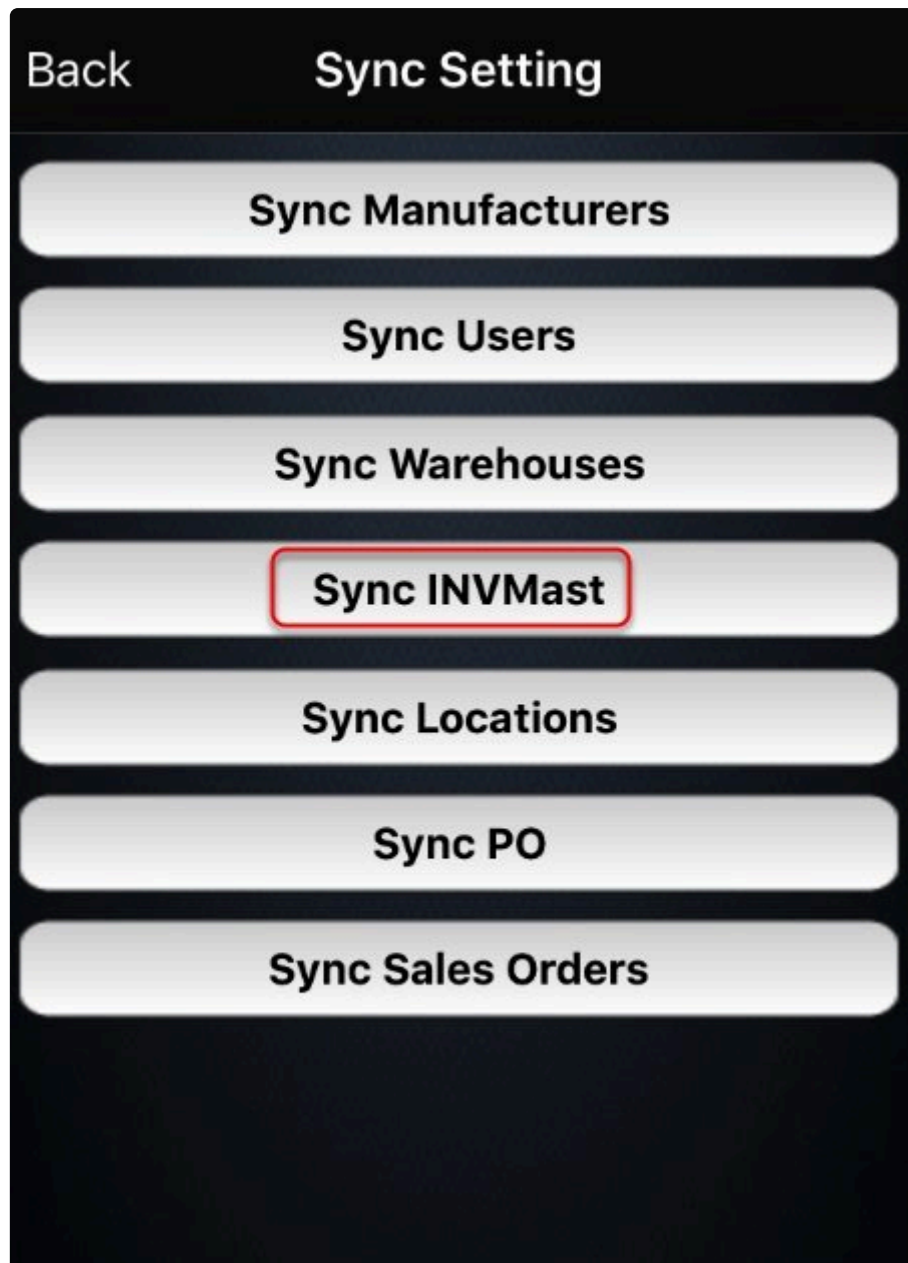
To sync the inventory data. From the main inventory screen. Tap on the settings icon.



Tap on the sync option



To begin the sync .Tap on Sync INVMast.



Now we have a complete sync with all components. We can now start doing an inventory review

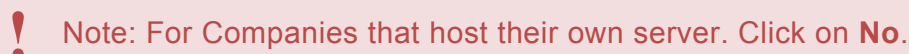
INVENTORY REVIEW

Once all Product are imported. Click on Inventory from the BASIS main window.

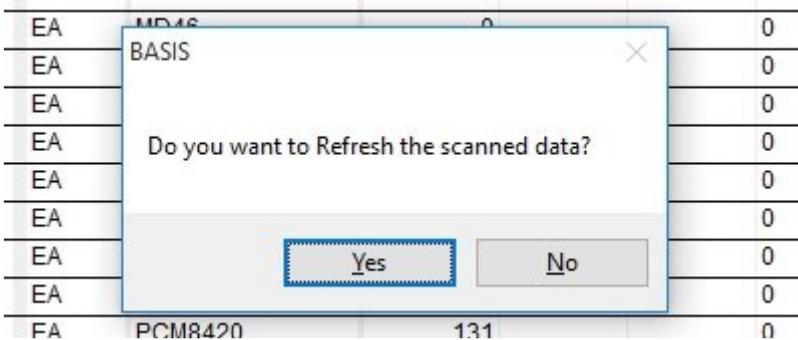


Click on Inventory Counting

Click on Yes to Import Inventory to Basis Cloud Server



Click on Yes to refresh scanned data



Click on the drop down menu and select a warehouse.

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses **Start/Stop BV Inventory** Time Inventory Started **14/06/2016 9:53:53 AM** Counter Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0				R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0				R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Replace BV Locations with Locations listed above ☐ **SBNU** **Recount Sheets** **Apply** **By \$**

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Export Type **BV** Double click to enable **Export To BV** Division **000**

Add Items not scanned to Inventory List Inventory History **CLEAN UP ALL TABLES** **Skid/Reset Expiry** **SN Report** **Bypass Committed**

se for which you are starting an image. you MUST start an image to do an inventory If adding a filter select YES when prompted to use filtered



NOTE: Inventory can be done one warehouse at a time

Click on **CLEAN UP ALL TABLES** and click on **YES** when prompted to remove any existing image

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started 14/06/2016 9:53:53 AM Counter Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0		✓		R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0		✓		R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Export Type BV Double click to enable Export To BV Division 000

Add Items not scanned to Inventory List Inventory History **CLEAN UP ALL TABLES** Skid/Reset Expiry SN Report Bypass Committed

to Inventory List History ALL TABLES

You MUST start an image to do an inventory
If adding a filter select YES when prompted to use filtered

Once all is cleared. An image can now be recreated.

[Online Instructions](#)
[PDF Instructions](#)

Scanned Items Only

Remove committed from image

Inventory Counting

☐ All Warehouses

Start/Stop BV Inventory

Time Inventory Started

14/06/2016 9:53:53 AM

Counter

Location

No Locations

> 1000

Refresh

WH

00

B

S

E

Item

B

S

E

Product Code

Search

Reset

Remove from Image

Add Initial

Reports

Report

Add Manually

Delete

WH

Code

Description

UOM

OnHand

Counted Qty

Location

SN

Lot

Weight

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:

Record: 14 1 of 1 No Filter Search

☐ Replace BV Locations with Locations listed above

SBNU

Recount Sheets

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

☐ UpLoad SN With Qty

Add to master

UOM

Export Type

BV

Export To BV

Division

000

...

Add Items not scanned to Inventory List

Inventory History

CLEAN UP ALL TABLES

Skid/Reset Expiry

SN Report

☐ Bypass Committed

You MUST start an image to do an inventory

IMAGE REVIEW

Two types of Images can be created which will be applicable for any inventory scenario

1. **Full Inventory Image** – this image contains all list of inventory.

To create a full inventory image . Make sure that there is nothing defined on the filters before clicking on Start Inventory.

Online Instructions PDF Instructions

Scanned Items Only Remove committed from image

Inventory Counting

☐ All Warehouses 00 WH 00 START INVENTORY Time Inventory Started 15/06/2016 5:35:39 AM Counter Location No Locations > 1000 Refresh

Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH Code Description UOM OnHand Counted Qty Location SN Lot Weig.

This will tell basis that all items will be included on the inventory count.

2. Cycle Inventory Image – this image is a collection predefined items from an inventory.

To create a cycle inventory image. Just type in a search string on the item or products field and then click on START INVENTORY

Online Instructions PDF Instructions

Scanned Items Only Remove committed from image

Inventory Counting

☐ All Warehouses 00 WH 00 START INVENTORY Time Inventory Started 15/06/2016 5:35:39 AM Counter Location No Locations > 1000 Refresh

Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH Code Description UOM OnHand Counted Qty Location SN Lot Weig.

In our example: We ticked on “B: (begins) and typed in “ST” on the item field which means that all items that

BEGINS with ST will be included in the Inventory.

Online Instructions PDF Instructions

Scanned Items Only Remove committed from image

Inventory Counting

☐ All Warehouses 00 WH 00 START INVENTORY Time Inventory Started 15/06/2016 5:51:11 AM Counter Location No Locations > 1000 Refresh

Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weig.
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1			R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2			R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4			R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9			R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor			R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin			R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor			R

After the image is created. We can now start the Inventory by clicking on START INVENTORY.

Online Instructions | Scanned Items Only | Remove committed from image | **Inventory Counting** | PDF Instructions

☐ All Warehouses | **START INVENTORY** | Time Inventory Started: 15/06/2016 5:51:11 AM | Counter: | Location: | No Locations: | > 1000 | Refresh

WH: 00 | B: | S: ST | E: | Product Code: | Search | Reset | Remove from Image | Add Initial

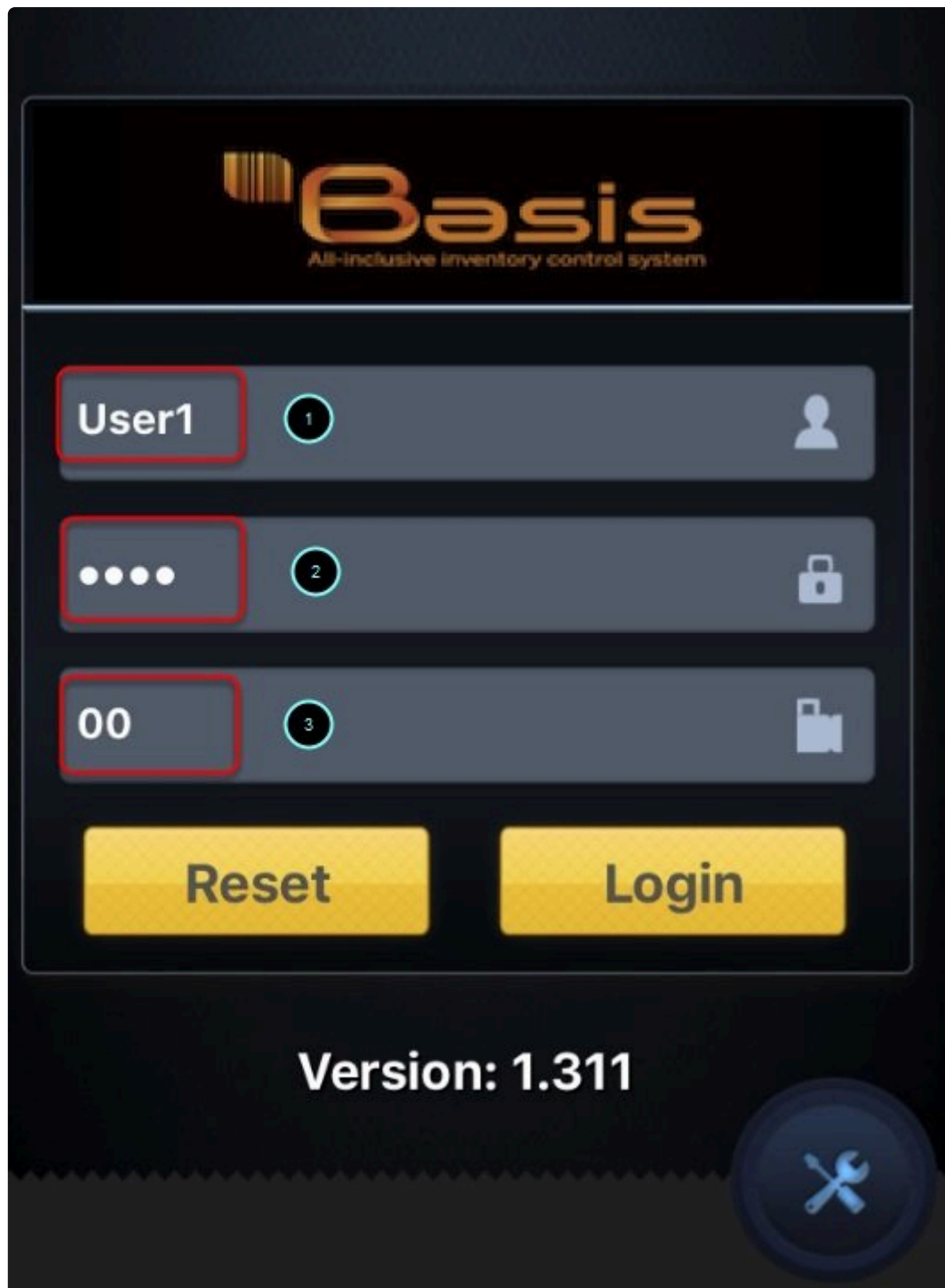
Reports: Discrepancy - Scanned Items | Report | Add Manually | Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1			R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2			R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4			R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9			R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor			R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin			R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor			R

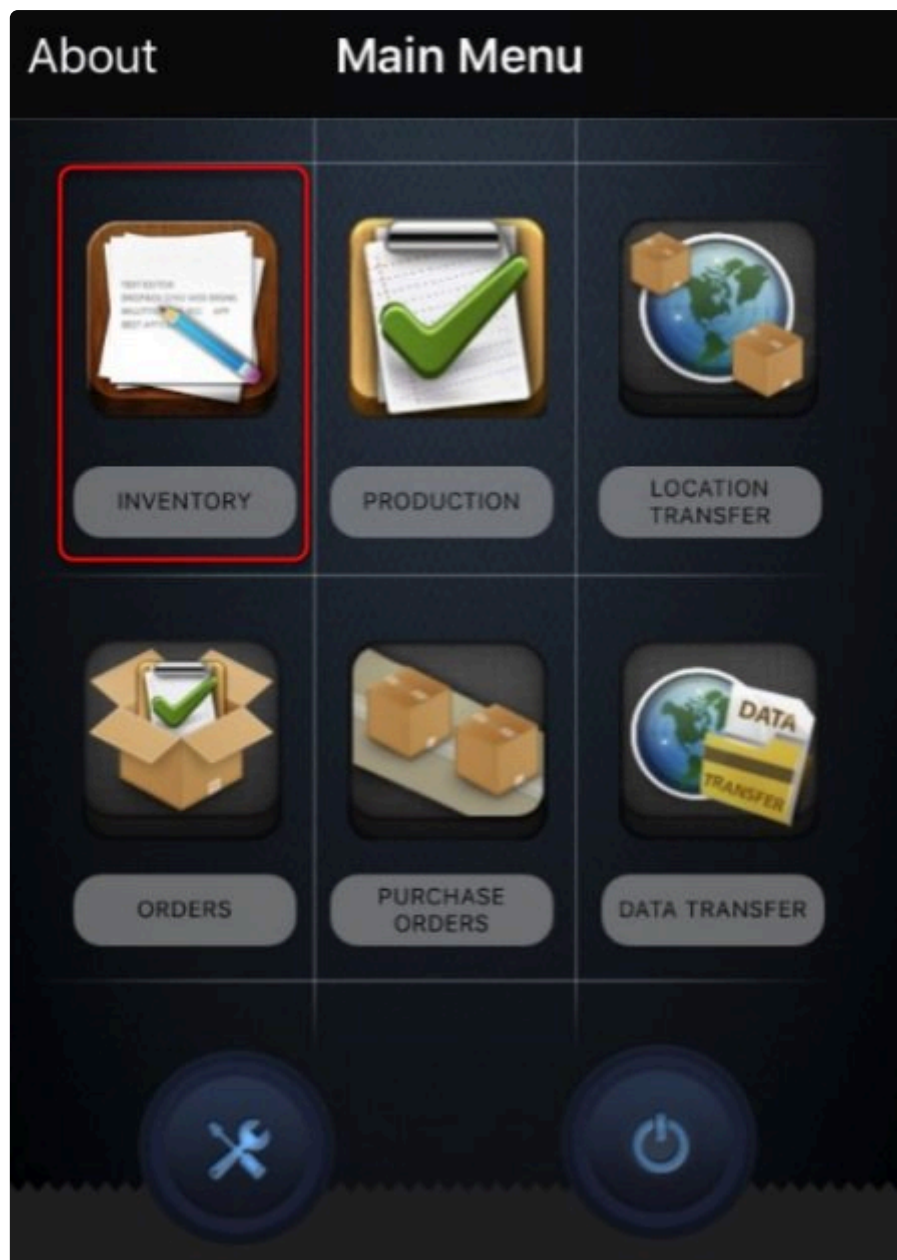
* NOTE: On the BASIS DESKTOP when creating an image. We recommended that we generate an inventory list that has a ZERO count prior the counting so that a real time monitoring can be achieved during the counting process.

INVENTORY COUNTING USING THE iPad.

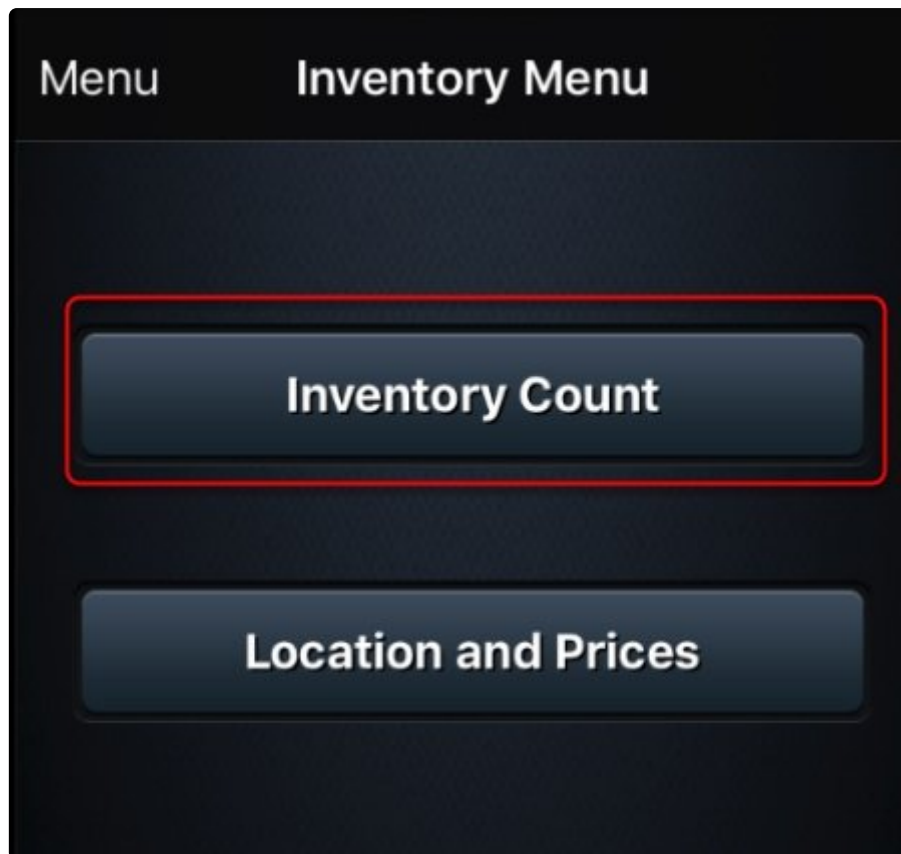
To get started login to the BASIS App



Tap on Inventory



Tap on Inventory count



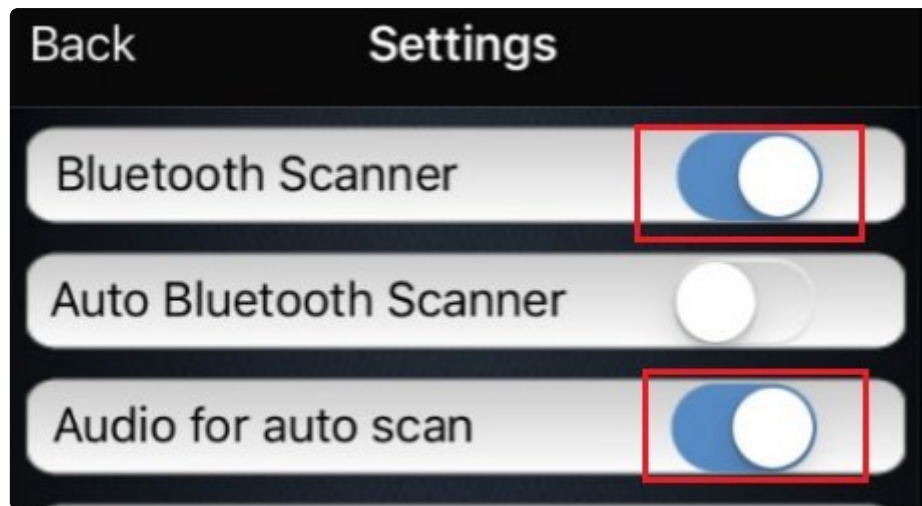
**

The [inventory count window](#) will open from here we can start the inventory count.

The screenshot shows the 'Inventory Count' screen of an application. At the top, there are three navigation options: 'Back', 'Inventory Count' (the current screen), and 'Settings'. Below these, there is a section with a toggle switch for 'Auto BT' (labeled 1), an 'Accept' button (labeled 2), and a 'Scanned 0' button (labeled 3). The next section contains a 'Next No.' field with the value '1' (labeled 4) and a 'SCAN' button (labeled 5). Below this is a 'Location' field with the placeholder text 'Scan or Enter Location' (labeled 6). The 'WH' field contains the value '00' (labeled 7). The 'Item#' field contains the text 'Item Number' (labeled 8), followed by a 'SEARCH' button (labeled 9) and a 'DESC' button (labeled 10). Below these are two rows of input fields: 'Code' (labeled 11) and 'Description' (labeled 12), and 'Serial Number' (labeled 13) and 'Exp Date' (labeled 14). The bottom section has three fields: 'QTY' (labeled 15), 'Qty' (labeled 16), 'Factor' (labeled 17), and 'UOM' (labeled 18). A large 'Accept' button is at the very bottom.

ADDING AN ITEM (INVENTORY COUNT)

Before adding an item. Make sure that the settings “**Bluetooth scanner**” and “**Audio for Auto scan**” are enabled under settings.



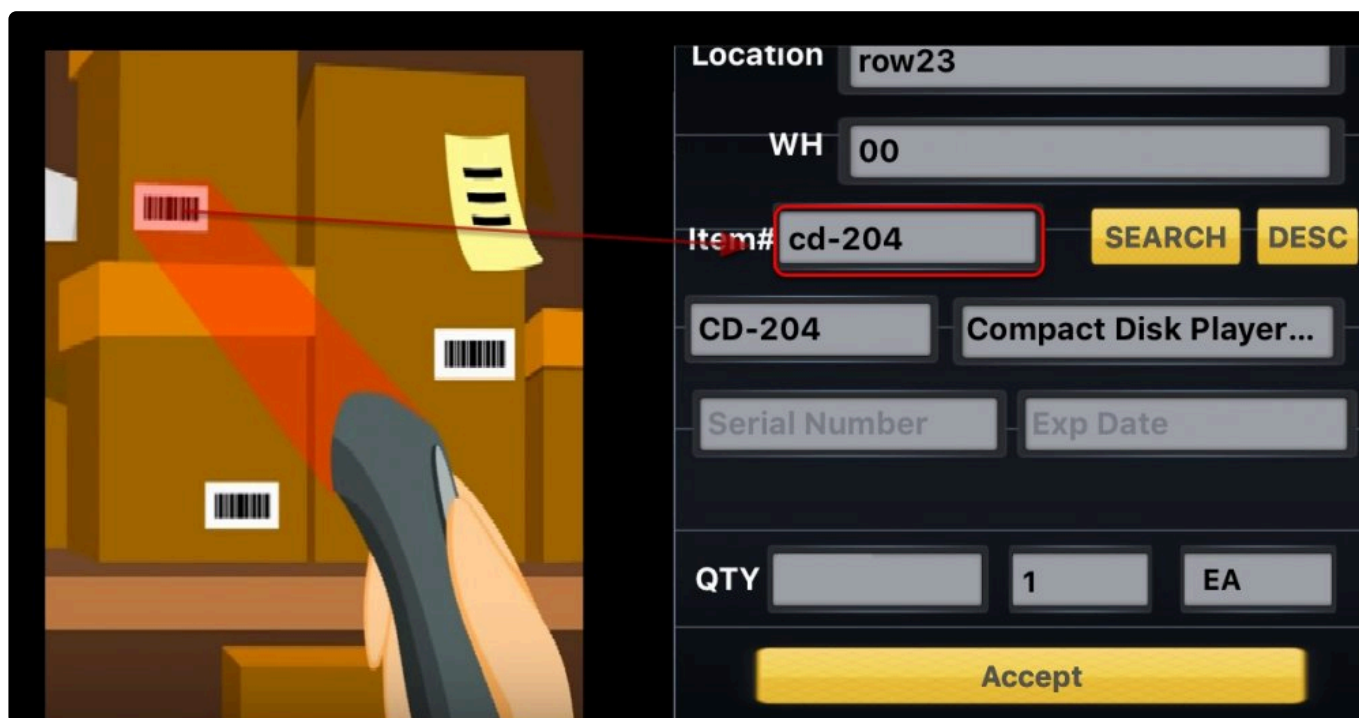
Using the Bluetooth Scanner Scan the item location or Manually Enter the location of the item.



More about Locations:

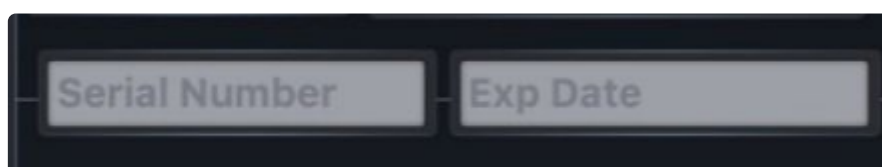
- Enabling the Auto fill function under Location settings will make the BASIS App use the default location that is defined in basis
- Enabling Clear location will erase the location after each scan and otherwise.
- Enabling Mandatory location will make basis not accept a scan unless the location is defined.

Scan the item bar code.



Note: Once the item is scanned it will auto populate the details

Scan Serial or LOT number (If applicable they both go in the Serial Number field)



* NOTE: If an item is serialized or lot numbered basis will prompt you to enter it otherwise it will just ask for the quantity.

Enter Quantity and tap on ACCEPT

The screenshot shows the 'Inventory Count' screen of an application. At the top, there are three tabs: 'Back', 'Inventory Count' (which is selected), and 'Settings'. Below the tabs, there are several input fields and buttons. The 'Location' field contains 'row23'. The 'WH' field contains '00'. The 'Item#' field contains 'cd-204', with a yellow 'SEARCH' button and a yellow 'DESC' button to its right. Below these, there are two more fields: 'CD-204' and 'Compact Disk Player...'. Further down, there are two more fields: 'Serial Number' and 'Exp Date'. At the bottom, there is a 'QTY' field with the value '220', a '1' field, and an 'EA' field. A red box highlights the 'QTY' field, and a green circle with the number '1' is next to it. Below the 'QTY' field, there is a yellow 'Accept' button, which is also highlighted with a red box. A green circle with the number '2' is next to the 'Accept' button.

A confirmation will show once the scan is successful. Just repeat the same process till all scans are finish



ADDITIONAL INFO on ADDING AN ITEM

In an event that the App doesn't recognize the item (UPC/ BARCODE issues). We can still do a manual entry on the item

To do a manual entry. Type in the name of the item in the item field. Then tap on search and the details will show once the search is successful.

The screenshot displays the BarcodeApps interface with the following elements:

- Item#** field containing **SPW-12G** (circled with a red box and labeled 1).
- SEARCH** button (circled with a red box and labeled 2).
- DESC** button.
- Item#** field containing **SPW-12G** (circled with a red box and labeled 3).
- SEARCH** button.
- DESC** button.
- SPW-12G** field.
- 12-Gauge Micro Flat S...** field.
- Serial Number** field.
- Exp Date** field.
- QTY** field containing **15**.
- 1** field.
- EA** field.
- Accept** button.

* Note: When typing the item code. Make sure that you key in the EXACT word.

ENABLING FAST MODE

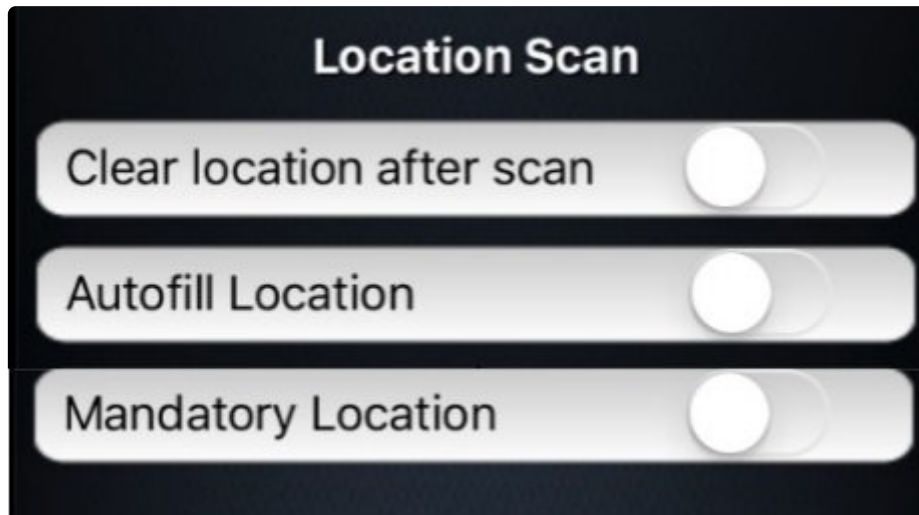
Another way to scan an item is via fast mode. Using this mode enables the user to scan in a continuous pace ,where each scan will be counted as one.

Best used in a scenario where multiple items are stored in a single location (box,lots,bins. etc)

To enable this feature just tap on the AUTO BT option.

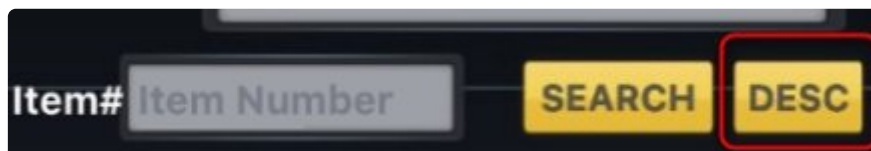


Note: When using this option we have to make sure the clear locations and mandatory locations are disabled.



SEARCH BY DESCRIPTION

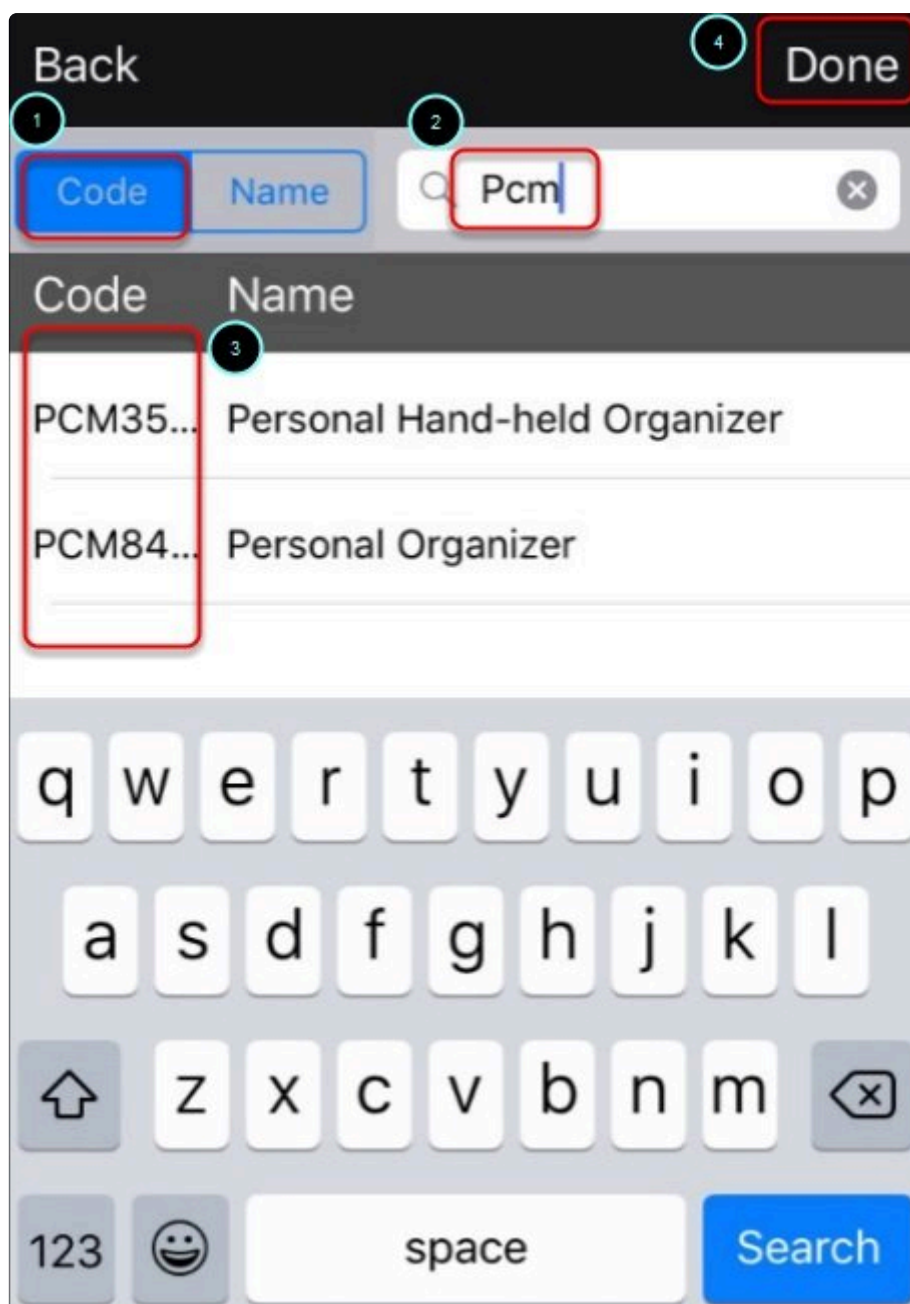
We can also use the search by description if there is an issue finding the item thru a manual search. To do a search by description. Tap on the DESC button.



There are two ways to search for an item

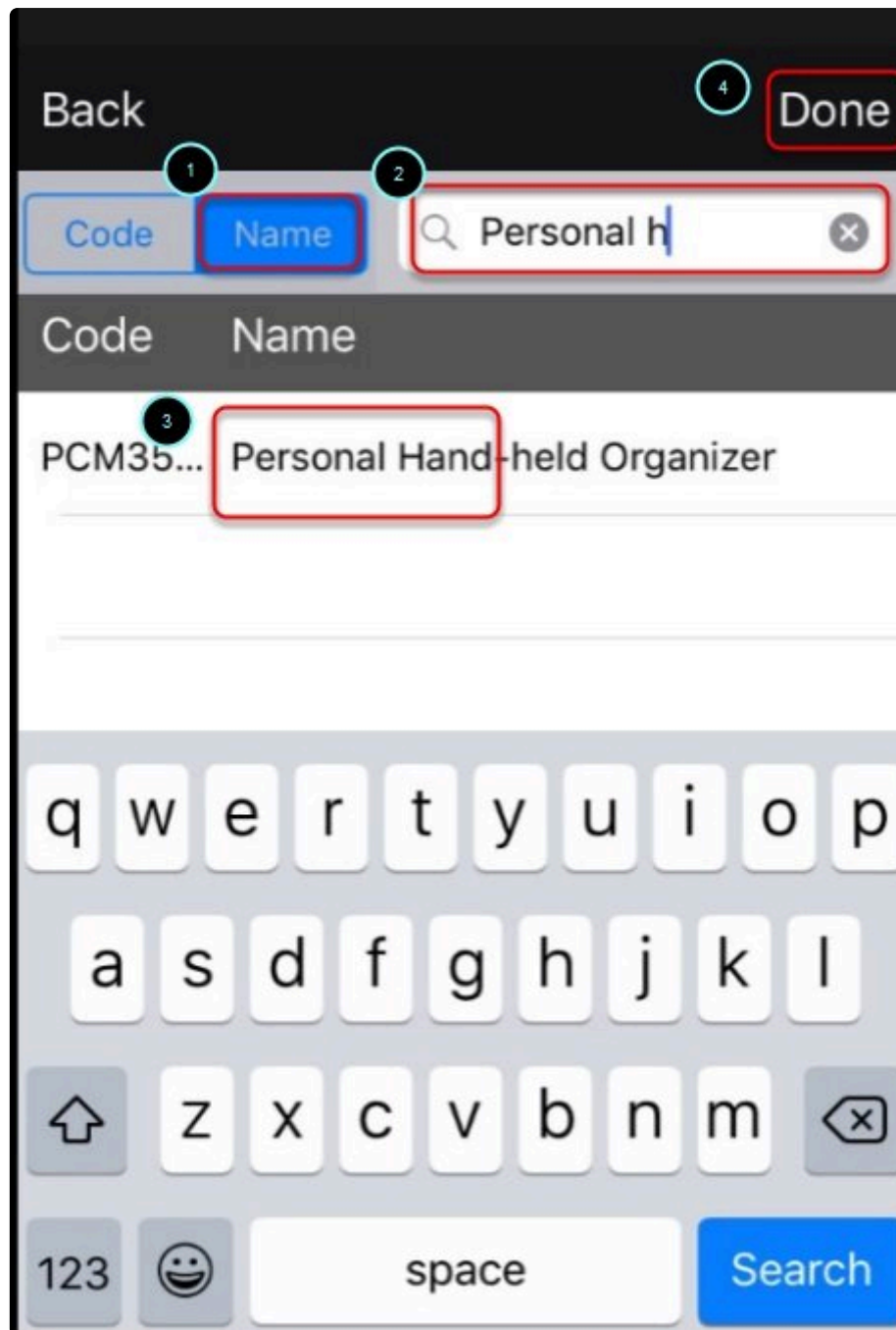
- Search by item code.

To search for item code. Tap on Code. Type in the keyword for the search. Results will show at the bottom . Once the item is found. just tap on it and then select done.



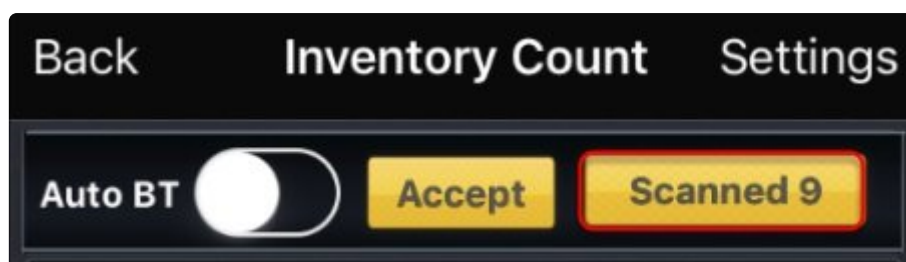
- Search by Description.

To search by description. Type in the keyword for the search. Results will show at the bottom . Once the item is found. just tap on it and then select done.

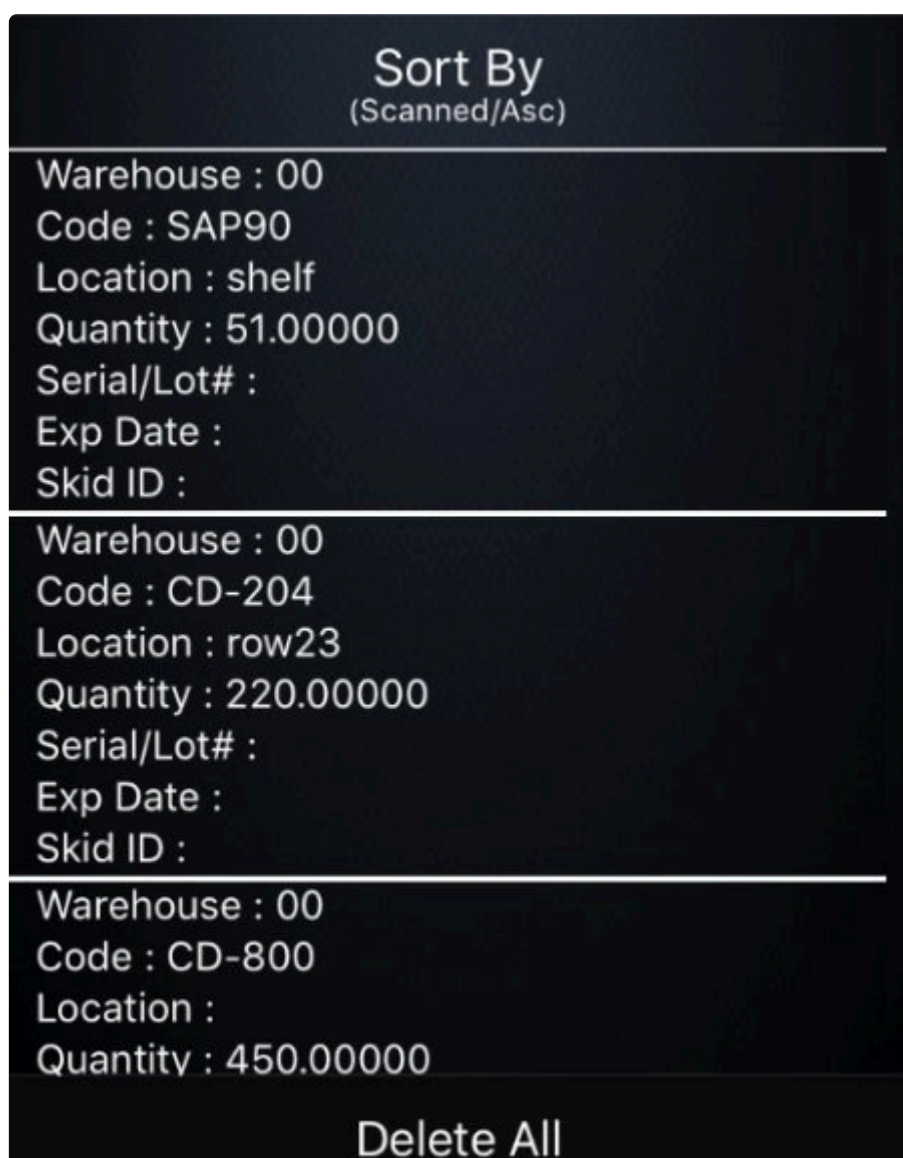


REVIEWING DATA

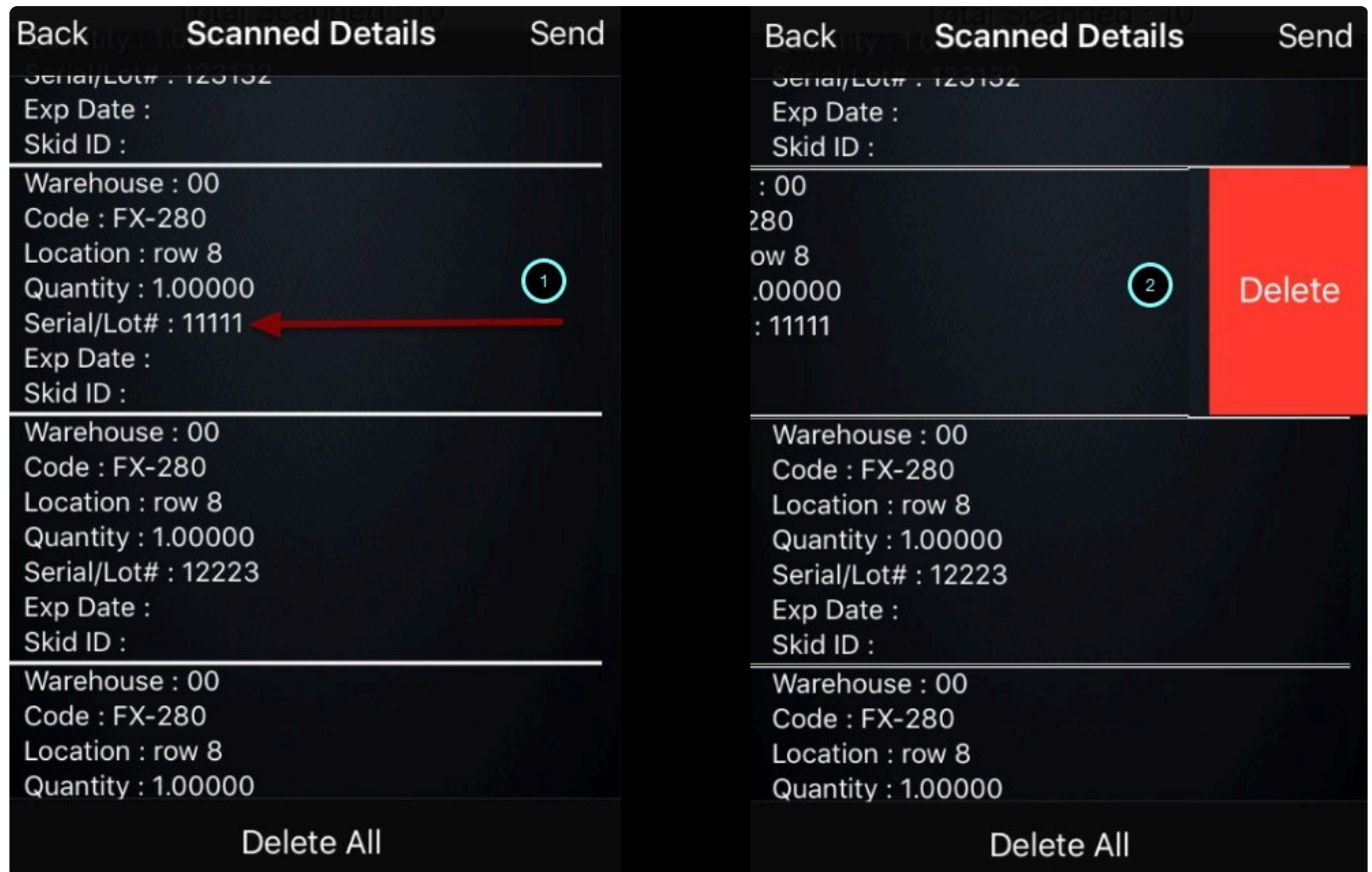
To review scanned items , tap on the scanned items option



This will show a summary of all scanned items

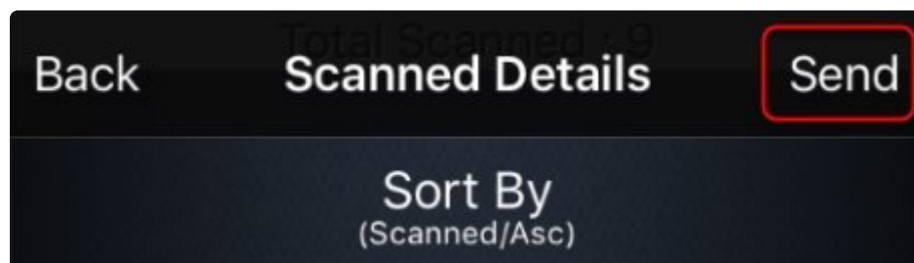


If you wish to delete an entry. Just swipe the item to the left and the delete option will appear. Just tap on delete

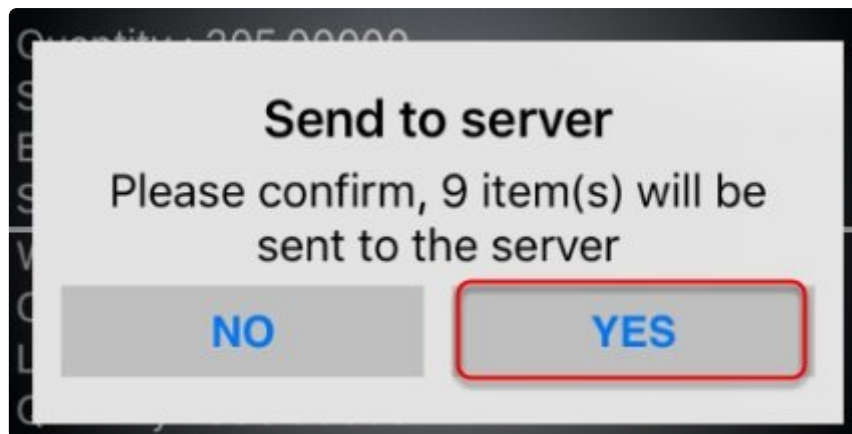


SENDING THE DATA BACK

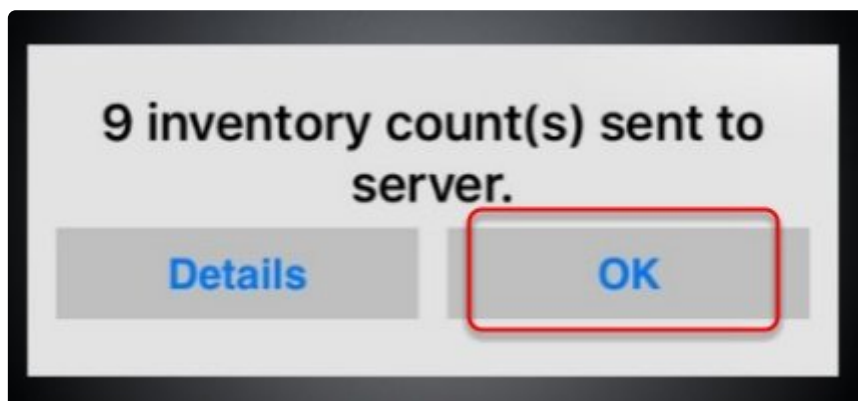
To send the data back to the cloud. on the review window just click SEND



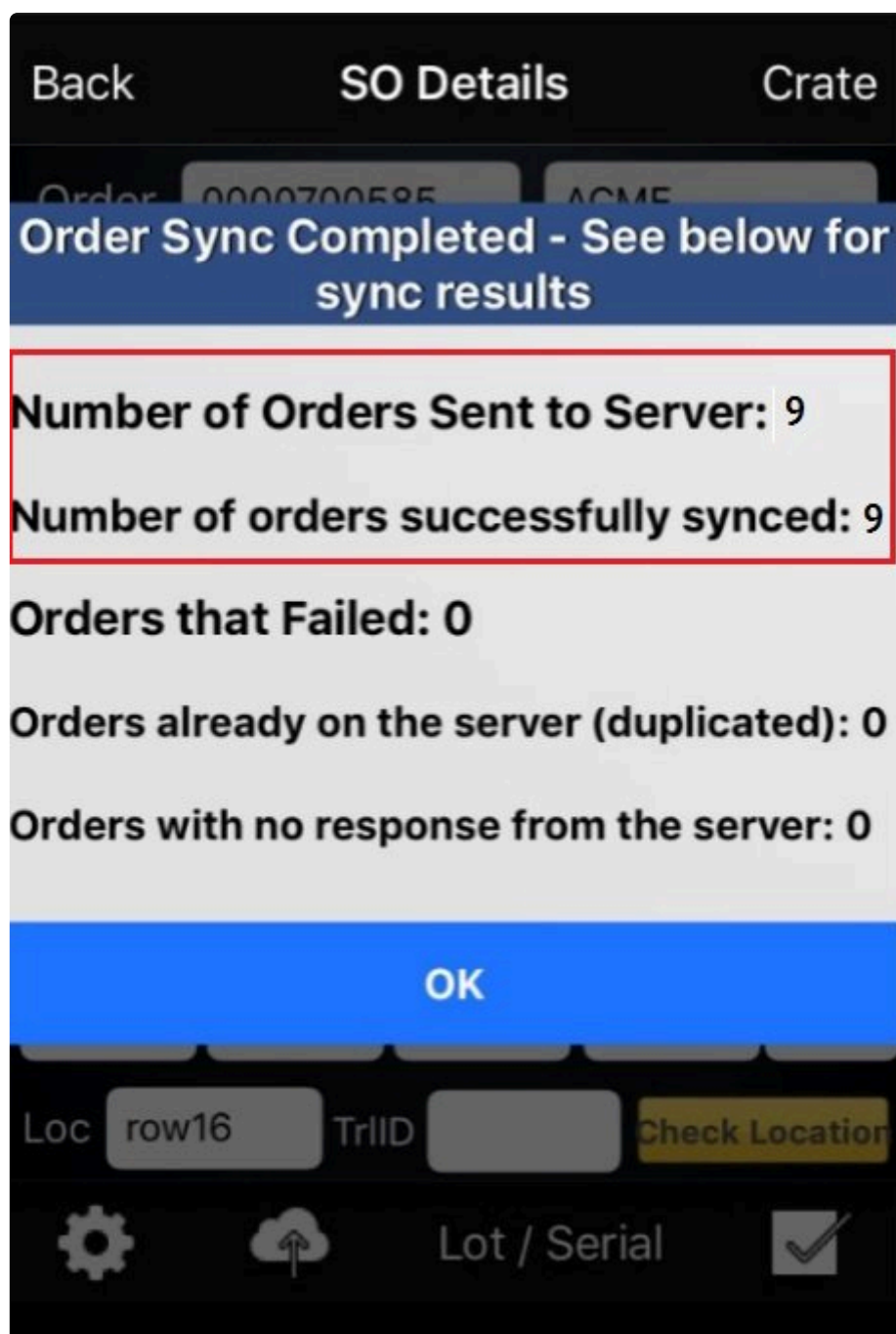
Click YES to confirm



Click on OK



A notification will show with a summary of the sync .



