

Docs

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Getting Started

Create an Account

Navigate to ftsware.com Click **Login** Click **Register** for an account. Enter your email address, name, and Password. Confirm your email by clicking on the link in the email you just received from FTS.

Log In

Go to the homepage (ftsware.com) and click **Login** Enter your email address and password used during registration. If you are having trouble with your password, see **Reset Password** below.

Reset Password

From the login page, click **Forgot Password** Enter your email address and follow the instructions sent to your email.

Walkthrough

This document provides a step-by-step walkthrough of how to use the features of this project. Follow the instructions below to get started.

Access Control

The **Access Control** module allows administrators to restrict employee access to items, drawers, cabinets, or stations. Rules are created that define who can (or cannot) issue items and under what conditions.

Also known as: *Restrictions, Permissions, Access Rules*

What Access Control Is

- Access Control creates **rules** that limit inventory access.
- Rules can apply to:
 - **Item** – restrict how much or how often an item can be issued.
 - **Drawer** – limit access to specific cabinet drawers.
 - **Cabinet** – limit access to an entire cabinet.
 - **Station** – limit access to everything within a station.
 - **Issue Other Item** – require employees to issue a substitute item before issuing the original.

Important: Access Control is a **software restriction only**. It cannot physically stop an employee from opening a drawer if the cabinet locks are shared. Always treat it as an inventory management tool, not a security system.

Examples

- Limit safety glasses to **1 pair per employee per week**.
- Restrict a supervisor-only drawer to supervisors.
- Block the Milling department from seeing or issuing items at the Lathe station.
- Require employees to issue "old stock" (e.g., older inserts) before they can issue "new stock."

Adding a New Rule

1. Navigate to the **Access Control** module from the [Dashboard](#).
2. Click **Add New Rule**.
3. Choose a **Rule Type**: Item, Drawer, Cabinet, Station, or Issue Other Item.
4. Select the item, drawer, cabinet, or station to apply the rule.
5. Configure options (time intervals, quantity limits, or substitute items).
6. Choose which employees the rule applies to (or doesn't apply to).
7. Save the rule.

Audit Logs Tab

The **Audit Logs** tab shows all changes made to access control rules.

- Includes **who** made the change and **when**.
 - Provides accountability for all rule creation, edits, and deletions.
-

FAQ

Can I restrict access by employee?

Yes. When creating a rule, choose which employees the rule **Applies To** or **Doesn't Apply To**.

Can I limit how often an item can be issued?

Yes. Create an **Item rule**, enable **Time Options**, and set a quantity limit with a time interval (e.g., 1 pair of safety glasses per week).

Can I require substitutes to be used before an item?

Yes. Use the **Issue Other Item** rule to make employees issue a secondary item before the primary one.

Does Access Control prevent drawer opening?

No. Drawer restrictions are **software-only**. All drawers open on the same lock backbone — so use these rules for inventory control, not physical security.

Related Topics

- [Employees](#)
- [Items](#)
- [Stations](#)
- [Cabinets](#)

Creating a New Access Control Rule (Adding a Rule)

Also known as: Add Access Rule, New Restriction, Set Up Access Control

To create a new access control rule:

1. Navigate to the **Access Control** module from the [Dashboard](#).
 2. Click on **Add New Rule**.
 3. Choose a **Rule Type** (see below).
 4. Configure the rule details.
 5. Select which employees the rule applies to (or does not apply to).
 6. Save the rule.
-

Rule Types

Item Rule

Restricts use of a specific item.

- Can limit how many times it can be issued.
- Can set a time window (e.g., 1 per day, 3 per week).
- Example: Safety glasses limited to **1 pair per employee per week**.

Drawer Rule

Restricts access to a cabinet drawer.

- Example: Only supervisors can access Drawer 4 in Cabinet A.

Cabinet Rule

Restricts access to an entire cabinet.

- Example: Block employees in the Milling department from accessing the Lathe cabinet.

Station Rule

Restricts access to all cabinets within a station.

- Example: Limit certain employees to the "Maintenance" station only.

Issue Other Item Rule

Requires employees to issue one item before another.

- Example: Employees must issue “Old Inserts” before they can issue “New Inserts.”
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Employee Scope

When creating a rule, you can specify:

- **Applies To:** Employees who the rule affects.
- **Does Not Apply To:** Employees who are exempt.

Tip: Use this to apply rules to departments, roles, or individuals.

Audit Logs

All rule changes are recorded in the [Audit Logs tab](#).

- Shows who created, edited, or deleted a rule.
 - Provides accountability and traceability.
-

FAQ

Can I restrict an item to supervisors only?

Yes. Create an **Item Rule** and set the **Does Not Apply To** list to include only supervisors.

How do I limit frequency of issuing an item?

Use an **Item Rule** with **Time Options** (e.g., max 1 issue per week).

Can I block an entire cabinet?

Yes. Use a **Cabinet Rule** to restrict access to the whole cabinet.

What's the difference between Drawer and Cabinet rules?

- **Drawer Rule** = restricts a single drawer.
- **Cabinet Rule** = restricts every drawer in the cabinet.

Can I use Issue Other Item for safety stock rotation?

Yes. For example, require employees to issue “Old Stock” before they can issue “New Stock.”