Click on Ok to proceed in sending the data back to the cloud.

REVIEWING RESULTS

Results from the scan can be reviewed using the BASIS desktop this will help the BASIS DESKTOP user to monitor the progress of the inventory count.

To check results click on Refresh from the BASIS DESKTOP

[Online Instructions](#)[PDF Instructions](#)

Scanned Items Only

Remove committed from image

Inventory Counting

☐ All Warehouses

START INVENTORY

Time Inventory Started

Counter

Location

No Locations

> 1000

Refresh

WH

00

Item

Product Code

Search

Reset

Remove from Image

Add Initial

Click on Yes

BASIS

Do you want to import the data from the cloud?

Yes

No

! Note:No if self hosted

The results of the scan will show under the Counted Qty Field

Custom Toolbars

[Online Instructions](#)[PDF Instructions](#)

Scanned Items Only

Remove committed from image

Inventory Counting

☐ All Warehouses

START INVENTORY

Time Inventory Started

Counter

Location

No Locations

> 1000

Refresh

WH

00

Item

Product Code

Search

Reset

Remove from Image

Add Initial

Reports

Report

Add Manually

Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigi
00	CD-204	Compact Disk Player with Autoskip	EA	307	205	row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	459	393	row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	93	100	bin			R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	168	5	row 8			0 R
00	SPW-12G	12-Gauge Micro Flat Speaker Wire	EA	135	141	bin 2			0 R

From here we can now generate reports (see reports) from the basis desktop to get an analysis of the inventory count and at the same time help with the decision making

Clicking on the item will also show a more detailed . For serialized / Lot numbered item it will show the details (serial,lot,location,exp date, SkidID) of each item

Inventory Counting

Online Instructions | Scanned Items Only | Remove committed from image | PDF Instructions

☐ All Warehouses | **START INVENTORY** | Time Inventory Started | Counter | Location | No Locations | > 1000 | Refresh

WH: 00 | Item: | Product Code: | Search | Reset | Remove from Image | Add Initial

Reports: | Report | Add Manually | Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh
00	CD-204	Compact Disk Player with Autoskip	EA	307	205	row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	459	393	row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	93	100	bin			R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	168	5	row 8	✓		0 R
00	SPW-12G	12-Gauge Micro Flat Speaker Wire	EA	135	147	bin 2			R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID
00	SPW-12G	6	bin			
00	SPW-12G	141	bin 2	#####		
* 00						

Record: 1 of 2 | No Filter | Search

Export Type: BV | Double click to enable | Export To BV | Division: 000

Add Items not scanned to Inventory List | Inventory History | CLEAN UP ALL TABLES | Skid/Reset Expiry | SN Report | Bypass Committed

it will also shows details of an item that has separate location.

00	FX-280	All-in-one Printer/Scanner/Copier	EA	168	5 row 8	✓	I	0	R
00	SPW-12G	12-Gauge Micro Flat Speaker Wire	EA	135	147 bin 2		I		R

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	SPW-12G		6 bin			
00	SPW-12G		141 bin 2		#####	
* 00						

Record: 1 of 2 No Filter Search

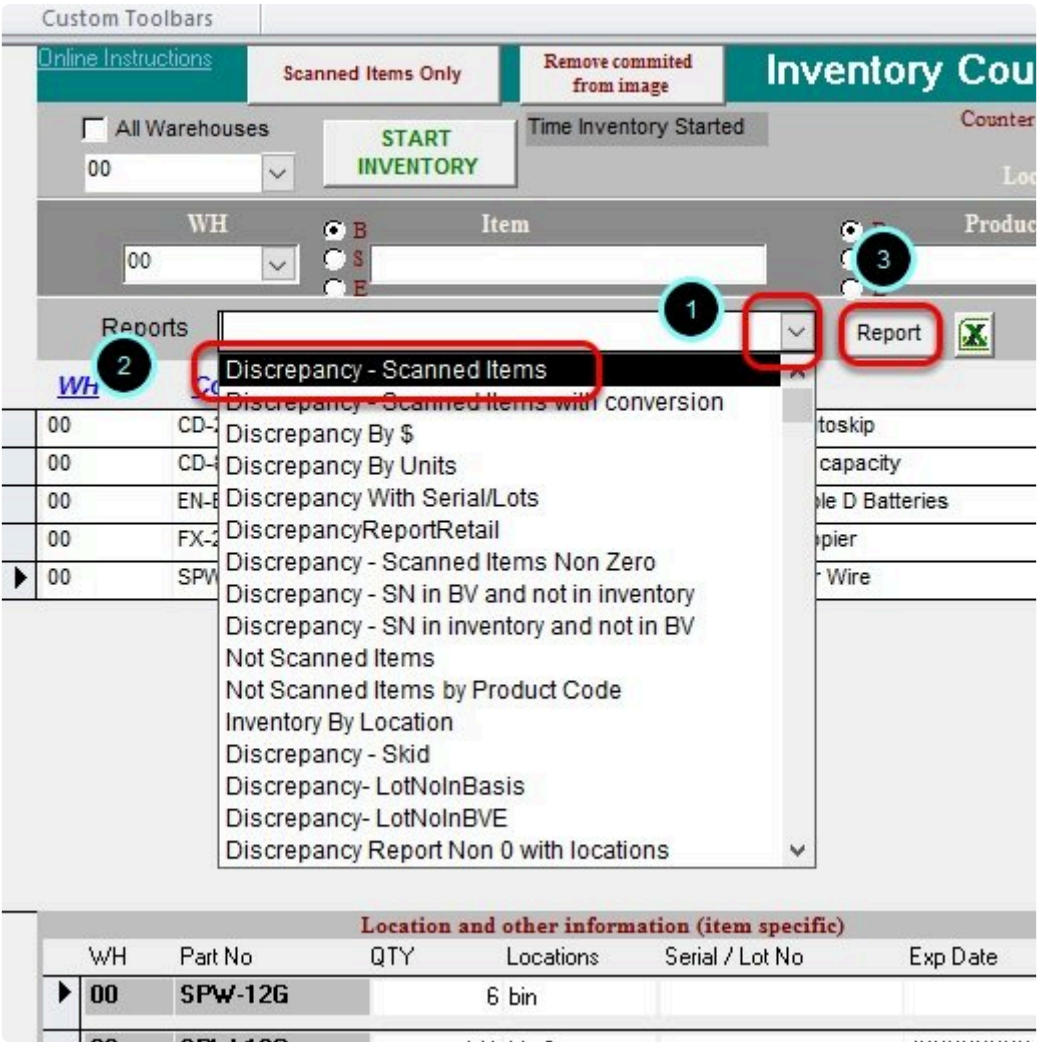
☐ Replace BV Locations with Locations listed above **SBNU** **Recount Sheets**

☐ UpLoad SN With Qty

A report can also be generated from the basis desktop to get an analysis of the inventory count .

To Generate a report just select the type of report and then click on the reports button. (see reports for details)

Sample of a DISCREPANCY – SCANNED ITEMS report

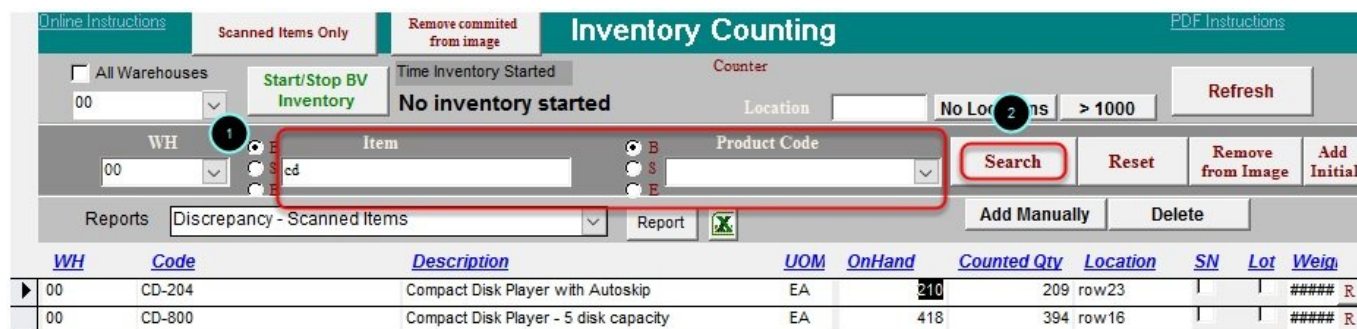


MAKING ADJUSTMENTS

After reviewing the Discrepancy report. Making minor adjustments or modification on the Inventory may be needed to meet the Inventory targets

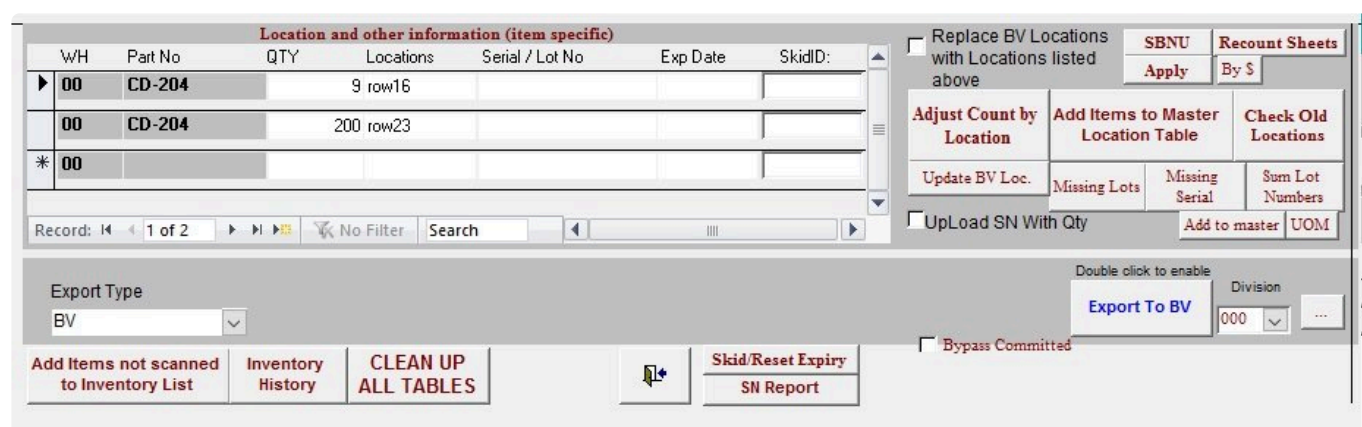
To make adjustments on an item select the item from the Inventory list.

* Note: that you can also use the search field. To do this, type in the string and click on search.



WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh
00	CD-204	Compact Disk Player with Autoskip	EA	210	209	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R

Once the item is selected the details should now show on the Location and Other information Section



WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID
00	CD-204		9 row16			
00	CD-204		200 row23			

Now we can make adjustments on the following:

- QTY
- LOCATION
- SERIAL NUMBER/LOT NUMBER
- EXPIRY DATE
- SKID NUMBER

Once adjustments is done click on Adjust Count by Location to update the quantities scanned.



MANUALLY ADDING AN ITEM

Items not scanned during the inventory can be manually added on the list.

To manually add an item Click on “Add Manually”

Inventory - BASIS

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started **No inventory started** Processing please wait Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report **Add Manually** Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	208	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			#### R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			#### R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			#### R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			#### R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			#### R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			#### R
00	GR-250	Speaker Grill for SP-250	EA	95	95	wrhse			#### R
00	MCB-250	Entertainment Center	EA	89	88	wrhse			#### R
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			#### R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			#### R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226	wrhse			#### R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			#### R
00	PCM8420	Personal Organizer	EA	131	130	lock2			#### R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59	whse			#### R
00	PS-2	Sony Playstation 2	EA	108	0				#### R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			#### R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-204	8	row16			
00	CD-204	200	row23			
*						

Record: 1 of 2 No Filter Search

Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Select a warehouse

The screenshot shows the 'Decode Barcode' window. At the top, there's a 'Wh' dropdown menu with '00' selected. Below it, a list of warehouses is visible: '00 Default Wareh', '01 test warehouse', and '03 test warehouse'. To the right of this list is a button that says 'Scan the Item Barcode or enter the item Code'. Below the warehouse list is a 'Description' field. At the bottom, there are two input fields: 'UPC' with the value 'TV-5200' and 'Product' with the value 'TV-5200'. To the right of these fields is a 'SkidNo' field.

Type in the item code or click on the drop down to search for an item.

The screenshot shows the 'Decode Barcode' window with a search results table. The 'Wh' dropdown is set to '00'. The 'Barcode' field is empty, and the 'Code' field contains 'tp-350'. The 'Description' field is empty. The search results table has the following columns: Item Code, Description, and various attributes (UPC, Product, Quantity, Location, Serial/Lot#, UOM, Date, Conv. Fact). The table lists several items, including 'ST-30 Stand - 30" Speaker', 'ST-40 Stand - Universal Cube Speaker', 'STS-01 Home Sound System with MP3', 'STS-01MAN Instruction Manual STS-01 Sou', 'STS-02 Surround Sound Home Theater', 'SY-MINI Sony MiniDisc Walkman Player', 'TP-350 DVD Player/Hi-Fi VCR Combo', 'TP-560 Toshiba Progressive-Scan DVD', 'TV-2100 20" TV with Flat Picture Tube', 'TV-3600 36" DBX Stereo Color Televisio', 'TV-5200 52" Dolby Pro Logic Surround S', 'UAC-300 Recoton Universal AC Adapter', 'V1-2A Digital-VHS VCR with HDTV-Re', 'V1-4A Hi-fi Stereo 4 Head VCR', 'VAIO-24 Desktop PC with Intel Pentium', and 'XBX-123 XBOX LIVE'. The 'TV-5200' item is highlighted in the table. At the bottom of the window, there is an 'Accept' button and a button with a plus sign.

Define the Quantity ,Location and other optional information such as Seria/Lot# , Skidno, Expiry can be used if its needed then Click on Accept to add the item.

Decode Barcode

Wh Scan the Item Barcode or enter the item Code

Barcode

Code

Description

UPC

Product

Quantity 1

Location

Serial/Lot#

UOM

Date

Conv. Fact

SkidNo Find

Expiry

52" Dolby Pro Logic Surround Sound TV

☒ Serialized ☐ Lot Numbered

2 **Accept**

Click on Refresh and click on Yes when Prompted (No if Self hosted) to update the inventory list.

[Online Instructions](#) [PDF Instructions](#)

Inventory Counting

Scanned Items Only Remove committed from image

☐ All Warehouses Start/Stop BV Inventory Time Inventory Started Processing please wait

No inventory started Location No Locations > 1000 Refresh

WH Item Product Code 1 Search Reset Remove from Image Add Initial

Reports Report Add Manually Delete

WH	Code	Description	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Play	208	row23			R
00	CD-800	Compact Disk Play	394	row16			R
00	EN-BATD	Energizer ACCU F	166	bin			R
00	EQ-1245	Equalizer (7 band	147	row10			R
00	EQ-1800	Equalizer (10 band	150	Row11			R
00	FCB-250	Finished cabinet f	50	whse			R
00	FX-280	All-in-one Printer/	141	row 8			R
00	FX-500	Multi-fax. Printer. Copier. Scanner	102	Row 8			R

BASIS

Do you want to import the data from the cloud?

2 Yes No

List has now been updated

00	EQ-1800	Equalizer (10 band)	EA	150	150 Row11				R
00	FCB-250	Finished cabinet for SP-250	EA	50	50 whse				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141 row 8	✓			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102 Row 8	✓			R
00	GR-250	Speaker Grill for SP-250	EA	95	95 wrhse				R
00	MCB-250	Entertainment Center	EA	89	88 wrhse				R
00	MD46	6" Midrange Cone Speaker	EA	70	69 shelf				R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380 bin 8				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226 wrhse				R
00	PCM3550	Personal Hand-held Organizer	EA	176	176 lock2				R
00	PCM8420	Personal Organizer	EA	131	130 lock2				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59 whse				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132 bin				R
00	SY-MINI	Sony MiniDisc Walkman Player/Recorder	EA	26	26 bin				R
00	TV-5200		EA		12 ROW11				R

SENDING THE DATA BACK

To send the data back to the cloud. just click on Send to complete the sync.

UPLOADING THE DATA BACK TO BV

Once the final discrepancy report has been printed and approved by a supervisor prior to upload. The quantities on that report are the amounts that will now be posted to BV as your new inventory quantities on hand.



NOTE: IT IS STRONGLY RECOMMENDED AT THIS POINT TO TAKE A BACKUP OF THE ACCOUNTING PACKAGE AND BASIS FILES

Sample Final Discrepancy Report

Donut Time Discrepancy Report

Tuesday, 21 June 2016

Counted	AP	OnHand	Disc.	OH-AP	Discr.\$	Location	UOM	Converted	ConvertedBV
Warehouse: 00									
Counted	AP	OnHand	Disc.	OH-AP	Discr.\$	Location	UOM	Converted	ConvertedBV
Sales Dept:									
CD-204	Compact Disk Player with Autoskip	208	210	-2	-\$413	row23	EA	208	210
CD-800	Compact Disk Player - 5 disk capacity	394	418	-24	-\$9,368	row16	EA	394	418
EN-BATD	Energizer ACCU Rechargeable D Batteries	166	166	0	\$0	bin	PK	166	166
EQ-1245	Equalizer (7 band)	147	147	0	\$0	row10	EA	147	147
EQ-1800	Equalizer (10 band)	150	150	0	\$0	Row11	EA	150	150
FCB-250	Finished cabinet for SP-250	50	50	0	\$0	whse	EA	50	50
FX-280	All-in-one Printer/Scanner/Copier	141	141	0	\$0	row 8	EA	141	141
FX-500	Multi-fax, Printer, Copier, Scanner	102	102	0	\$0	Row 8	EA	102	102
GR-250	Speaker Grill for SP-250	95	95	0	\$0	whse	EA	95	95
MCB-250	Entertainment Center	88	89	-1	-\$193	whse	EA	88	89
MD46	6" Midrange Cone Speaker	69	70	-1	-\$20	shelf	EA	69	70
N142	Screws for Speakers (SP-250)	1380	1380	0	\$0	bin 8	EA	1380	1380
P1210A	Semi-gloss resin paint (SP-250)	226	226.5	-0.5	-\$19	whse	EA	226	226.5
PCM3550	Personal Hand-held Organizer	176	176	0	\$0	lock2	EA	176	176
PCM8420	Personal Organizer	130	131	-1	-\$501	lock2	EA	130	131
PRCB-250	Unfinished Speaker Cabinet	59	59	0	\$0	whse	EA	59	59
PS-2	Sony Playstation 2	108	108	0	\$0	shelf	EA	108	108
STS-01MAN	Instruction Manual STS-01 Sound System	132	132	0	\$0	bin	EA	132	132
SY-MINI	Sony MiniDisc Walkman Player/Recorder	26	26	0	\$0	bin	EA	26	26
TV-5200	52" Dolby Pro Logic Surround Sound TV	42	44	-2	-\$714	ROW12	EA	42	44

Based on Average Cost

Value of Counted Inventory \$487,895

Value of AP Inventory \$499,123

Difference Counted - AP -\$11,228

Based on Current Cost

Value of Counted Inventory \$477,964

Value of AP Inventory \$488,812

Difference Counted - AP -\$10,848

Page 1 of 2

UPLOADING DATA ON BV

To upload the data to the accounting package. Click on the Accounting Package Selection drop down menu and then select the accounting package.

2

00

P1210A

226 whse

* Accpac

BV

BVEss

QB

Re Excel

Ascii

Syspro

Accountmate

BV

No Filter

Search

There is no current filter.

Replace BV Locations with Locations listed above

SBNU Apply

Recount Sheets By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

UpLoad SN With Qty

Add to master

UOM

Double click to enable

Export To BV

Division 000

Add Items not scanned to Inventory List

Inventory History

CLEAN UP ALL TABLES

Skid/Reset Expiry SN Report

Bypass Committed

✿ NOTE: IF YOU NEED TO UPDATE SERIAL NUMBERS AS WELL, MAKE SURE THE Upd SN check box is Ticked

Replace BV Locations with Locations listed above

SBNU Apply

Recount Sheets By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Update BV Loc.

Missing Lots

Missing Serial

Sum Lot Numbers

☒ UpLoad SN With Qty

Add to master

UOM

✿ NOTE: Tick on this option to update the LOCATION in the inventory files of the accounting package. (BV SPECIFIC)

☒ Replace BV Locations with Locations listed above

Select Export to BV

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
▶ 00	CD-204		8 row16			
00	CD-204	200	row23			
* 00						

Record: 1 of 2

No Filter

Search

Replace BV Locations with Locations listed above

SBNU Apply

Recount Sheets By \$

Adjust Count by Location

Add Items to Master Location Table

Check Old Locations

Missing Lots

Missing Serial

Sum Lot Numbers

UpLoad SN With Qty

Add to master

UOM

Export Type

Export Dir: C:\BASIS\

File inv2

Export to BVE

Export To

Division 000

Add Items not scanned to Inventory List

Inventory History

CLEAN UP ALL TABLES

Skid/Reset Expiry

SN Report

Bypass Committed

✿ NOTE: IF OPTION IS GRAYED OUT. just double click on the label that says double click to enable

Double click to enable

Export To

Location and QTY

8

Click Yes

Finished cabinet for SP-250

EA

50

50

wh

Speaker Grill for SP-250

EA

95

95

wri

88 wri

69 she

1380 bin

226 wri

176 loc

130 loc

59 wh

108 she

Instruction Manual STS-01 Sound System

EA

132

132

bin

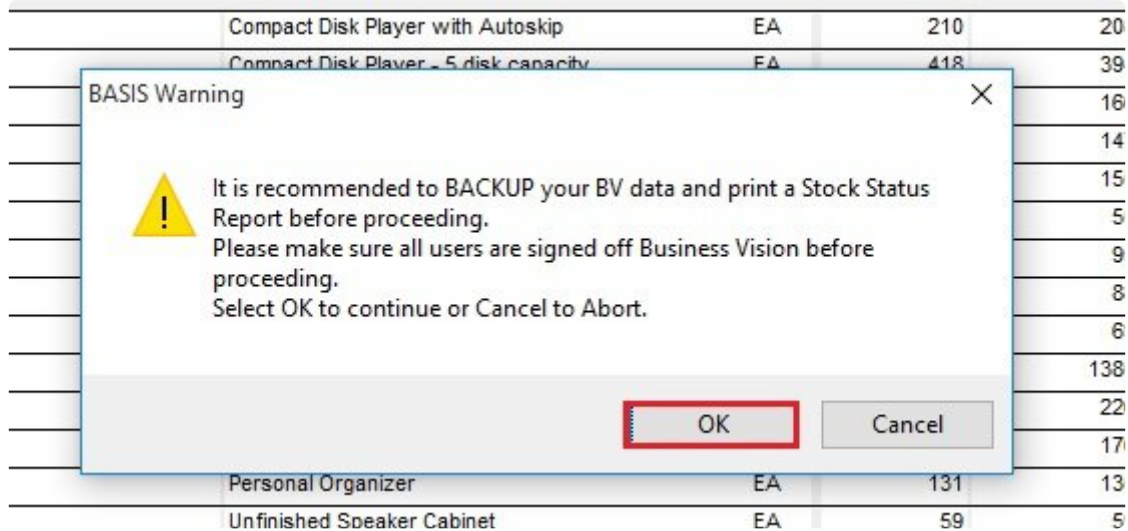
BASIS

Do you need to add items not scanned to inventory? Press cancel to abort. Do you wish to continue?

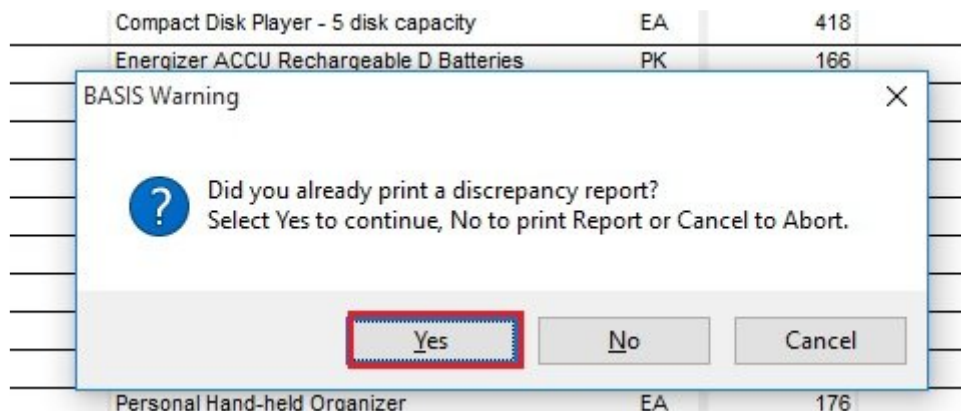
Yes

No

Click Ok

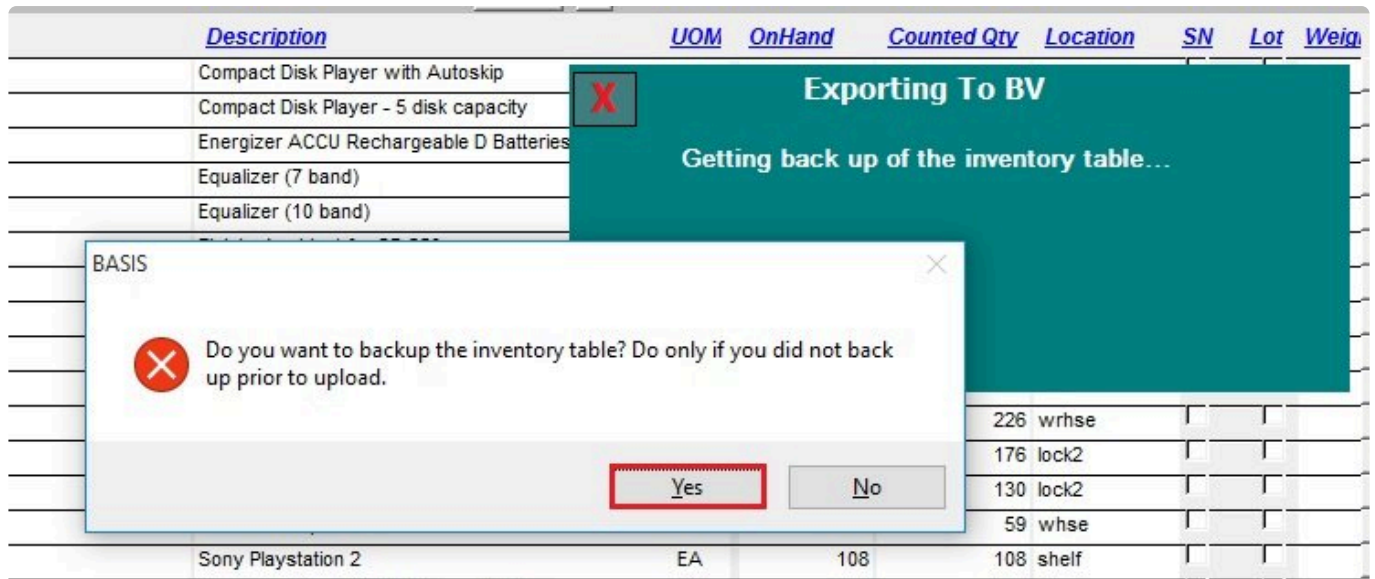


Click Yes

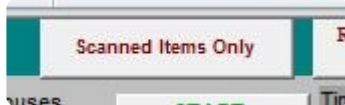


* Note: Clicking on No will automatically make BASIS Generate a Discrepancy Report.

Click on Yes

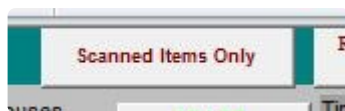


The Accounting package is now updated with the new inventory count. We can now open the accounting package to cross check if the changes took place or We can check the results straight from BASIS by taking another image (Inventory snapshot) of the scanned items from the accounting package. To get a snapshot just click on Scanned Items only



On hand quantity should now be equal to the Counted Quantity after getting the snapshot.

<u>WH</u>	<u>Code</u>	<u>Description</u>	<u>UOM</u>	<u>OnHand</u>	<u>Counted Qty</u>	<u>Location</u>	<u>SN</u>	<u>Lot</u>	<u>Weigh</u>
00	CD-204	Compact Disk Player with Autoskip	EA	208	208	Row23			R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	394	394	Row16			R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	100	100	bin			R
00	EQ-1245	Equalizer (7 band)	EA	147	147	Row10			R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			R
00	GR-250	Speaker Grill for SP-250	EA	95	95	whse			R
00	MCB-250	Entertainment Center	EA	88	88	whse			R
00	MD46	6" Midrange Cone Speaker	EA	69	69	shelf			R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226	226	whse			R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			R
00	PCM8420	Personal Organizer	EA	130	130	lock2			R



To check results in BASIS, click on  to get a snapshot of the current inventory count.

The On-hand and the Counted Qty should be equal once the adjustment is a success.

The screenshot shows the "Inventory Counting" interface. At the top, there are tabs for "Online Instructions", "Scanned Items Only", and "Remove committed from image". The main title is "Inventory Counting". Below the title, there are several input fields and buttons. On the left, there's a "WH" dropdown set to "00" and a "START INVENTORY" button. In the center, there's a "Time Inventory Started" field and a "Counter" field. On the right, there's a "Location" dropdown set to "No Locations" and a "> 1000" button, along with a "Refresh" button. Below these, there are fields for "Item" (set to "st-10") and "Product Code", with "Search", "Reset", "Remove from Image", and "Add Initial" buttons. At the bottom, there's a "Reports" dropdown and a "Report" button. The main table has columns: "WH", "Code", "Description", "UOM", "OnHand", "Counted Qty", "Location", "SN", "Lot", and "Weigh". The first row shows "00", "ST-10", "Stand - for mini speakers", "EA", "153", "153 rack1", and "R". The "OnHand" and "Counted Qty" cells are highlighted with a red box.

7.2.3.2. II. Inventory counting with BVessentials

This knowledge base article will guide users on how to run an inventory count using the BASIS App together with BVessentials from start to finish.

IMPORTING INVENTORY DATA FROM BVESS

IMPORTED INVENTORY LIST													
Search by: Code / Desc / UPC/Loc													
(Double click to cancel filter)													
WH	Code	Description	U.O.M	UPC	On Hand	Price 1	Price 2	Serialized	Lot#	Location	Conv.Fac	Bcde	Allow. FRACTIONAL Qty
00	CD-204	Compact Disk Player with Autoskip	EA	CD-204	208			0		row23	1	✓	1
00	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	393			0		row16	1	✓	1
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	100			0		bin	1	✓	1
00	EQ-1245	Equalizer (7 band)	EA	EQ-1245	147			0		row10	1	✓	1
00	EQ-1800	Equalizer (10 band)	EA	EQ-1800	150			0		Row11	1	✓	1
00	FCB-250	Finished cabinet for SP-250	EA	FCB-250	50			0		whse	1	✓	1
00	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	141			1		Row 8	1	✓	1
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	102			1		row 8	1	✓	1
00	GR-250	Speaker Grill for SP-250	EA	GR-250	95			0		whse	1	✓	1
00	MCB-250	Entertainment Center	EA	MCB-250	87			0		whse	1	✓	1
00	MD46	6" Midrange Cone Speaker	EA	MD46	69			0		shelf	1	✓	1
00	N142	Screws for Speakers (SP-250)	EA	N142	1380			0		bin 8	1	✓	1
00	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	226			0		whse	1	✓	1
00	PCM3550	Personal Hand-held Organizer	EA	PCM3550	176			0		lock2	1	✓	1
00	PCM8420	Personal Organizer	EA	PCM8420	130			0		lock2	1	✓	1
00	PRCB-250	Unfinished Speaker Cabinet	EA	PRCB-250	59			0		whse	1	✓	1
00	PS-2	Sony Playstation 2	EA	PS-2	108			0		shelf	1	✓	1
00	RC2400	Receiver - 100 watts	EA	RC2400	110			0		Row20	1	✓	1
00	RC4850	Receiver - 220 watts	EA	RC4850	180			0		sl 27	1	✓	1
00	RCA-R	RCA Stereo CD Clock Radio	EA	RCA-R	156			0		shelf	1	✓	1
00	SAP90	Cables: Shielded Phono/RCA/6ft.	EA	SAP90	130			0		Shelf	1	✓	1
00	SBX-250	Cardboard container for SP-250	EA	SBX-250	347			0		sl 19	1	✓	1
00	SP-101	Speakers - Bookshelf	PR	SP-101	84			0		Shelf	1	✓	1
00	SP-20	Speakers - 10" Bookshelf	PR	SP-20	120			0		Shelf	1	✓	1
00	SP-250	Speakers - Indoor/Outdoor	PR	SP-250	154			0		Floor	1	✓	1
00	SP-30	Speakers - Ceiling	PR	SP-30	139			0		Row 6	1	✓	1
00	SP-303	Speakers - Wharfedale Floor	PR	SP-303	166			0		Floor	1	✓	1
00	SP-400	Speakers - 3-Way Floor	PR	SP-400	155			0		Floor	1	✓	1

Inventory Counting

Inventory Scanning

Print Barcodes

Copy / Updates Products between Warehouses

Additional Info

Get from Cloud

Send To Cloud

Use API

Close Inventory Form

Print

Skid Labels

Label Setup

Copy codes to UPC for Primary

Format xx-xxxxxx to barcode

Barcodes Missing

Record: 1 of 51

Unfiltered


Search

To get started with the inventory count we have to make sure that the item inventory in business vision are imported on the BASIS DESKTOP ([see Importing Inventory](#)) .

Once all is imported we can now start syncing

SYNC INVENTORY TO CLOUD



To sync the inventory to the cloud just click on the  button

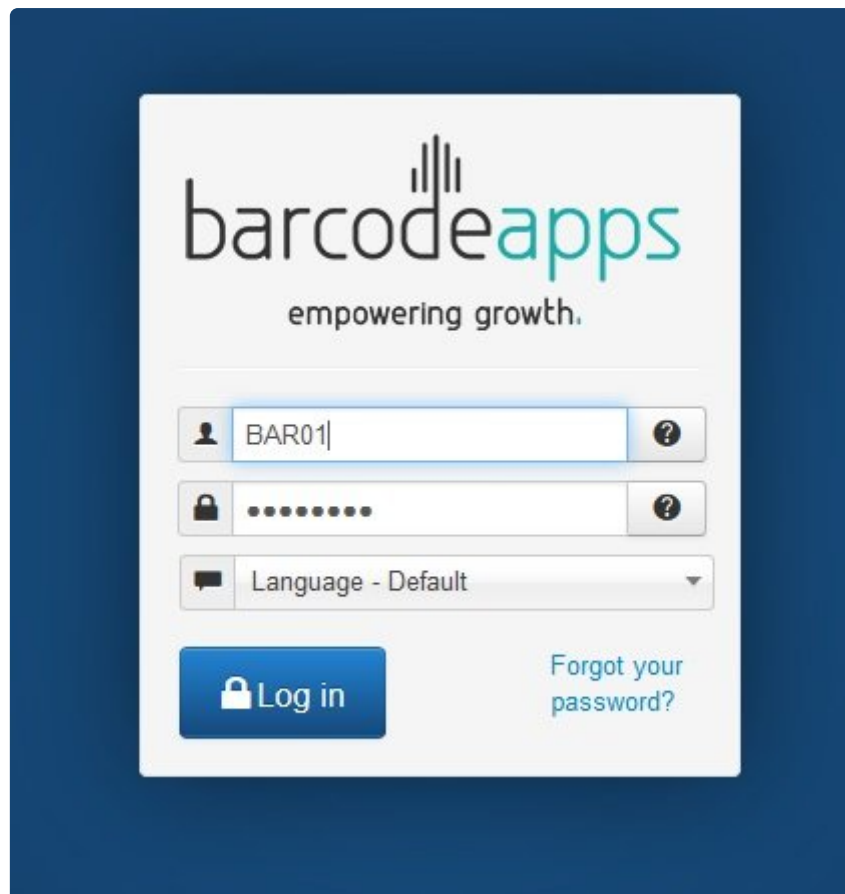
The total number of items will be displayed in the confirmation box once the export is finish.

```
47 / 51
48 / 51
49 / 51
50 / 51
Done
Inventory UOM sync done
Please wait.....
```

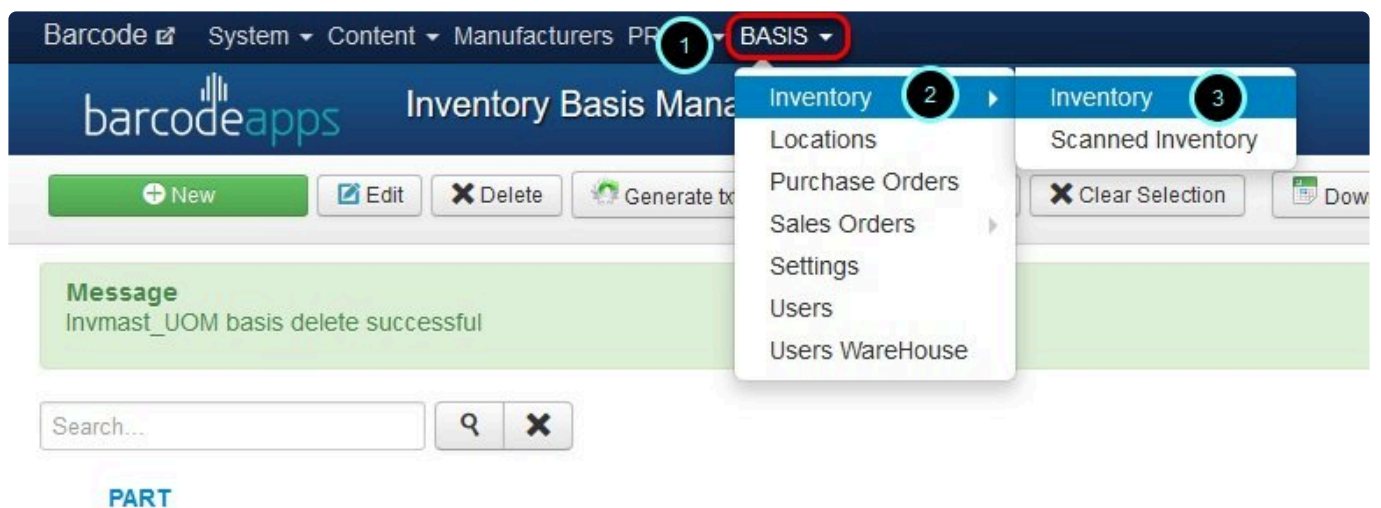
```
PRISM API Version : 1.2.119
PRISM Cloud> Server :http://basmax1.dyndns.biz
PRISM Cloud> ServerDB :BAR01
PRISM Cloud> Service :BasisInvMast
PRISM Cloud> Action :uploadInvMast
PRISM Cloud> Operation Type :Delete and insert
PRISM Cloud> Local DB connected to JUNBARCODEAPPS\BASIS (BAR01)
PRISM Cloud> Your request is under process, Please wait ....
PRISM Cloud> Processing 51 records ...
```

We can also check if the inventory was successfully exported to the cloud (Joomla Website)

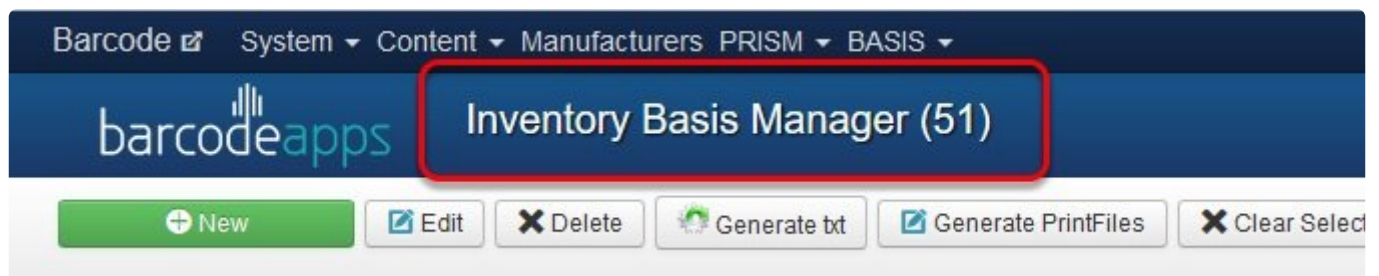
To check the cloud. Login using your admin credentials on the Joomla website.



Click on BASIS , Inventory, and then Inventory



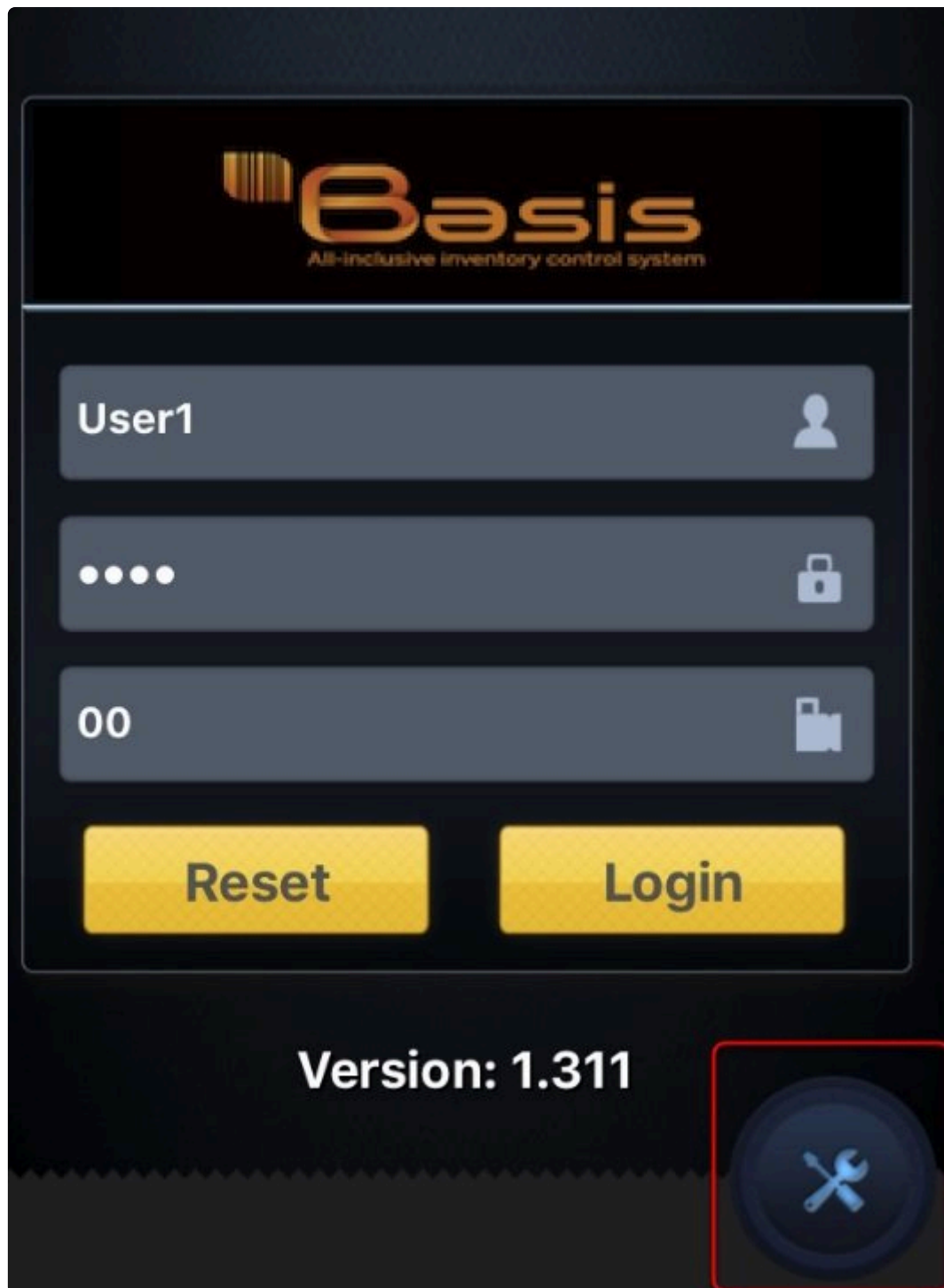
* note: Total number should match with the total uploaded item/s.



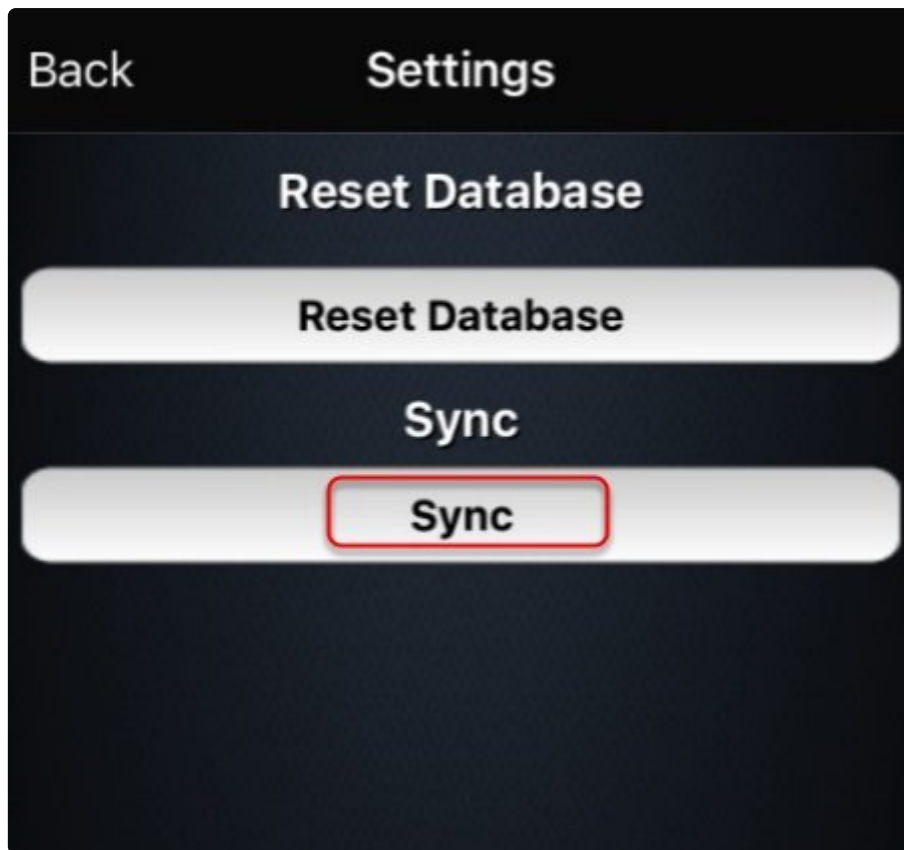
Once finish. We can now then run a sync on the BASIS App

SYNC INVENTORY TO MOBILE DEVICE

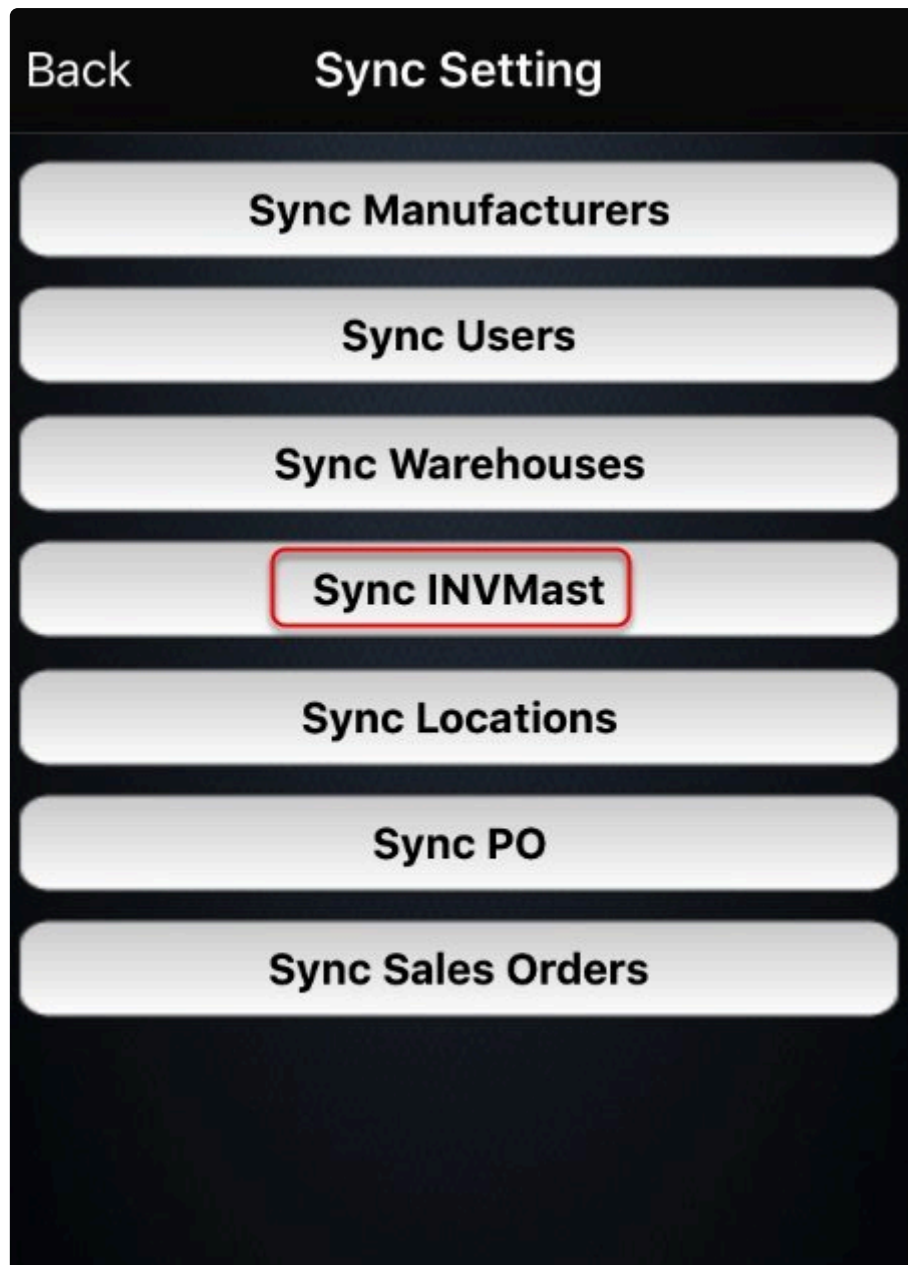
To sync the inventory data. From the main inventory screen. Tap on the settings icon.+



Tap on the sync option



To begin the sync .Tap on Sync INVMast.



Now we have a complete sync with all the components. We can now start doing an inventory review

INVENTORY REVIEW

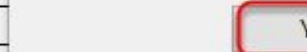
Once all Product are imported. Click on Inventory from the BASIS main window.



Click on Inventory Counting

IMPORTED INVENTORY LIST																
Online Instructions																
Search by: Code / Desc / UPC/Loc																
(Double click to cancel filter)																
<div> <div>All</div> <div>Allow FRACTIONAL Qty</div> </div>																
WH	Code	Description	U.O.M	UPC	On Hand	Price 1	Price 2	Serialized	Lot#	Location	Conv.Fac	Bcde				
▶ 01	CD-204	Compact Disk Player with Autoskip	EA	CD-204	0			0		Row23	1		✓	1		
00	CD-204	Compact Disk Player with Autoskip	EA	CD-204	210			0		Row23	1		✓	1		
00	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	418			0		Row16	1		✓	1		
01	CD-800	Compact Disk Player - 5 disk capacity	EA	CD-800	0			0		Row16	1		✓	1		
01	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	0			0		bin	1		✓	1		
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	EN-BATD	166			0		bin	1		✓	1		
00	EQ-1245	Equalizer (7 band)	EA	EQ-1245	147			0		Row10	1		✓	1		
01	EQ-1245	Equalizer (7 band)	EA	EQ-1245	0			0		Row10	1		✓	1		
01	EQ-1800	Equalizer (10 band)	EA	EQ-1800	0			0		Row11	1		✓	1		
00	EQ-1800	Equalizer (10 band)	EA	EQ-1800	150			0		Row11	1		✓	1		
00	FCB-250	Finished cabinet for SP-250	EA	FCB-250	50			0		whse	1		✓	1		
01	FCB-250	Finished cabinet for SP-250	EA	FCB-250	0			0		whse	1		✓	1		
01	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	0			1		Row 8	1		✓	1		
00	FX-280	All-in-one Printer/Scanner/Copier	EA	FX-280	141			1		Row 8	1		✓	1		
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	102			1		row 8	1		✓	1		
01	FX-500	Multi-fax, Printer, Copier, Scanner	EA	FX-500	0			1		row 8	1		✓	1		
01	GR-250	Speaker Grill for SP-250	EA	GR-250	0			0		whse	1		✓	1		
00	GR-250	Speaker Grill for SP-250	EA	GR-250	95			0		whse	1		✓	1		
00	MCB-250	Entertainment Center	EA	MCB-250	89			0		whse	1		✓	1		
01	MCB-250	Entertainment Center	EA	MCB-250	0			0		whse	1		✓	1		
01	MD46	6" Midrange Cone Speaker	EA	MD46	0			0		shelf	1		✓	1		
00	MD46	6" Midrange Cone Speaker	EA	MD46	70			0		shelf	1		✓	1		
00	N142	Screws for Speakers (SP-250)	EA	N142	1380			0		bin 8	1		✓	1		
01	N142	Screws for Speakers (SP-250)	EA	N142	0			0		bin 8	1		✓	1		
01	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	0			0		whse	1		✓	1		
00	P1210A	Semi-gloss resin paint (SP-250)	EA	P1210A	226.5			0		whse	1		✓	1		
00	PCM3550	Personal Hand-held Organizer	EA	PCM3550	176			0		lock2	1		✓	1		
01	PCM3550	Personal Hand-held Organizer	EA	PCM3550	0											

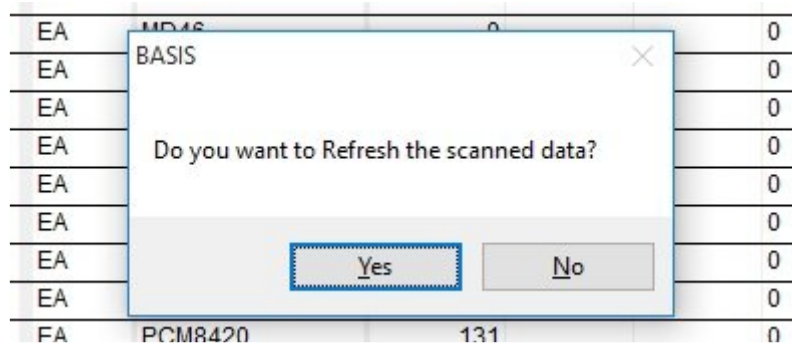
Click on **Yes** to Import the Inventory to the Basis Cloud Server



The screenshot shows a 'BASIS' dialog box with the question 'Do you want to import the data from the cloud?'. There are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red rectangle.

! Note: For Companies that host their own server. Click on **No.**

Click on **Yes** to refresh scanned data



Click on the drop down menu and select a warehouse.

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses Start/Stop BV Inventory Time Inventory Started 14/06/2016 9:53:53 AM Counter Location No Locations > 1000 Refresh

WH 00 Item 1 Product Code Search Reset Remove from Image Add Initial

00 2 Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0				R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0				R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Export Type BV Double click to enable Export To BV Division 000

Add Items not scanned to Inventory List Inventory History CLEAN UP ALL TABLES

Skid/Reset Expiry SN Report Bypass Committed

se for which you are starting an image. you MUST start an image to do an inventory If adding a filter select YES when prompted to use filtered

Click on CLEAN UP ALL TABLES and click on **YES** when prompted to remove any existing image

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started 14/06/2016 9:53:53 AM Counter Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	0				R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	0				R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	0				R
00	EQ-1245	Equalizer (7 band)	EA	147	0				R
00	EQ-1800	Equalizer (10 band)	EA	150	0				R
00	FCB-250	Finished cabinet for SP-250	EA	50	0				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	0		✓		R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	0		✓		R
00	GR-250	Speaker Grill for SP-250	EA	95	0				R
00	MCB-250	Entertainment Center	EA	89	0				R
00	MD46	6" Midrange Cone Speaker	EA	70	0				R
00	N142	Screws for Speakers (SP-250)	EA	1380	0				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	0				R
00	PCM3550	Personal Hand-held Organizer	EA	176	0				R
00	PCM8420	Personal Organizer	EA	131	0				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	0				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	RC2400	Receiver - 100 watts	EA	110	0				R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00						

Record: 1 of 1 No Filter Search

Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Export Type BV Double click to enable Export To BV Division 000

Add Items not scanned to Inventory List Inventory History **CLEAN UP ALL TABLES** Skid/Reset Expiry SN Report Bypass Committed

to Inventory List History ALL TABLES

You MUST start an image to do an inventory
If adding a filter select YES when prompted to use filtered

Once all is cleared. An image can now be recreated.

Online Instructions		Scanned Items Only		Remove committed from image		Inventory Counting		PDF Instructions																															
<input type="checkbox"/> All Warehouses 00		Start/Stop BV Inventory 14/06/2016 9:53:53 AM		Counter Location		No Locations > 1000		Refresh																															
WH 00		Item B S E		Product Code B S E		Search		Reset Remove from Image Add Initial																															
Reports		Report		Add Manually		Delete																																	
WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh																														
<table border="1"> <thead> <tr> <th colspan="7">Location and other information (item specific)</th> <th colspan="3"> <input type="checkbox"/> Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$ </th> </tr> <tr> <th>WH</th> <th>Part No</th> <th>QTY</th> <th>Locations</th> <th>Serial / Lot No</th> <th>Exp Date</th> <th>SkidID:</th> <th colspan="3"></th> </tr> </thead> <tbody> <tr> <td colspan="7" style="height: 100px;"></td> <td colspan="3"> Adjust Count by Location Add Items to Master Location Table Check Old Locations Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers <input type="checkbox"/> UpLoad SN With Qty Add to master UOM </td> </tr> </tbody> </table>										Location and other information (item specific)							<input type="checkbox"/> Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$			WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:											Adjust Count by Location Add Items to Master Location Table Check Old Locations Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers <input type="checkbox"/> UpLoad SN With Qty Add to master UOM		
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Add Items not scanned to Inventory List Inventory History CLEAN UP ALL TABLES to Inventory List History ALL TABLES							Skid/Reset Expiry SN Report Bypass Committed Double click to enable Export To BV Division 000																																

IMAGE REVIEW

Two types of Images can be created which will be applicable for any inventory scenario

1. **Full Inventory Image** – this image contains all list of inventory.

To create a full inventory image . Make sure that there is nothing defined on the filters before clicking on Start Inventory.

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **START INVENTORY** Time Inventory Started 15/06/2016 5:35:39 AM Counter Location No Locations > 1000 Refresh

WH 00 **1** **2** Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH Code Description UOM OnHand Counted Qty Location SN Lot Weig.

This will tell basis that all items will be included on the inventory count.

2. Cycle Inventory Image – this image is a collection predefined items from an inventory.

To create a cycle inventory image. Just type in a search string on the item or products field and then click on START INVENTORY

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **START INVENTORY** Time Inventory Started 15/06/2016 5:35:39 AM Counter Location No Locations > 1000 Refresh

WH 00 **1** **2** Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH Code Description UOM OnHand Counted Qty Location SN Lot Weig.

In our example: We ticked on “B: (begins) and typed in “ST” on the item field which means that all items that

BEGINS with ST will be included in the Inventory.

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **START INVENTORY** Time Inventory Started 15/06/2016 5:51:11 AM Counter Location No Locations > 1000 Refresh

WH 00 **1** **2** Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report Add Manually Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weig.
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1			R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2			R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4			R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9			R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor			R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin			R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor			R

After the image is created. We can now start the Inventory by clicking on START INVENTORY.

Online Instructions | Scanned Items Only | Remove committed from image | **Inventory Counting** | PDF Instructions

☐ All Warehouses | **START INVENTORY** | Time Inventory Started: 15/06/2016 5:51:11 AM | Counter: | Location: | No Locations: | > 1000 | Refresh

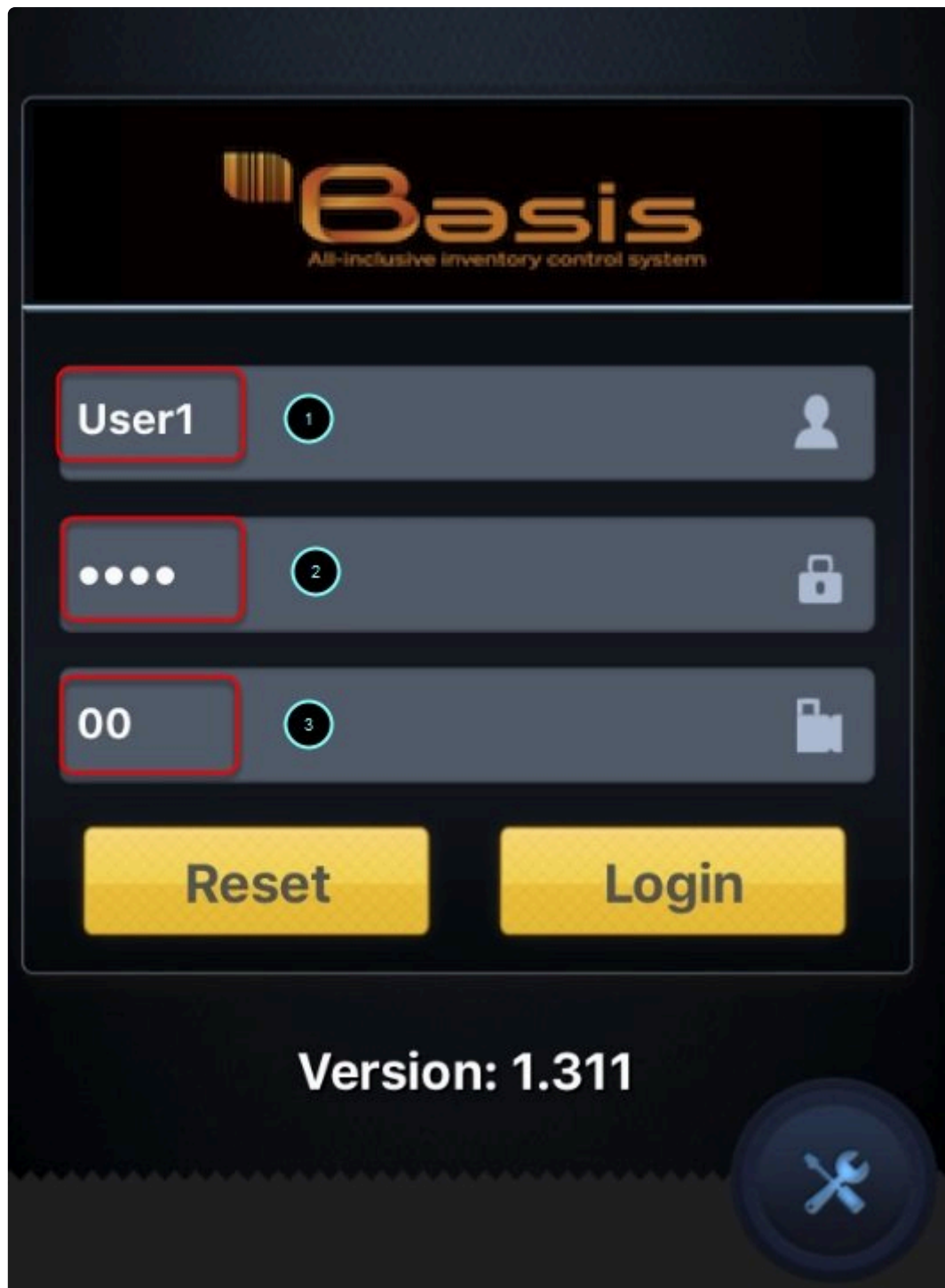
WH: 00 | Item: ST | Product Code: | Search | Reset | Remove from Image | Add Initial

Reports: Discrepancy - Scanned Items | Report | Add Manually | Delete

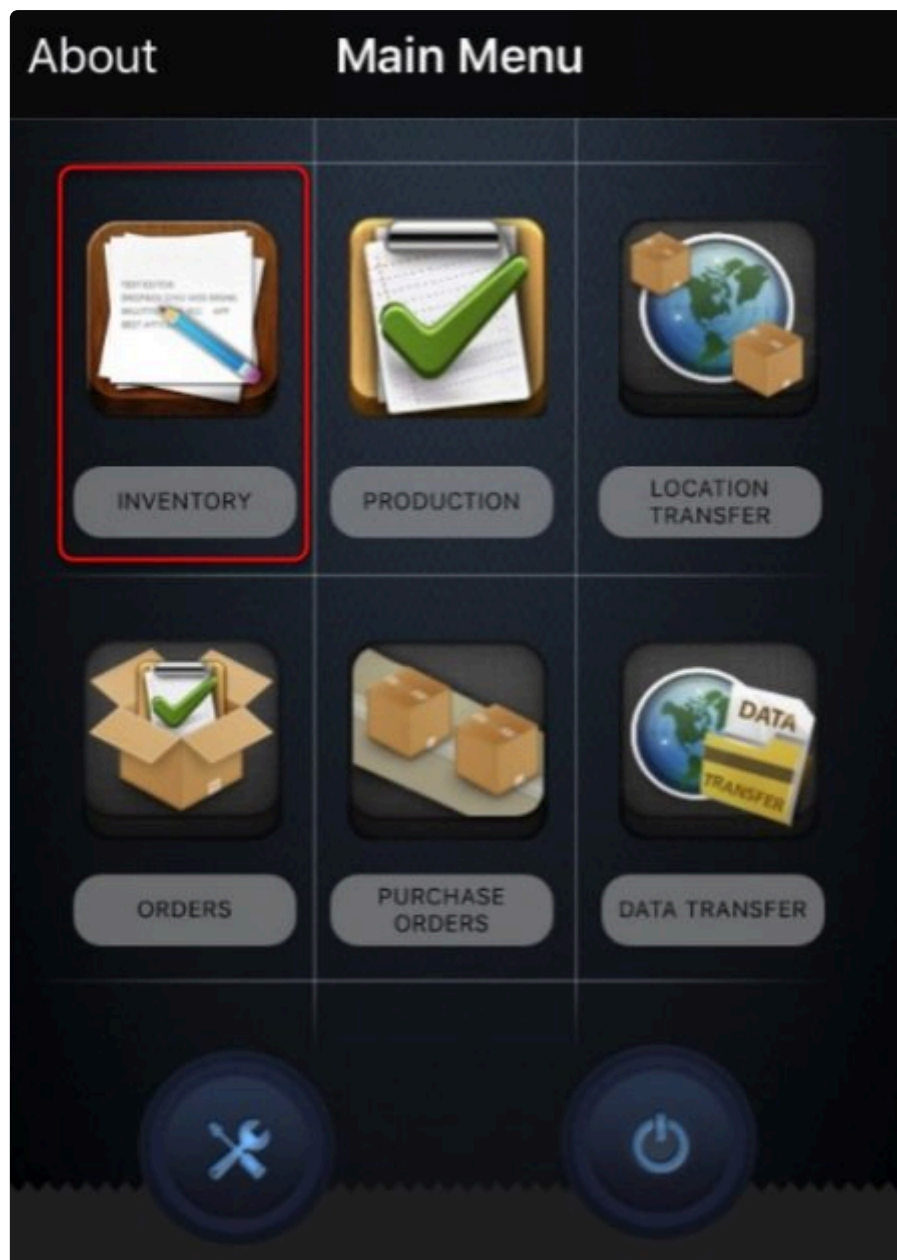
WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	ST-10	Stand - for mini speakers	EA	155	0	Rack1			R
00	ST-25	Stand - 24" Speaker	PR	55	0	Row 2			R
00	ST-30	Stand - 30" Speaker	EA	214	0	Row 4			R
00	ST-40	Stand - Universal Cube Speaker	PR	50	0	Row 9			R
00	STS-01	Home Sound System with MP3 Decoder	EA	67	0	floor			R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	0	bin			R
00	STS-02	Surround Sound Home Theater System	EA	179	0	floor			R

INVENTORY COUNTING USING THE iPad.

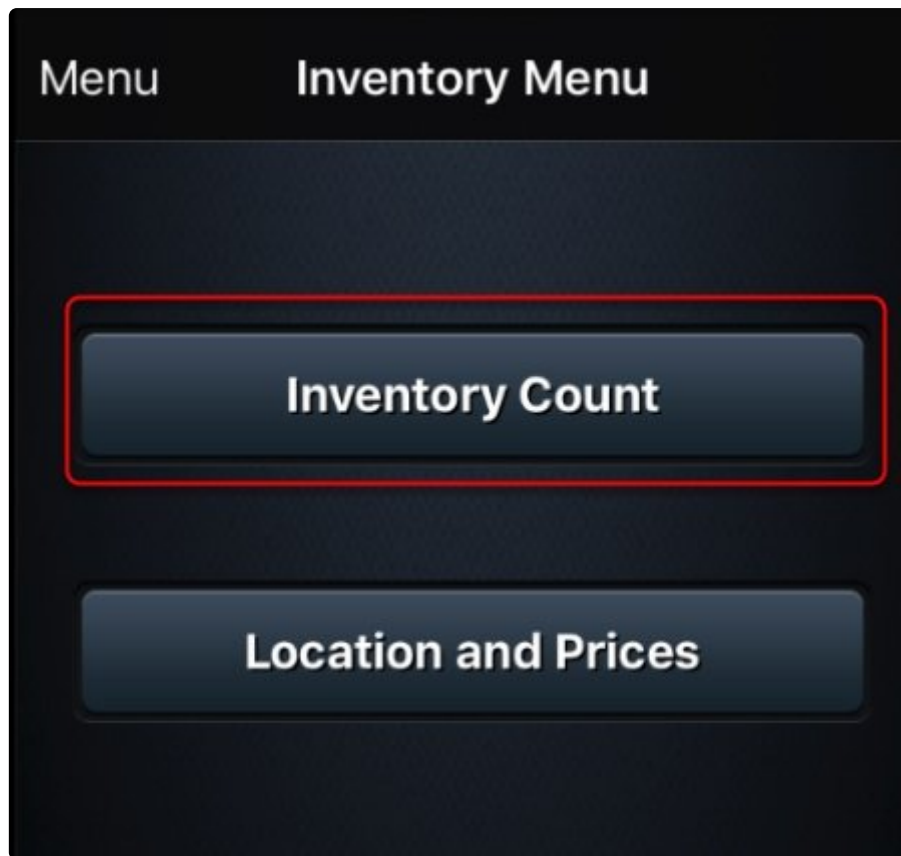
To get started, login to the BASIS App



Tap on Inventory



Tap on Inventory count



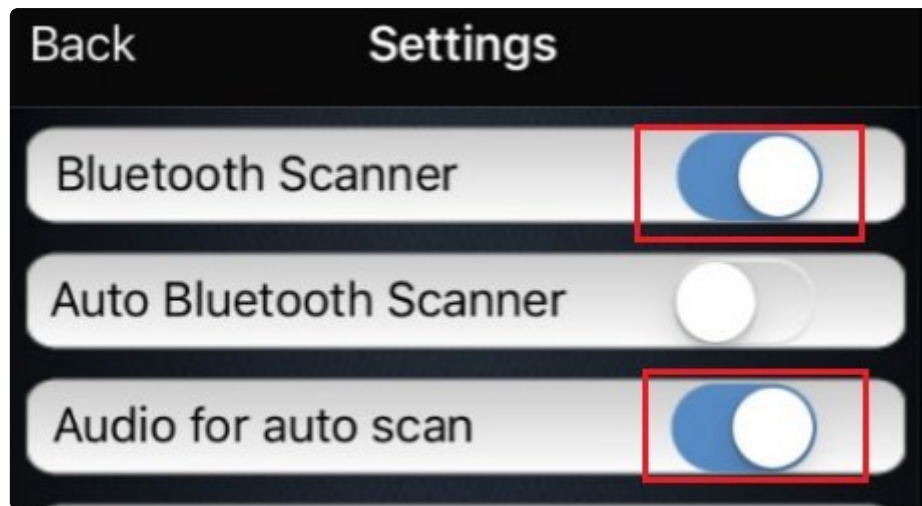
**

The [inventory count window](#) will open from here we can start the inventory count.

The screenshot shows the 'Inventory Count' screen of the BarcodeApps application. The interface is dark-themed with yellow buttons. At the top, there are three tabs: 'Back', 'Inventory Count' (selected), and 'Settings'. Below the tabs, there is a section with a toggle switch for 'Auto BT' (labeled 1), an 'Accept' button (labeled 2), and a 'Scanned 0' button (labeled 3). Below this, there is a 'Next No.' field with the value '1' (labeled 4) and a 'SCAN' button (labeled 5). Below the 'Next No.' field, there is a 'Location' field with the placeholder text 'Scan or Enter Location' (labeled 6). Below the 'Location' field, there is a 'WH' field with the value '00' (labeled 7). Below the 'WH' field, there is an 'Item#' field with the placeholder text 'Item Number' (labeled 8), a 'SEARCH' button (labeled 9), and a 'DESC' button (labeled 10). Below the 'Item#' field, there is a 'Code' field (labeled 11) and a 'Description' field (labeled 12). Below the 'Code' field, there is a 'Serial Number' field (labeled 13) and an 'Exp Date' field (labeled 14). Below the 'Serial Number' field, there is a 'QTY' field with the placeholder text 'Qty' (labeled 15), a 'Factor' field (labeled 16), and a 'UOM' field (labeled 17). At the bottom of the screen, there is a large yellow 'Accept' button (labeled 18).

ADDING AN ITEM (INVENTORY COUNT)

Before adding an item. Make sure that the settings “Bluetooth scanner” and “Audio for Auto scan” are enabled under settings.



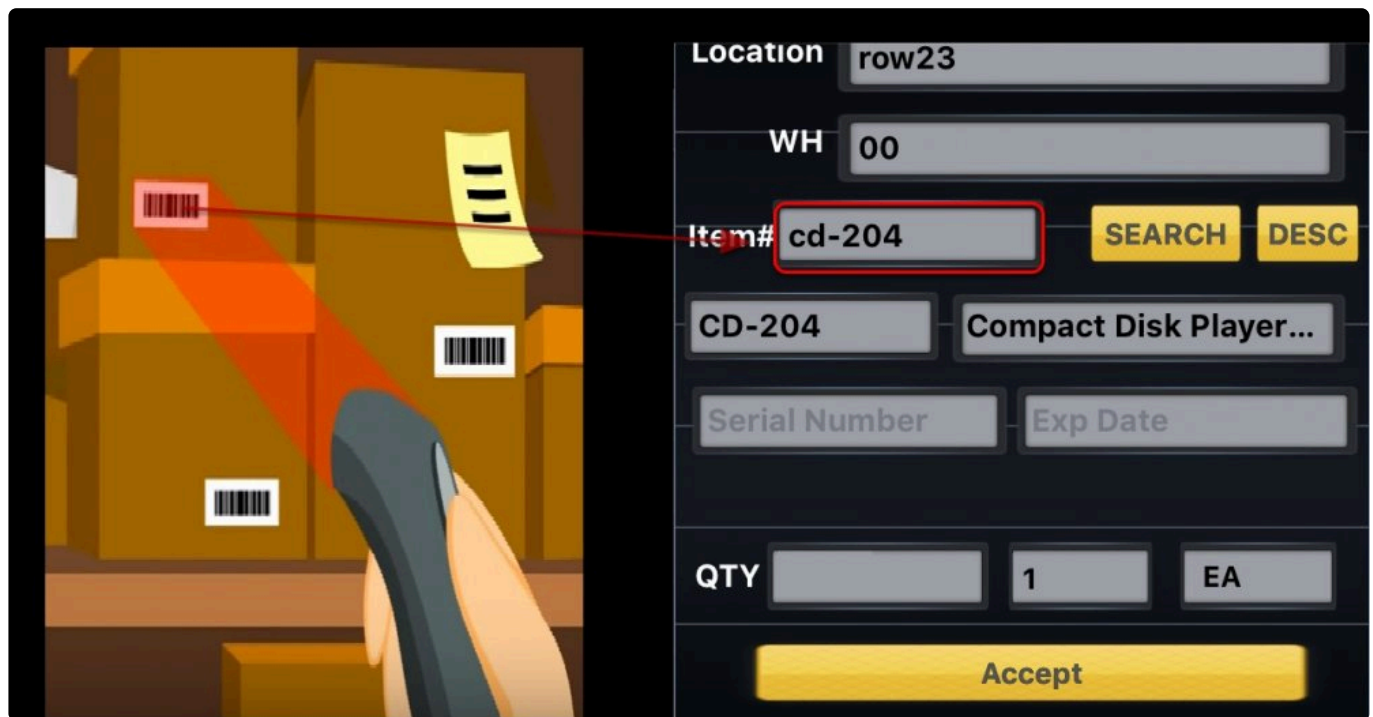
Using the Bluetooth Scanner Scan the item location or Manually Enter the location of the item.



More about Locations:

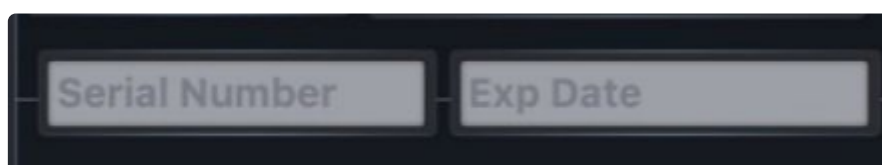
- Enabling the Auto fill function under Location settings will make the BASIS App use the default location that is defined in basis
- Enabling Clear location will erase the location after each scan and otherwise.
- Enabling Mandatory location will make basis not accept a scan unless the location is defined.

Scan the item bar code.



* Note: Once the item is scanned it will auto populate the details.

Scan Serial or LOT number (If applicable they both go in the Serial Number field)



* NOTE: If an item is serialized or lot numbered basis will prompt you to enter it otherwise it will just ask for the quantity.

Enter Quantity and tap on ACCEPT

The screenshot shows the 'Inventory Count' screen of an application. At the top, there are three tabs: 'Back', 'Inventory Count' (which is selected), and 'Settings'. Below the tabs, there are several input fields and buttons. The 'Location' field contains 'row23'. The 'WH' field contains '00'. The 'Item#' field contains 'cd-204', with a yellow 'SEARCH' button and a yellow 'DESC' button to its right. Below these, there are two more fields: 'CD-204' and 'Compact Disk Player...'. Further down, there are two more fields: 'Serial Number' and 'Exp Date'. At the bottom, there is a 'QTY' field with the value '220', a '1' field, and an 'EA' field. A red box highlights the 'QTY' field, and a green circle with the number '1' is next to it. Below the 'QTY' field, there is a yellow 'Accept' button, which is also highlighted with a red box. A green circle with the number '2' is next to the 'Accept' button.

A confirmation will show once the scan is successful. Just repeat the same process till all scans are finish



ADDITIONAL INFO on ADDING AN ITEM

In an event that the App doesn't recognize the item (UPC/ BARCODE issues). We can still do a manual entry on the item

To do a manual entry. Type in the name of the item in the item field. Then tap on search and the details will show
auto populate once the search is successful.

The screenshot displays the BarcodeApps interface with the following elements:

- Item#** field containing **SPW-12G** (highlighted with a red box and callout 1).
- SEARCH** button (highlighted with a red box and callout 2).
- DESC** button.
- Item#** field containing **SPW-12G** (highlighted with a red box and callout 3).
- SEARCH** button.
- DESC** button.
- Serial Number** field.
- Exp Date** field.
- QTY** field containing **15**.
- 1** field.
- EA** field.
- Accept** button.

* Note: When typing the item code. Make sure that you key in the EXACT word.

SEARCH BY DESCRIPTION

We can also use the search by description if there is an issue finding the item thru a manual search. To do a search by description. Tap on the DESC button.

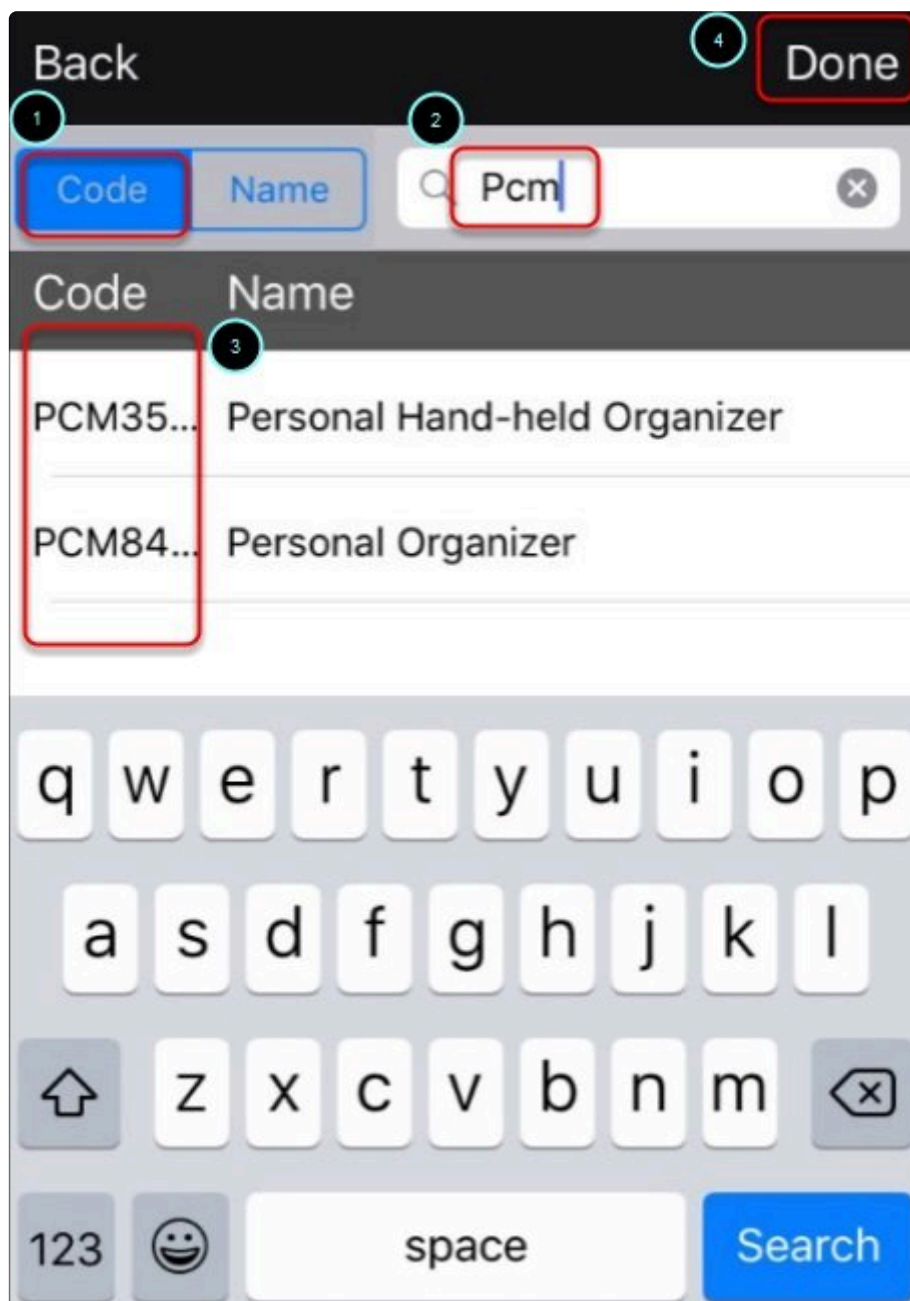
The screenshot displays the BarcodeApps interface with the following elements:

- Item#** field containing **Item Number**.
- SEARCH** button.
- DESC** button (highlighted with a red box).

There are two ways to search for an item

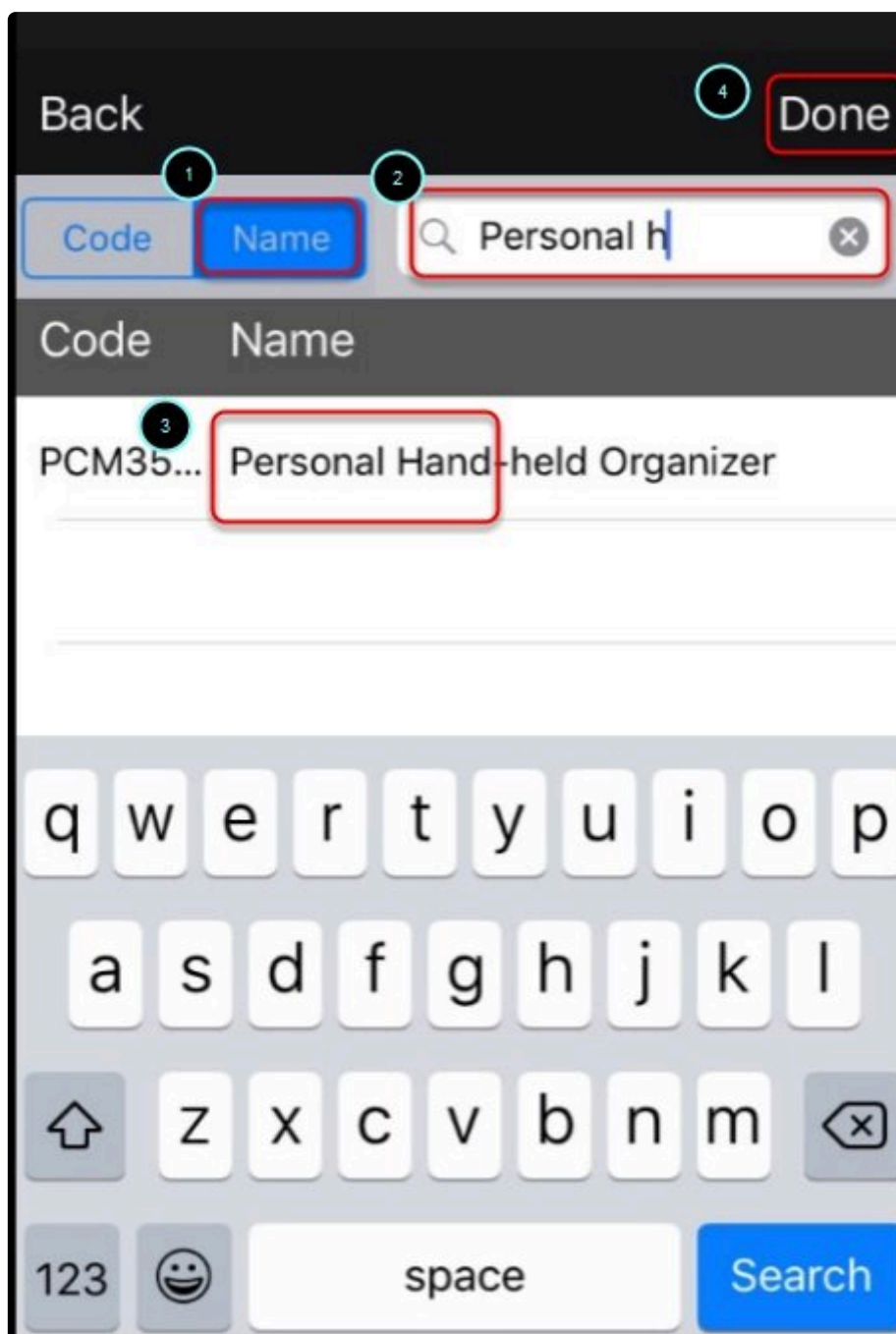
- Search by item code.

To search for item code. Tap on Code. Type in the keyword for the search. Results will show at the bottom . Once the item is found. just tap on it and then select done.



- Search by Description.

To search by description. Type in the keyword for the search. Results will show at the bottom . Once the item is found. just tap on it and then select done.



ENABLING FAST MODE

Another way to scan an item is via fast mode. Using this mode enables the user to scan in a continuous

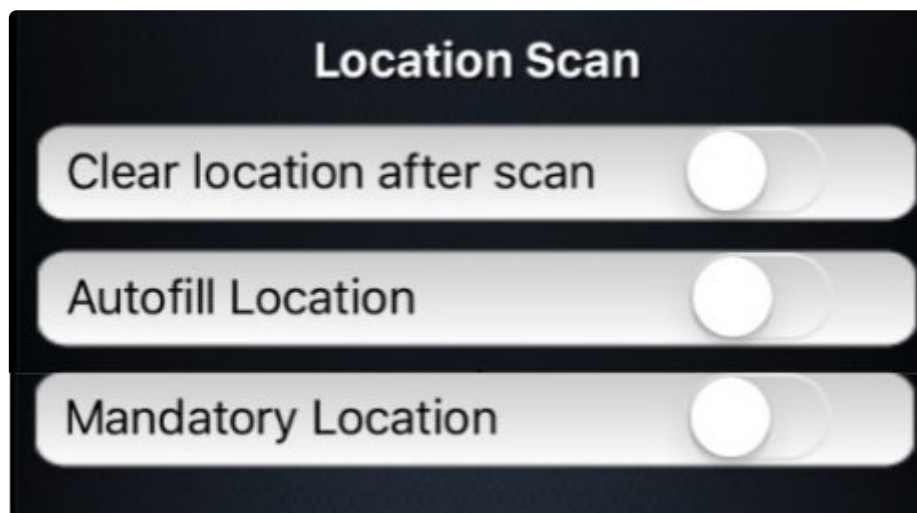
pace ,where each scan will be counted as one.

Best used in a scenario where multiple items are stored in a single location (box,lots,bins. etc)

To enable this feature just tap on the AUTO BT option.

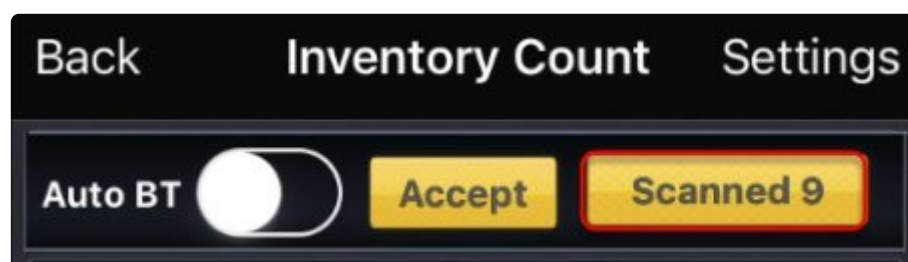


Note: When using this option we have to make sure the clear locations and mandatory locations are disabled.



REVIEWING DATA

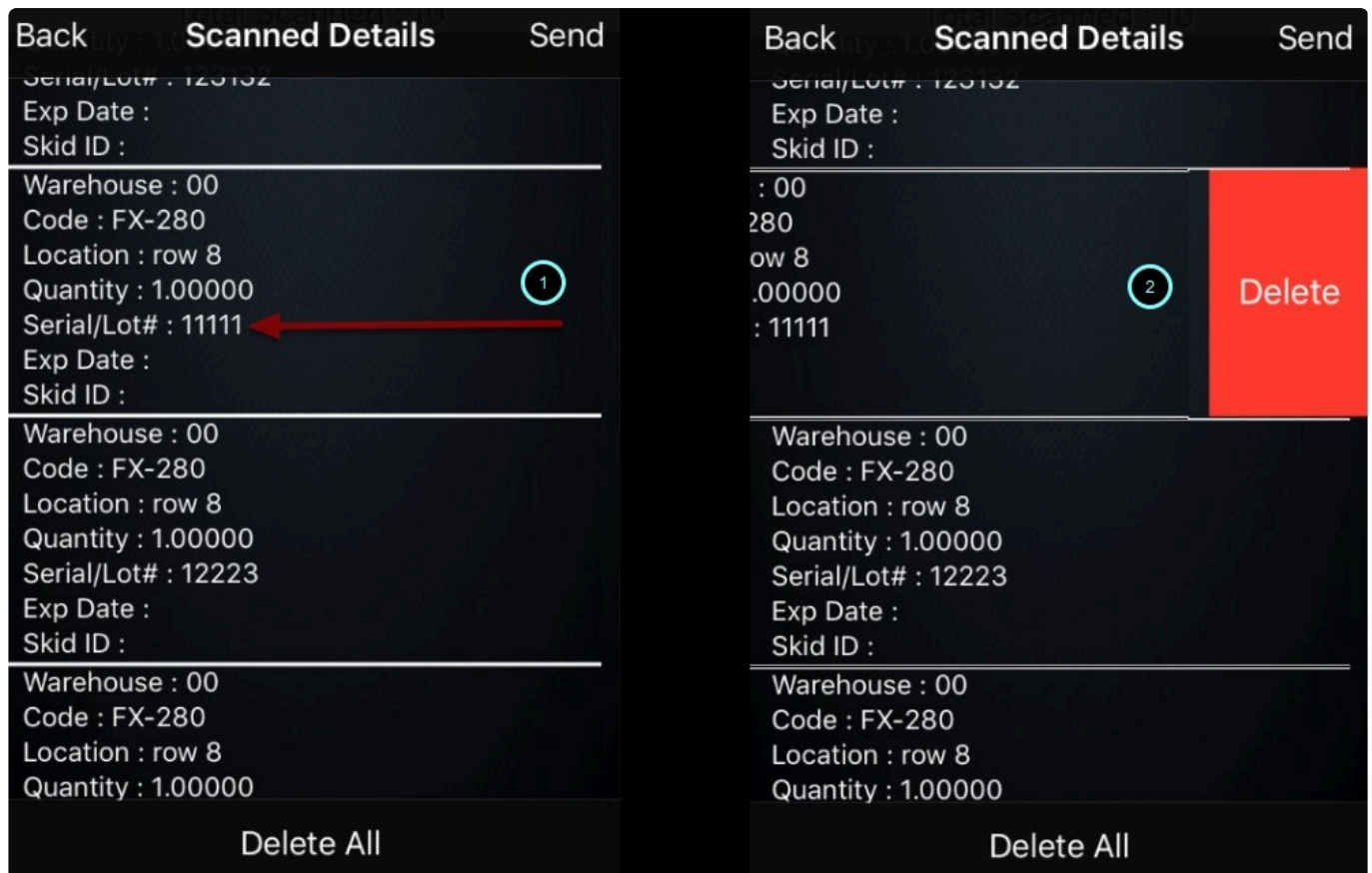
To review scanned items , tap on the scanned items option



This will show a summary of all scanned items

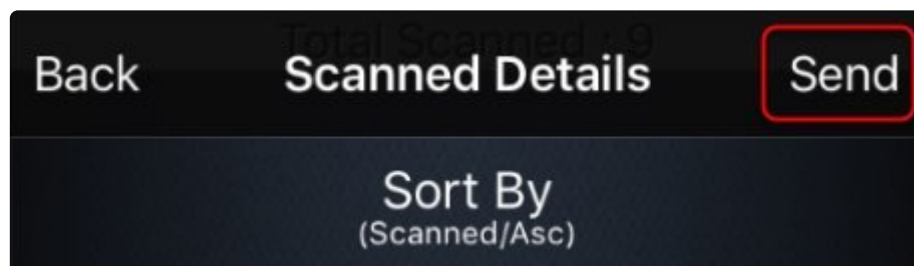
Sort By (Scanned/Asc)	
Warehouse : 00	
Code : SAP90	
Location : shelf	
Quantity : 51.00000	
Serial/Lot# :	
Exp Date :	
Skid ID :	
Warehouse : 00	
Code : CD-204	
Location : row23	
Quantity : 220.00000	
Serial/Lot# :	
Exp Date :	
Skid ID :	
Warehouse : 00	
Code : CD-800	
Location :	
Quantity : 450.00000	
Delete All	

If you wish to delete an entry. Just swipe the item to the left and the delete option will appear. Just tap on delete

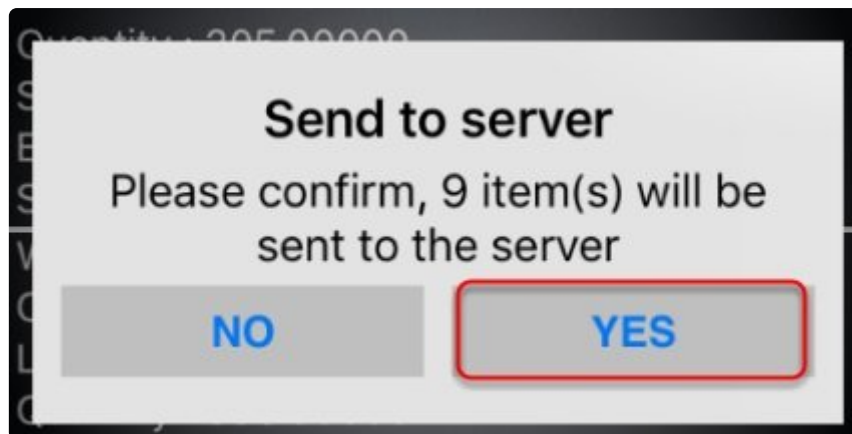


SENDING THE DATA BACK

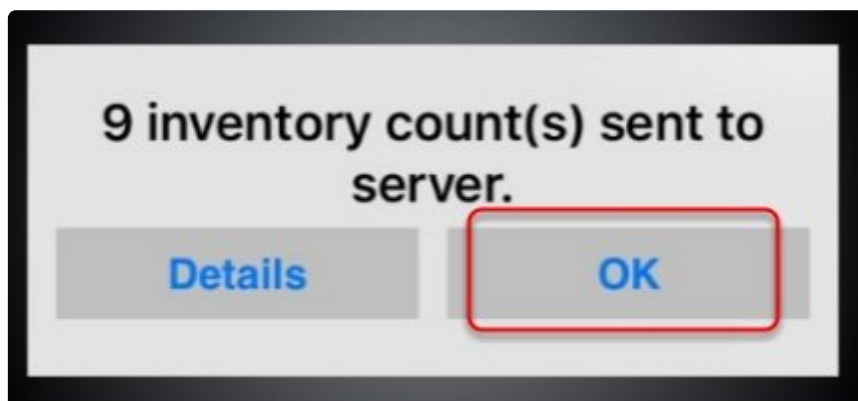
To send the data back to the cloud. on the review window just click SEND



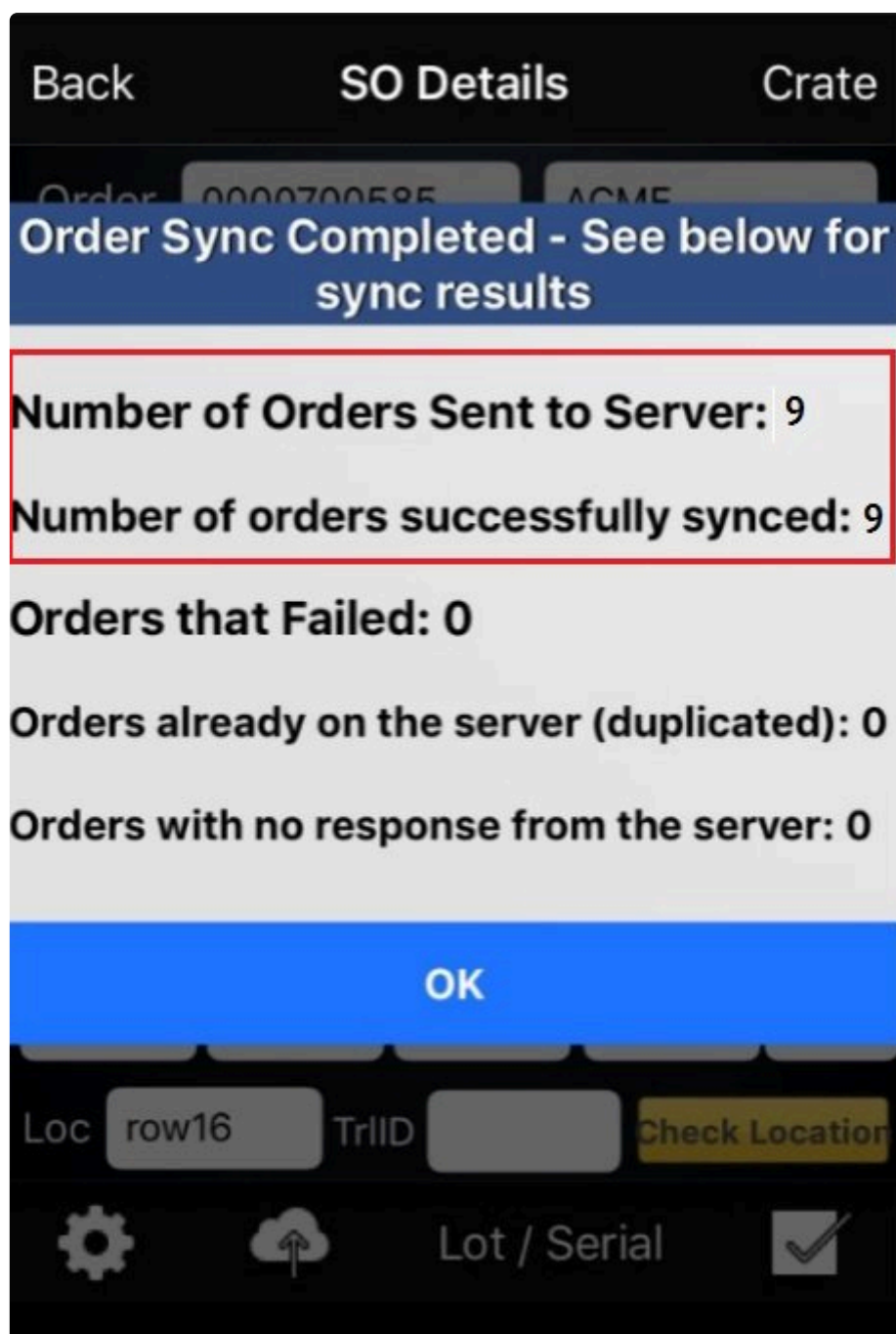
Click YES to confirm



Click on OK



A notification will show with a summary of the sync .



Click on Ok to proceed in sending the data back to the cloud.

REVIEWING RESULTS

Results from the scan can be reviewed using the BASIS desktop this will help the BASIS DESKTOP user to monitor the progress of the inventory count.

To check results click on Refresh from the BASIS DESKTOP

Click on Yes



Note:No if self hosted

The results of the scan will show under the Counted Qty Field

From here we can now generate reports (see reports) from the basis desktop to get an analysis of the inventory count and at the same time help with the decision making

Clicking on the item will also show a more detailed . For serialized / Lot numbered item it will show the details (serial,lot,location,exp date, SkidID) of each item

it will also show the details of an item that has separate location.

A report can also be generated from the basis desktop to get an analysis of the inventory count .

To Generate a report just select the type of report and then click on the reports button. (see reports for details)

Sample of a DISCREPANCY – SCANNED ITEMS report

MAKING ADJUSTMENTS

After reviewing the Discrepancy report. Making minor adjustments or modification on the Inventory may be needed to meet the Inventory targets

To make adjustments on an item select the item from the Inventory list.



Note: that you can also use the search field. To do this, type in the string and click on search.

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weigh
00	CD-204	Compact Disk Player with Autoskip	EA	210	209	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R

Once the item is selected the details should now show on the Location and Other information Section

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID
00	CD-204		9 row16			
00	CD-204		200 row23			

Now we can make adjustments on the following:

- QTY
- LOCATION
- SERIAL NUMBER/LOT NUMBER
- EXPIRY DATE
- SKID NUMBER

Once adjustments is done click on Adjust Count by Location to update the quantities scanned.



MANUALLY ADDING AN ITEM

Items not scanned during the inventory can be manually added on the list.

To manually add an item Click on “Add Manually”

Inventory - BASIS

File Add-Ins

Online Instructions Scanned Items Only Remove committed from image **Inventory Counting** PDF Instructions

☐ All Warehouses 00 **Start/Stop BV Inventory** Time Inventory Started **No inventory started** Processing please wait Location No Locations > 1000 Refresh

WH Item Product Code Search Reset Remove from Image Add Initial

Reports Discrepancy - Scanned Items Report **Add Manually** Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	CD-204	Compact Disk Player with Autoskip	EA	210	208	row23			#### R
00	CD-800	Compact Disk Player - 5 disk capacity	EA	418	394	row16			#### R
00	EN-BATD	Energizer ACCU Rechargeable D Batteries	PK	166	166	bin			#### R
00	EQ-1245	Equalizer (7 band)	EA	147	147	row10			#### R
00	EQ-1800	Equalizer (10 band)	EA	150	150	Row11			#### R
00	FCB-250	Finished cabinet for SP-250	EA	50	50	whse			#### R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141	row 8			#### R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102	Row 8			#### R
00	GR-250	Speaker Grill for SP-250	EA	95	95	wrhse			#### R
00	MCB-250	Entertainment Center	EA	89	88	wrhse			#### R
00	MD46	6" Midrange Cone Speaker	EA	70	69	shelf			#### R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380	bin 8			#### R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226	wrhse			#### R
00	PCM3550	Personal Hand-held Organizer	EA	176	176	lock2			#### R
00	PCM8420	Personal Organizer	EA	131	130	lock2			#### R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59	whse			#### R
00	PS-2	Sony Playstation 2	EA	108	0				#### R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132	bin			#### R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	CD-204	8	row16			
00	CD-204	200	row23			
*						

Record: 1 of 2 No Filter Search

Replace BV Locations with Locations listed above SBNU Recount Sheets Apply By \$

Adjust Count by Location Add Items to Master Location Table Check Old Locations

Update BV Loc. Missing Lots Missing Serial Sum Lot Numbers

UpLoad SN With Qty Add to master UOM

Select a warehouse

Wh 00

Scan the Item Barcode or enter the item Code

00	Default Wareh
01	test warehouse
03	test warehouse

200

Description

UPC TV-5200

Product TV-5200

SkidNo

Type in the item code or click on the drop down to search for an item.

Wh 00

Scan the Item Barcode or enter the item Code

Barcode

Code tp-350

Description

ST-30	ST-30	Stand - 30" Speaker	00	0	EA	1	1
ST-40	ST-40	Stand - Universal Cube Speake	00	0	PR	1	1
STS-01	STS-01	Home Sound System with MP3	00	0	EA	1	1
STS-01MAN	STS-01MAN	Instruction Manual STS-01 Sou	00	0	EA	1	1
STS-02	STS-02	Surround Sound Home Theater	00	0	EA	1	1
SY-MINI	SY-MINI	Sony MiniDisc Walkman Player	00	0	EA	1	1
TP-350	TP-350	DVD Player/Hi-Fi VCR Combo	00	0	EA	1	1
TP-560	TP-560	Toshiba Progressive-Scan DVD	00	0	EA	1	1
TV-2100	TV-2100	20" TV with Flat Picture Tube	00	0	EA	1	1
TV-3600	TV-3600	36" DBX Stereo Color Televisio	00	0	EA	1	1
TV-5200	TV-5200	52" Dolby Pro Logic Surround S	00	0	EA	1	1
UAC-300	UAC-300	Recoton Universal AC Adapter	00	0	EA	1	1
V1-2A	V1-2A	Digital-VHS VCR with HDTV-Re	00	0	EA	1	1
V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	00	0	EA	1	1
VAIO-24	VAIO-24	Desktop PC with Intel Pentium	00	0	EA	1	1
XBX-123	XBX-123	XBOX LIVE	00	0	EA	1	1

UPC

Product

Quantity

Location

Serial/Lot#

UOM

Date 21/06/201

Conv. Fact

Accept

Define the Quantity ,Location and other optional information such as Seria/Lot# , Skidno, Expiry can be used if its needed then Click on Accept to add the item.

Decode Barcode

Wh Scan the Item Barcode or enter the item Code

Barcode

Code

Description

UPC

Product

Quantity 1

Location

Serial/Lot#

UOM

Date

Conv. Fact

SkidNo Find

Expiry

52" Dolby Pro Logic Surround Sound TV

☒ Serialized ☐ Lot Numbered

2 **Accept**

Click on Refresh and click on Yes when Prompted (No if Self hosted) to update the inventory list.

[Online Instructions](#) [PDF Instructions](#)

Inventory Counting

Scanned Items Only Remove committed from image

☐ All Warehouses Start/Stop BV Inventory Time Inventory Started Processing please wait

00 No inventory started Location No Locations > 1000 Refresh

WH Item Product Code 1 Search Reset Remove from Image Add Initial

Reports Report Add Manually Delete

WH	Code	Description	Counted Qty	Location	SN	Lot	Weigh
00	CD-204	Compact Disk Play	208	row23			R
00	CD-800	Compact Disk Play	394	row16			R
00	EN-BATD	Energizer ACCU F	166	bin			R
00	EQ-1245	Equalizer (7 band	147	row10			R
00	EQ-1800	Equalizer (10 band	150	Row11			R
00	FCB-250	Finished cabinet f	50	whse			R
00	FX-280	All-in-one Printer/	141	row 8			R
00	FX-500	Multi-fax. Printer. Copier. Scanner	102	Row 8			R

BASIS

Do you want to import the data from the cloud?

2 Yes No

List has now been updated

00	EQ-1800	Equalizer (10 band)	EA	150	150 Row11				R
00	FCB-250	Finished cabinet for SP-250	EA	50	50 whse				R
00	FX-280	All-in-one Printer/Scanner/Copier	EA	141	141 row 8	✓			R
00	FX-500	Multi-fax, Printer, Copier, Scanner	EA	102	102 Row 8	✓			R
00	GR-250	Speaker Grill for SP-250	EA	95	95 wrhse				R
00	MCB-250	Entertainment Center	EA	89	88 wrhse				R
00	MD46	6" Midrange Cone Speaker	EA	70	69 shelf				R
00	N142	Screws for Speakers (SP-250)	EA	1380	1380 bin 8				R
00	P1210A	Semi-gloss resin paint (SP-250)	EA	226.5	226 wrhse				R
00	PCM3550	Personal Hand-held Organizer	EA	176	176 lock2				R
00	PCM8420	Personal Organizer	EA	131	130 lock2				R
00	PRCB-250	Unfinished Speaker Cabinet	EA	59	59 whse				R
00	PS-2	Sony Playstation 2	EA	108	0				R
00	STS-01MAN	Instruction Manual STS-01 Sound System	EA	132	132 bin				R
00	SY-MINI	Sony MiniDisc Walkman Player/Recorder	EA	26	26 bin				R
00	TV-5200		EA		12 ROW11				R

SENDING THE DATA BACK

To send the data back to the cloud. just click on Send to complete the sync.

Once the final discrepancy report has been printed and approved by a supervisor prior to upload. The quantities on that report are the amounts that will now be posted to BV as your new inventory quantities on hand.



NOTE: IT IS STRONGLY RECOMMENDED AT THIS POINT TO TAKE A BACKUP OF THE ACCOUNTING PACKAGE AND BASIS FILES

Sample Final Discrepancy Report

Donut Time Discrepancy Report

Tuesday, 21 June 2016

Counted	AP	OnHand	Disc.	OH-AP	Discr.\$	Location	UOM	Converted	ConvertedBV
Warehouse: 00									
Sales Dept:									
CD-204	Compact Disk Player with Autoskip	208	210	-2	-\$413	row23	EA	208	210
CD-800	Compact Disk Player - 5 disk capacity	394	418	-24	-\$9,368	row16	EA	394	418
EN-BATD	Energizer ACCU Rechargeable D Batteries	166	166	0	\$0	bin	PK	166	166
EQ-1245	Equalizer (7 band)	147	147	0	\$0	row10	EA	147	147
EQ-1800	Equalizer (10 band)	150	150	0	\$0	Row11	EA	150	150
FCB-250	Finished cabinet for SP-250	50	50	0	\$0	whse	EA	50	50
FX-280	All-in-one Printer/Scanner/Copier	141	141	0	\$0	row 8	EA	141	141
FX-500	Multi-fax, Printer, Copier, Scanner	102	102	0	\$0	Row 8	EA	102	102
GR-250	Speaker Grill for SP-250	95	95	0	\$0	whse	EA	95	95
MCB-250	Entertainment Center	88	89	-1	-\$193	whse	EA	88	89
MD46	6" Midrange Cone Speaker	69	70	-1	-\$20	shelf	EA	69	70
N142	Screws for Speakers (SP-250)	1380	1380	0	\$0	bin 8	EA	1380	1380
P1210A	Semi-gloss resin paint (SP-250)	226	226.5	-0.5	-\$19	whse	EA	226	226.5
PCM3550	Personal Hand-held Organizer	176	176	0	\$0	lock2	EA	176	176
PCM8420	Personal Organizer	130	131	-1	-\$501	lock2	EA	130	131
PRCB-250	Unfinished Speaker Cabinet	59	59	0	\$0	whse	EA	59	59
PS-2	Sony Playstation 2	108	108	0	\$0	shelf	EA	108	108
STS-01MAN	Instruction Manual STS-01 Sound System	132	132	0	\$0	bin	EA	132	132
SY-MINI	Sony MiniDisc Walkman Player/Recorder	26	26	0	\$0	bin	EA	26	26
TV-5200	52" Dolby Pro Logic Surround Sound TV	42	44	-2	-\$714	ROW12	EA	42	44

Based on Average Cost

Value of Counted Inventory \$487,895

Value of AP Inventory \$499,123

Difference Counted - AP -\$11,228

Based on Current Cost

Value of Counted Inventory \$477,964

Value of AP Inventory \$488,812

Difference Counted - AP -\$10,848

UPLOADING DATA ON BVES

To upload the new inventory count. Click on the Export to BVE button

Online Instructions | Scanned Items Only | Remove committed from image | **Inventory Counting** | PDF Instructions

☐ All Warehouses | **START INVENTORY** | Time Inventory Started: 10/07/2016 5:15:43 AM | Counter: | Location: | No Locations | > 1000 | Refresh

WH: 00 | Item: st-10 | Product Code: | Search | Reset | Remove from Image | Add Initial

Reports: | Report | Add Manually | Delete

WH	Code	Description	UOM	OnHand	Counted Qty	Location	SN	Lot	Weight
00	ST-10	Stand - for mini speakers	EA	155	153	rack1			R

Location and other information (item specific)

WH	Part No	QTY	Locations	Serial / Lot No	Exp Date	SkidID:
00	ST-10		153 rack1			
* 00						

Record: 1 of 1 | No Filter | Search

Export Type: BV

Replace BV Locations with Locations listed above | SBNU | Recount Sheets | Apply | By \$

Adjust Count by Location | Add Items to Master Location Table | Check Old Locations

Update BV Loc. | Missing Lots | Missing Serial | Sum Lot Numbers

UpLoad SN With Qty | Add to master | UOM

Export to BVE | Export To BV | Double click to enable

Add Items not scanned to Inventory List | Inventory History | CLEAN UP ALL TABS | Skid/Reset Expiry | SN Report

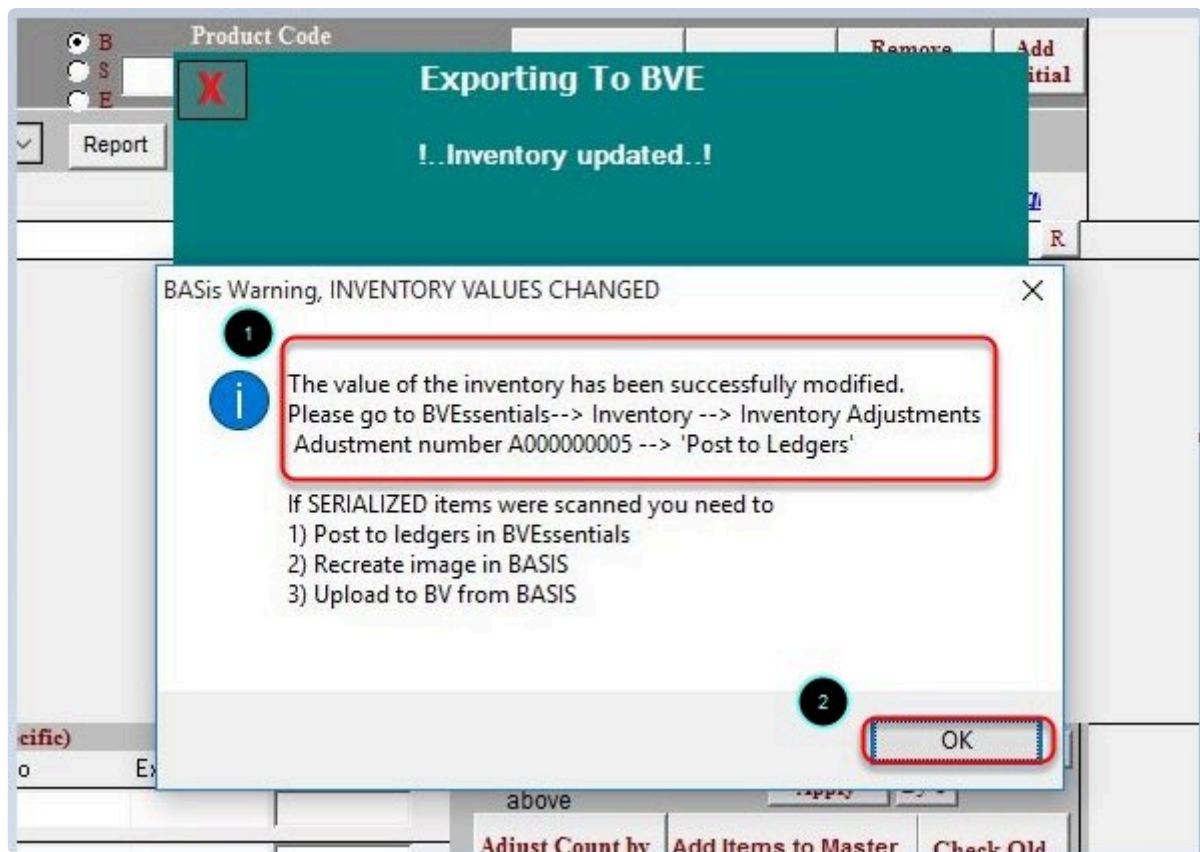
Click on Yes.

BASIS Warning

Did you already print a discrepancy report?
Select Yes to continue, No to print Report or Cancel to Abort.

Yes No Cancel

Take note of the adjustment number and then click on OK



To make the adjustments in BVESS click on the Adjust Inventory module.



And then locate and open the adjustment form (A000000005) that BASIS created in BVESS.



Check and review the adjustment and then click on Post to Ledgers.

Inventory Adjust

Mode: ☐ Receive Inventory ☒ Adjust Inventory

Date: 01/01/2012 Adjust No: A000000005

Supplier: Reference No: Supplier:

Parts

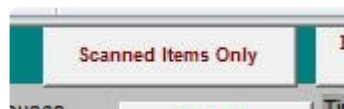
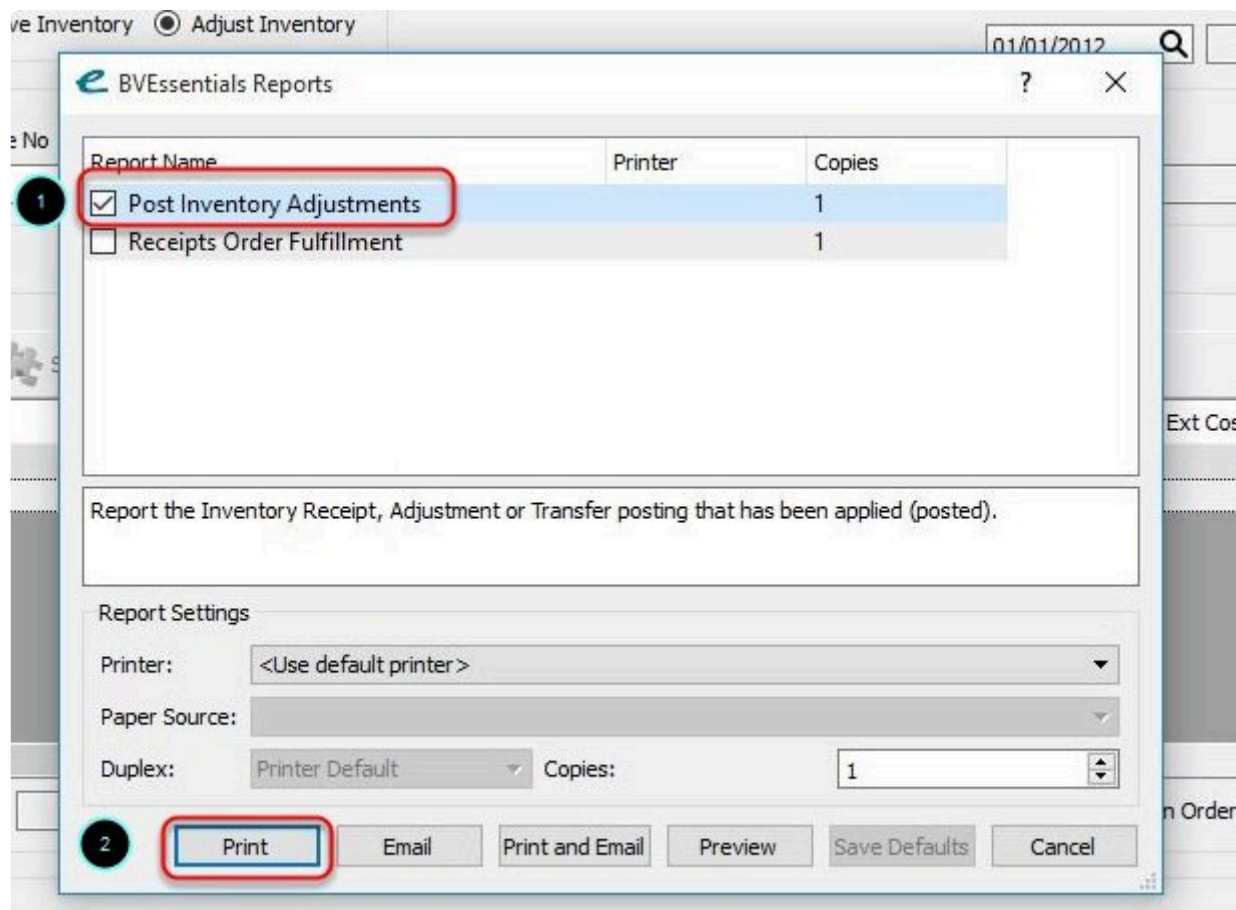
Serial Numbers

Part No	Description	Adjust Qty	Cost	UOM	Ext Cost	Base Ext Co
[00] ST-10	Stand - for mini speakers	-2.000	85.320	EA	-170.640	-170.640

Available: On Hand: Committed: Backorder: On Order:

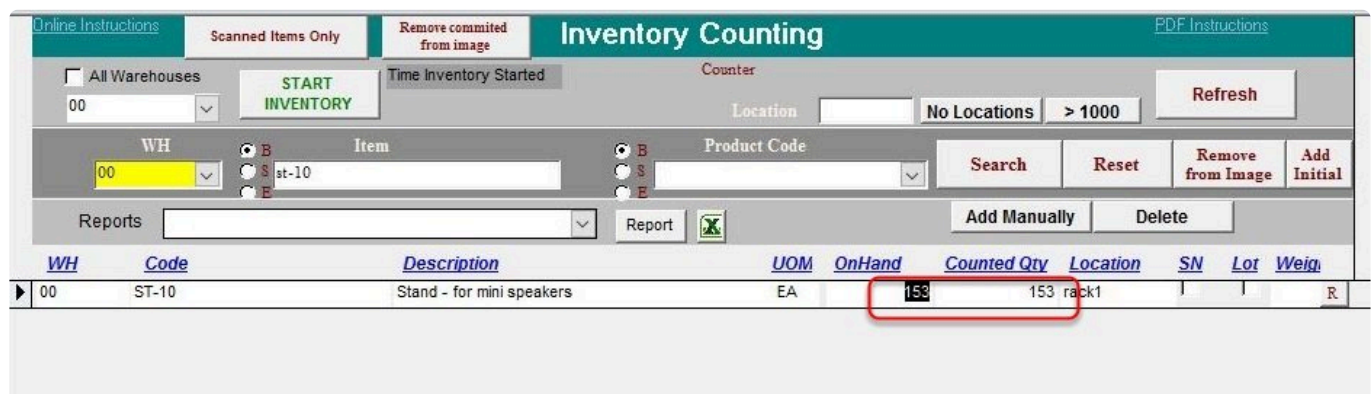
Notes:

To finalize the adjustment just select a report and then select the output (PRINT, EMAIL and PRINT / EMAIL). This will create the report and the adjustments will be carried out to BVES.



To check results in BASIS, click on **Scanned Items Only** to get a snapshot of the current inventory count.

The On-hand and the Counted Qty should be equal once the adjustment is a success.



7.2.4. D. SALES ORDER MODULE

7.2.4.1. i. Sales Order Management with BV

This knowledge base will guide user on how a sales order is being processed with the help of the BASIS App.

To process a Sales Order using the BASIS App. We have to make sure that the sales order is imported from BV to the BASIS DESKTOP


Sage BusinessVision Client-Server Edition - ABC Electronic Components Inc. - [Order Details - 0000700500]

File Edit View Utilities Options Window Help

Order Number: 0000700500 P.O. No.: Y5888 Status: Okay Order Date: 06/05/11
 Customer No.: INTSYS Name: Integrated Sound Solutions Required Date: 00/00/00
 Ship-to ID: Same as bill-to Name: Integrated Sound Solutions Invoice Date: 06/17/11

Item Details Order Details Bill-To Ship-To Notes

Whse	Part number	Description	Sell UOM	Order qty.	Unit price	Comd. qty.	B.O. qty.	Cost price	Sales tax 1	Sales tax 2	Ext'd price	Margin %
00	CD-204	Compact Disk Player with Autoskip	EA	12.00000	301.84000	12.00000		185.25000			3,622.08	38.63%
00	PCM8420	Personal Organizer	EA	2.00000	599.00000	2.00000		450.00000			1,198.00	24.87%
00	MCB-250	Entertainment Centre	EA	3.00000	350.00000	3.00000		179.00000			1,050.00	48.86%
00	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-RW	EA	3.00000	563.60000	3.00000		267.30000			1,630.80	52.57%
00	TV-3600	36" DBX Stereo Colour Television	EA	2.00000	468.10000	2.00000		297.00000			936.20	36.55%
00	V1-4A	HiFi Stereo 4 Head VCR	EA	3.00000	473.90000	3.00000		206.45300			1,421.70	56.44%



SALES ORDERS Donut Time

☐ Show only Completed orders ☐ Show only updated orders ☐ Show only On Hold Orders ☐ Hide Completed orders

Get Data

Search By Number or Name Double click to cancel
 Search By Item Code

HH Selection: BV ☐ HH ☐ All ☐

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	Delete	Tracking
0000700500	INTSYS	Integrated Sound Sol	31/08/2016	PHASE1												

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries Serialized Lot Numbers from BVE Order Time Report Daily Report for Report to 2

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
	1	00	CD-204	CD-204	Compact Disk Player with Autoskip	EA	12	0	0	12			row23			Edit
	2	00	PCM8420	PCM8420	Personal Organizer	EA	2	0	0	2			lock2			Edit
	3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	0	0	3			whse			Edit
	4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	0	0	3			row 5			Edit
	5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	0	0	2			Box 3			Edit

Record: 1 of 6 Unfiltered Search

There are 3 ways to import an order from the accounting package.

1. [SINGLE IMPORT](#)
2. [IMPORT ALL](#)
3. [AUTO IMPORT](#)

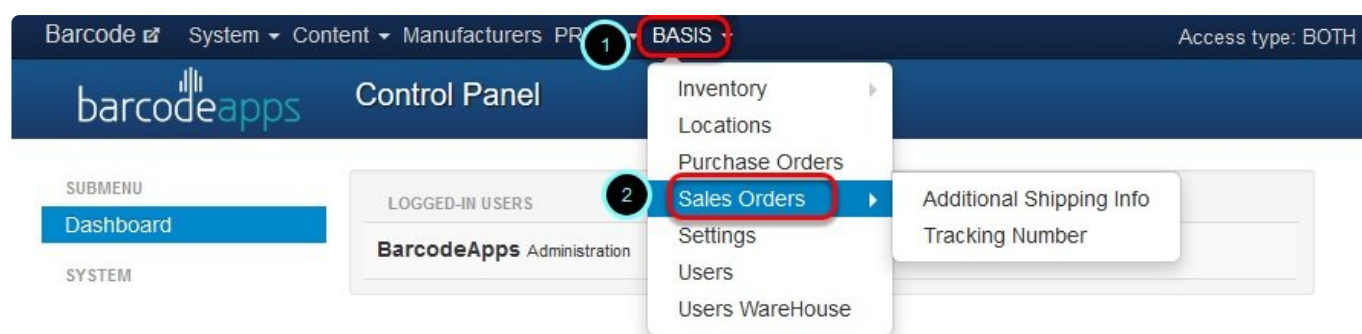
Once import is finish we can now proceed on scanning the items

It's also a best practice that we familiarize the process of checking the order on the cloud

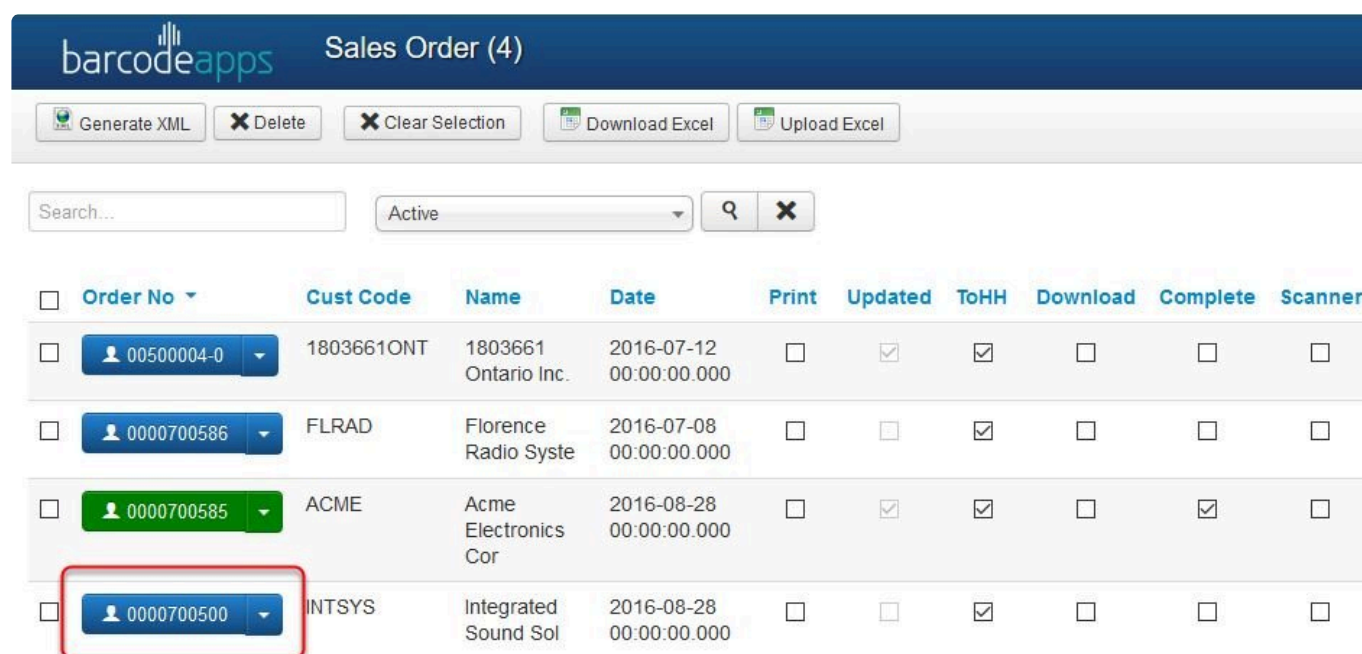
To do this. Login to the Joomla website using an admin credential



Click on BASIS and then Sales Order

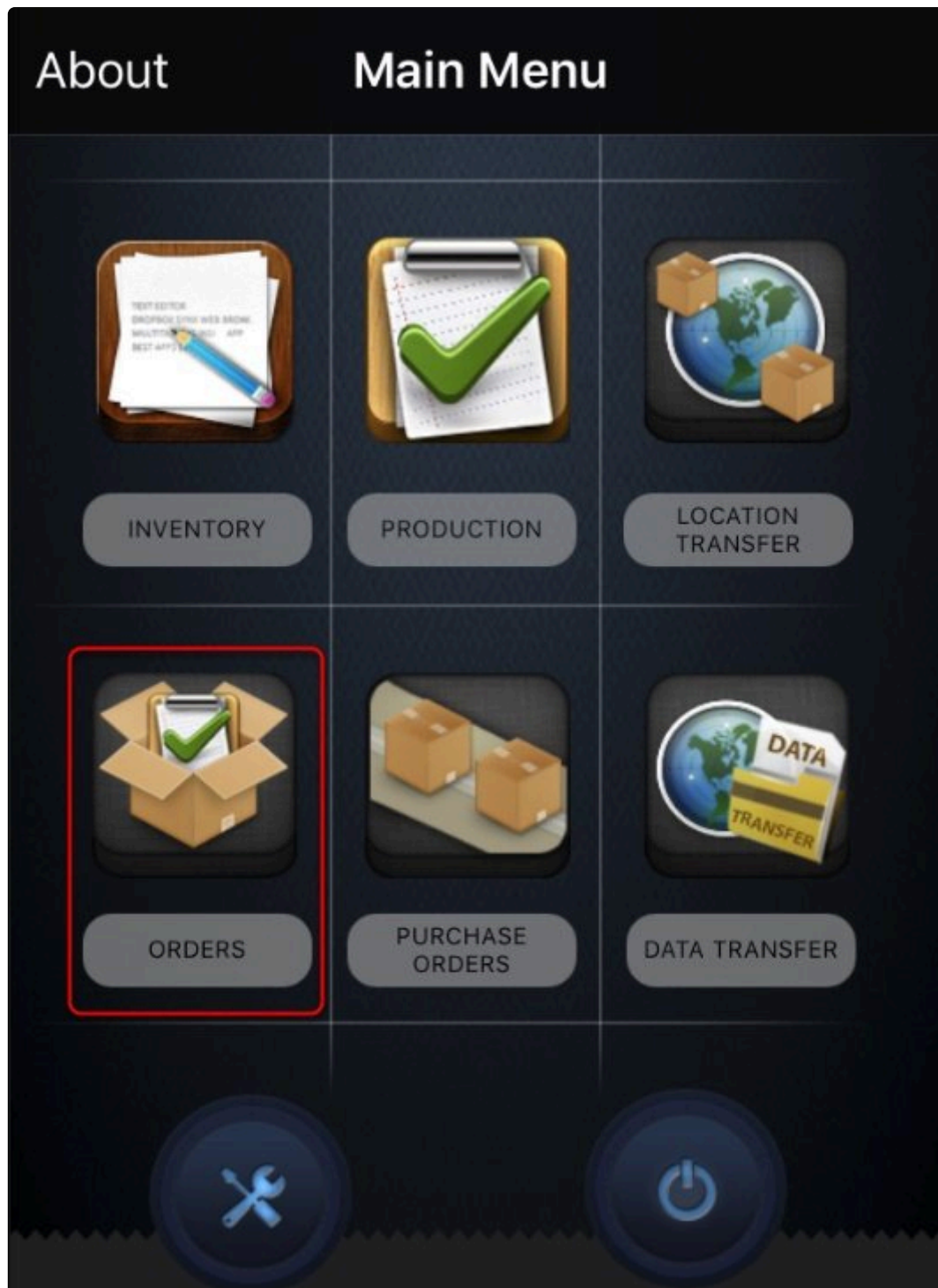


From here we can verify if the SALES ORDER is imported successfully from the BASIS DESKTOP



Scanning an item from a Sales Order

To Access the Sales order module. From the BASIS App Main Window. Tap on Orders



Type in the Sales Order number in the search field and then tap on find

Menu **Sales Order**

WH

Order #

NO#	Customer	OrderDate
000700500"		

000700500"

1 2 3 4 5 6 7 8 9 0

- / : ; () \$ & @ "

#+= . , ? ! '

Tap on the Sales order number

Menu

Sales Order

WH

00

Order #

Order Number

Find

NO#	Customer	OrderDate
0000700500	INTSYS	2016-08-31

to open the Sales Order details window

Back

SO Details

Crate

Order

0000700500

INTSYS

Barcode

Barcode #

Find

Qty	LOCATION	CODE	NAME
2	Box 3	TV-3600	36" DBX Stereo C Television
12	row23	CD-204	Compact Disk Pla Autoskip
3	wrhse	MCB-250	Entertainment Ce

5

00

TV-3600

SkidID

Ordered

To Date

Ship

UMO

2

0

EA

Loc

Box 3

TrIID

Check Location

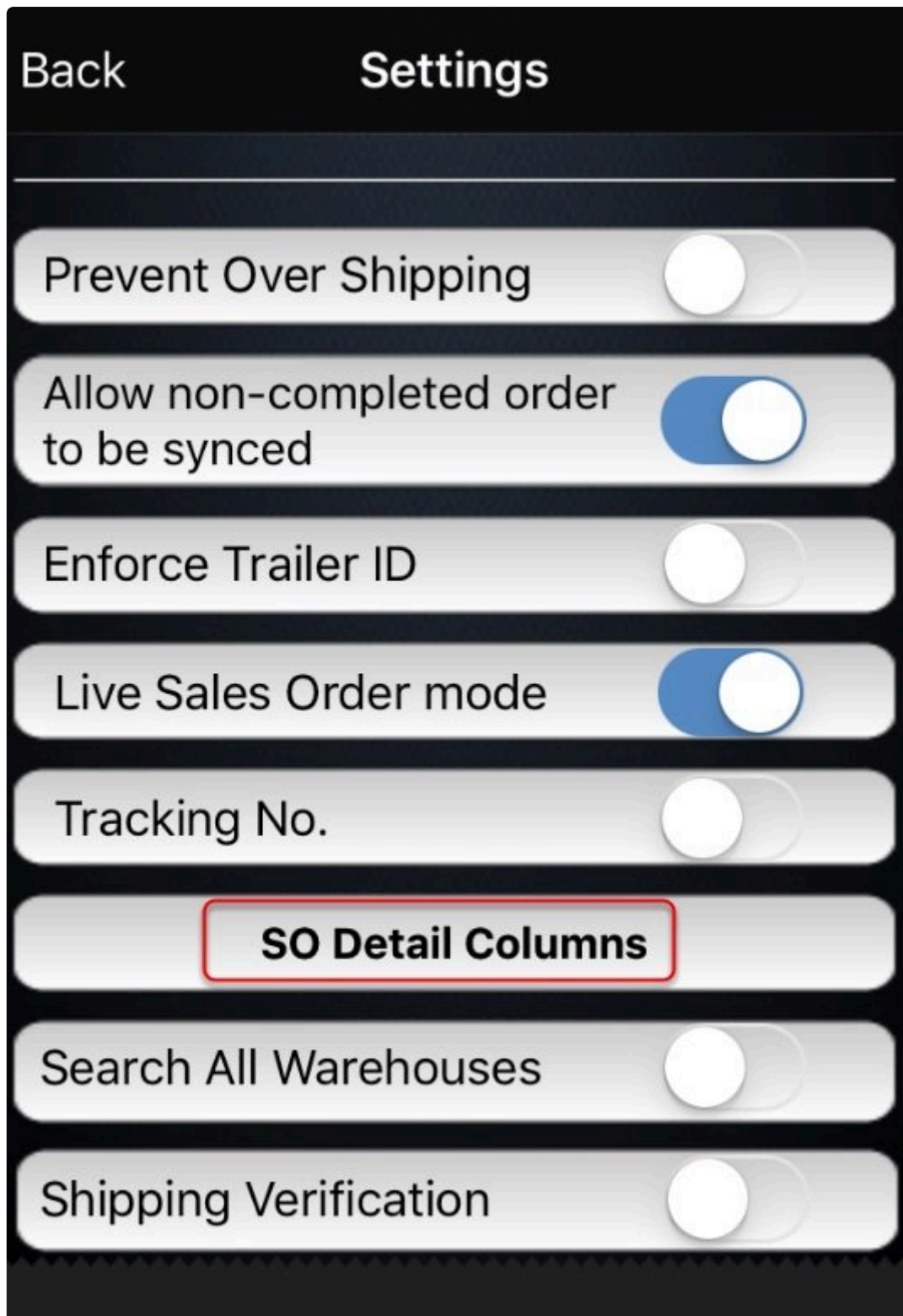
Lot / Serial

* Note: We can make an adjustment on the viewing pane to make the quantity appear first.

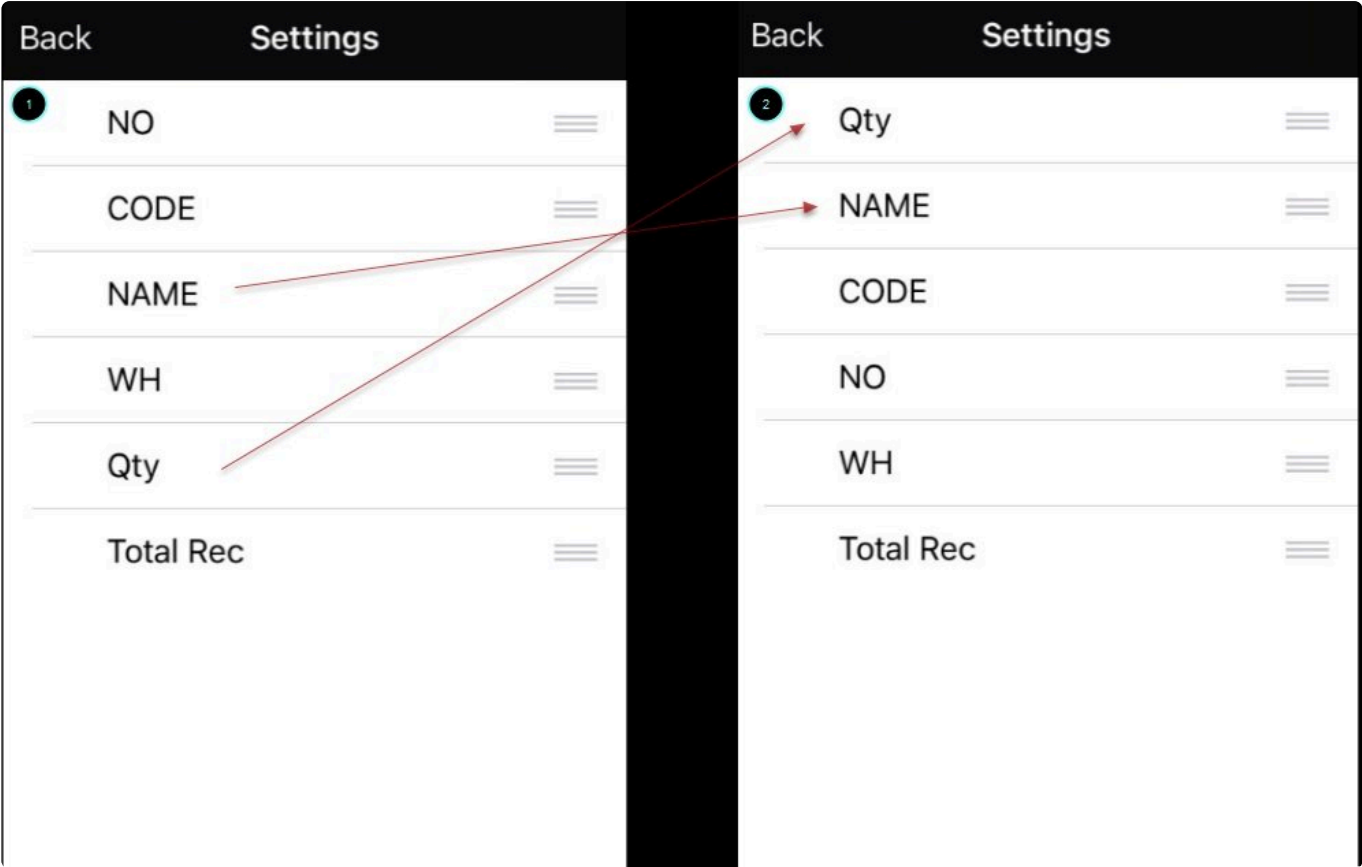


To do this tap on

Tap on SO DETAILS COLUMN.



From here we can make the quantity column as the first column by simply doing a tap,hold and drag action on the screen.



ADDING ITEMS TO THE SALES ORDER

To start adding an item, we have two ways to do it

- 1. Scanning an item via a Bluetooth scanner
- 2. Manually tapping on the product from the SO details window



Next step is to enter the quantity of the item

BackSO DetailsCrate

3wrhseMCB-250Entertainment Ce

500TV-3600

SkidIDOrderedTo DateShipUMO

2

0

2


EA

LocBox 3TrnID

CheckDone

Lot / Serial

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ

Then tap on the Check button  to confirm the data.

Once confirmed a notification will show once the transaction is successful

Page 1174 of 1305

BackSO DetailsCrate

Item Added Successfully

Total Rec - 2.00000 of Order - 0000700500

Qty	LOCATION	CODE	NAME
2	Box 3	TV-3600	36" DBX Stereo C Television
12	row23	CD-204	Compact Disk Pl Autoskip
3	wrhse	MCB-250	Entertainment Ce

SkidID

Ordered

To Date

Ship

UMO

Loc

TrIID

Check Location

Lot / Serial

Just repeat the same process to all other items until all are scanned

* Note: Highlights will be color coded base on the items receive to help user validate

Qty	LOCATION	CODE	NAME
3	wrhse	MCB-250	Entertainment C
3	shelf	V1-4A	Hi-fi Stereo 4 He
2	lock2	PCM8420	Personal Organiz

GREEN	ordered item = scanned item
BLUE	ordered item < scanned item
YELLOW	ordered item > scanned item



To send the data back to the cloud. tap on the cloud icon and a notification will pop up to confirm if the upload is successful

Back SO Details Crate

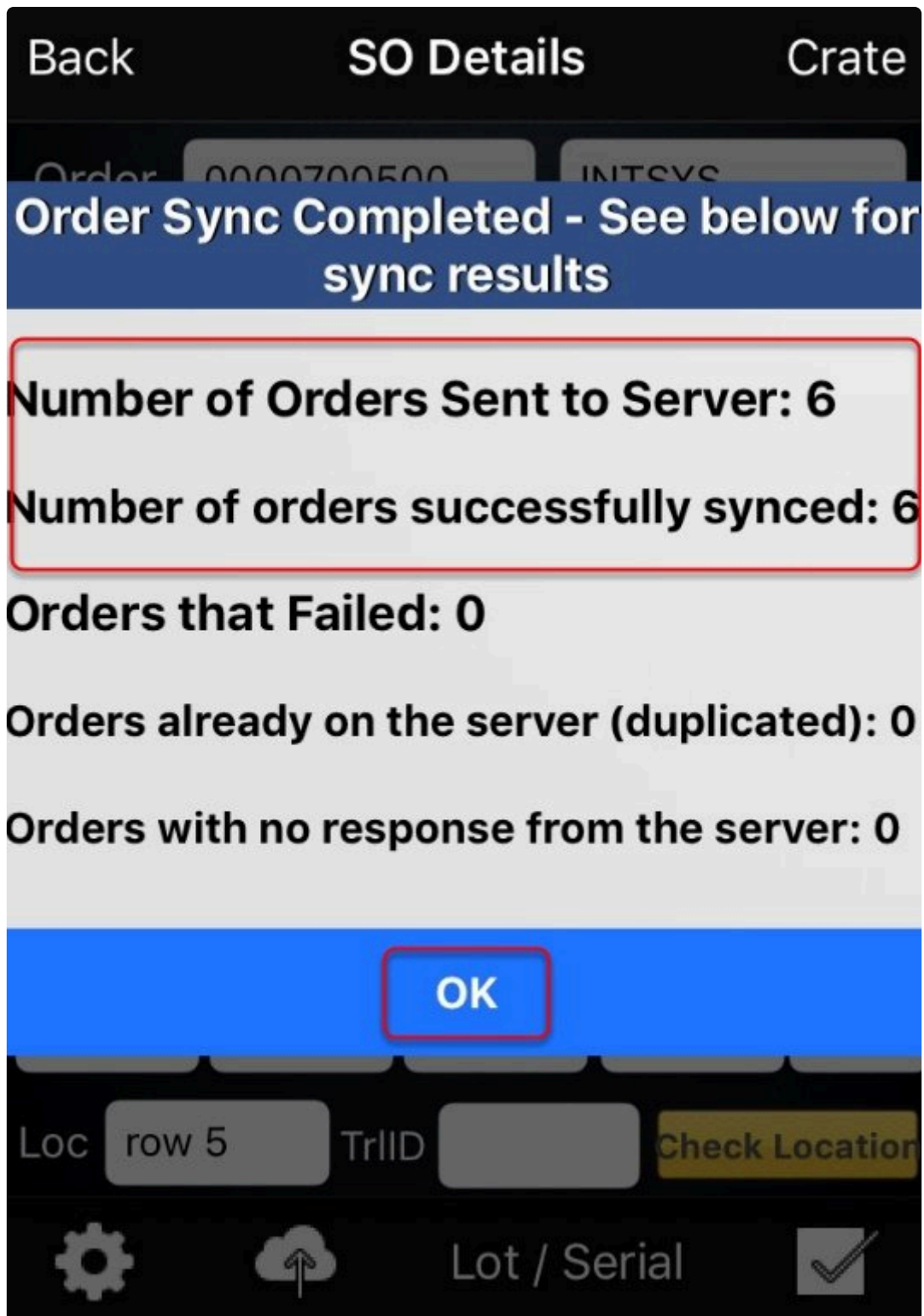
Order 0000700500 INTSYS

Barcode Barcode # Find

Qty	LOCATION	CODE	NAME	
3			He	
2			niz	
3			ess	
4	00	TP-560		
SkidID	Ordered	To Date	Ship	UMO
	3	3.0		EA
Loc	row 5	TrIID		Check Location
		Lot / Serial		

Would you like to send this order as completed?

YES NO



REVIEWING SCANNED SALES ORDER ITEMS VIA PRISM JOOMLA WEBSITE

All orders sent to the cloud can be directly check on the Joomla Website. To do this login to the website,

click on Basis and then Sales Order. The PO will now be green which means that the order is now received or completed.

barcodeapps

Sales Order (4)

Generate XML

Delete

Clear Selection

Download Excel

Upload Excel

Search...

Active

Q

X

Item CDE

Descending

20

<input type="checkbox"/>	Order No	Cust Code	Name	Date	Print	Updated	ToHH	Download	Complete	Scanner	Phase	Hold	ASN	Tracking
<input type="checkbox"/>	<div><div>00500004-0</div></div>	1803661ONT	1803661 Ontario Inc.	2016-07-12 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700586</div></div>	FLRAD	Florence Radio Syste	2016-07-08 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>0</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700585</div></div>	ACME	Acme Electronics Cor	2016-08-26 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>PHASE1</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700500</div></div>	INTSYS	Integrated Sound Sol	2016-08-31 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>PHASE1</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>

REVIEWING SCANNED SO ITEM VIA PRISM DESKTOP

There are number of ways to retrieve and view the scanned items

- by pressing F5

- Using the show status options

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders



- Click on Get data
- Let BASIS do it using the auto import feature.

Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

0000700500	INTSYS	Integrated Sound Sol	31/08/2016	PHASE1	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000700576	TORRAD	Toronto Radio Limite	07/03/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700577	ACTECH	Access Technologies	07/04/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700578	TORRAD	Toronto Radio Limite	07/04/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GREEN

Completed Orders

ORANGE	Updated but not complete
YELLOW	On Hold Orders
NO HIGH LIGHT	Not Scanned

To review a scanned order just select the order from the scanned orders window and the details will show at the order details window

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

Search By Number or Name: Double click to cancel

Search By Item Code:

HH Selection:

Order No: 0000700500 Cust Code: INTSYS Name: Integrated Sound Sol Date: 31/08/2016 Phase: PHASE1

Print Printed Status Updated To HH Download Complete

Reset All HOLD ASN Delete Tracking

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
1	00	CD-204	CD-204	Compact Disk Player with Autospin	EA	12	12	0	12		<input checked="" type="checkbox"/>	row23				
2	00	PCM8420	PCM8420	Personal Organizer	EA	2	2	0	2		<input checked="" type="checkbox"/>	lock2				
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3		<input checked="" type="checkbox"/>	whise				
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3		<input checked="" type="checkbox"/>	row 5				
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2		<input checked="" type="checkbox"/>	Box 3				

SHIPPED QUANTITY will be color coded in order to verify if there is no discrepancy on the items and otherwise.

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3		<input checked="" type="checkbox"/>	whise				
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3		<input checked="" type="checkbox"/>	row 5				
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2		<input checked="" type="checkbox"/>	Box 3				
6	00	V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	EA	3	4	0	3		<input checked="" type="checkbox"/>	shelf				

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

MAKING CHANGES

Orders can be edited before uploading an order back to the accounting package

To edit an order just select the order from the Sales Order window. On the Order review window just click on the section the you plan to edit and after making the changes the order can be uploaded back to the accounting package.

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

☐ Search By Number or Name
☐ Search By Item Code

Double click to cancel

HH Selection

☐ All
☐ Both
☐ Phase

Print Printed Status Updated To HH Download Complete

Reset All HOLD ASN All Delete Tracking

Order No	Cust Code	Name	Date	Phase	Print	Printed	Status	Updated	To HH	Download	Complete	Reset All	HOLD	ASN	All	Delete	Tracking
0000700500	NTSYS	Integrated Sound Sol	31/08/2016	PHASE1													

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Re

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
	1	00	CD-204	CD-204	Compact Disk Player with Autoskip	EA	12	12	0	12			row23			
	2	00	PCM8420	PCM8420	Personal Organizer	EA	2	2	0	2			lock2			
	3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3			whse			
	4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3			row 5			
	5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2			Box 3			



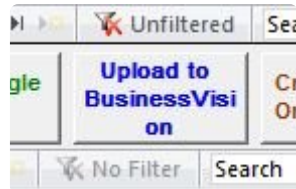
Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Shipped Quantities.

UPLOADING THE ORDER BACK TO BV

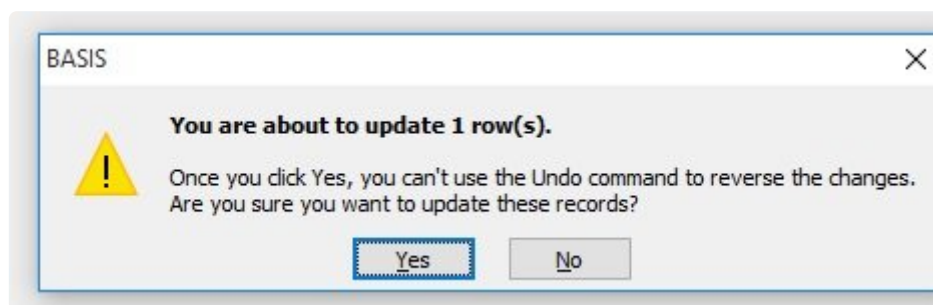
To upload the order back to the accounting package , select the completed order that you wish to

upload.

Click on the Upload to Business Vision button



Click on OK when prompted.



After the upload is done. We can now go back to BV to print the invoice and at the same time we can also check if the item(s) has been omitted from the inventory.

Order Number 0000700500
Customer No. INTSYS
Ship-to ID Same as bill-to

Status Okay **Order Date** 06/05/11
Required Date 03/00/00
Invoice Date 06/17/11

Item Details | **Order Details** | **Bill-To** | **Ship-To** | **Notes**

Whse.	Part number	Description	Sell UOM	Order qty.	Unit price	Cmtd. qty.	B.O. qty.	Cost price	Sales
00	CD-204	Compact Disk Player with Autoskip	EA	12.00000	301.84000	12.00000		185.25000	✓
00	PCM8420	Personal Organizer	EA	2.00000	599.00000	2.00000		450.00000	✓
00	MCB-250	Entertainment Centre	EA	3.00000	350.00000	3.00000		179.00000	✓
00	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-RW	EA	3.00000	563.60000	3.00000		267.30000	✓
00	TV-3600	36" DBX Stereo Colour Television	EA	2.00000	468.10000	2.00000		297.00000	✓
00	V1-4A	Hi-Fi Stereo 4 Head VCR	EA	3.00000	473.90000	3.00000		206.45300	✓
									☐

7.2.4.2. ii. Sales Order Management with BVESS

This knowledge base will guide user on how a sales order is being processed with the help of the BASIS App.

To process a Sales Order using the BASIS App. We have to make sure that the sales order is imported from BV to the BASIS DESKTOP

Sage BusinessVision Client-Server Edition - ABC Electronic Components Inc. - [Order Details - 0000700500]

File Edit View Utilities Options Window Help

Order Number: 0000700500 P.O. No: YS888 Status: Okay Order Date: 06/05/11
 Customer No: INTSYS Name: Integrated Sound Solutions Required Date: 00/00/00
 Ship-to ID: Same as bill-to Name: Integrated Sound Solutions Invoice Date: 06/17/11

Item Details Order Details Ship-To Notes

Where	Part number	Description	Sell UOM	Order qty.	Unit price	Comd. qty.	B.O. qty.	Cost price	Sales tax 1	Sales tax 2	Extd. price	Margin %
00	CD-204	Compact Disk Player with Autoskip	EA	12.00000	301.84000	12.00000		185.25000			3,622.08	38.63%
00	PCMB420	Personal Organizer	EA	2.00000	599.00000	2.00000		450.00000			1,198.00	24.87%
00	MCB-250	Entertainment Centre	EA	3.00000	350.00000	3.00000		179.00000			1,050.00	48.86%
00	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-RW	EA	3.00000	563.60000	3.00000		267.30000			1,630.80	52.57%
00	TV-3600	36" DBX Stereo Colour Television	EA	2.00000	468.10000	2.00000		297.00000			936.20	36.55%
00	V1-4A	HiFi Stereo 4 Head VCR	EA	3.00000	473.90000	3.00000		206.45300			1,421.70	56.44%

SALES ORDERS Donut Time

Show only Completed orders
 Show only updated orders
 Show only On Hold Orders
 Hide Completed orders

Get Data

Search By Number or Name
 Search By Item Code

Double click to cancel

HH Selection

Order No: 0000700500 Cust. Code: INTSYS Name: Integrated Sound Sol Date: 31/08/2016 Phase: PHASE1

Print Printed Status Updated To HH Download Complete

Reset All HOLD ASN All Delete Tracking

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report for: Report to 3

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New Item	Upload	Location	Skid	Ser	Lot
1	00	CD-204	CD-204	Compact Disk Player with Autoskip	EA	12	0	0	12				row23			Edit
2	00	PCMB420	PCMB420	Personal Organizer	EA	2	0	0	2				lock2			Edit
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	0	0	3				withse			Edit
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	0	0	3				row 5			Edit
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	0	0	2				Box 3			Edit

Record: 1 of 6 Unfiltered Search

There are 3 ways to import an order from the accounting package.

1. [SINGLE IMPORT](#)
2. [IMPORT ALL](#)
3. [AUTO IMPORT](#)

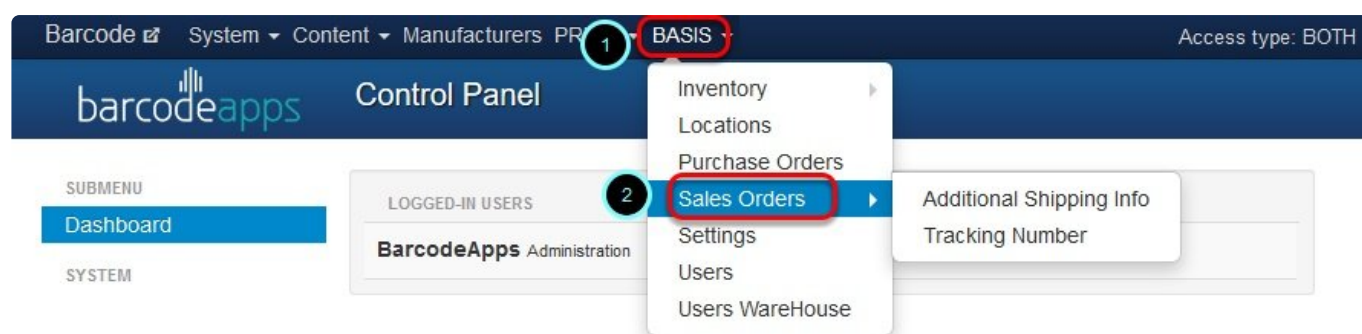
Once import is finish we can now proceed on scanning the items

It's also a best practice that we familiarize the process of checking the order on the cloud

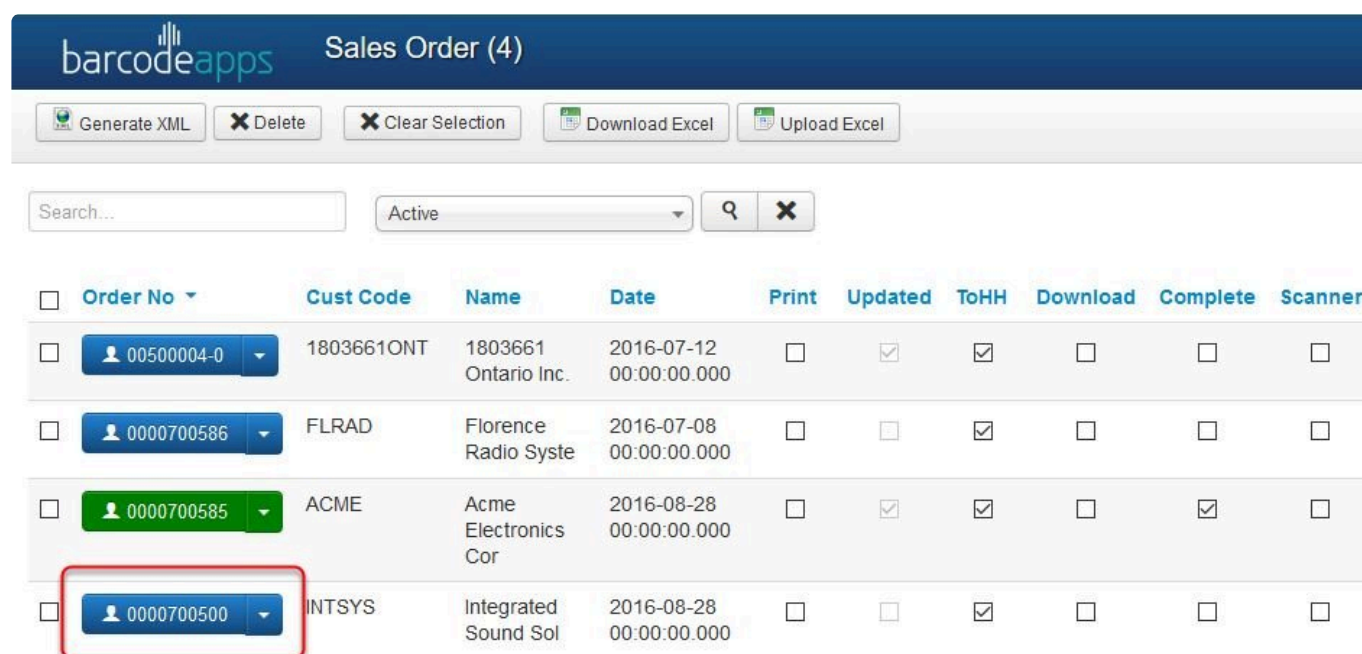
To do this. Login to the Joomla website using an admin credential



Click on BASIS and then Sales Order

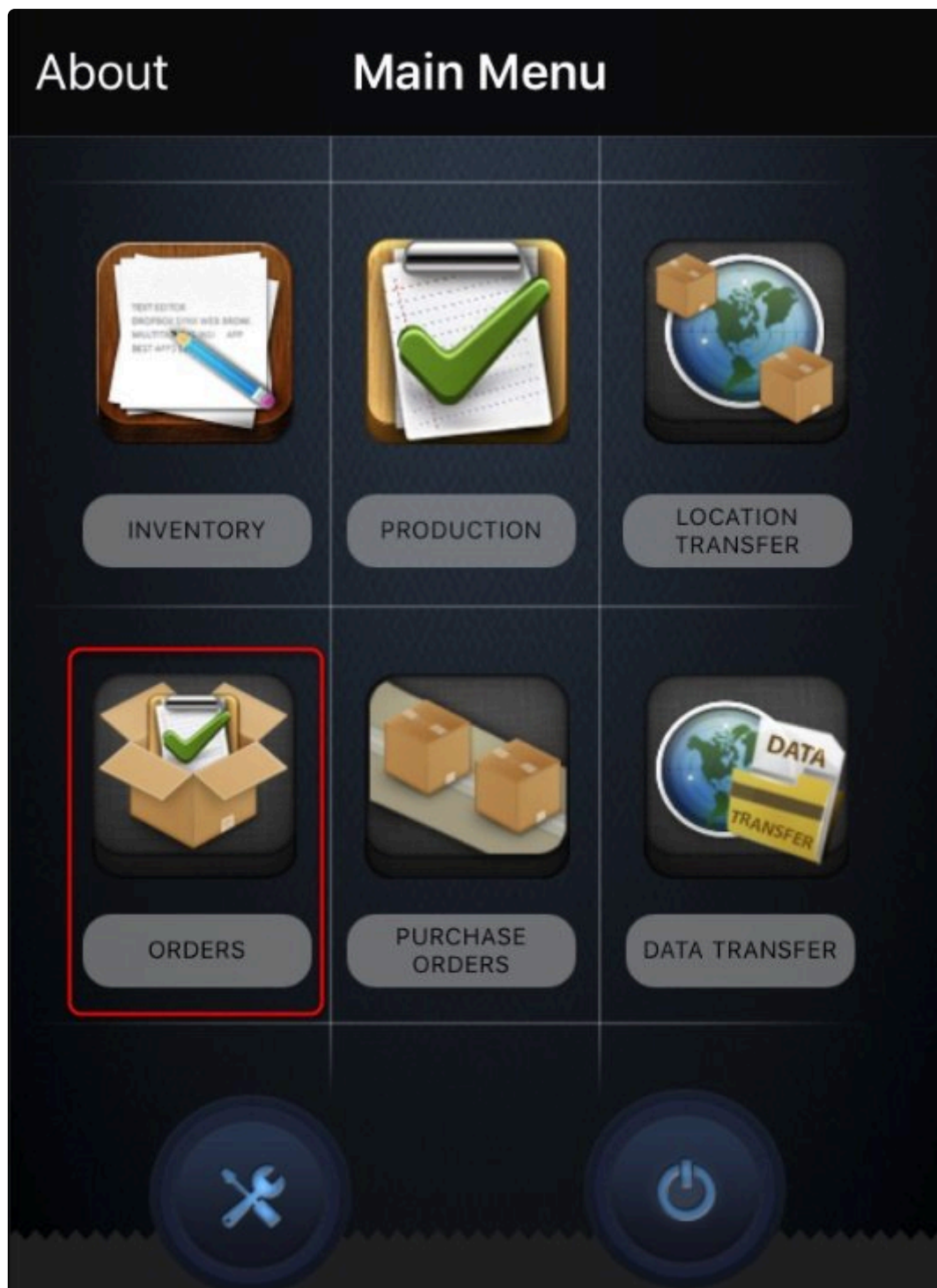


From here we can verify if the SALES ORDER is imported successfully from the BASIS DESKTOP



Scanning an item from a Sales Order

To Access the Sales order module. From the BASIS App Main Window. Tap on Orders



Type in the Sales Order number in the search field and then tap on find

Menu **Sales Order**

WH

Order #

NO#	Customer	OrderDate
000700500"		

000700500"

1 2 3 4 5 6 7 8 9 0

- / : ; () \$ & @ "

#+= . , ? ! '

Tap on the Sales order number

Menu

Sales Order

WH

00

Order #

Order Number

Find

NO#	Customer	OrderDate
0000700500	INTSYS	2016-08-31

to open the Sales Order details window

Back

SO Details

Crate

Order

0000700500

INTSYS

Barcode

Barcode #

Find

Qty	LOCATION	CODE	NAME
2	Box 3	TV-3600	36" DBX Stereo C Television
12	row23	CD-204	Compact Disk Pla Autoskip
3	wrhse	MCB-250	Entertainment Ce

5

00

TV-3600

SkidID

Ordered

To Date

Ship

UMO

2

0

EA

Loc

Box 3

TrIID

Check Location

Lot / Serial

* Note: We can make an adjustment on the viewing pane to make the quantity appear first.

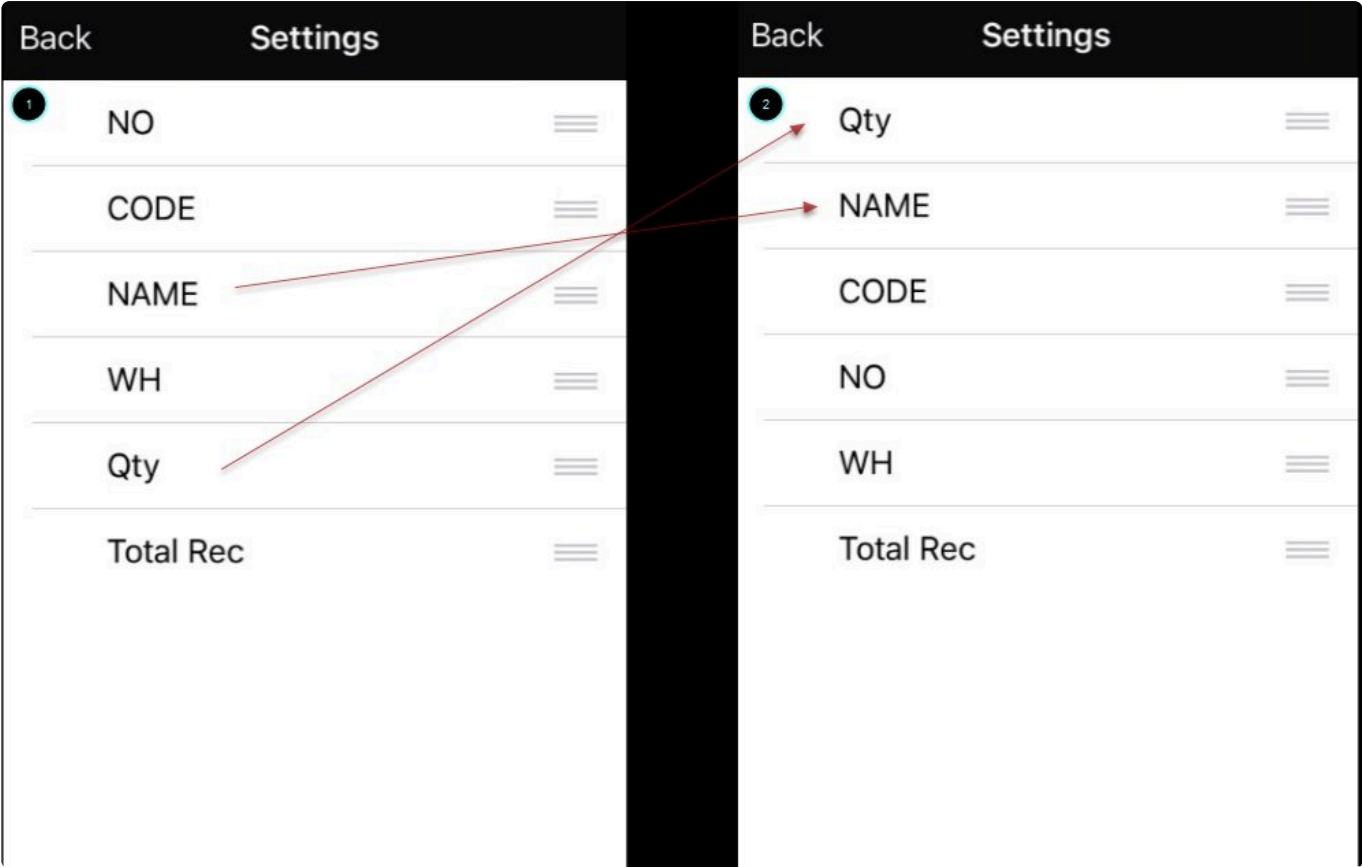


To do this tap on

Tap on SO DETAILS COLUMN.



From here we can make the quantity column as the first column by simply doing a tap,hold and drag action on the screen.



ADDING ITEMS TO THE SALES ORDER

To start adding an item, we have two ways to do it

- 1. Scanning an item via a Bluetooth scanner
- 2. Manually tapping on the product from the SO details window



Next step is to enter the quantity of the item

BackSO DetailsCrate

3wrhseMCB-250Entertainment Ce

500TV-3600

SkidIDOrderedTo DateShipUMO

2

0

2

EA

LocBox 3TrnID

CheckDone

Lot / Serial

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
	0	

Then tap on the Check button  to confirm the data.

Once confirmed a notification will show once the transaction is successful

BackSO DetailsCrate

Item Added Successfully

Total Rec - 2.00000 of Order - 0000700500

Qty	LOCATION	CODE	NAME
2	Box 3	TV-3600	36" DBX Stereo C Television
12	row23	CD-204	Compact Disk Pl Autoskip
3	wrhse	MCB-250	Entertainment Ce

SkidID

Ordered

To Date

Ship

UMO

Loc

TrIID

Check Location

Lot / Serial

Just repeat the same process to all other items until all are scanned

* Note: Highlights will be color coded base on the items receive to help user validate

Qty	LOCATION	CODE	NAME
3	wrhse	MCB-250	Entertainment C
3	shelf	V1-4A	Hi-fi Stereo 4 He
2	lock2	PCM8420	Personal Organiz

GREEN	ordered item = scanned item
BLUE	ordered item < scanned item
YELLOW	ordered item > scanned item



To send the data back to the cloud. tap on the cloud icon and a notification will pop up to confirm if the upload is successful

Back SO Details Crate

Order 0000700500 INTSYS

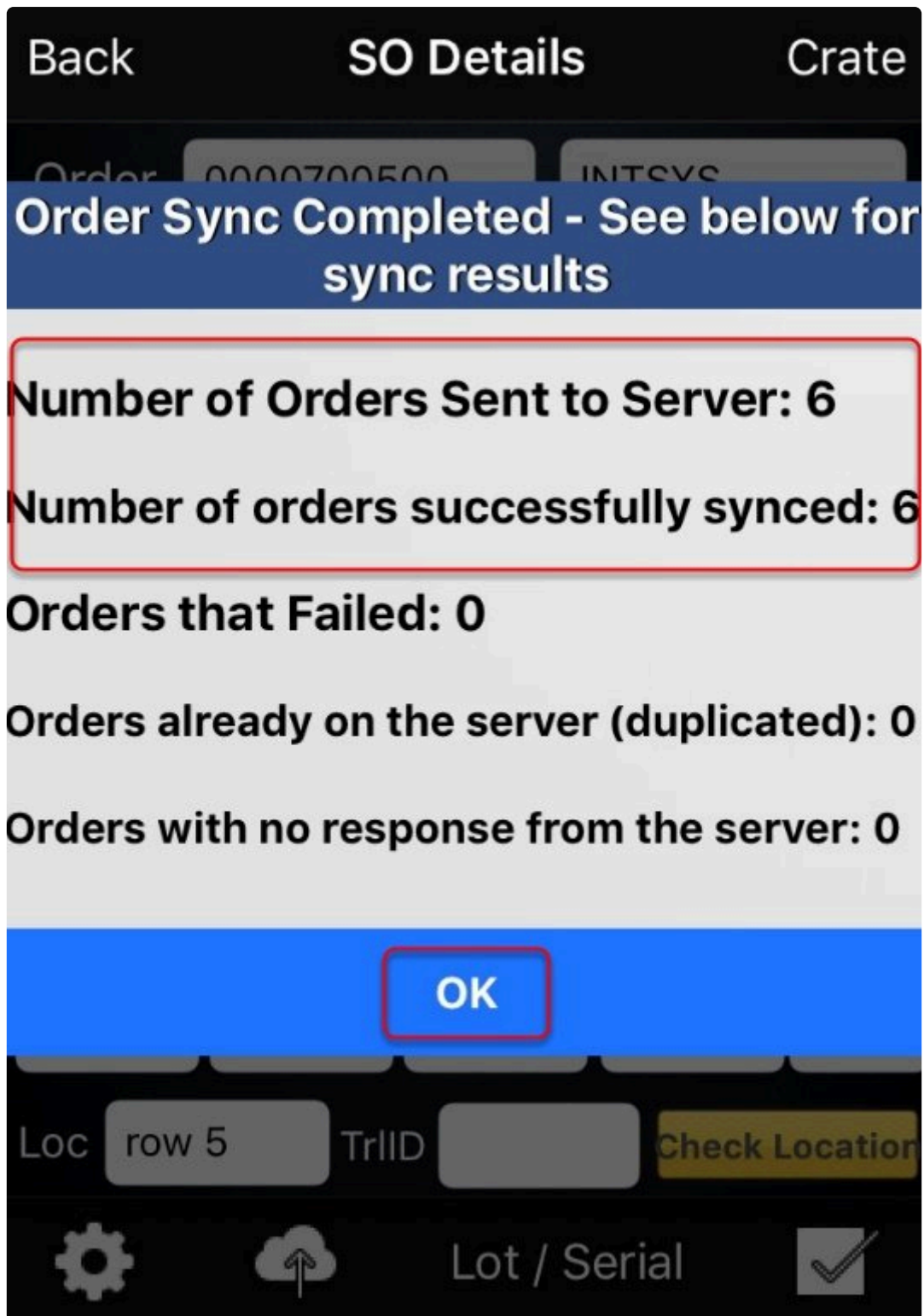
Barcode Barcode # Find

Qty	LOCATION	CODE	NAME	
3			He	
2			niz	
3			ess	
4	00	TP-560		
SkidID	Ordered	To Date	Ship	UMO
	3	3.0		EA
Loc	row 5	TrIID		Check Location

Would you like to send this order as completed?

YES NO

Lot / Serial



REVIEWING SCANNED SALES ORDER ITEMS VIA PRISM JOOMLA WEBSITE

All orders sent to the cloud can be directly check on the Joomla Website. To do this login to the website,

click on Basis and then Sales Order. The PO will now be green which means that the order is now received or completed.

barcodeapps

Sales Order (4)

Generate XML

Delete

Clear Selection

Download Excel

Upload Excel

Search...

Active

Q

X

Item CDE

Descending

20

<input type="checkbox"/>	Order No	Cust Code	Name	Date	Print	Updated	ToHH	Download	Complete	Scanner	Phase	Hold	ASN	Tracking
<input type="checkbox"/>	<div><div>00500004-0</div></div>	1803661ONT	1803661 Ontario Inc.	2016-07-12 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700586</div></div>	FLRAD	Florence Radio Syste	2016-07-08 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>0</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700585</div></div>	ACME	Acme Electronics Cor	2016-08-26 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>PHASE1</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<input type="checkbox"/>	<div><div>0000700500</div></div>	INTSYS	Integrated Sound Sol	2016-08-31 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>PHASE1</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>

REVIEWING SCANNED SO ITEM VIA PRISM DESKTOP

There are number of ways to retrieve and view the scanned items

- by pressing F5

- Using the show status options

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders



- Click on Get data
- Let BASIS do it using the auto import feature.

Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

0000700500	INTSYS	Integrated Sound Sol	31/08/2016	PHASE1	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000700576	TORRAD	Toronto Radio Limite	07/03/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700577	ACTECH	Access Technologies	07/04/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0000700578	TORRAD	Toronto Radio Limite	07/04/2016		<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GREEN

Completed Orders

ORANGE	Updated but not complete
YELLOW	On Hold Orders
NO HIGH LIGHT	Not Scanned

To review a scanned order just select the order from the scanned orders window and the details will show at the order details window

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

Search By Number or Name: Double click to cancel

Search By Item Code:

HH Selection:

Order No: 0000700500 Cust Code: INTSYS Name: Integrated Sound Sol Date: 31/08/2016 Phase: PHASE1

Print Printed Status Updated To HH Download Complete

Reset All HOLD ASN Delete Tracking

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
1	00	CD-204	CD-204	Compact Disk Player with Autospin	EA	12	12	0	12		<input checked="" type="checkbox"/>		row23			
2	00	PCM8420	PCM8420	Personal Organizer	EA	2	2	0	2		<input checked="" type="checkbox"/>		lock2			
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3		<input checked="" type="checkbox"/>		whise			
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3		<input checked="" type="checkbox"/>		row 5			
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2		<input checked="" type="checkbox"/>		Box 3			

SHIPPED QUANTITY will be color coded in order to verify if there is no discrepancy on the items and otherwise.

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries

Serialized Lot Numbers from BVE Order Time Report Daily Report

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3		<input checked="" type="checkbox"/>		whise			
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3		<input checked="" type="checkbox"/>		row 5			
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2		<input checked="" type="checkbox"/>		Box 3			
6	00	V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	EA	3	4	0	3		<input checked="" type="checkbox"/>		shelf			

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

MAKING CHANGES

Orders can be edited before uploading an order back to the accounting package

To edit an order just select the order from the Sales Order window. On the Order review window just click on the section the you plan to edit and after making the changes the order can be uploaded back to the accounting package.

SALES ORDERS Donut Time

☐ Show only Completed orders
☐ Show only updated orders
☐ Show only On Hold Orders
☐ Hide Completed orders

Get Data

☐ Search By Number or Name
☐ Search By Item Code

Double click to cancel

HH Selection

☐ All
☐ Both
☐ All

Print Printed Status Updated To HH Download Complete

Reset All HOLD ASN Delete Tracking

Order Number: 0000700500

Transfer Pick List SHIP Pick List Check Scans Load Sheet Select All Deselect All Print Summaries Serialized Lot Numbers from BVE Order Time Report Daily Re

Skid	Line	WH	Item Code	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	New item	Upload	Location	Skid	Ser	Lot
1	00	CD-204	CD-204	Compact Disk Player with Autoskip	EA	12	12	0	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	row23		<input type="checkbox"/>	<input type="checkbox"/>	E
2	00	PCM8420	PCM8420	Personal Organizer	EA	2	2	0	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	lock2		<input type="checkbox"/>	<input type="checkbox"/>	E
3	00	MCB-250	MCB-250	Entertainment Centre	EA	3	2	0	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	whise		<input type="checkbox"/>	<input type="checkbox"/>	E
4	00	TP-560	TP-560	Toshiba Progressive-Scan DVD/DVD-R/CD-R	EA	3	3	0	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	row 5		<input type="checkbox"/>	<input type="checkbox"/>	E
5	00	TV-3600	TV-3600	36" DBX Stereo Colour Television	EA	2	2	0	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Box 3		<input type="checkbox"/>	<input type="checkbox"/>	E



Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Shipped Quantities.

UPLOADING THE ORDER BACK

Click on the Upload to BVEssentials button.

Order Number

Transfer **Pick List** **SHIP Pick List** **Check Scans** **Load Sheet** **Select**

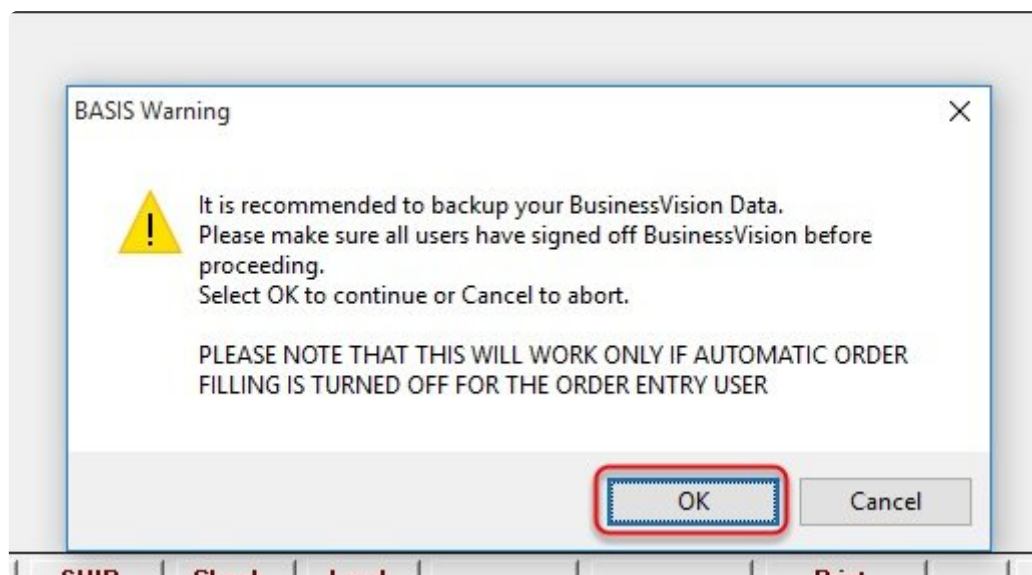
Skid	Line	WH	Item Code	Barcode	Description	U.C
	1	00	FCB-250	FCB-250	Finished cabinet for SP-250	E
*						

Record: 1 of 1 | Unfiltered | Search

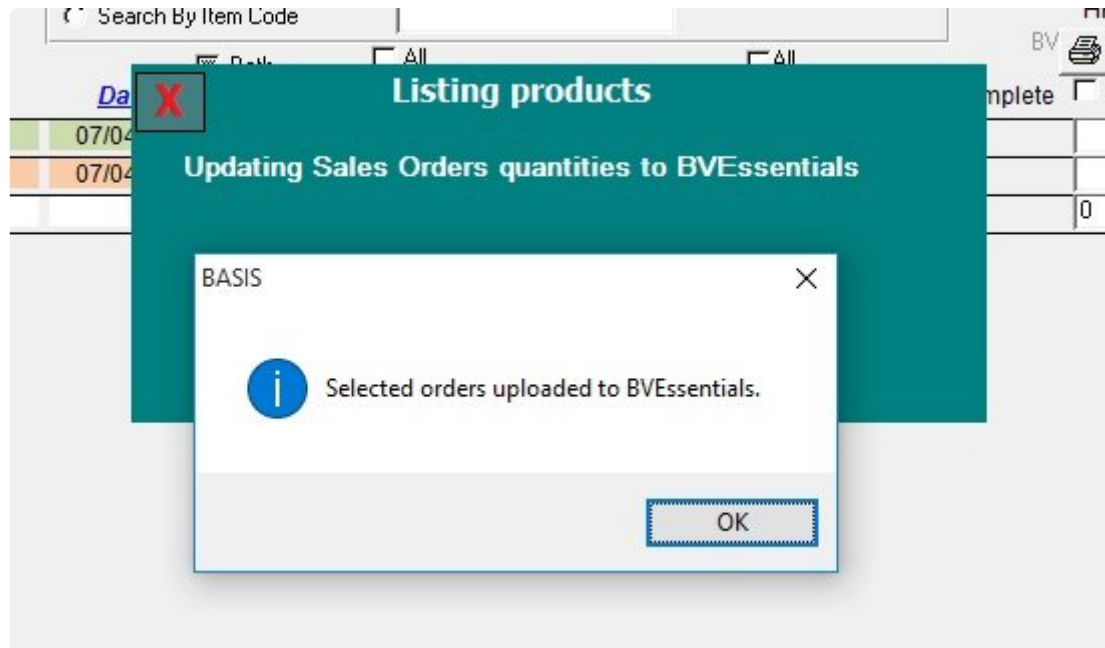
Import All Orders **Import Single Order** **Upload to BV Essentials** **Create Orders** **BV Form** **Open Ship Form** **Print Barcodes** **Refresh**

Record: 1 of 2 | No Filter | Search

Click on OK



Click OK on the Prompt



* Note : Orders successfully uploaded to BVESS will be erased out of the SALES ORDER WINDOW.

Now we can go back to BVESS and the uploaded order will show now as a “Processed Sales Order”

Sales - 0000700577 Access Technologies

Ship Reprocess Invoice Next Phase Totals By Ordered Qty Add To Order

This order has been processed and is read-only Re-Open Order Dismiss

Main Bill To Ship To Info Phase Communication Sales History Sales Orders Attachments Fill Order Vehicle Info

Customer

Customer No ACTECH Access Technologies A/R Balance 23,313.72 Credit Limit 60,000.00

PO No Ref No 61 Other Orders 0.00 Available 36,686.28

Notes Salesperson Territory TC1

Shipping

Ship To Access Technologies Ship Via 03 Federal Express FOB Your Dock

Contact

Name Phone Fax/Cell Email

Order Details

Processed Sales Order

Order No 0000700577

Order Date 03/07/2016

Required Date / /

Invoice No

Invoice Date 03/07/2016

Repeat None

Phase

Items Rental

Insert Comment Serial Numbers Add Job Header Fill Backorders Prices

Part No	Description	Order Qty	Ship Qty	B/O Qty	Disc	Unit Price	Current Cost	U/M	Conversion Factor	G.S.T.
[00] FCB-250	Finished cabinet for SP-250	12	12	0	0.0	300.00	167.191	EA	1 EA per EA	<input checked="" type="checkbox"/>

Available 36,000 On Hand 50,000 Committed 14,000 Backorder 0,000 On Order 51,000 Expected 12/06/2011

Total Weight 0.0 Discount 0.0 % 0.00 Current GP 44.27 % 1,593.71 Subtotal 3,600.00

Freight 0.00 G.S.T. 180.00

3,780.00

View Compact

Created by P on 03/07/2016 12:00:00 AM Modified by BV* on 04/07/2016 11:16:17 AM

7.2.5. E. PURCHASE ORDER MODULE

7.2.5.1. I. Purchase Order Management with BV

This knowledge base will guide user on how a purchase order is being processed with the help of the BASIS APP.

To process a purchase order using the BASIS App. We have to make sure that the processed order is imported from BV to the BASIS DESKTOP

Purchase Order Details - 0000300284

P.O. Number: 0000300284 Order Number: Status: Standing Order Date: 06/03/11
 Vendor No.: AMCOMP Name: Amtron Components Required Date: 06/06/11
 Buyer: Received date: 06/11/11

Item Details | Order Details | Address | Ship-To | Notes

Whse.	Part number	Description	Buy UOM	Order qty.	Unit price	Sales tax 1	Sales tax 2	Vendor part
00	MCB-250	Entertainment Centre	EA	15.00000	179.00000	✓	✓	MCB-250
00	ST-10	Stand - for mini speakers	EA	14.00000	79.00000	✓	✓	TX4000
00	ST-25	24" Speaker Stands	PR	12.00000	26.40000	✓	✓	TX5000
00	ST-30	30" Speaker Stand	EA	4.00000	34.10000	✓	✓	TX6000
00	ST-40	Universal Cube Speaker Stand	PR	40.00000	35.20000	✓	✓	TX8000

PO FORM

PURCHASE ORDERS

Get Data Headers

☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00

Update 0 prices Delete from BASIS Check Scans Select All Deselect All Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	15	0	0
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	14	0	0
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	12	0	0
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	4	0	0
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	40	0	0

Record: 14 1 of 5 Unfiltered Search

Status: 0000300284 Importing Headers...

Import ALL P.O.'s Import Single P.O.'s Upload to BV Upload To BVE Print Barcodes Back Orders Update 0 PO price with current Skid Labels

There are 3 ways to import an order from the accounting package.

1. [SINGLE IMPORT](#)
2. [IMPORT ALL](#)
3. [AUTO IMPORT](#)

Once import is finish we can now proceed on scanning the items

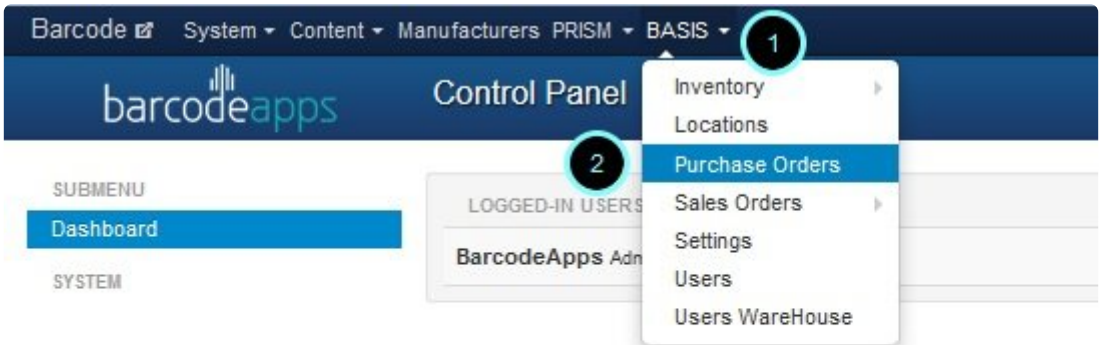
✿ Note: For new inventory items we have to print a label for it if using a scanner

It's also a best practice that we familiarize the process of checking the order on the cloud

To do this. Login to the Joomla website using an admin credential



Click on BASIS and then Purchase Order



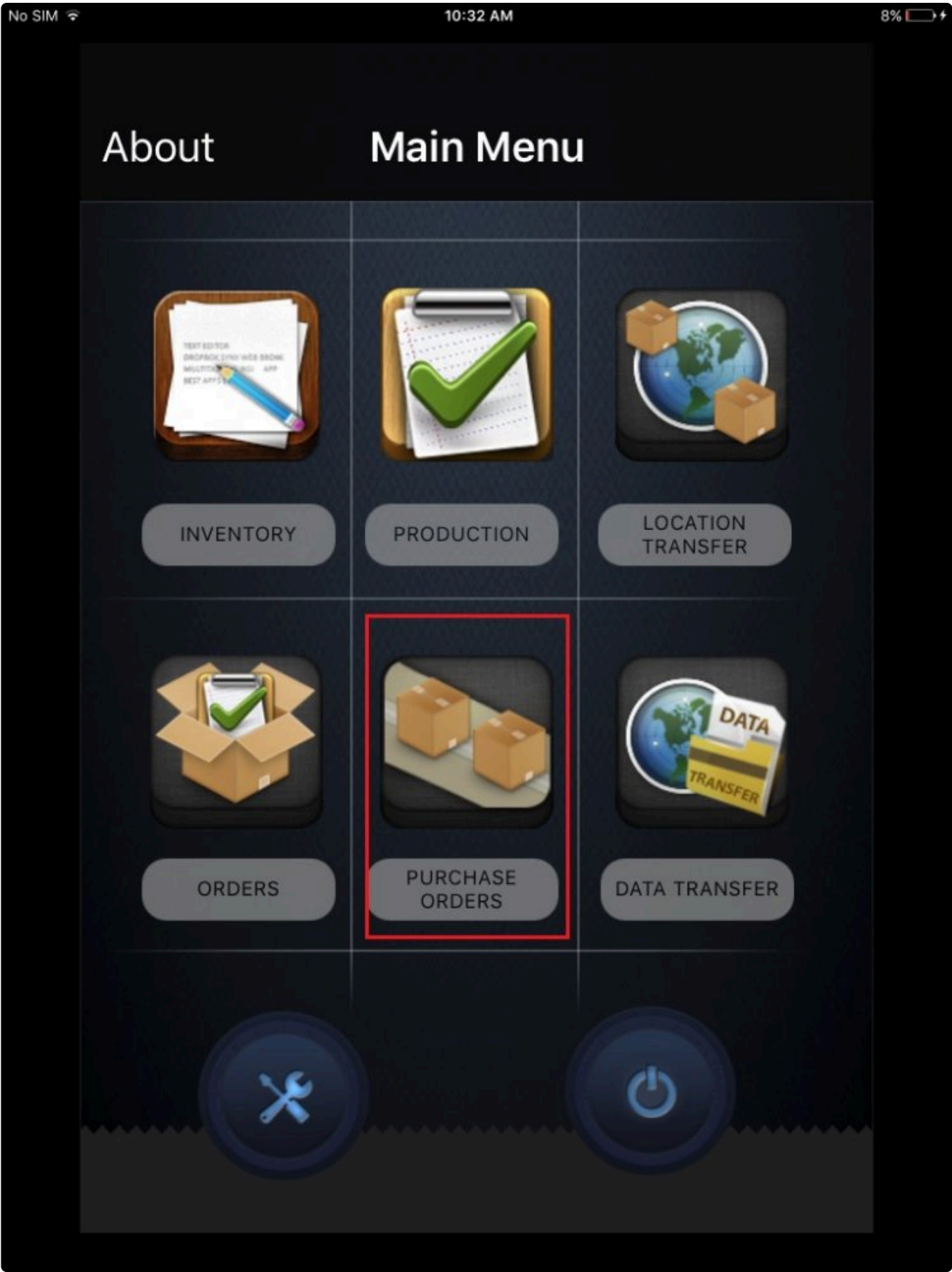
From here we can verify if the PURCHASE ORDER is imported successfully from the BASIS DESKTOP

A screenshot of the BarcodeApps 'Purchase Orders (9)' page. It features a table with columns: PO #, Supplier Code, Name, Date, Complete, and To Device. The table lists several purchase orders. The last row, with PO # 0000300284 and Supplier Code AMCOMP, is highlighted with a red box. The 'Complete' checkbox for this row is also highlighted with a red box. The 'To Device' checkbox for this row is checked. The table includes a search bar, a 'Delete' button, and sorting options (Item CDE, Descending, 20 items per page).

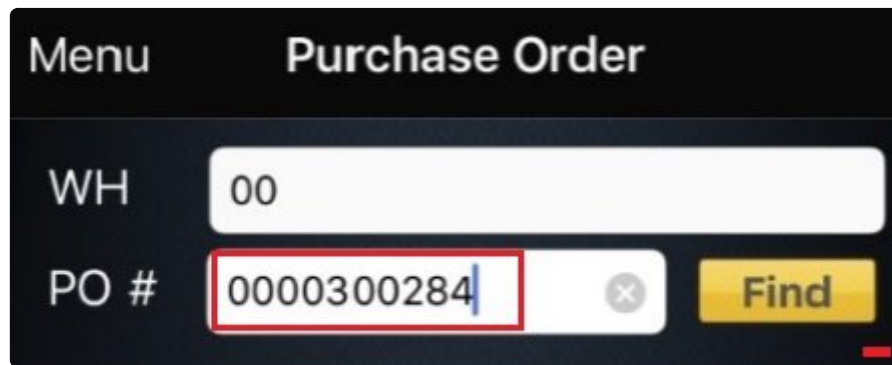
PO #	Supplier Code	Name	Date	Complete	To Device
0000300286	CDAPOS	Canada Post	2011-06-17 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300297	EVPLAN	Evolution Planet	2011-06-17 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300294	BOSAUD	Bosley Audio Supply	2011-06-05 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300290	DAVELE	Davidson Electronics	2011-06-04 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300289	GRTAUD	Great Audio Equipmen	2011-06-04 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300288	INSSND	International Sound	2011-06-11 00:00:00.000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0000300287	CINCP	CINCP Music	2011-06-11 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300280	EVPLAN	Evolution Planet	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000300284	AMCOMP	Amtron Components	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Scanning an item from a Purchase Order

To Access the Purchase order module. From the BASIS App Main Window. Tap on Purchase Orders.



Type in the Purchase order number in the search field and then tap on find

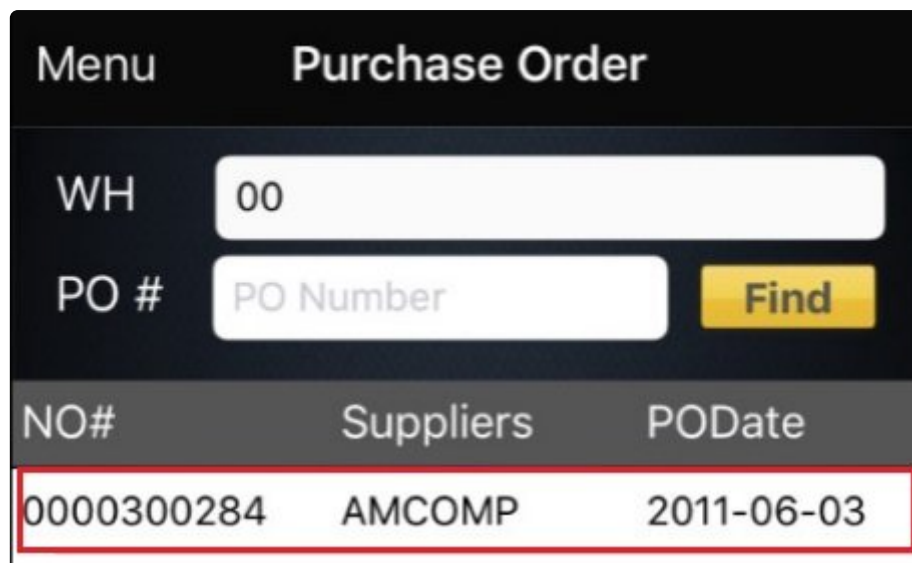


Menu Purchase Order

WH 00

PO # 0000300284 × Find

Tap on the Purchase order number



Menu Purchase Order

WH 00

PO # PO Number Find

NO#	Suppliers	PODate
0000300284	AMCOMP	2011-06-03

to open the PO details window

Back

PO Details

Order

0000300284

AMCOMP

Barcode

Barcode

Find

Primary Loc.

wrhse

NO	CODE	NAME
3	ST-25	24" Speaker Stands
4	ST-30	30" Speaker Stand
1	MCB-250	Entertainment Centre
2	ST-10	Stand - for mini speakers
5	ST-40	Universal Cube Speaker S

94

00

MCB-250

Initial

Ordered

Total Rec

Rec Qty

UMO

15.0

15.0

0

EA

Loc

ContID

Check Location

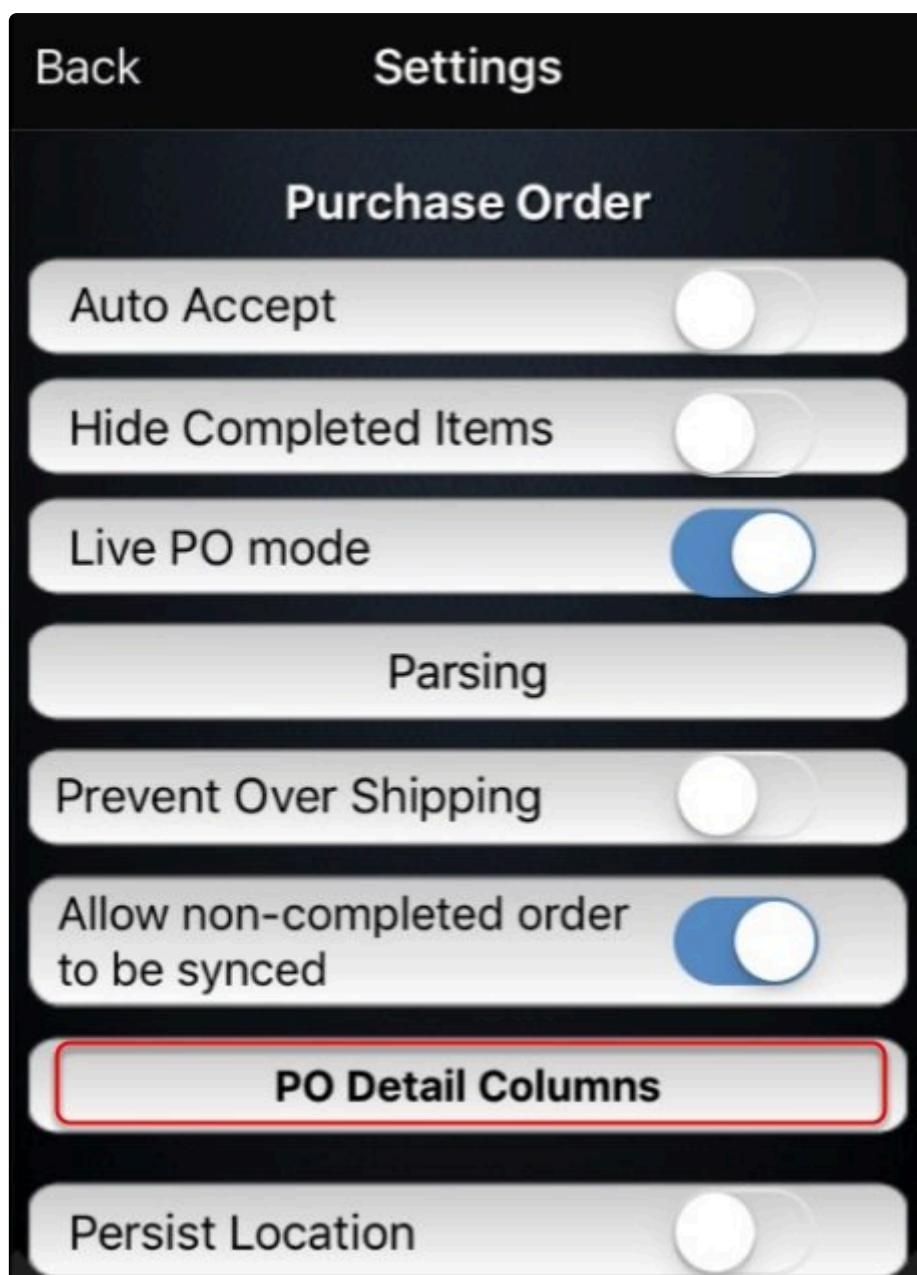
Lot / Serial

* Note: We can make an adjustment on the viewing pane to make the quantity appear first.

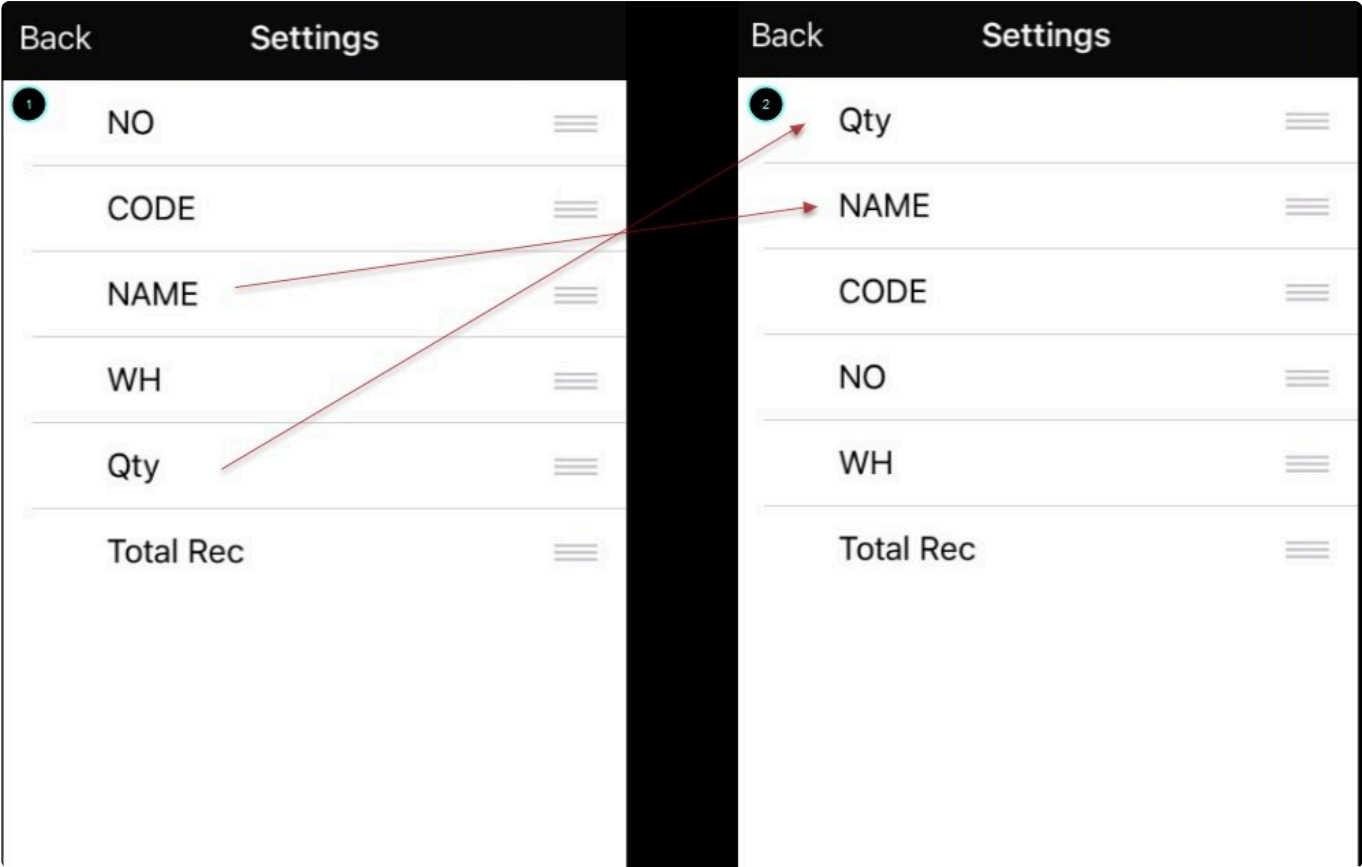


To do this tap on

Tap on PO DETAILS COLUMN.



From here we can make the quantity column as the first column by simply doing a tap,hold and drag action on the screen.



Before getting started receiving a purchase order.

Define the location on where the item will be received

Back

PO Details

Order

0000300284

AMCOMP

Barcode

Barcode

Find

Primary Loc.

Row 2

Order Qty	NAME
12.0	24" Speaker Stands
4.0	30" Speaker Stand
15.0	Entertainment Centre
14.0	Stand - for mini speakers
40.0	Universal Cube Speaker Stand

96

00

ST-25

Initial	Ordered	Total Rec	Rec Qty	UMO
12.0	12.0	0		PR

Loc

ContID

Check Location

Lot / Serial

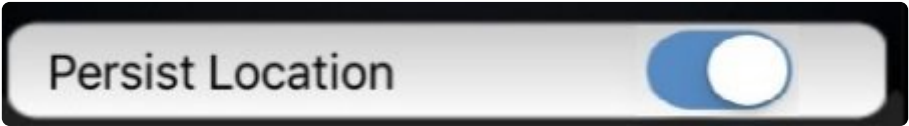
In our example. In most cases the receiving area is a common place in a warehouse. So we will tag it as receiving

Loc

receiving

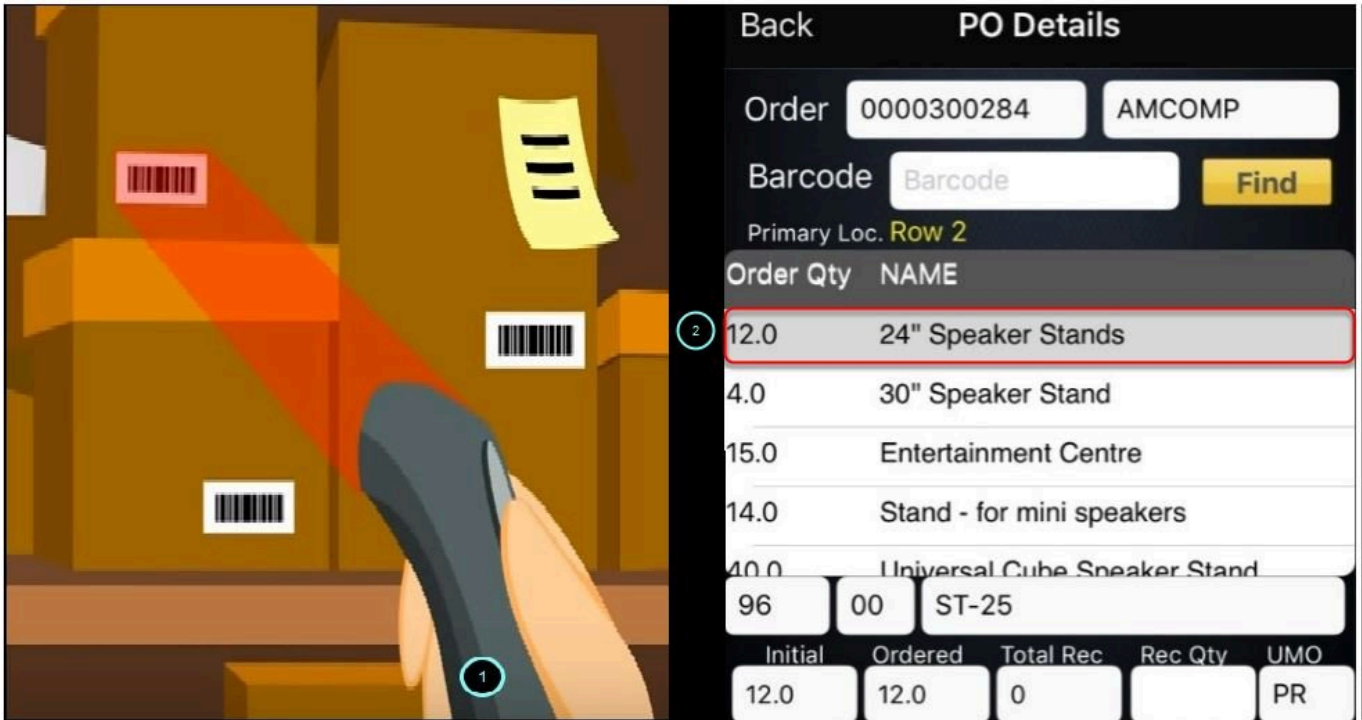
ContID

Note: If you wish to keep a single location on all items in the Purchase Order. Just tap on settings and make sure the Persist Location is Enabled



To start receiving an item, we have two ways to do it

- 1. Scanning an item via a Bluetooth scanner
- 2. Manually tapping on the product from the PO details window



Next step is to enter the quantity of the item

Back

PO Details

15.0

Entertainment Centre

14.0

Stand - for mini speakers

40.0

Universal Cube Speaker Stand

96

00

ST-25

Initial

Ordered

Total Rec

Rec Qty

UMO

12.0

12.0

0

12

PR

Loc

ContID

Check Location

Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
.	0	

Optional: Enter the CONT ID/ SKID ID of the item

Loc

ContID

Check Location

CONT ID/SKID ID is another feature of basis that will allow the application to group an item of the same

kind for easy search and management. When using this feature make sure that CONT ID is enabled under [general settings](#).



Then tap on the Check button to confirm the data.

Once confirmed a notification will show once the transaction is successful

Back

PO Details

Item Added Successfully

Total Rec - 12.00000 of Order - 0000300284

Primary Loc. Row 2

Order Qty	NAME
12.0	24" Speaker Stands
4.0	30" Speaker Stand
15.0	Entertainment Centre
14.0	Stand - for mini speakers
40.0	Universal Cube Speaker Stand

Initial

Ordered

Total Rec


Rec Qty


UMO

Loc


ContID

Check Location






Lot / Serial



Just repeat the same process to all other items until all are scanned

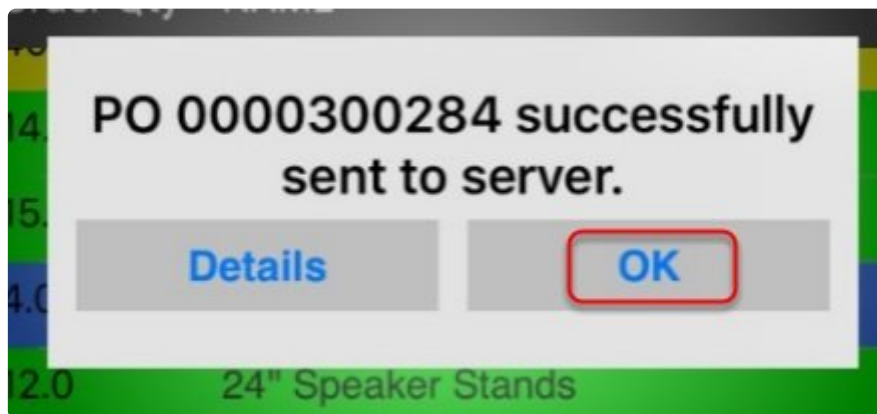
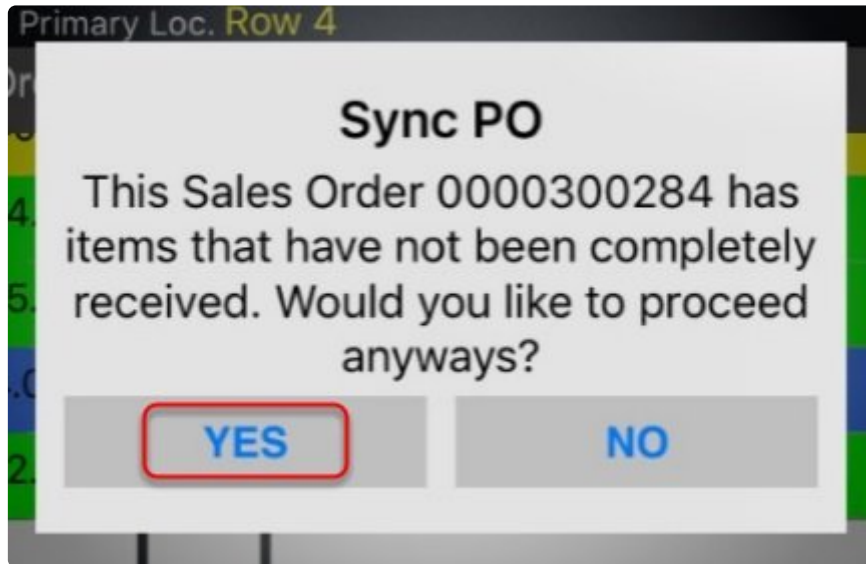
 Note: Highlights will be color coded base on the items receive



GREEN	ordered item = scanned item
BLUE	ordered item < scanned item
YELLOW	ordered item > scanned item

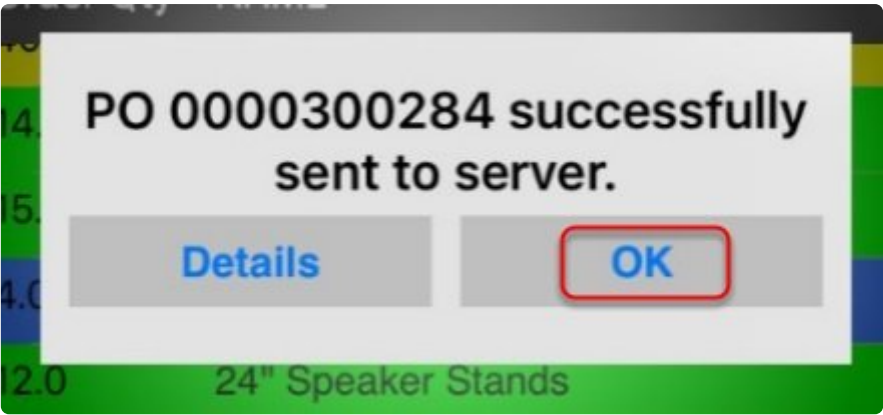


To send the data back to the cloud, tap on the cloud icon and a notification will pop up to confirm if the upload is successful



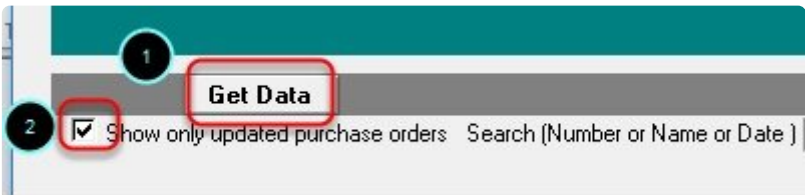
REVIEWING SCANNED PO ITEM VIA PRISM JOOMLA WEBSITE

All orders sent to the cloud can be directly check on the Joomla Website. To do this login to the website, click on Basis and then Purchase Order. The PO will now be green which means that the order is now received or completed.



REVIEWING SCANNED PO ITEM VIA PRISM DESKTOP

To review scanned PO'S. click on the get data button to import the data from the cloud and then check the tick box "show only updated order" to filter all updated items.



Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

PURCHASE ORDERS														
Get Data														
Headers														
<input checked="" type="checkbox"/> Show only updated purchase orders Search (Number or Name or Date) Double click to cancel <input type="checkbox"/> Include PST in price calculations <input type="checkbox"/> All Delete All														
PO #	Supp Code	Name	Date		Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight Scan date
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud

GREEN	Scanned Purchase Orders
-------	-------------------------

YELLOW	On Hold Purchase Orders
NO HIGH LIGHT	Not Scanned

to check the details just click on the order and the PO details will show on the bottom

PURCHASE ORDERS

Get Data

Headers

Show only updated purchase orders

Search (Number or Name or Date)

Double click to cancel

Include PST in price calculations

All

Order Complete

Freight

Duty

By Weight

Scan date

Delete All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Complete	Freight	Duty	By Weight	Scan date
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/> To Cloud
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		<input checked="" type="checkbox"/> To Cloud

Update 0 prices

Delete from BASIS

Check Scans

Select All

Deselect All

Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 5 Unfiltered Search Importing Headers...

Received quantity will also be color coded

PURCHASE ORDERS

Get Data
☐ Show only updated purchase orders Search (Number or Name or Date) : _____

Headers
 Double click to cancel ☐ Include PST in price calculations ☐ All Delete All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date	
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/>
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/>

Update 0 prices

Delete from BASIS
Check Scans
Select All
Deselect All
Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 5 Unfiltered Search

Status: 0000300284 Importing Headers...

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

New items, Serialized and Lotted items will also be tagged to make identification more easier.

PO Details															
Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Another way to review scanned order is the check scans feature. To do this. Just select an order and then click on check scan.



This will show a more detailed result for each item scanned

SkidID														
Discrepancy Review for Serial Numbers Uploading to PO														
PO #	Item Code	WH	Quantity	Scanned Qty	Serial No	Date	C	UOM	Exp Date	Location	DoneT	SkidID	Sc.	LN
0000300284	ST-25	00	12	12		17/08/2016	0	PR		receiving	True			3
0000300284	ST-30	00	4	4		17/08/2016	0	EA		receiving	True			4
0000300284	MCB-250	00	15	15		17/08/2016	0	EA		receiving	True			1
0000300284	ST-10	00	14	14		17/08/2016	0	EA		receiving	True			2
0000300284	ST-40	00	39	39		17/08/2016	0	PR		receiving	True			5
0000300284	ST-30	00	2	2		17/08/2016	0	EA		receiving	True			4
*														



Note: Items that are serialized will be separated from each other when using the check scans feature.

Making Changes on the PO

Some changes on the Purchase Order may be needed to meet the targets

To make changes on the PO. Select the Purchase order and then under PO details window , click on the section that needs to be edited

PURCHASE ORDERS

Get Data **Headers**

☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan da
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	2	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 5 Search

Status: [nnnnnn]284 Importing Headers...



NOTE: Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Received Quantities.

UPLOADING THE ORDER BACK TO BV

To upload the updated a purchase order back to BV, click on the **UPLOAD to BV** button.

PURCHASE ORDERS

Get Data

Headers

Show only updated purchase orders

Search (Number or Name or Date)

Double click to cancel

Include PST in price calculations

All

Delete All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date	
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284							\$0.00	\$0.00			X To Cloud
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286							\$0.00	\$0.00			X To Cloud

Update 0 prices

Delete from BASIS

Check Scans

Select All

Deselect All

Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0				
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0				
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0				
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	0	4	0				
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	0	40	0				

Records: 1 of 5

Unfiltered

Search

Status

0000300284

Importing Headers...

Import ALL P.O.'s

Import Single P.O.'s

Upload to BV

Upload To BVE

Print Barcodes

Back Orders

Update 0 PO price with current

Skid Labels

EXIT

Excel Path

Import Data From Excel

Import PO From Excel

the upload completed status will show once the upload is finish

Search

0000300284

Upload completed.

Upload To BVE

Print Barcodes

Back Orders

Update 0 PO price with current

Skid Labels

EXIT

The order status should change now from open to receive.

7.2.5.2. II. Purchase Order Management with BVESS

This knowledge base will guide user on how a purchase order is being processed with the help of the BASIS APP.

To process a purchase order using the BASIS App. We have to make sure that the processed order is imported from BV to the BASIS DESKTOP

Purchase Order - 0000300284 Amtron Components

Man Address Ship To Info Purchase History Sales History Communication Receive Order

Vendor
Vendor No: AMCOMP Amtron Components Notes: Vendor Order No:

Order Details
Status: Open PO No: 0000300284
Order Date: 03/06/2011
Required Date: 06/06/2011
Last Received Date: 11/06/2011
Receive Date: 01/01/2011

General
Warehouse: 00 Ship To: ID: Ref No:
Ship Via: 05 Buyer: FOB: OUR DOCK

Items
+ Insert X Serial Numbers Comment Receive All Receive None

Part No	Description	Order Qty	To Date Qty	Receive Qty	Cost	Inventory Cost	UOM	HST (13%)	Ext Cost
MCB-250	Entertainment Centre	15.000	15.000	0.000	179.000	179.000	EA		2685.00



PO FORM

PURCHASE ORDERS

Get Data Headers
☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations
☐ All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284					<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	\$0.00
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286					<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	\$0.00

Update 0 prices Delete from BASIS Check Scans Select All Deselect All Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	15	0	0
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	14	0	0
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	12	0	0
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	4	0	0
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	40	0	0

Record: 14 1 of 5 Unfiltered Search

Status: 0000300284 Importing Headers...

Import ALL P.O.'s Import Single P.O.'s Upload to BV Upload To BVE Print Barcodes Back Orders Update 0 PO price with current Skid Labels

There are 3 ways to import an order from the accounting package.

1. [SINGLE IMPORT](#)
2. [IMPORT ALL](#)
3. [AUTO IMPORT](#)

Once import is finish we can now proceed on scanning the items

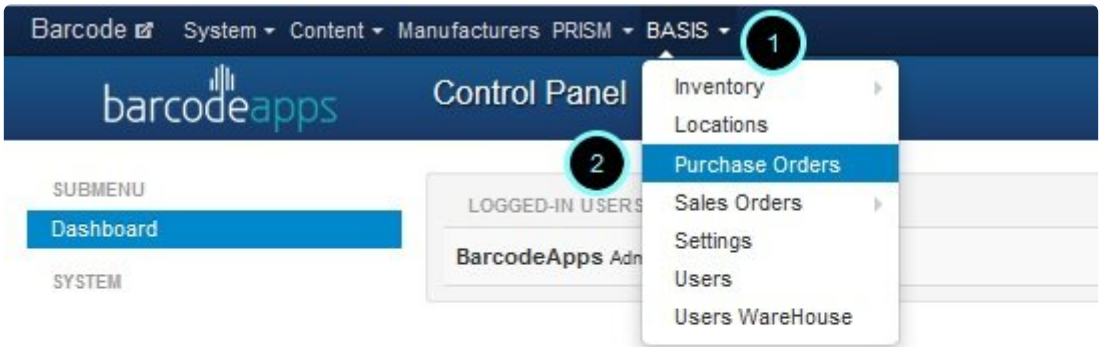
* Note: For new inventory items we have to print a label for it if using a scanner

It's also a best practice that we familiarize the process of checking the order on the cloud

To do this. Login to the Joomla website using an admin credential



Click on BASIS and then Purchase Order



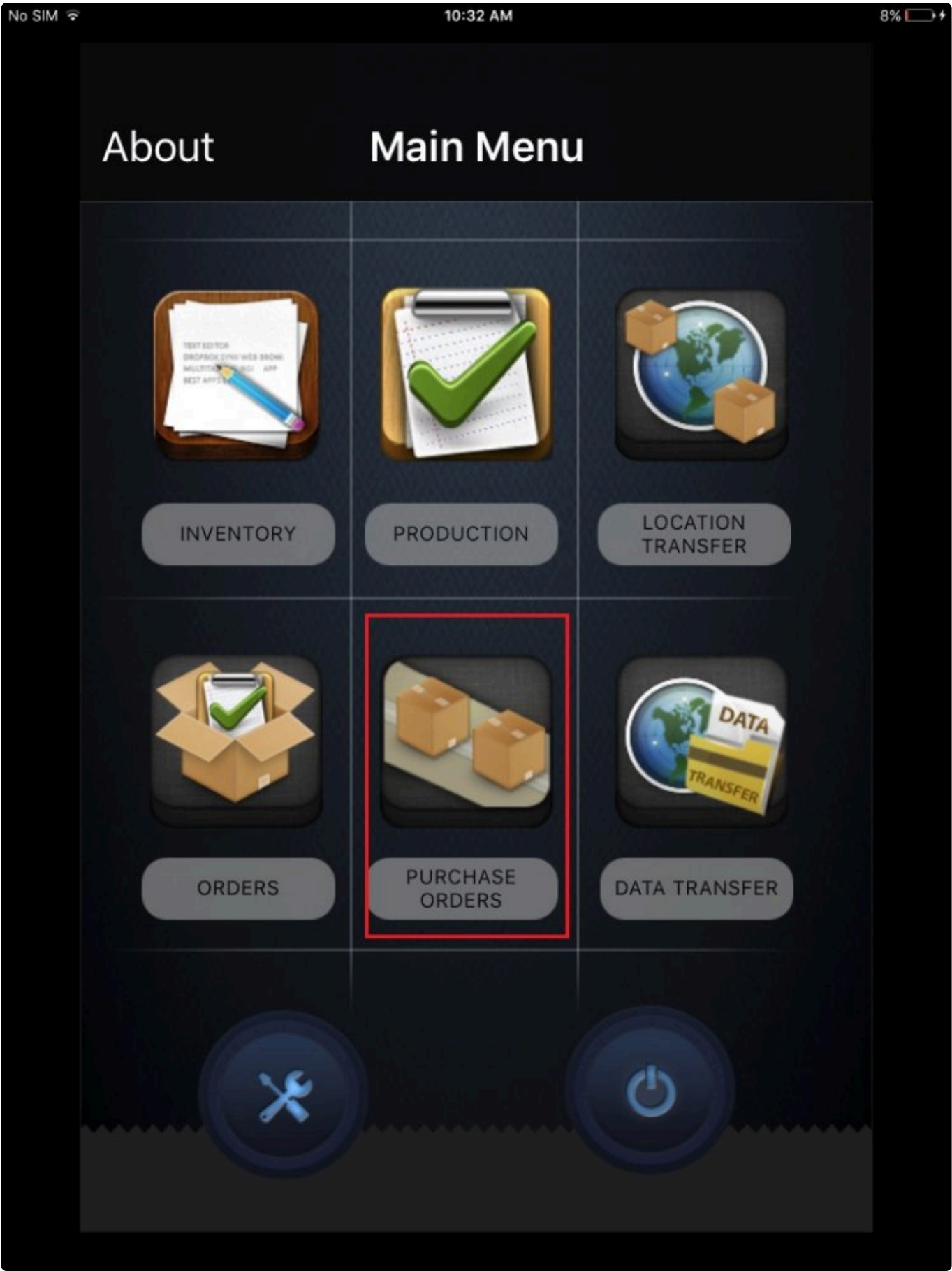
From here we can verify if the PURCHASE ORDER is imported successfully from the BASIS DESKTOP

The screenshot shows the BarcodeApps Purchase Orders (9) page. The table lists purchase orders with columns: PO #, Supplier Code, Name, Date, Complete, and To Device. The last row, PO # 0000300284, is highlighted with a red box, and its 'Complete' checkbox is also highlighted with a red box.

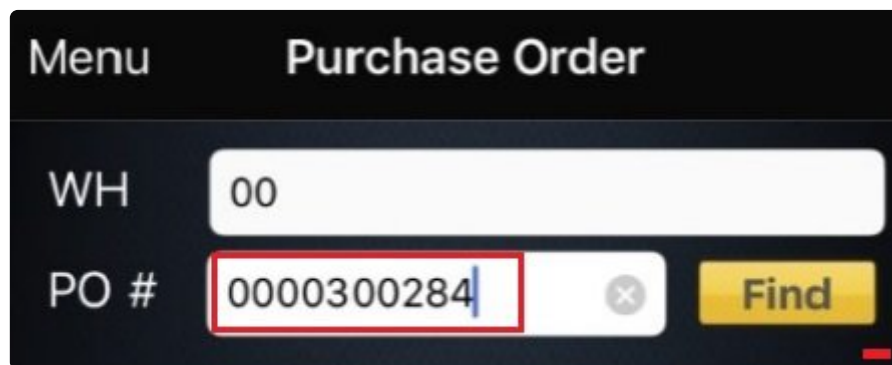
PO #	Supplier Code	Name	Date	Complete	To Device
0000300286	CDAPOS	Canada Post	2011-06-17 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300297	EVPLAN	Evolution Planet	2011-06-17 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300294	BOSAUD	Bosley Audio Supply	2011-06-05 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300290	DAVELE	Davidson Electronics	2011-06-04 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300289	GRTAUD	Great Audio Equipmen	2011-06-04 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300288	INSSND	International Sound	2011-06-11 00:00:00.000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
0000300287	CINCP	CINCP Music	2011-06-11 00:00:00.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
0000300280	EVPLAN	Evolution Planet	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000300284	AMCOMP	Amtron Components	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Scanning an item from a Purchase Order

To Access the Purchase order module. From the BASIS App Main Window. Tap on Purchase Orders.



Type in the Purchase order number in the search field and then tap on find

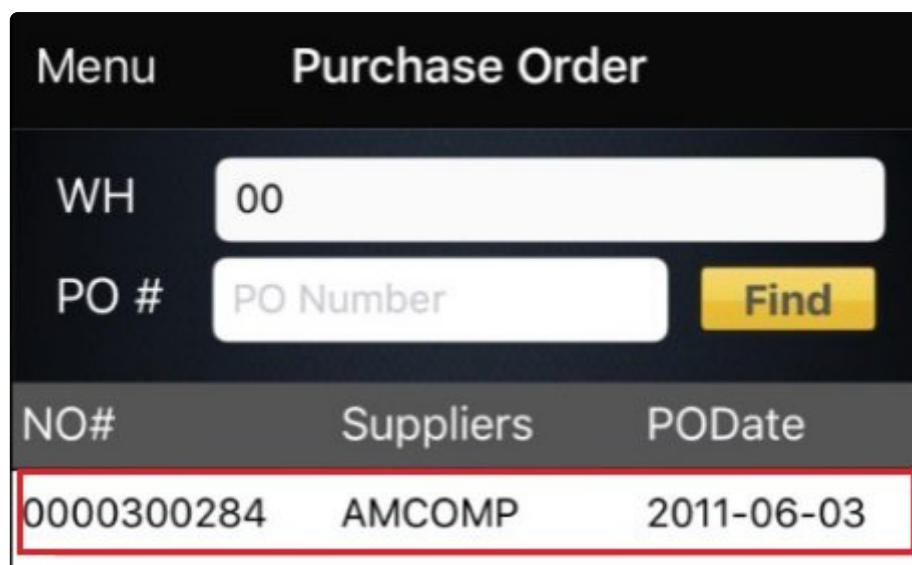


Menu Purchase Order

WH 00

PO # 0000300284 × Find

Tap on the Purchase order number



Menu Purchase Order

WH 00

PO # PO Number Find

NO#	Suppliers	PODate
0000300284	AMCOMP	2011-06-03

to open the PO details window

Back

PO Details

Order

0000300284

AMCOMP

Barcode

Barcode

Find

Primary Loc.

wrhse

NO	CODE	NAME
3	ST-25	24" Speaker Stands
4	ST-30	30" Speaker Stand
1	MCB-250	Entertainment Centre
2	ST-10	Stand - for mini speakers
5	ST-40	Universal Cube Speaker S

94

00

MCB-250

Initial

Ordered

Total Rec

Rec Qty

UMO

15.0

15.0

0

EA

Loc

ContID

Check Location

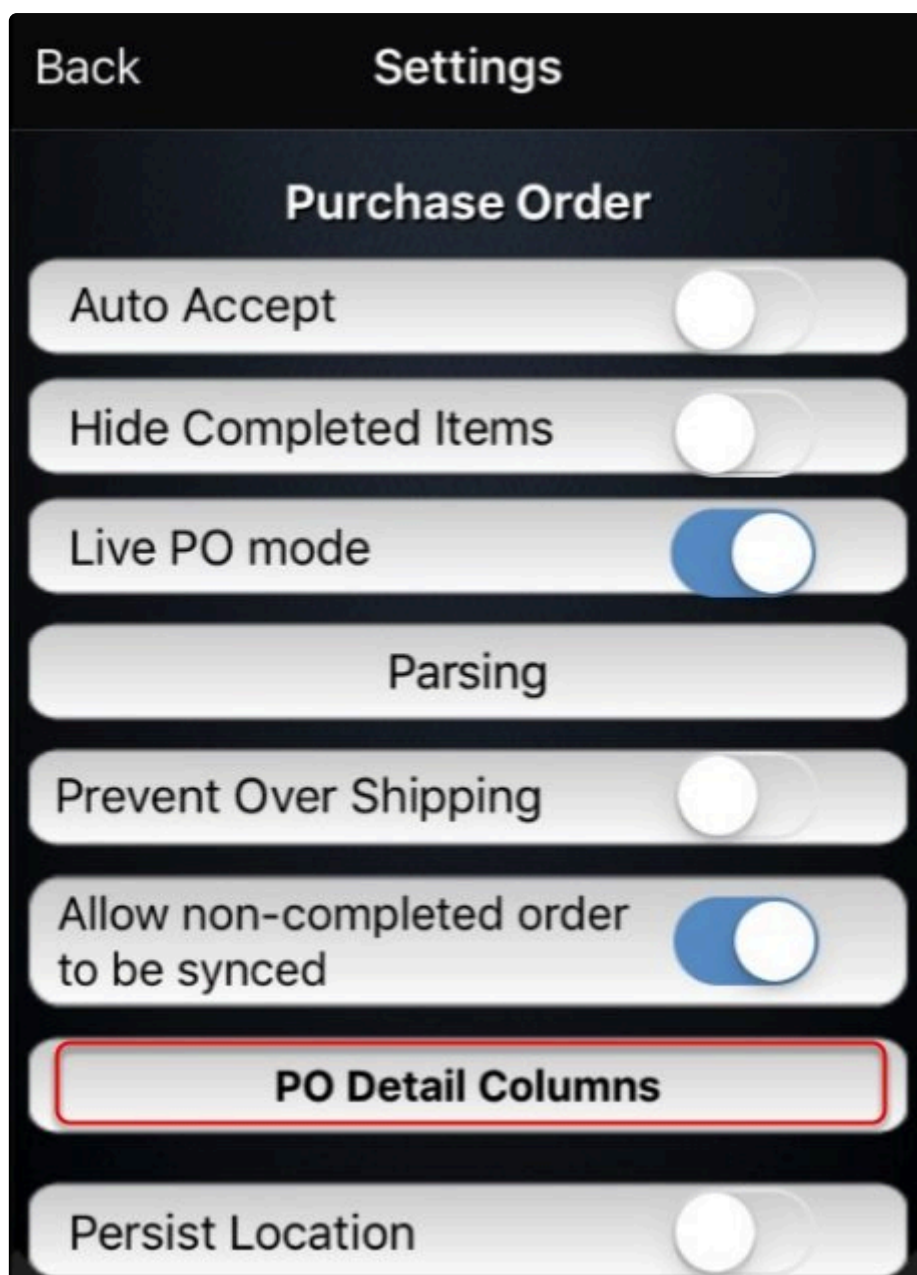
Lot / Serial

* Note: We can make an adjustment on the viewing pane to make the quantity appear first.

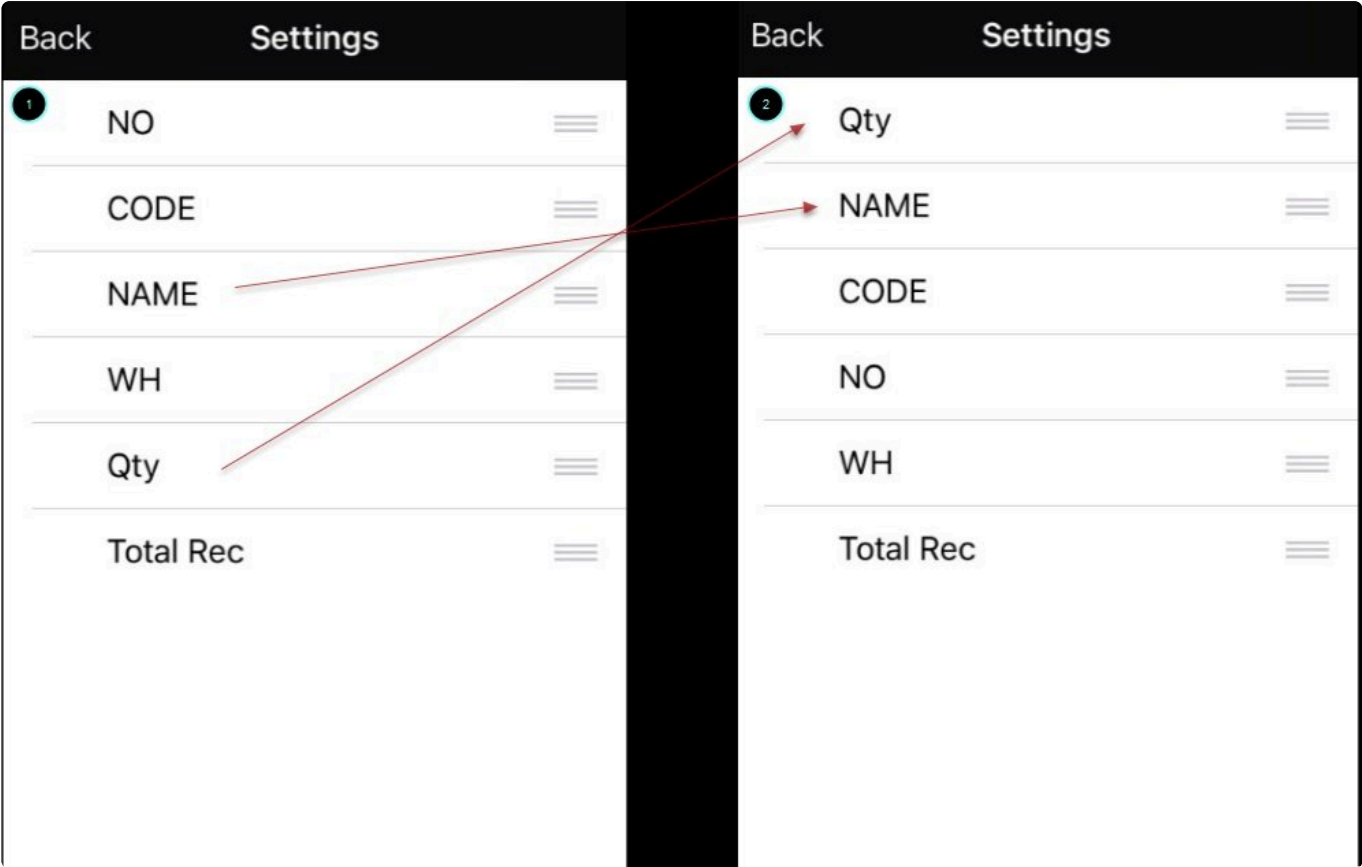


To do this tap on

Tap on PO DETAILS COLUMN.



From here we can make the quantity column as the first column by simply doing a tap,hold and drag action on the screen.



Before getting started receiving a purchase order.

Define the location on where the item will be received

Back

PO Details

Order

0000300284

AMCOMP

Barcode

Barcode

Find

Primary Loc.

Row 2

Order Qty	NAME
12.0	24" Speaker Stands
4.0	30" Speaker Stand
15.0	Entertainment Centre
14.0	Stand - for mini speakers
40.0	Universal Cube Speaker Stand

96

00

ST-25

Initial	Ordered	Total Rec	Rec Qty	UMO
12.0	12.0	0		PR

Loc

ContID

Check Location

Lot / Serial

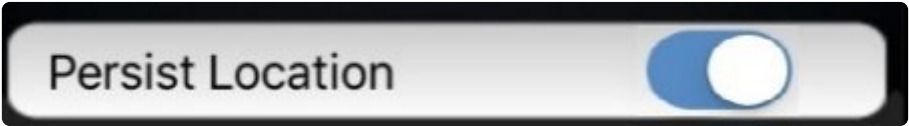
In our example. In most cases the receiving area is a common place in a warehouse. So we will tag it as receiving

Loc

receiving

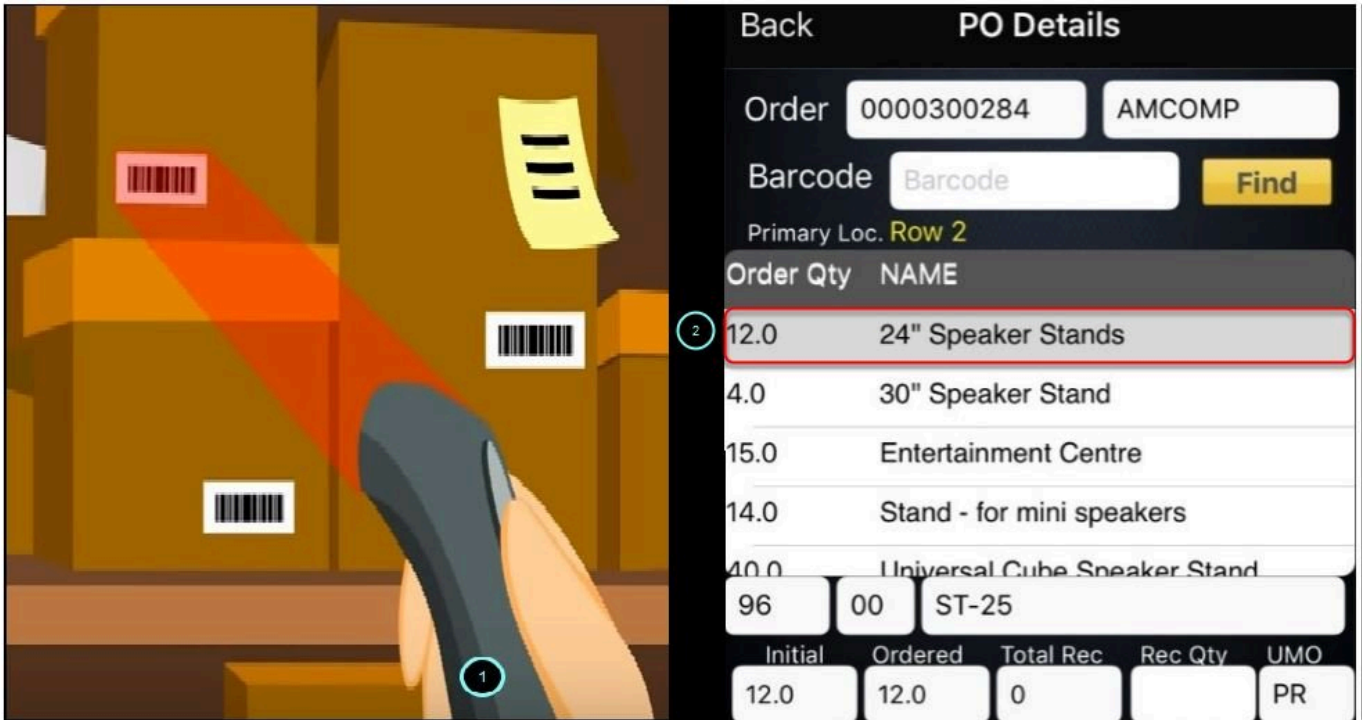
ContID

Note: If you wish to keep a single location on all items in the Purchase Order. Just tap on settings and make sure the Persist Location is Enabled



To start receiving an item, we have two ways to do it

- 1. Scanning an item via a Bluetooth scanner
- 2. Manually tapping on the product from the PO details window



Next step is to enter the quantity of the item

Back

PO Details

15.0

Entertainment Centre

14.0

Stand - for mini speakers

40.0

Universal Cube Speaker Stand

96

00

ST-25

Initial

Ordered

Total Rec

Rec Qty

UMO

12.0

12.0

0

12

PR

Loc

ContID

Check Location

Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
.	0	

Optional: Enter the CONT ID/ SKID ID of the item

Loc

ContID

Check Location

CONT ID/SKID ID is another feature of basis that will allow the application to group an item of the same

kind for easy search and management. When using this feature make sure that CONT ID is enabled under [general settings](#).



Then tap on the Check button to confirm the data.

Once confirmed a notification will show once the transaction is successful

Back PO Details

Item Added Successfully

Total Rec - 12.00000 of Order - 0000300284

Primary Loc. Row 2

Order Qty	NAME
12.0	24" Speaker Stands
4.0	30" Speaker Stand
15.0	Entertainment Centre
14.0	Stand - for mini speakers
40.0	Universal Cube Speaker Stand

Initial	Ordered	Total Rec	Rec Qty	UMO

Loc ContID

Lot / Serial

Just repeat the same process to all other items until all are scanned

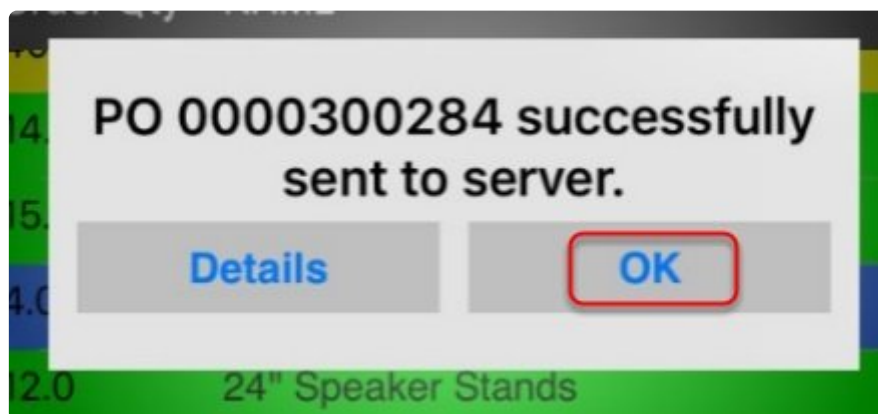
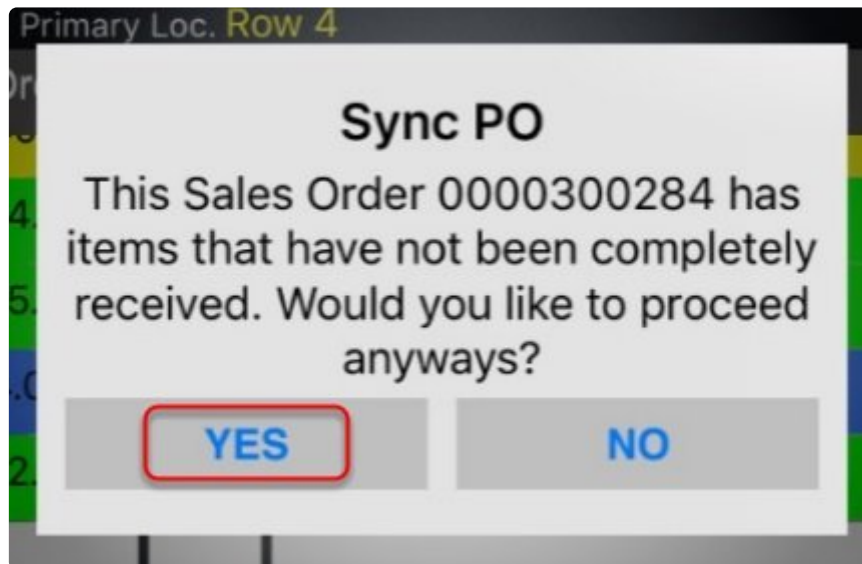
* Note: Highlights will be color coded base on the items receive



GREEN	ordered item = scanned item
BLUE	ordered item < scanned item
YELLOW	ordered item > scanned item

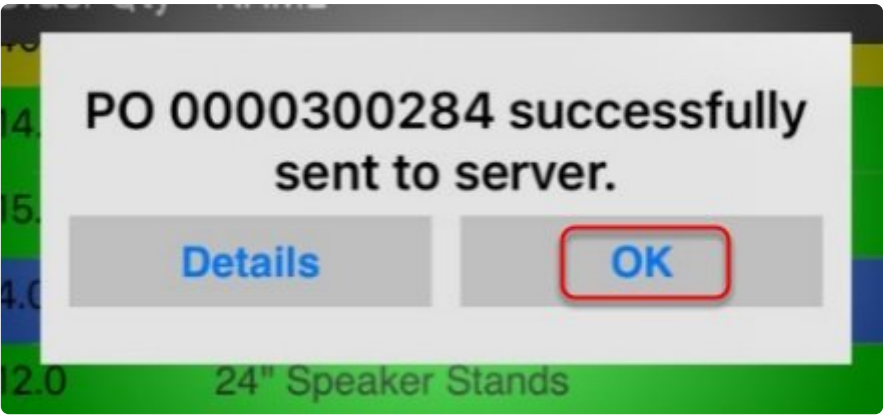


To send the data back to the cloud, tap on the cloud icon and a notification will pop up to confirm if the upload is successful



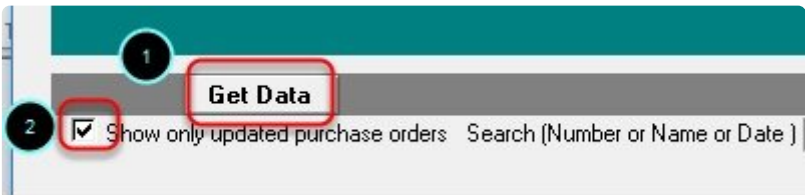
REVIEWING SCANNED PO ITEM VIA PRISM JOOMLA WEBSITE

All orders sent to the cloud can be directly check on the Joomla Website. To do this login to the website, click on Basis and then Purchase Order. The PO will now be green which means that the order is now received or completed.



REVIEWING SCANNED PO ITEM VIA PRISM DESKTOP

To review scanned PO'S. click on the get data button to import the data from the cloud and then check the tick box "show only updated order" to filter all updated items.



Retrieved orders will be color coded base on their status, to help users identify the order more quickly.

PURCHASE ORDERS														
Get Data														
Headers														
<input checked="" type="checkbox"/> Show only updated purchase orders Search (Number or Name or Date) Double click to cancel <input type="checkbox"/> Include PST in price calculations <input type="checkbox"/> All Delete All														
PO #	Supp Code	Name	Date		Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight Scan date
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud
0000300287	CNCP	CNCP Music	11/06/2011	0000300287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud
0000300289	GRTAUD	Great Audio Equipmen	04/06/2011	0000300289	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00	<input checked="" type="checkbox"/> To Cloud

GREEN	Scanned Purchase Orders
-------	-------------------------

YELLOW	On Hold Purchase Orders
NO HIGH LIGHT	Not Scanned

to check the details just click on the order and the PO details will show on the bottom

PURCHASE ORDERS

Get Data Headers

Show only updated purchase orders Search (Number or Name or Date) Double click to cancel Include PST in price calculations

☐ All ☐ Order Complete ☐ Freight ☐ Duty ☐ By Weight ☐ Scan date

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Complete	Freight	Duty	By Weight	Scan date	
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/> To Cloud
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/> To Cloud

2 Update 0 prices

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 5 Search

Status 0000300284

Received quantity will also be color coded

PURCHASE ORDERS

Get Data

Headers

Show only updated purchase orders

Search (Number or Name or Date)

Double click to cancel

Include PST in price calculations

All

Delete All

PO #	Supp Code	Name	Date	Print	Printed Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan date	
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/>
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00			<input checked="" type="checkbox"/>

Update 0 prices

Delete from BASIS

Check Scans

Select All

Deselect All

Print

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 5 Unfiltered Search

Status 0000300284 Importing Headers...

GREEN	ordered item = scanned item
RED	ordered item < scanned item
YELLOW	ordered item > scanned item

New items, Serialized and Lotted items will also be tagged to make identification more easier.

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upld	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	0	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Records: 1 of 5 Unfiltered Search

Another way to review scanned order is the check scans feature. To do this. Just select an order and then click on check scan.



This will show a more detailed result for each item scanned

SkidID															
Discrepancy Review for Serial Numbers Uploading to PO															
PO #	Item Code	WH	Quantity	Scanned Qty	Serial No	Date	C	UOM	Exp Date	Location	DoneT	SkidID	Sc.	LN	
0000300284	ST-25	00	12	12		17/08/2016	0	PR		receiving	True			3	
0000300284	ST-30	00	4	4		17/08/2016	0	EA		receiving	True			4	
0000300284	MCB-250	00	15	15		17/08/2016	0	EA		receiving	True			1	
0000300284	ST-10	00	14	14		17/08/2016	0	EA		receiving	True			2	
0000300284	ST-40	00	39	39		17/08/2016	0	PR		receiving	True			5	
0000300284	ST-30	00	2	2		17/08/2016	0	EA		receiving	True			4	
*															



Note: Items that are serialized will be separated from each other when using the check scans feature.

Making Changes on the PO

Some changes on the Purchase Order may be needed to meet the targets

To make changes on the PO. Select the Purchase order and then under PO details window , click on the section that needs to be edited

PURCHASE ORDERS

Get Data **Headers**

☐ Show only updated purchase orders Search (Number or Name or Date) Double click to cancel ☐ Include PST in price calculations ☐ All

PO #	Supp Code	Name	Date	Print	Printed	Upload	Download	To HH	Hold	Order Complete	Freight	Duty	By Weight	Scan da
0000300284	AMCOMP	Amtron Components	03/06/2011	0000300284	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		
0000300286	EVPLAN	Evolution Planet	03/06/2011	0000300286	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	\$0.00		

Update 0 prices

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300284	00	MCB-250	MCB-250	Entertainment Centre	EA	179	15	0	15	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300284	00	ST-10	ST-10	Stand - for mini speakers	EA	79	14	0	14	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300284	00	ST-25	ST-25	24" Speaker Stands	PR	26.4	12	2	12	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300284	00	ST-30	ST-30	30" Speaker Stand	EA	34.1	4	-2	6	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	0000300284	00	ST-40	ST-40	Universal Cube Speaker Stand	PR	35.2	40	1	39	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 5 Search

Status: 0000300284 Importing Headers...



NOTE: Almost all columns can be edited . Just be careful what to edit because this may affect the data on the accounting package . We recommend to only adjust Received Quantities.

Uploading the Data back to BVESS

Once all items are received the update can now be sent back to the accounting package. To send the data back to the accounting package click on the **UPLOAD to BVE** button.

Update 0 prices

PO Details

Rec	PO #	WH	Item Code	Barcode	Description	UOM	Price	Initial Ord	Outs	Rec'd Qty	To Receive	New Item	Upd	Ser	Lot
1	0000300289	00	CD-204	CD-204	Compact Disk Player with Autos	EA	185.25	50	1	49	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	0000300289	00	EQ-1800	EQ-1800	Equalizer (10 band)	EA	95	42	-1	43	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	0000300289	00	SP-500	SP-500	Home Theatre Speaker Package	EA	510.75	14	14	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	0000300289	00	CD-800	CD-800	Compact Disk Player - 5 disk c	EA	405.908	8	0	8	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 4 Search

Status: 0000300289 Upload completed.

Excel Path:

the upload completed status will show once the upload is finish

Search: 0000300284 **Upload completed.**

Buttons: Upload To BVE, Print Barcodes, Back Orders, Update 0 PO price with current, Skid Labels, EXIT

We can now go back to BVES to check and receive the purchase order

Purchase Order - 0000300284 Amtron Components

Buttons: Refresh Prices, Unissue, **Receive**, Close, Totals by Receiving Qty, Labels

Tabs: Main, Address, Ship To, Info, Purchase History, Sales History, Communication, Receive Order

Vendor: Vendor No: AMCOMP, Vendor Order No: []

General: Warehouse: 00, Ship To: [], ID: [], Ref No: [], Ship Via: 05, Buyer: [], FOB: OUR DOCK

Order Details: Status: Open, PO No: 0000300284, Order Date: 03/06/2011, Required Date: 06/06/2011, Last Received Date: 11/06/2011, Receive Date: 01/01/2011

Part No	Description	Order Qty	To Date Qty	Receive Qty	Cost	Inventory Cost	UOM	HST (13%)	Ext Cost
[00] MCB-250	Entertainment Centre	15.000	15.000	0.000	179.000	179.000	EA	✓	2,68
[00] ST-10	Stand - for mini speakers	14.000	14.000	0.000	79.000	79.000	EA	✓	1,10
[00] ST-25	24" Speaker Stands	12.000	12.000	0.000	26.400	26.400	PR	✓	3,17
[00] ST-30	30" Speaker Stand	4.000	4.000	0.000	34.100	34.100	EA	✓	1,36
[00] ST-40	Universal Cube Speaker Sta	40.000	40.000	0.000	35.200	35.200	PR	✓	1,41

Available: 0.000, On Hand: 0.000, Committed: 0.000, Backorder: 0.000, On Order: 0.000, Expected: []

Vendor Freight: 0.00, Discount: 0.0 %, 0.00, Subtotal: 5,652.20, HST (13%): 734.79, Landed Freight: 0.00, Landed Duty: 0.00

6,386.99

To do this open the purchase order and after validation that all is received. Just click on the receive button to complete the receiving of the PO.

Purchase Order - 0000300284 Amtron Components

Refresh Prices Unissue Receive Close Totals by Receiving Qty Labels

Main Address Ship To Info Purchase History Sales History Communication Receive Order

Vendor

Vendor No AMCOMP Amtron Components Notes

Vendor Order No

General

Warehouse 00 Ship To ID Ref No

Ship Via 05 Buyer FOB OUR DOCK

Order Details

Status Received

PO No 0000300284

Order Date 03/06/2011

Required Date 06/06/2011

Last Received Date 11/06/2011

Receive Date 01/01/2011

Items

Insert Serial Numbers Comment Receive All Receive None

Part No	Description	Order Qty	To Date Qty	Receive Qty	Cost	Inventory Cost	UOM	HST (13%)	Ext Cost
[00] MCB-250	Entertainment Centre	15.000	15.000	0.000	179.000	179.000	EA	<input checked="" type="checkbox"/>	2,68
[00] ST-10	Stand - for mini speakers	14.000	14.000	0.000	79.000	79.000	EA	<input checked="" type="checkbox"/>	1,10
[00] ST-25	24" Speaker Stands	12.000	12.000	0.000	26.400	26.400	PR	<input checked="" type="checkbox"/>	3,17
[00] ST-30	30" Speaker Stand	4.000	4.000	0.000	34.100	34.100	EA	<input checked="" type="checkbox"/>	1,36
[00] ST-40	Universal Cube Speaker Sta	40.000	40.000	0.000	35.200	35.200	PR	<input checked="" type="checkbox"/>	1,41

Available 0.000 On Hand 0.000 Committed 0.000 Backorder 0.000 On Order 0.000 Expected

Vendor Freight 0.00 Discount 0.0 % 0.00 Subtotal 5,652.20

Landed Freight 0.00 HST (13%) 734.79

Landed Duty 0.00

6,386.99

7.2.6. i. Quick Transfer

This knowledge base article will guide users on how the location transfer works via the Quick Transfer Module

I. Reviewing item to be transferred

Using the BASIS Desktop we can review the item that has to be transferred. This can be done by opening the location master module.



Using the master location form just click on the item and the location will show the details window. Once finish with the review, just click on the send data to sync with the cloud.

MASTER LOCATIONS FORM

Product Code: EN-BATD

Details: WH: 00, Loc: bin, Code: EN-BATD, Qty: 93

WH	STOCKCODE	Description	Total	Loc	Code	Qty	SerialNumber	SkidID	INIQTy	EXPDate
00	CD-204	Compact Disk Player with Autost	307							
00	CD-300	Compact Disk Player - 3 disk cap	103							
00	EN-BATD	Energizer ACCU Rechargeable D	93	00	bin	93			0	
00	EQ-1800	Equalizer (10 band)	230							
00	FCB-250	Finished cabinet for SP-250	50							
00	FX-280	All-in-one Printer/Scanner/Copier	168							
00	FX-500	Multi-fax, Printer, Copier, Scanne	124							
00	GR-250	Speaker Grill for SP-250	95							
00	MCB-250	Entertainment Center	98							

Transactions:

Transaction Type: All, Order No: , Item Code: , Serial No: , Skid ID: , Filter, Reset, Print, Delete, Items About to Expire in: , Resend, Return Order

Master Warehouse: 00, From Whse: , To: , Total: , Clear Temp Qty, Clear Neq. Qty

Buttons: Delete All Locations, REFRESH, Update BV for transfers, Update BVE transfers, Modify Qties by items, Modify Qties by Location, Tr. To XL, Transfer Report, Location Review, Location Details, Location By Item, Details by Location, Top 5 Locations, Daily Rpt Date (Format as above), Review Daily Report, Review Backed Up Transactions, Discrepancy List, ClearZero's, Update O.N., Recalc. ALL, Recalc. Skids, Load No, Recalc. Item

We can also review the location from the Joomla website. To do this, from the main screen just click on BASIS and then Locations . Now we can search for the item

BarcodeApps System Content Manufacturers PR BASIS Access type: BOTH

Item Groups (1)

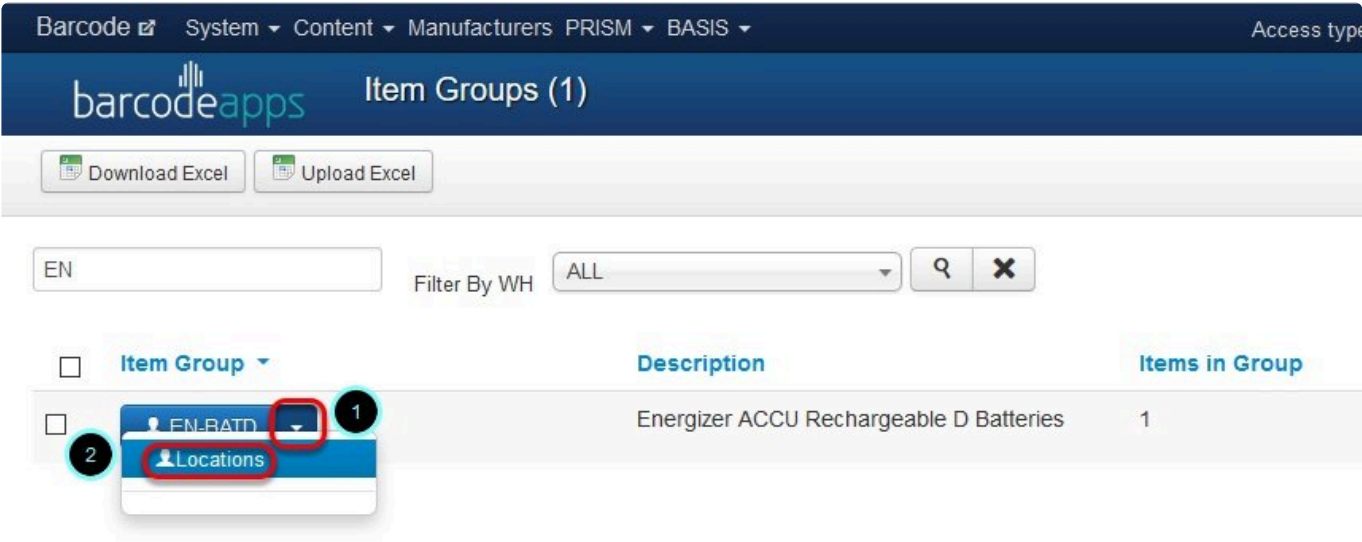
Download Excel Upload Excel

EN Filter By WH ALL

Item Group Description Items in Group

Item Group	Description	Items in Group
EN-BATD	Energizer ACCU Rechargeable D Batteries	1

As soon as we see the item. just click on the drop down arrow and then click on locations
From here it will display the current location that the cloud can see

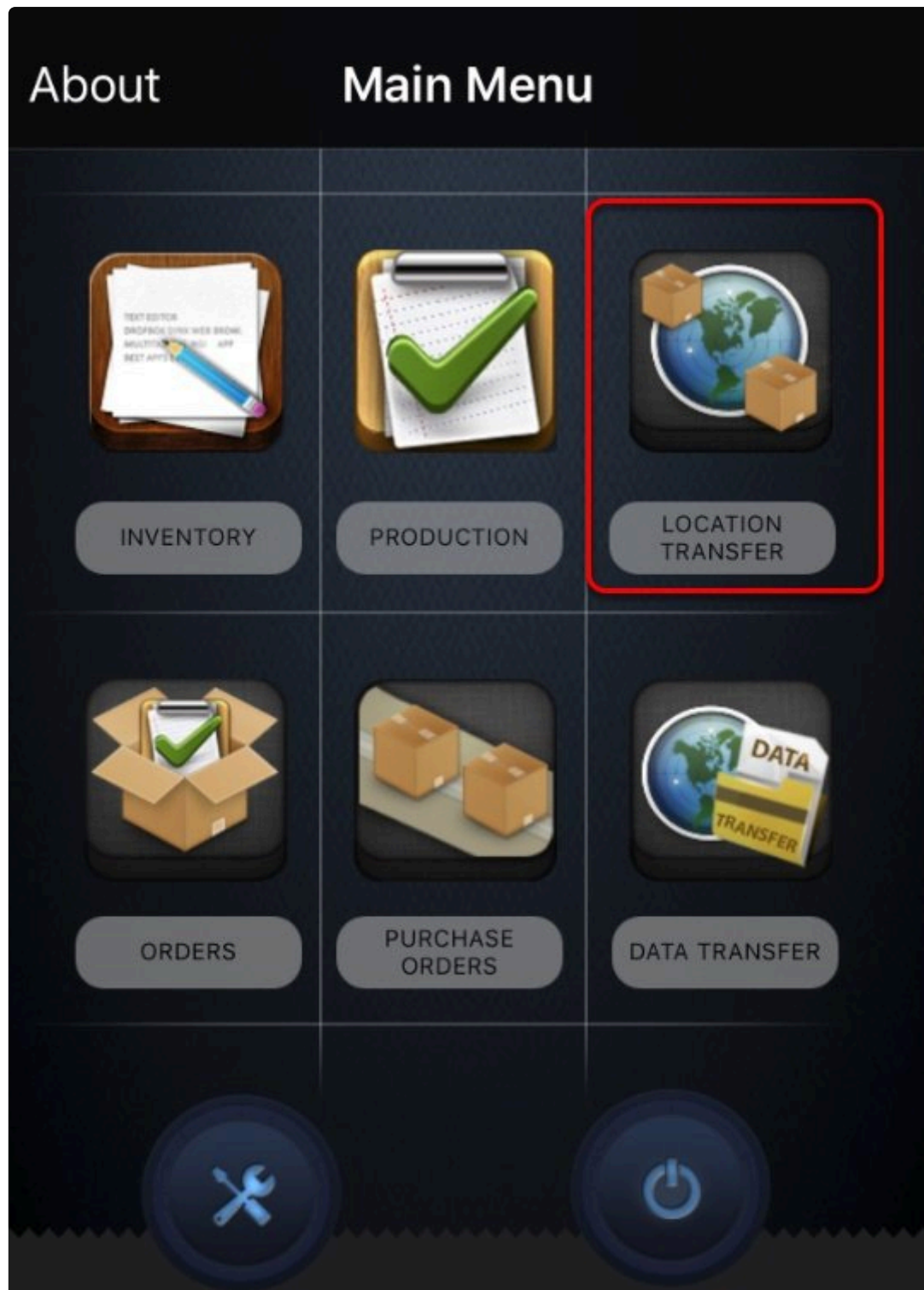


II. TRANSFER LOCATION VIA QUICK TRANSFER

To access the quick transfer module using the BASIS APP. Tap on location transfer

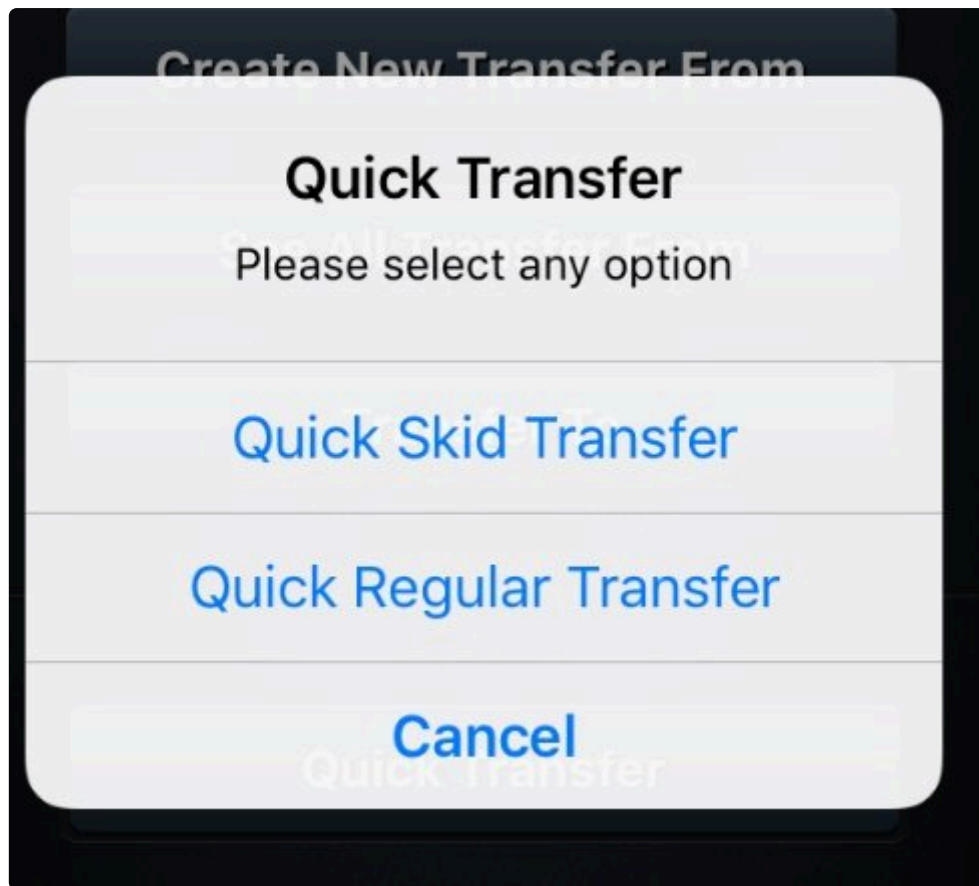


and then Tap on quick transfer



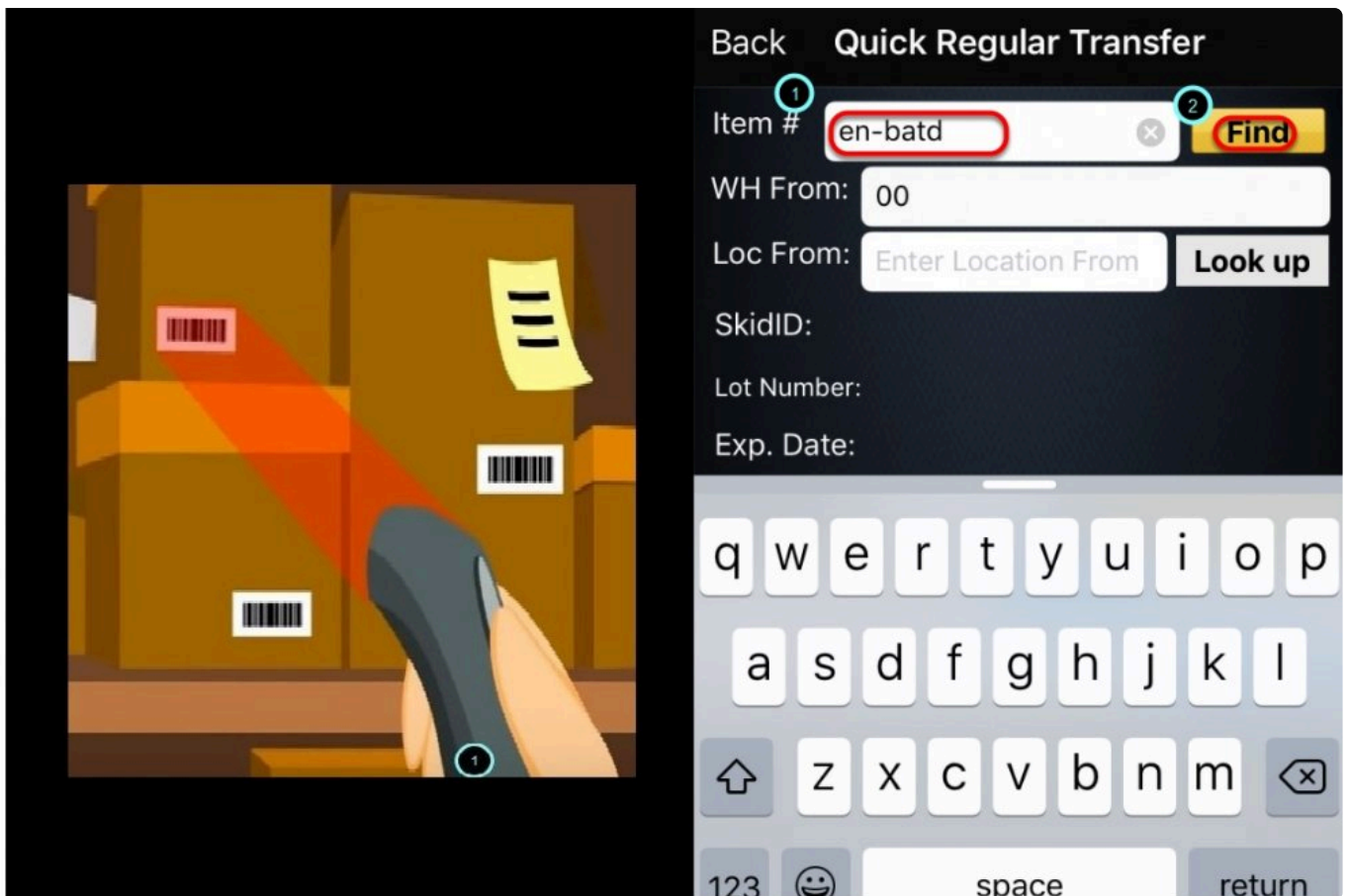
Two options are available

Quick SKID Transfer and Regular Transfer



Regular Transfer

To add an item, scan the item that has to be transferred or manually punch in the name of the item field and then tap on find.



The current Quantity of the item will show on the initial screen . If you wish to transfer all item , just tap on accept.

Item # **Find**

WH From:

Loc From: **Look up**

SkidID:

Lot Number:

Exp. Date: 1900-01-01 00:00:00.000

Quantity: **Accept**

00	CD-800	Compact Disk Player - 5 disk	439
00	EN-BATD	Energizer ACCU Rechargeable D	93
00	EQ-1245	Equalizer (7 band)	177
00	EQ-1245	Equalizer (10 band)	220

NOTE: If the warehouse is blank , Tap on the warehouse field , select the warehouse and the tap on done.

Back Quick Regular Transfer

43.00 still to be transferred

Item #

WH To:

Loc To: **Look up**

SkidID:

Select Warehouse

CANCEL **3 DONE**

2 00

01

03

Or If you wish to Transfer a partial quantity, just define the quantity and then tap on accept.

Back **Quick Regular Transfer**

Item #

en-batd

Find

WH From:

00

Loc From:

bin

Look up

SkidID:

Lot Number:

Exp. Date:

1900-01-01 00:00:00.000

Quantity:

43

2 Accept

Open on Accept

Enable

Disable

Persist WH

Enable

Disable

Persist Location

Enable

Disable



Note: PERSIST LOCATION AND PERSIST WAREHOUSE SHOULD BE ENABLED

Open on Accept	<input type="button" value="Enable"/>	<input type="button" value="Disable"/>
Persist WH	<input type="button" value="Enable"/>	<input type="button" value="Disable"/>
Persist Location	<input type="button" value="Enable"/>	<input type="button" value="Disable"/>

On the next window. We can define the new location (bin2) on where the item will be transferred or if you wish to transfer an item on a different warehouse we can do this as well .

Back **Quick Regular Transfer**

43.00 still to be transferred

Item #

WH To:

Loc To:

SkidID:

Lot Number:

Once finish tap on Add.

Back **Quick Regular Transfer**

43.00 still to be transferred

Item #

WH To:

Loc To: **Look up**

SkidID:

Lot Number:

Exp. Date: 1900-01-01 00:00:00.000

Quantity:

Cancel **Add**

Review

Persist Location	Enable	Disable
Persist WH	Enable	Disable
Clear WH	Enable	Disable

Now we can review the item to be transferred by tapping on the review option. This will show a summary of the transaction. If you wish to make some changes just tap on delete and recreate the transaction.

0.00 still to be transferred

Item # EN-BATD

WH To: 00

Loc To: bin2 Look up

SkidID:

Lot Number:

Exp. Date: 1900-01-01 00:00:00.000

Quantity: 43

Cancel Send

Review

2

Total Items: 1				Total Items: 1	
Item Code	Quantity	WH From	WH To	Loc From	Loc To
EN-BATD	43.00000	00	00	bin	bin2
					Delete

Once all is verified. We can now tap on Send.

Back **Quick Regular Transfer**

0.00 still to be transferred

Item #

WH To:

Loc To: **Look up**

SkidID:

Lot Number:

Exp. Date: 1900-01-01 00:00:00.000

Quantity:

Cancel **Send**

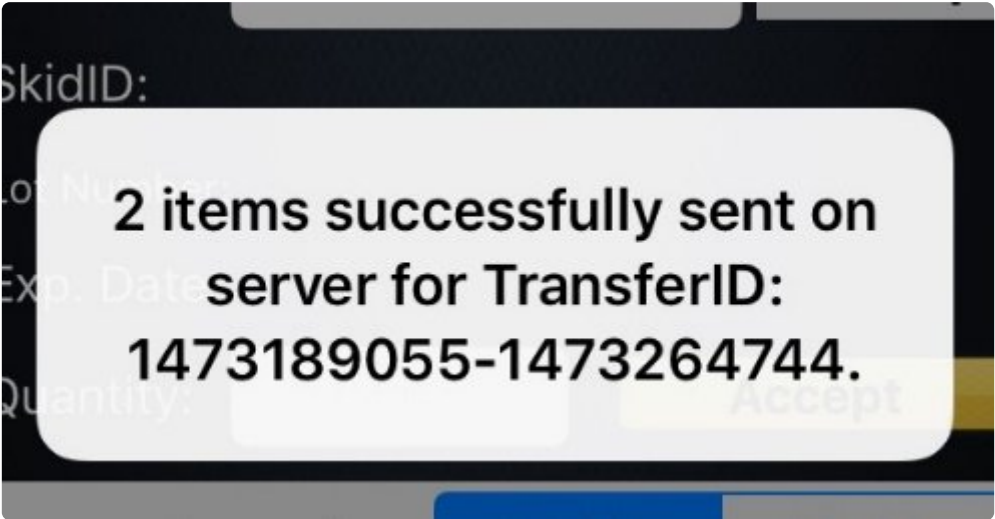
Review

Persist Location	Enable	Disable
Persist WH	Enable	Disable
Clear WH	Enable	Disable

* Note:

We can leave the Loc to and the Quantity Field **Blank** on this window.

A confirmation will show once the transfer is complete.



We can now check the basis desktop to consolidate. To do this just click on Get data and then click on the item .
The details will now reflect the new location.

MASTER LOCATIONS FORM

Product Code: EN-BATD Details: Energizer ACCU Rechargeable D Batteries

WH	STOCKCODE	Description	Total	WH	Loc	Code	Qty	SerialNumber	SkidID	INIQT	EXPDate
00	CD-800	Compact Disk Player - 5 disk cap.	439	00	bin	EN-BATD	50			0	13/12/1901
00	EN-BATD	Energizer ACCU Rechargeable D	93	00	bin2	EN-BATD	43			0	
00	EQ-1245	Equalizer (7 band)	177								
00	EQ-1800	Equalizer (10 band)	230								
00	FCB-250	Finished cabinet for SP-250	50								
00	FX-280	All-in-one Printer/Scanner/Copier	168								
00	FX-500	Multi-fax, Printer, Copier, Scanner	124								
00	GR-250	Speaker Grill for SP-250	95								
00	MCB-250	Entertainment Center	98								
00	MD46	6" Midrange Cone Speaker	49								

Transactions

Transaction Type	Order No	Item Code	Serial No	Skid ID	Filter	Reset	Print	Delete	Items About to Expire in :	Resend	Return Order			
T	1473189055	EN-BATD	EN-BATD	00 bin	00 bin2	43	0	09/08/16	12:19 A	0	10	1473264	0	12/13/01
F	1473189055	EN-BATD	EN-BATD	00 bin	999	43	0	09/08/16	12:14 A	0	10	1473264	0	12/13/01

In our example EN- BATD which has a total of 93 items are now separated in to two different locations which are bin (50) and bin2(43).

L.

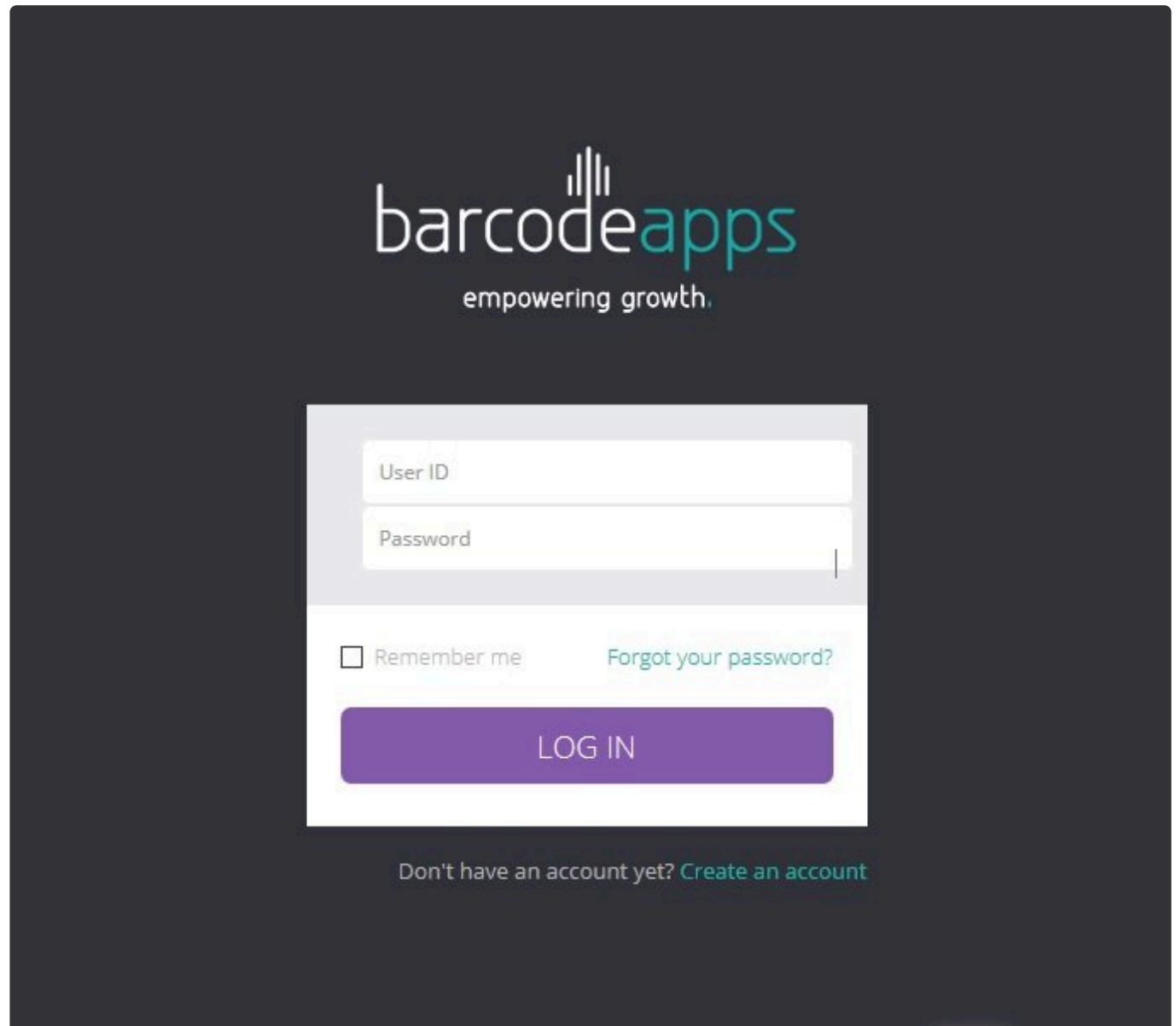
7.2.7. F. LOCATION TRANSFER MODULE

One of the feature of BASIS is the location manager whereas BASIS creates an image of the location of all items for easy tracking.

- Before using this feature a full inventory count is needed to create an image of a master location
- Transfer can be done from one warehouse to another

7.3. III. BASIS ONLINE PORTAL

BASIS ONLINE PORTAL



The image shows the login portal for BarcodeApps. At the top, the logo "barcodeapps" is displayed in white and teal, with the tagline "empowering growth." below it. The login form is centered and contains the following elements:

- A "User ID" input field.
- A "Password" input field with a toggle icon on the right.
- A checkbox labeled "Remember me".
- A link labeled "Forgot your password?".
- A large purple "LOG IN" button.
- A link at the bottom: "Don't have an account yet? [Create an account](#)".

7.3.1. I. Inventory Module

This knowledge base article will explain how the inventory module works.

The inventory module is where all inventory items can be managed. Using this section you can upload and download your Inventory items.

The screenshot displays the BarcodeApps Inventory Listing interface. The sidebar on the left includes 'Home', 'BASIS', and 'PRISM' options. The main content area is titled 'Inventory Listing' and features a table of inventory items. The table columns are: PART NUMBER, BARCODE, DESCRIPTION, WH, BIN LOCATION, ON HAND, PRICE 1, PRICE 2, UOM, and UOM DESCRIPTION. The table lists several items, including XBOX LIVE RED, XBOX LIVE BLACK, XBOX LIVE, Desktop PC with Intel Pentium 4 Proc., Hi-fi Stereo 4 Head VCR, and Digital-VHS VCR with HDTV-Recording. Above the table, there are buttons for 'Add', 'Delete', 'Generate txt', 'Generate PrintFiles', and 'Clear Selection'. The top right corner shows 'TOTAL: 55' and a dropdown menu set to '20'.

PART NUMBER	BARCODE	DESCRIPTION	WH	BIN LOCATION	ON HAND	PRICE 1	PRICE 2	UOM	UOM DESCRIPTION
XBX-123R	123R	XBOX LIVE RED	00	comshelf	100	0	0	EA	
XBX-123B	123B	XBOX LIVE BLACK	00	comshelf	50	0	0	EA	
XBX-123	XBX-123UOM_1	XBOX LIVE	00	Comshelf	0	0	0	UOM_1	BUNDLE (buy 1 take 1)
XBX-123	XBX-123	XBOX LIVE	00	Comshelf	285	0	0	EA	EA
VAIO-24	VAIO-24	Desktop PC with Intel Pentium 4 Proc.	00	whse	5	0	0	EA	EA
V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	00	shelf	170	0	0	EA	EA
V1-2A	V1-2A	Digital-VHS VCR with HDTV-Recording	00	Shelf	67	0	0	EA	EA
	114C-300	Bernton Universal AC Adapter	00	bin	117	0	0	EA	EA

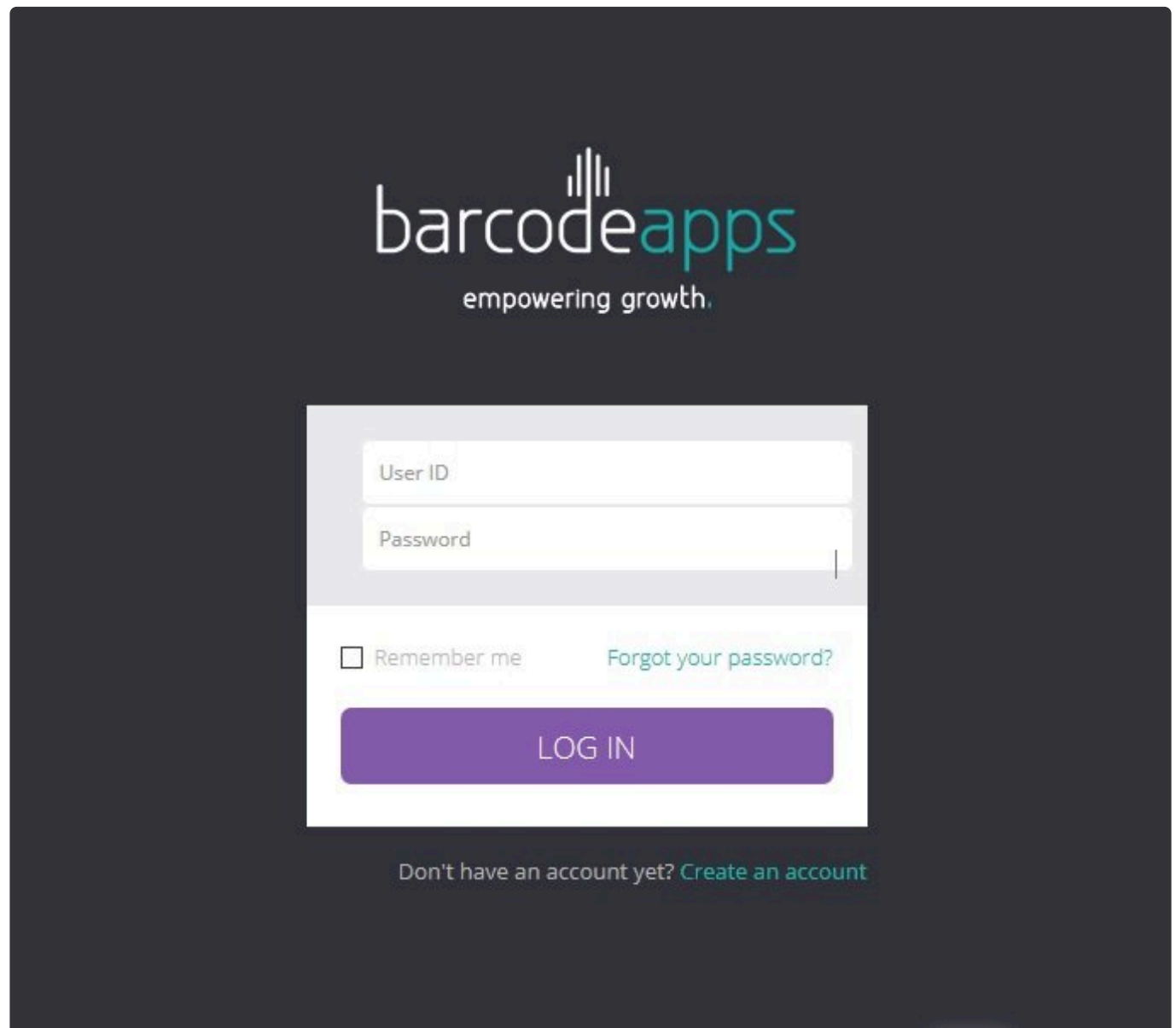
The Inventory Module has two sections

1. Inventory Listing
2. Scanned Inventory

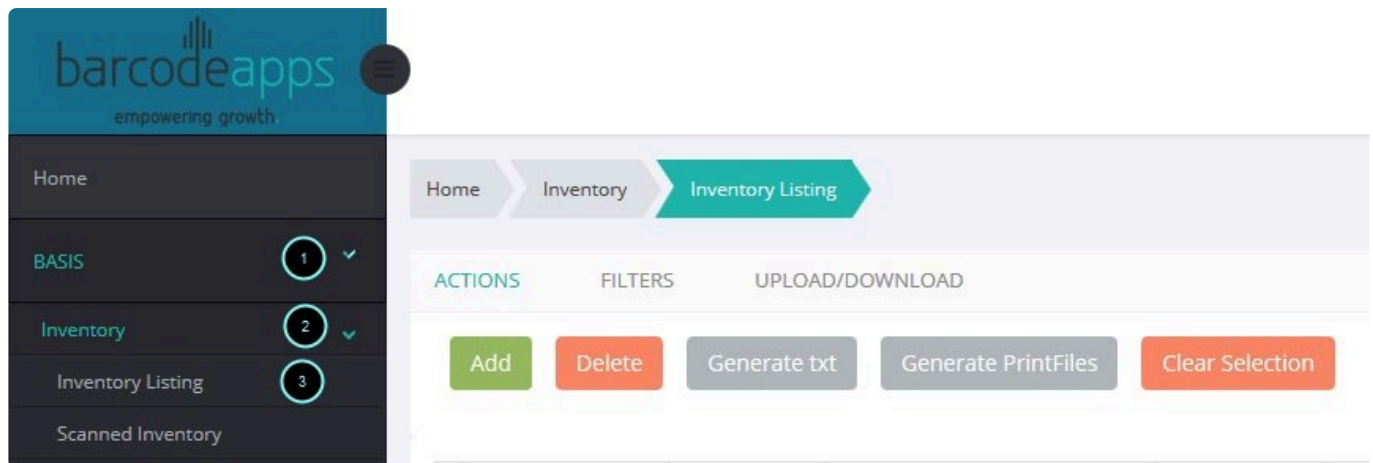
7.3.1.1. a. Inventory Listing

The Inventory Listing is a section of the inventory module on where all Inventory items are stored. Using this section we can manage our inventory items.

To access the Inventory Listing, Login to the portal using an admin credentials



On the home page click on BASIS, Inventory, and Inventory Listing. From here you can get started on uploading your inventory items

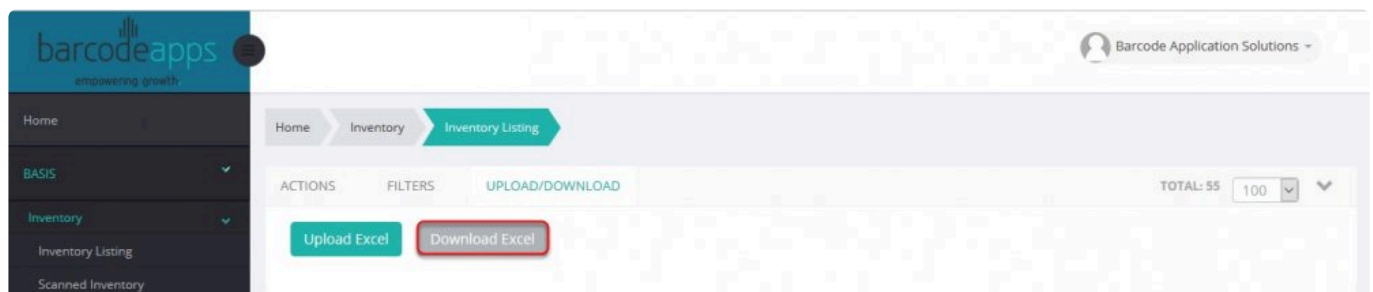


UPLOADING INVENTORY ITEM

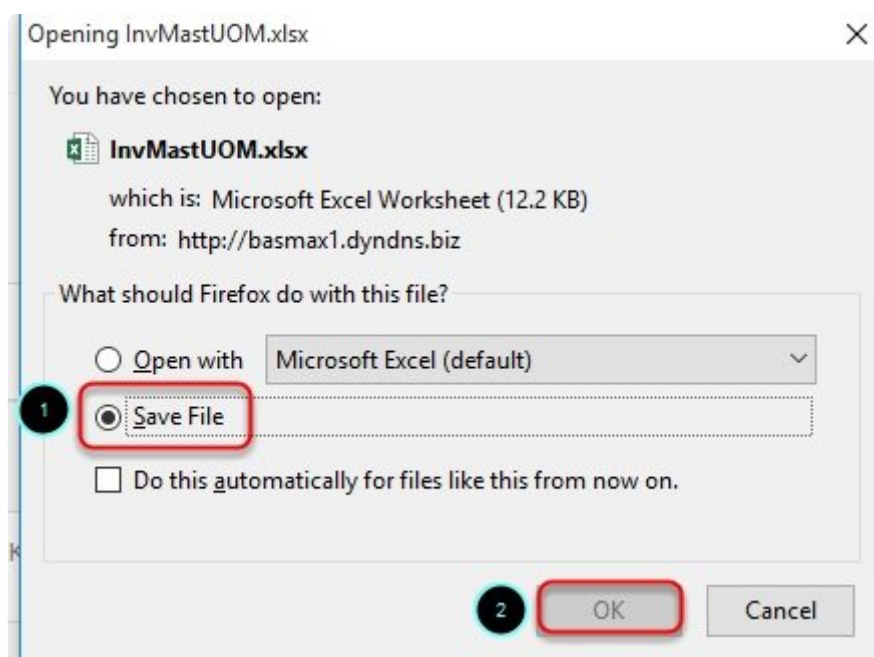
To upload your inventory items click on the UPLOAD/DOWNLOAD ribbon



click on Download Excel



Save the InvMastUOM.xlsx file in your computer



Open the file and now we can fill out the form with our inventory items

InvMastUOM(7) [Protected View] - Microsoft Excel

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ItemCode	Barcode	Description	Warehouse	Location	OnHand	Serialized	LotNo	Retail	Cost	UOM	ConversionFactor	IsPrimaryUOM	AllowFractional	OnHold
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															
20															
21															
22															

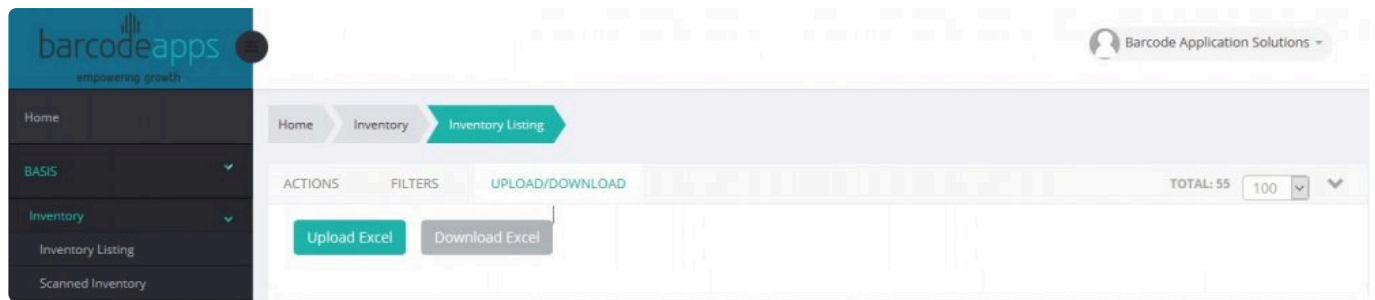
See table definition below

- **Item code** – Item code or Product Code
- **Barcode** – This will hold the UPC code
- **Description** – description of the item
- **Warehouse** – Warehouse number
- **Location** – Item Location
- **OnHand** – Onhand Quantity
- **Serialized** – Set to 1 if an item is serialized otherwise 0.
- **LotNo** – Set to 1 if an item is lot numbered otherwise 0.
- **Retail** – set to 1 if retailed otherwise 0.
- **Cost** – unit price
- **UOM** – Unit of Measure (eg. EA (each),PK (Pack), FT (Feet), KG (Kilo). etc.)
- **Conversion Factor** – shows the multiplier for the unit of measure. e.g. A Box that has a dozen of the item will show 12 as a factor.
- **Primary UOM** – Show the primary unit of measure (eg. EA (each),PK (Pack), FT (Feet), KG (Kilo). etc.)
- **AllowFraction** – Set to 1
- **OnHold** – Set to 1 if the item is on hold

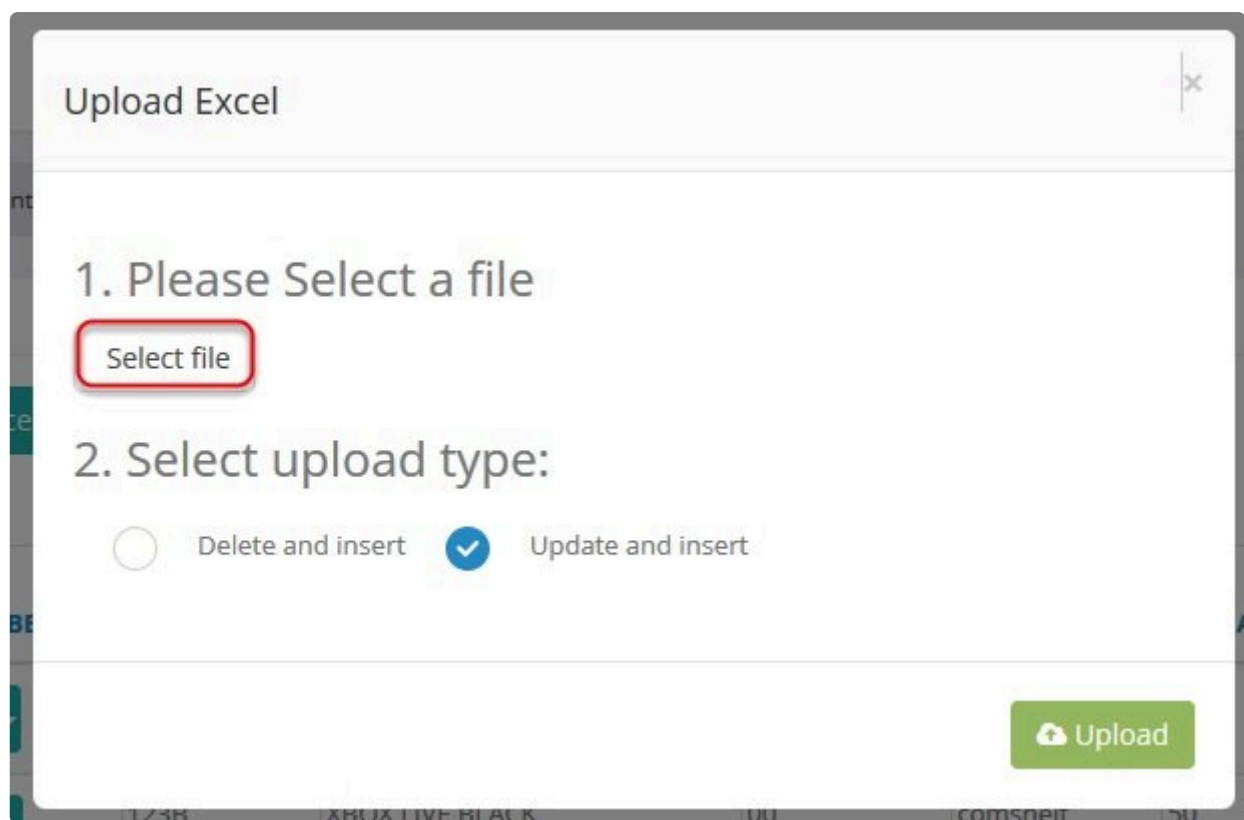
Sample excel with inventory items inside

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ItemCode	Barcode	Description	Warehouse	Location	OnHand	Serialized	LotNo	Retail	Cost	UOM	ConversionFactor	IsPrimaryUOM	AllowFractional	OnHold
2	XBX-123R	123R	XBOX LIVE R	00	comshelf	100	0	0	0	00	EA	1	1	1	0
3	XBX-123B	123B	XBOX LIVE BL	00	comshelf	50	0	0	0	00	EA	1	1	1	0
4	XBX-123	XBX-123UO	XBOX LIVE	00	Comshelf	0	0	0	0	00000	UOM_1	2	0	0	0
5	XBX-123	XBX-123	XBOX LIVE	00	Comshelf	285	0	0	0	00	EA	1	1	1	0
6	VAIO-24	VAIO-24	Desktop PC v	00	whse	5	0	0	0	00	EA	1	1	1	0
7	V1-4A	V1-4A	Hi-fi Stereo	00	shelf	170	0	0	0	00	EA	1	1	1	0
8	V1-2A	V1-2A	Digital-VHS	00	Shelf	67	0	0	0	00	EA	1	1	1	0
9	UAC-300	UAC-300	Recoton Univ	00	bin	112	0	0	0	00	EA	1	1	1	0
10	TV-5200	TV-5200	52" Dolby Pri	00	ROW12	75	0	0	0	00	EA	1	1	1	0
11	TV-3600	TV-3600	36" DBX Steri	00	Box 3	69	0	0	0	00	EA	1	1	1	0
12	TV-2100	TV-2100	20" TV with F	00	Whse	56	0	0	0	00	EA	1	1	1	0
13	TP-560	TP-560	Toshiba Prog	00	row 5	129	0	0	0	00	EA	1	1	1	0
14	TP-350	TP-350	DVD Player/I	00	row 4	171	0	0	0	00	EA	1	1	1	0
15	TESTBACKC	123456	TESTBACKOR	00	bin1	2	0	0	0	00	EA	1	1	0	0
16	SY-MINI	SY-MINI	Sony MiniDis	00	bin	26	0	0	0	00	EA	1	1	1	0
17	STS-02	STS-02	Surround Sox	00	floor	177	0	0	0	00	EA	1	1	1	0
18	STS-01MAN	STS-01MAN	Instruction M	00	bin	139	0	0	0	00	EA	1	1	1	0
19	STS-01	STS-01	Home Sound	00	floor	77	0	0	0	00	EA	1	1	1	0
20	ST-40	ST-40	Stand - Univ	00	Row 9	90	0	0	0	00	PR	1	1	1	0
21	ST-30	ST-30	Stand - 30" S	00	Row 4	218	0	0	0	00	EA	1	1	1	0
22	ST-25	ST-25	Stand - 24" S	00	Row 2	67	0	0	0	00	PR	1	1	1	0
23	ST-10	ST-10	Stand - for m	00	Rack1	167	0	0	0	00	EA	1	1	1	0
24	SPW-14G	SPW-14G	14 Gauge Spe	00	bin 4	306	0	0	0	00	EA	1	1	1	0
25	SPW-12G	SPW-12G	12-Gauge Mi	00	bin 2	135	0	0	0	00	EA	1	1	1	0
26	SP-500	SP-500	Speakers - Hi	00	Row 1	80	0	0	0	00	EA	1	1	1	0
27	SP-50	SP-50	Speakers - Cr	00	Shelf	45	0	0	0	00	EA	1	1	1	0
28	SP-400-ST1	SP-400-ST1	Speakers - Pr	00	shelf	126	0	0	0	00	EA	1	1	1	0

To upload the inventory items click on Upload Excel



Click on select file and navigate to the location on where you saved the InvMasUOM file



Select the upload type and then click on Upload.

Upload Excel

1. Please Select a file

Change

InvMastUOM (3).xlsx

2. Select upload type:

1

Delete and insert

Update and insert

2

Upload

All inventory files are now uploaded.

barcodeapps

empowering growth

Home

BASIS

PRISM

Home

Inventory

Inventory Listing

ACTIONS

FILTERS

UPLOAD/DOWNLOAD

1

2

3

TOTAL: 55

20

Add

Delete

Generate txt

Generate PrintFiles

Clear Selection

<input type="checkbox"/>	PART NUMBER	BARCODE	DESCRIPTION	WH	BIN LOCATION	ON HAND	PRICE 1	PRICE 2	UOM	UOM DESCRIPTION
<input type="checkbox"/>	XBX-123R	123R	XBOX LIVE RED	00	comshelf	100	0	0	EA	
<input type="checkbox"/>	XBX-123B	123B	XBOX LIVE BLACK	00	comshelf	50	0	0	EA	
<input type="checkbox"/>	XBX-123	XBX-123UOM_1	XBOX LIVE	00	Comshelf	0	0	0	UOM_1	BUNDLE (buy 1 take 1)
<input type="checkbox"/>	XBX-123	XBX-123	XBOX LIVE	00	Comshelf	285	0	0	EA	EA
<input type="checkbox"/>	VAIO-24	VAIO-24	Desktop PC with Intel Pentium 4 Proc.	00	whse	5	0	0	EA	EA
<input type="checkbox"/>	V1-4A	V1-4A	Hi-fi Stereo 4 Head VCR	00	shelf	170	0	0	EA	EA
<input type="checkbox"/>	V1-2A	V1-2A	Digital-VHS VCR with HDTV-Recording	00	Shelf	67	0	0	EA	EA
<input type="checkbox"/>	11AC-200	11AC-200	Barco Universal AC Adapter	00	bin	117	0	0	EA	EA

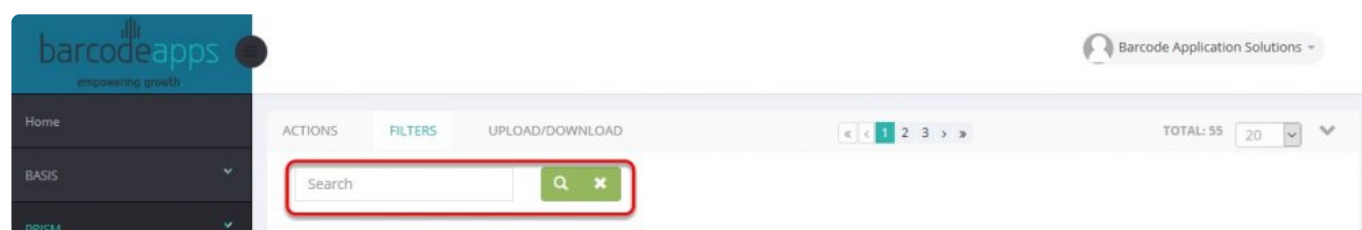
INVENTORY MODULE NAVIGATION

ACTIONS SECTION



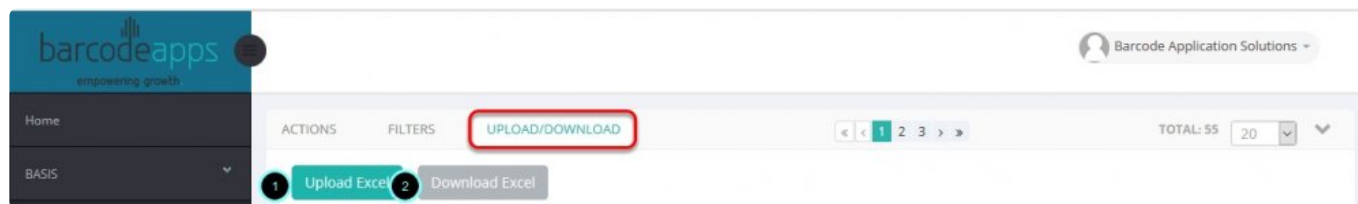
- **Add** – click to add an item
- **Delete** – Click to delete a selected item
- **Generate Text** – Click on this button to sync your items with the BASIS App
- **Generate Print Files** – this will generate print files
- **Clear Selection** – click on the button to clear selected items.

FILTERS SECTION



- **Filter selection field** – An item can be searched using this field.

UPLOAD AND DOWNLOAD SECTION



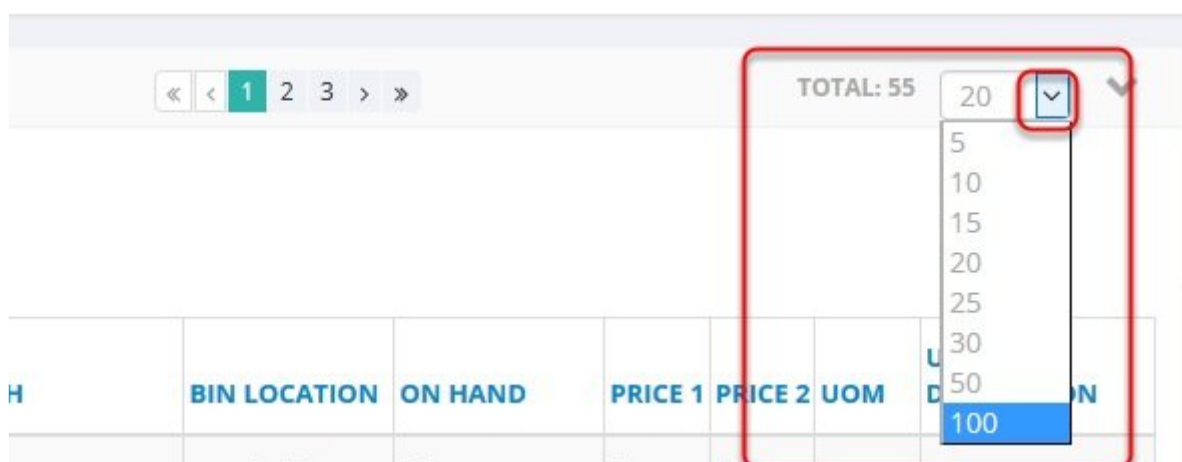
- **UPLOAD** – use this to upload the InvMastUOM form
- **DOWNLOAD** – use this to download the InvMastUOM form or download selected items.

NAVIGATION BUTTONS

Page selection button – click on the page number to switch page



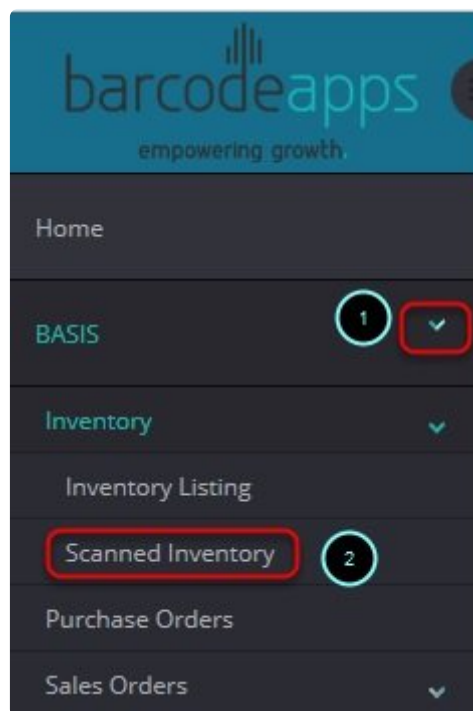
Page Display Section – click on the drop down to choose the number of items to be displayed on a page. Maximum is 100 items



7.3.1.2. b. Scanned Inventory

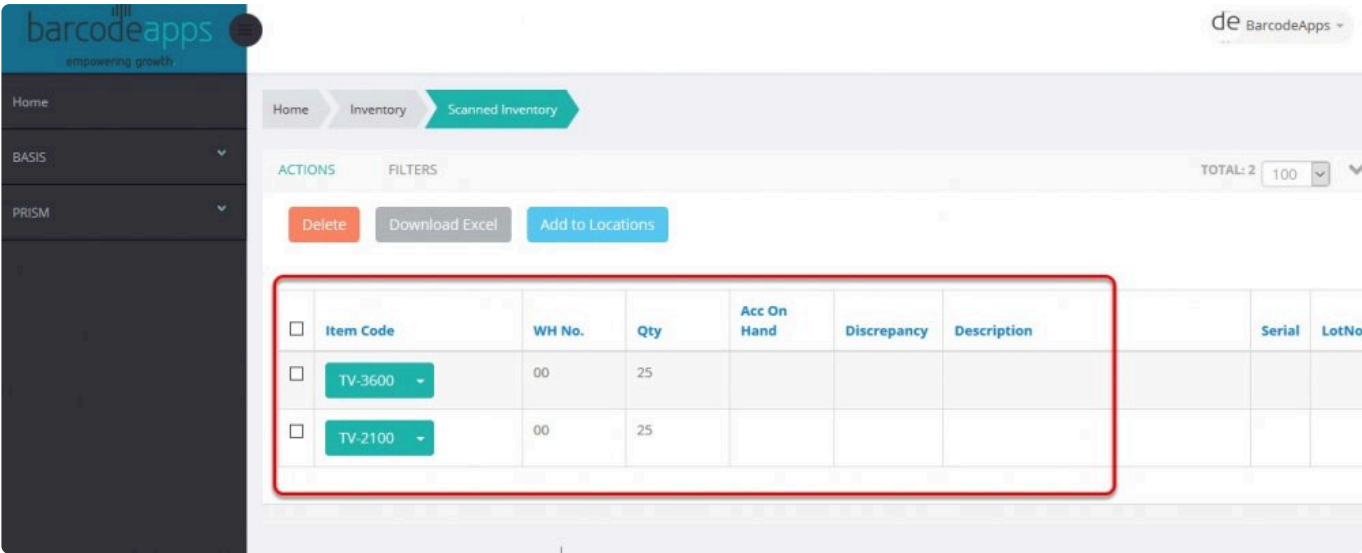
The scanned inventory section is the repository of all items scanned using the basis app.

To access scanned inventory click on basis,inventory and then scanned items .

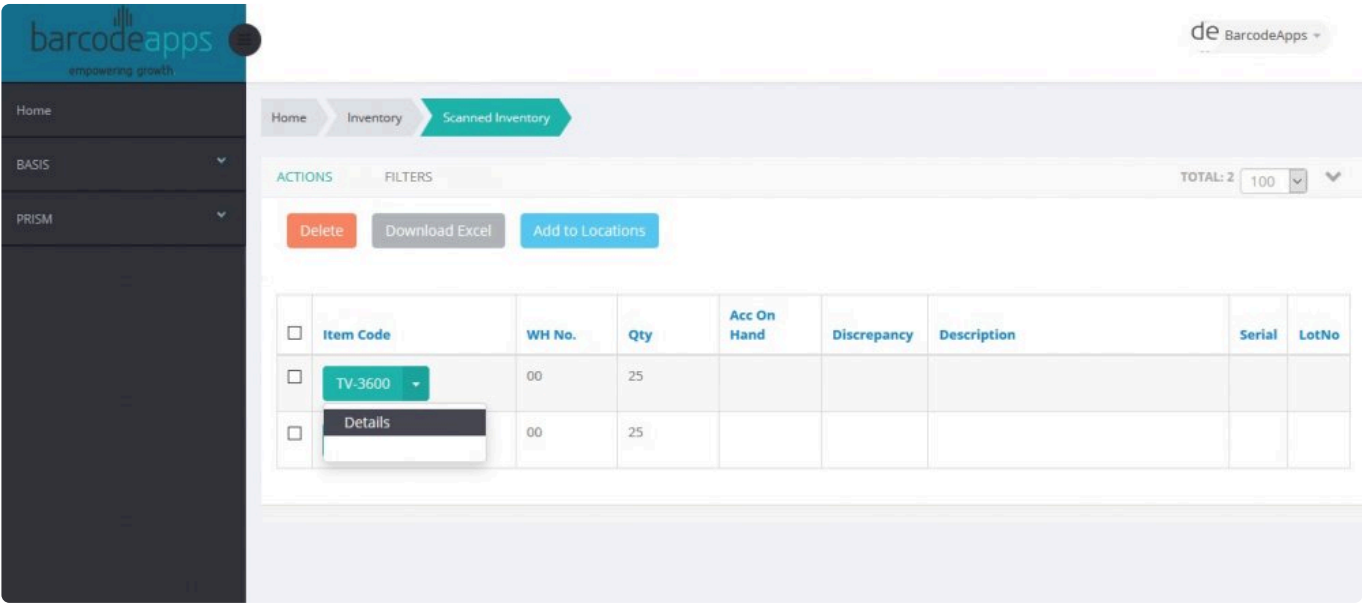


From here all scanned items using the basis app will show on the list.

Sample screenshot of items scanned using the BASIS APP




Items Details can also be checked or modified by clicking on the down arrow just beside the item code.



When modifying scanned items . Quantity, Location, SerialNumber , SkidID can be changed.

Locations

Item Code	WH No.	Qty	Location	SerialNumber	SkidID	EXPDate	Actions
TV-3600	00	25				1900-01-01	

Fields can be modified

click on the save button once changes has been made

Close

SCANNED INVENTORY NAVIGATION

ACTIONS SECTION

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empowering growth

Home

BASIS

PRISM

Home

Inventory

Scanned Inventory

ACTIONS

FILTERS

TOTAL: 2 100

Delete

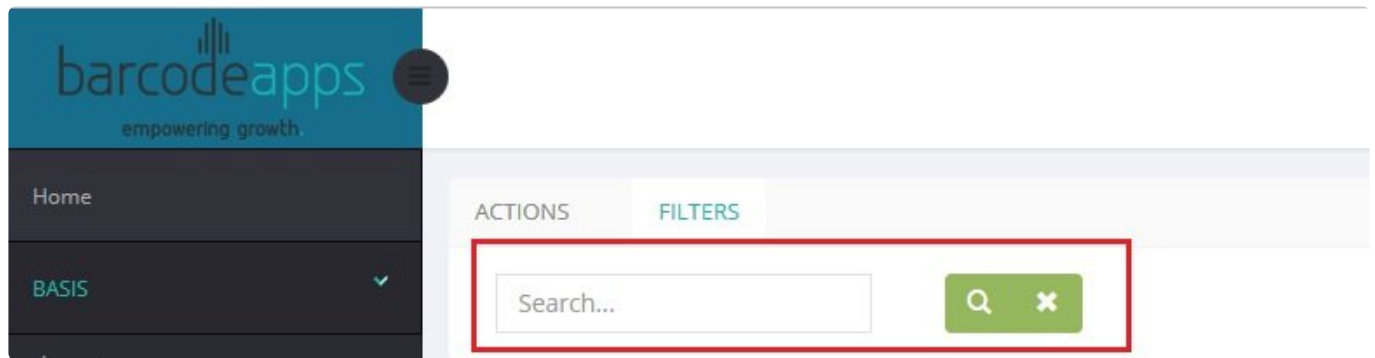
Download Excel

Add to Locations

	Item Code	WH No.	Qty	Acc On Hand	Discrepancy	Description	Serial	LotNo
<input type="checkbox"/>	TV-3600	00	25					
<input type="checkbox"/>	TV-2100	00	25					

- **Delete** – Click on this button to delete a selection
- **Download excel** – Download a copy of scanned items
- **Add to Locations** – Location transfers button

FILTERS SECTION – use this option to do a quick search on the list.

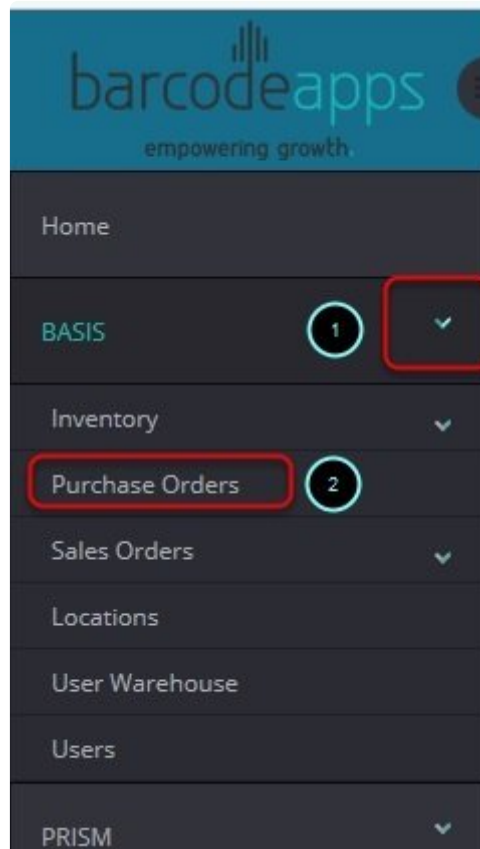


BarcodeApps © 2017

7.3.2. II. Purchase Order Module

The Purchase Order Module works as a repository of all Purchase Orders, from here we can manage and review all purchase orders.

To access the purchase order module. from the home page click on BASIS and then Purchase order



From here we can see all purchase orders uploaded via BASIS desktop , an excel file or imported from an accounting package program (eg.spire).

PO #	Supplier Code	Name	Date	Complete	To Device
0000300305	AIRCAN	Air Canada	2011-06-17 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>
0000300304	AIRCAN	Air Canada	2011-06-17 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>
0000300293	CLAIR	Clairons Specialty S	2011-06-11 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>
0000300287	CNCP	CNCP Music	2011-06-11 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>
0000300284	AMCOMP	Amtron Components	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0000300274	CLASND	Clarence Sound Syste	2011-06-10 00:00:00.000	<input type="checkbox"/>	<input type="checkbox"/>
0000300264	CHIP	CHIP Radio Inc.	2011-06-03 00:00:00.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>

PURCHASE ORDER MODULE NAVIGATION

ACTIONS SECTION

- **Delete** – use this option to delete a purchase order
- **Import from spire** – Spire user's can click on this button and all purchase orders will be downloaded by the Basis Portal
- **Download Excel** – using this option allows you to download the PurchaseOrders Form.
- **Upload Excel** – using this option you can upload the excel back to the portal.

Sample excel file

Type	PONumber	VendorCod	Date	Terms	Warehouse	ItemNumbe	UPCCod	UOM	Quantity
H		0000300264	CHIP	2011-06-03 00:00:00.000					
D		0000300264				0 EN-BATD	EN-BATD	PK	0
D		0000300264				0 RCA-R	RCA-R	EA	20
H		0000300274	CLASND	2011-06-10 00:00:00.000					
D		0000300274				0 V1-2A		EA	32
D		0000300274				0 V1-4A		EA	25
D		0000300274				0 FCB-250		EA	51
D		0000300274				0 SY-MINI		EA	25
D		0000300274				0 SP-250		PR	38

PO NUMBER – Purchase order number

VENDOR CODE – Vendor code

DATE – date of the PO

TERMS – terms of payment

WAREHOUSE – warehouse number

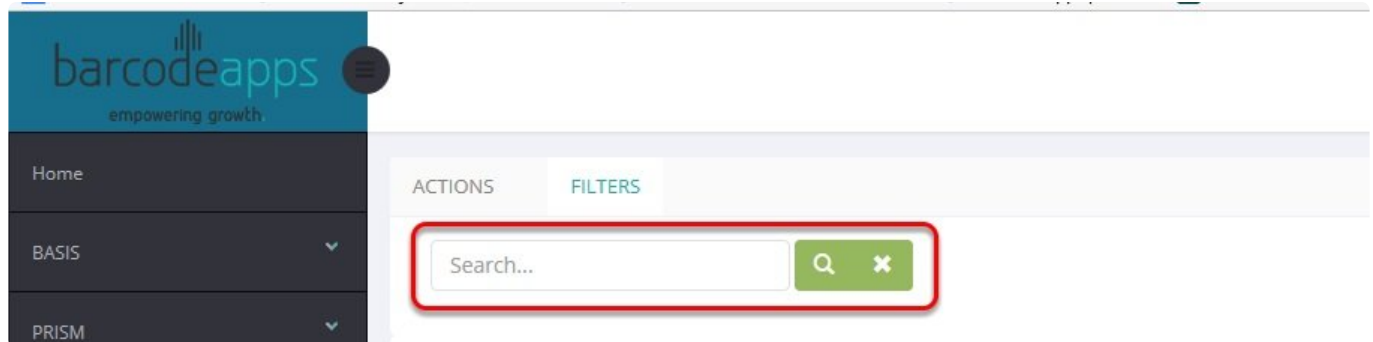
ITEM NUMBER – Product code

UPCCODE – UPC code

UOM – unit of measure

QUANTITY – number of the items

FILTERS SECTION

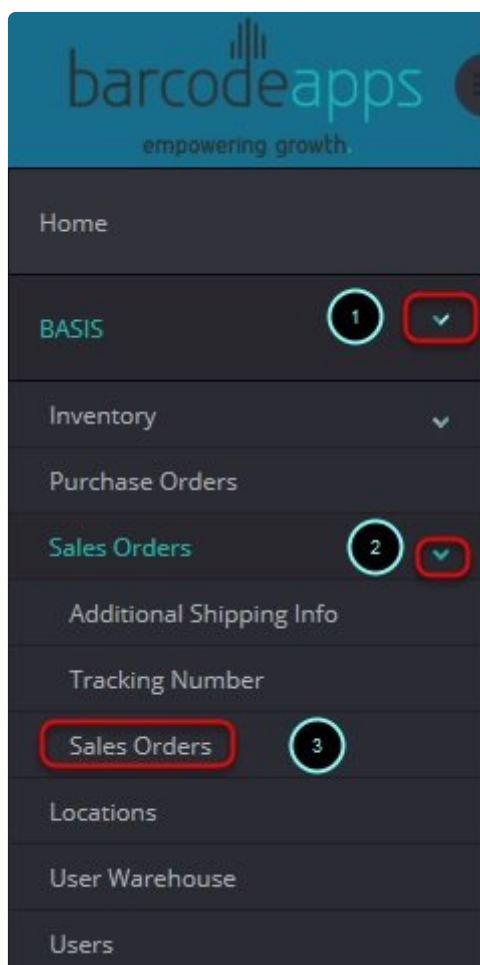


Search field – use this field to search for a Purchase Order .

7.3.3. III. Sales Order Module

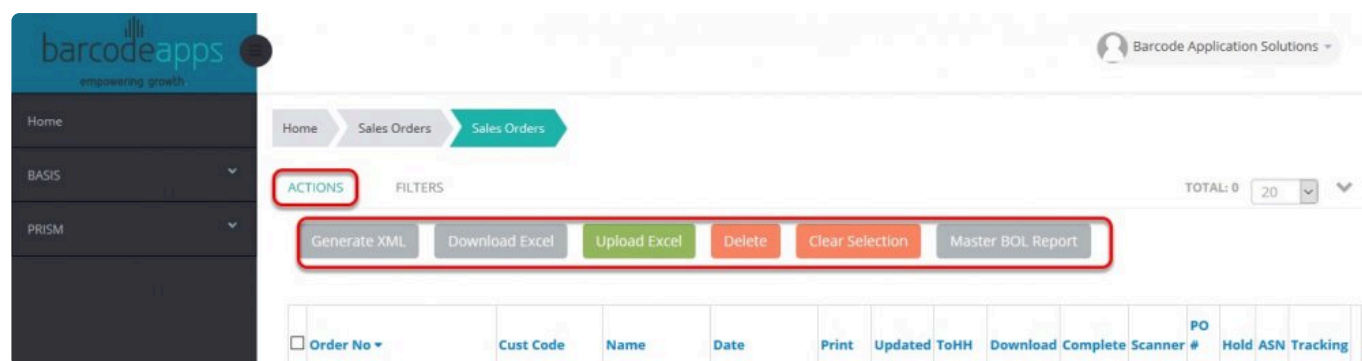
The Sales Order Module works as a repository of all Sales Orders, from here we can manage and review all Sales orders.

To access the sales order module from the Home page. Click on BASIS , Sales orders and then sales orders



SALES ORDER MODULE NAVIGATION

ACTIONS SECTION



- **Generate XML** – Sync the order with the BASIS App
- **Download Excel** – use this button to download the SalesOrders Form or to download the form with a selected sales order

Sample excel file

[illegible]

SO EXCEL FIELD DEFINITION

- **TYPE** – Set to H and D where H is the Header of an order and D is the part of the order.
- **PO NUMBER** – Sales order number
- **Customer CODE** – Vendor code
- **DATE** – date of the SO
- **TERMS** = terms of payment
- **WAREHOUSE** – warehouse number
- **ITEM NUMBER** – Product code
- **UPCCODE** – UPC code

- **UOM** – unit of measure
- **QUANTITY** – number of the items
- **UploadExcel** – use this button to upload the SalesOrder Form
- **Delete** – Deletes a selected sales orders
- **Clear Selection** – Clears selected orders
- **Master BOL Report** – TBA

FILTERS SECTION

Use this section to find sales order via search field.

The screenshot displays the 'Sales Orders' section of the BarcodeApps interface. The 'FILTERS' tab is highlighted with a red box. Below the filters, there is a search bar with a 'Search' input field, an 'Active' dropdown, a 'Filter By:' dropdown set to 'All', and a green search button with a magnifying glass icon. To the right of the search bar, there are two 'TOTAL: 0' indicators with dropdown arrows. Below the search bar, a table header is visible with columns: Order No (with a dropdown arrow), Cust Code, Name, Date, Print, Updated ToHH, Download Complete, Scanner #, PO, and Hold ASN Tracking. A small table on the right side of the interface shows the 'PO' and 'Hold ASN Tracking' columns.

MANAGING SALES ORDER ITEMS

Orders can be managed by clicking on the down arrow button right after the sales order number

barcodeapps
empowering growth

Home

BASIS

PRISM

ACTIONS

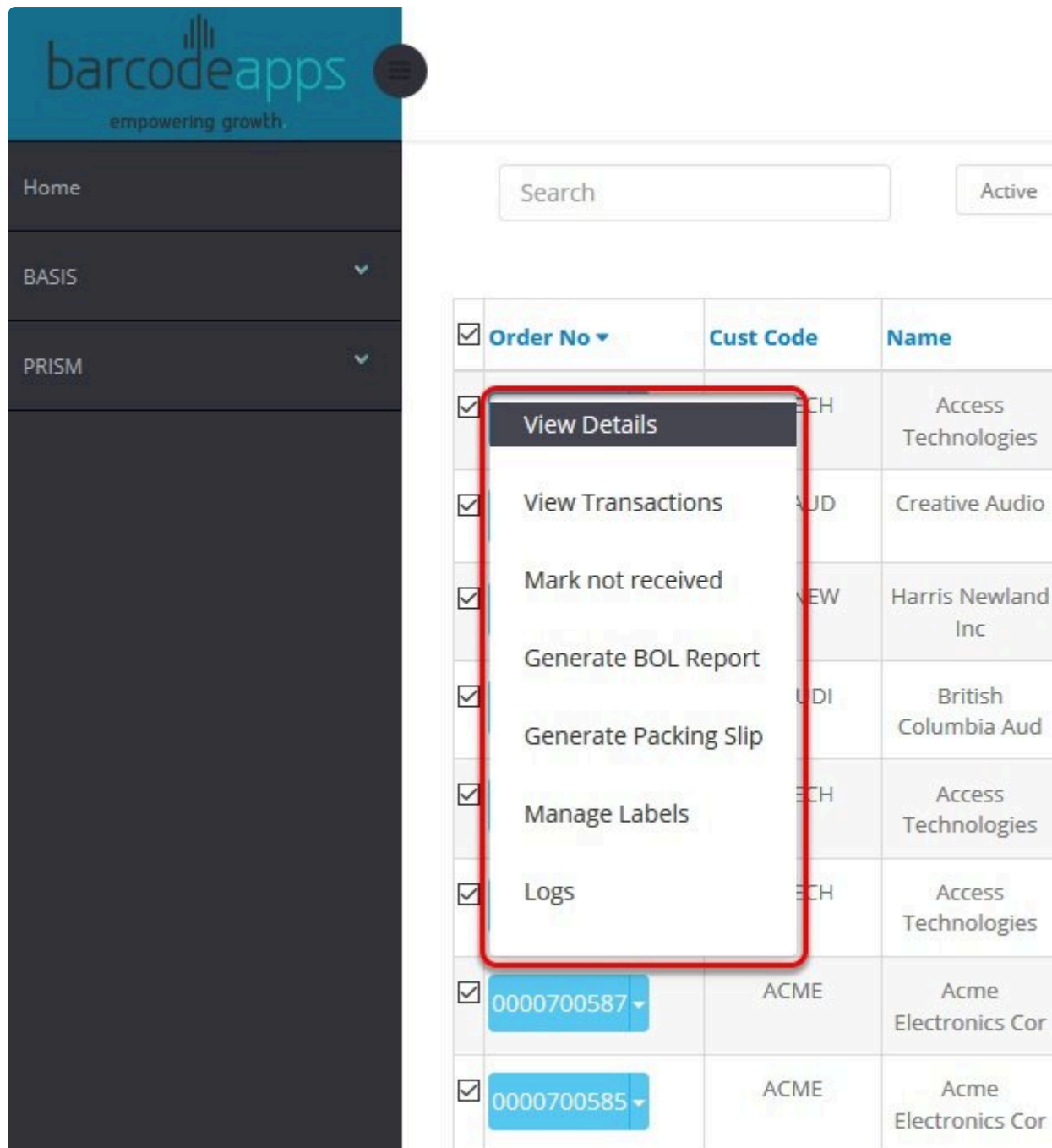
FILTERS

Generate XML

Download Excel

<input checked="" type="checkbox"/>	Order No ▾	Cust Code	Nan
<input checked="" type="checkbox"/>	0000700595 ▾	ACTECH	Te
<input checked="" type="checkbox"/>	0000700592 ▾	CREAUD	Cre
<input checked="" type="checkbox"/>	0000700591 ▾	HARNEW	Har

From here you will see all available options for order management.



The screenshot shows the BarcodeApps web application interface. On the left is a dark sidebar with the 'barcodeapps' logo and the tagline 'empowering growth.' Below the logo are navigation links: 'Home', 'BASIS' (with a dropdown arrow), and 'PRISM' (with a dropdown arrow). The main content area has a search bar and an 'Active' button. Below these is a table with three columns: 'Order No', 'Cust Code', and 'Name'. The table contains several rows of data. A context menu is open over the first row, listing the following actions: 'View Details' (highlighted), 'View Transactions', 'Mark not received', 'Generate BOL Report', 'Generate Packing Slip', 'Manage Labels', and 'Logs'. The table data is as follows:

Order No	Cust Code	Name
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	ECH	Access Technologies
<input checked="" type="checkbox"/>	AUD	Creative Audio
<input checked="" type="checkbox"/>	NEW	Harris Newland Inc
<input checked="" type="checkbox"/>	UDI	British Columbia Aud
<input checked="" type="checkbox"/>	ECH	Access Technologies
<input checked="" type="checkbox"/>	ECH	Access Technologies
<input checked="" type="checkbox"/>	0000700587	ACME Acme Electronics Cor
<input checked="" type="checkbox"/>	0000700585	ACME Acme Electronics Cor

Description

- **View Details** – This option will display the contents of an order

Home

Sales Orders

0000700590

ACTIONS

TOTAL: 1

Back

SALES ORDER DETAILS

Item Code	Skid Line	WH	Barcode	Description	U.O.M	Ordered	Shipped	BO	Committed in BV	Location	Skid	Set	Lot
CD-800	1	00		Compact Disk Player - 5 disk capacity	EA	10	0	0	10	row16		<input type="checkbox"/>	<input type="checkbox"/>

- **View Transactions** – TBA
- **Mark not received** – TBA
- **Generate BOL Report** – Generates a bill of lading

sample form

Bill of Lading - Not Negotiable

Ship Date: 2017/04/18**BOL#:** 0000700596**Carrier:****Ref#:** 1 of 1**Page:****Consignor**

Barcode Application Solutions

Consignee

Access Technologies


Total number of boxes: 0**Declared Value:** _____**WT:** _____ (LBS.)**Consignor Signature:** _____**Date:** _____**Carrier Signature:** _____**Date:** _____

*****IMPORTANT*****
PLEASE NOTE: CARRIER AND CONSIGNOR, YOU ARE SIGNING FOR
PACKAGE QUANTITY LISTED ABOVE, NOT SKID QUANTITY.

Page 1

- **Generate Packing Slip** – Generates a packing slip

sample form

Telephone:	Barcode Application Solutions	Packing Order		
Fax:				
.				
S	Date	Customer#	Packing#	Page
O T	2017/04/18		0000700596	1 of 1
L O				
D				
S				
H T				
I O				
P				
Terms:				
Customer Purchase Orders	GST #	PST Exempt #	SLs #	F.O.B
<hr/>				
<hr/>				
Ship Via: _____		Parcel: _____		
Weight: _____		Carton: _____		
Page 1				

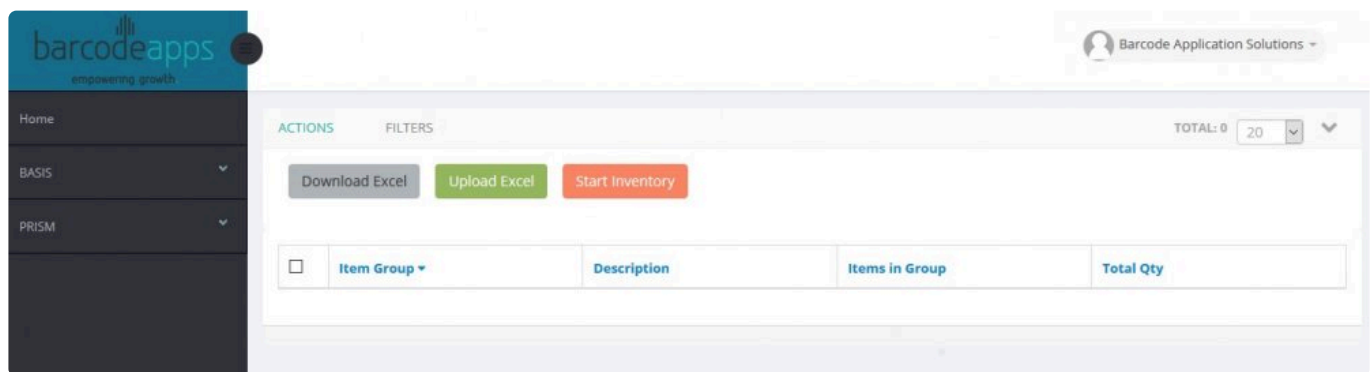
- **Manage Labels** – TBA
- **Logs** – TBA

7.3.4. IV. Locations Module

The locations module is where the locations can be managed . This is also part of the BASIS portal on where you can start an actual inventory.

LOCATIONS MODULE NAVIGATION

ACTIONS SECTION



The screenshot displays the BarcodeApps web application interface. On the left is a dark sidebar with the 'barcodeapps' logo and navigation links for 'Home', 'BASIS', and 'PRISM'. The main content area has a header with 'Barcode Application Solutions' and a 'TOTAL: 0' indicator. Below the header, there are tabs for 'ACTIONS' and 'FILTERS'. The 'ACTIONS' tab is active, showing three buttons: 'Download Excel' (grey), 'Upload Excel' (green), and 'Start Inventory' (orange). Below these buttons is a table with four columns: 'Item Group' (with a dropdown arrow), 'Description', 'Items in Group', and 'Total Qty'. The table is currently empty.

- **Download Excel** – use this button to download the LocationsForm.

see sample form

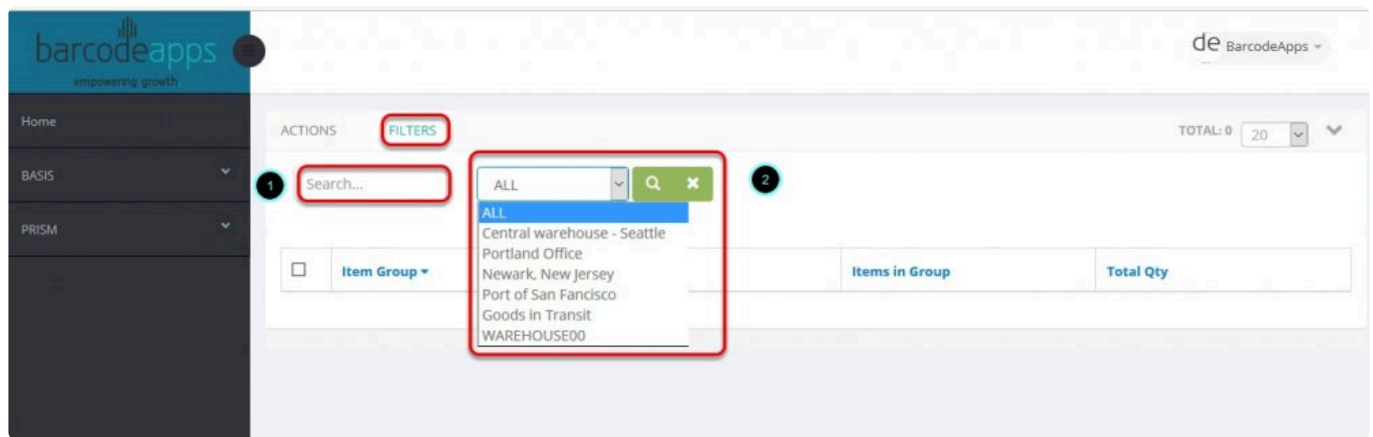
	A	B	C	D	E	F	G	H
1	Warehouse	ItemNumber	Location	Quantity	LotSerialNumber	ExpiryDate	SkidID	
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

- **Upload Excel** – use this button to upload the locations form.
- **Start Inventory** – use this button to start an inventory (Applicable for Basis Excel users).

FIELD DEFINITIONS

- **Warehouse** – warehouse number
- **ItemNumber** – Item code
- **Location** – Item Location
- **Quantity** – quantity of an item
- **LotSerialNumber** – Lot number or Serial number
- **Expiry Date** – Expiration date
- **SkidID** – SkidID number

FILTERS SECTION



- **Search Field** – use this field to define the search criteria.
- **Locations Selection** – You can choose the warehouse location default will be **ALL** locations.

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8. ADP SUBMISSION PROGRAM

8.1. I. ADP DESKTOP SETUP

8.2. II. ADP DESKTOP PROCEDURES

9. DOWNLOAD LIBRARIES AND TRAINING VIDEOS

9.1. I. BASIS Download Library

BASIS DOWNLOAD LIBRARY

- B.1. [Access Runtime 2010](#) (Make sure to select AccessRuntime.exe – Not _X64)
- B.2. [SQL ExpressR2 2008](#) (Only download 1 of the last 2 32 bit or 64 bit)
- B.3. [SQL Express 2012](#) (SQLManagementStudio_x64_ENU – For 64 Bit or the bottom one for 32)
- B.4. [BASIS Main Installer](#)
- B.4A. [BASIS Main Client Installer](#)
- B.5. [BASIS Server Updater](#)
- B.5A. [BASIS Client Updater](#)
- B.6. [SQL Express 2005](#) (Only for Windows XP 32 bit machines – File SQLEXPRESS.EXE)
- B.7. [SQL Express 2005 Management Studio](#) (Only for Windows XP 32 bit machines or if SQL 2005 already installed)
- B.8. [NET Framework 3.5](#)
- B.9. [FX1 Folder containing](#) – PHP Config File and V113 Subfolder
- B.10. [FX1 Folder containing](#) – XML Config File and XMLWEB Subfolder
- B.11. [PHP Installer](#)*
- B.12. [PHP Install Instructions](#)
- B.12A. [WEB PI Installer](#) (to activate CGI on non W2008 machines)

SAGE 300 (FORMERLY ACCPAC) DOWNLOADS

- B.11. [Version 6.0](#)
- B.12. [Version 6.1](#)
- B.13. [Version 6.2](#)

- B.12. DLL Requirements

BASIS MOBILE WINDOW FILES

(FOR .NET 35 ONLY ONE OF THE FILE MIGHT BE NEEDED – NEWER DEVICES INCLUDE IT)

- C.1. [CAB](#)
- C.2. [CAB](#)
- C.3. [CAB](#)
- C.4. [CAB](#)
- C.5. [.NET35 for Windows Mobile Devices](#)
- C.6. [.NET35 for Windows ppc Devices](#)
- C.7. [.NET35 for Windows CE Devices](#)
- C.8. [.NET35 Messages for Windows Mobile Devices](#)
- C.9. [DATAWEDGE](#)
- C.10 BASIS Devices With Limited Memory (128 or less)
- C.11 [BASIS Devices With Normal Memory](#)
- C.12 [Prism Windows Mobile](#)

OTHER INSTALLER FILES

(For BASIS AND PRISM)

[D.1. BAS API](#)

We're excited to get you started with BarcodeApps. Call us today at 855-822-3434 or locally at +1 (416) 822 3434.

You can also fill-out the [information request form](#).

9.2. II. PRISM Download Library

SOFTWARE REQUIREMENTS

[A.1. Access Runtime 2010](#) (Make sure to select AccessRuntime.exe – Not _X64)

[A.1.b Access Runtime 2013](#) (Make sure to select AccessRuntime.exe – Not _X64)

[A.2. SQL ExpressR2 2008](#) (Only download 1 of the last 2 32 bit or 64 bit)

[A.3. SQL Express 2012](#) (SQLManagementStudio_x64_ENU for 64 Bit or the bottom one for 32)

[A.4. PRISM Main Installer](#)

[A.5. PRISM Updater](#)

[A.6. SQL Express 2005](#) (Only for Windows XP 32 bit machines – File SQLEXPRESS.EXE)

[A.7. SQL Express 2005 Management Studio](#) (Only for Windows XP 32 bit machines or if SQL 2005 already installed)

[A.8. .NET Framework 3.5](#)

A.9. SQL Script

[A.10. QB 11 SDK](#) (for Quickbooks)

[A.11. MySQL 3.51 ODBC Connector](#) (for Simply Accounting)

[A.12. How to configure connection](#) (for Simply Accounting)

A.13. Android Download

[A.10. PRISM.APK](#) (for Android)

We're excited to get you started with BarcodeApps. Call us today at 855-822-3434 or locally at +1 (416) 822 3434.

You can also fill-out the [information request form](#).

9.3. III. BASIS Training Videos

BASIS complete inventory management solution for counts, PO Receipt, Order Shipping, Location Tracking and much more...

YOUTUBE VIDEOS

[BASIS YouTube Channel](#)

[BASIS TRAINING VIDEOS](#)

TRAINING VIDEOS

[Installing on iPad and pairing scanner](#)

[Starting Inventory on the Desktop Version](#)

[Performing count on iOS devices](#)

[Final Inventory Steps](#)

[Receiving Purchase Orders](#)

[Shipping Sales Orders](#)

Performing transfers (coming soon)

[Label Printing](#)

WEBINARS/REFERENCES

[NOT JUST A TOY: LEARN HOW AN IPAD CAN HELP YOUR MANUFACTURING BUSINESS!](#)

[BASIS Review and FAQ Webinar](#) (August 6, 2015)

9.4. IV. PRISM Training Videos

PRISM is the front end of a complete hosted sales tool designed specifically for companies to take orders on the road, at trade shows and in their showroom. The iPad front end's mission is to be as powerful yet as simple as possible for the salesperson to use on a day to day basis.

TRAINING VIDEOS

[iPad Memory Management](#)

[Pairing a Bluetooth Scanner](#)

[PRISM YouTube Channel](#)

[PRISM TRAINING VIDEOS](#)

WEBINARS/REFERENCES

[PRISM New Look Intro](#) (July 14, 2014)

[PRISM Order Entry Webinar](#) (August 20, 2014)

[EVERYDAY SALES CAN BE INNOVATIVE WITH THE IPAD!](#)