Related Topics

- [Access Control Overview](#)
- [Employees](#)
- [Items](#)
- [Stations](#)
- [Cabinets](#)

Cabinets

Cabinets are a major part of FTS because they control where inventory is stored, tracked, and managed. The **Cabinet** module is where items are assigned to a location.

Also known as: *Virtual Cabinets, Toolbox Cabinets, Cabinet Locations*

What is a Cabinet?

A cabinet can be either **physical** or **virtual**:

- **Physical Cabinet:** A real storage unit such as a Lista toolbox or vending machine.
- **Virtual Cabinet:** A location that functions like a cabinet in the system but does not physically exist as a traditional toolbox.
 - Examples: a coolant shed, warehouse racking, or an open storage area.
 - Even though there isn't a physical cabinet, FTS can still track inventory at that location using cabinet features.
 - **Important:** All Virtual Cabinets should use the cabinet type **Traditional – No Lock**.

What You Can Do in the Cabinet Module

- **Create or Edit Cabinets:** Add new cabinets or update existing ones.
 - **Search and Review Inventory:** Look inside a specific cabinet to see the items stored there.
 - **Change Bin Locations:** Reassign items to different locations inside a cabinet.
 - **Adjust Min/Max:** Update stocking levels for items.
 - **Enter On-Hand Quantities:** Record the current quantity of items in a cabinet.
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Why Cabinets Matter

- Cabinets are the foundation of **location-based inventory tracking** in FTS.
 - They provide visibility into **where items are stored** and ensure stock levels are managed correctly.
 - Virtual cabinets extend the same features to non-traditional storage areas, giving you flexibility in how you track inventory.
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Examples

- **Physical Cabinets:** Lista toolbox, tool crib cabinet, vending drawer system.
 - **Virtual Cabinets:** Coolant shed, warehouse racking, outdoor storage containers.
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Related Topics

- [Stations/Station Groups](#)
- [Creating a New Cabinet](#) (*if you plan to have a page for this*)
- [Items](#)

Cabinet Types

Cabinets in FTS can be one of several types. The cabinet type determines whether the cabinet is physical or virtual, and whether it is controlled by a locking mechanism.

Also known as: Cabinet Categories, Cabinet Type Options

Traditional – No Lock

A cabinet or location that is **unmanaged** and not controlled by any locking mechanism.

- Use this for **Virtual Cabinets** (e.g., coolant shed, warehouse racking, open storage).
 - No Device ID is required.
-

Westlock

A cabinet controlled by the **FTS Cloud locking mechanism (Nimbis)**.

- Requires a **Device ID** from the control box.
 - Ensures only authorized users can access the cabinet.
-

Bulk

A bulk cabinet controlled by the **FTS Cloud bulk locking mechanism (Nimbis)**.

- Requires a **Device ID** from the control box.
 - Designed for larger-volume storage where bulk access is controlled.
-

FAQ

Which cabinet type should I use for a Virtual Cabinet?

Always use **Traditional – No Lock**.

What is the difference between Westlock and Bulk?

Both are controlled cabinets with Device IDs.

- **Westlock** is for standard drawer/toolbox style cabinets.
- **Bulk** is for large-volume storage.

Do all cabinet types need a Device ID?

No. Only **Westlock** and **Bulk** require a Device ID.

Traditional – No Lock does not.

Related Topics

- [Cabinets \(Overview\)](#)
- [Creating a New Cabinet](#)
- [Stations/Station Groups](#)

Creating a New Cabinet (Adding a Cabinet)

Also known as: *Add Cabinet, New Cabinet, Set Up Cabinet*

To add a new cabinet to the FTS system, follow these steps:

1. Navigate to the **Cabinets** module from the [Dashboard](#).
2. Click on the **Create New Cabinet** link.
3. Fill in the cabinet details:
 - **Station** (choose the [Station](#) this cabinet belongs to from the dropdown list).
 - **Cabinet ID** (a short identifier, often a number or short code).
 - **Description** (clear description so everyone knows what the cabinet is used for).
 - **Cabinet Type** (see [Cabinet Types](#) for options).
 - **Device ID** (only for cabinets with locking mechanisms).
4. Click **Save** to add the cabinet.

Tip: Cabinets can be **physical** (e.g., Lista toolbox, vending drawer) or **virtual** (e.g., coolant shed, warehouse racking).

Virtual Cabinets must use the cabinet type **Traditional – No Lock**.

Cabinet Type Options

- **Traditional – No Lock**

Cabinet or location is unmanaged and not controlled by a locking mechanism.

- Use this for **Virtual Cabinets** (non-physical storage areas).

- **Westlock**

Cabinet controlled by the FTS Cloud locking mechanism (Nimbis).

- **Bulk**

Bulk cabinet controlled by the FTS Cloud bulk locking mechanism (Nimbis).

For more details, see [Cabinet Types](#).

Device ID

- A unique identifier printed on the bottom of the FTS Cloud Control Box.
- Required for cabinets with locking mechanisms (**Westlock** or **Bulk**).
- Not required or shown for **Traditional – No Lock** cabinets.

FAQ

What is a good Cabinet ID?

Keep it short and easy to recognize, such as [CAB01](#), [TOOLBOXA](#), or [VEND01](#).

Which Cabinet Type should I use for a Virtual Cabinet?

Always use **Traditional – No Lock**.

Where do I find the Device ID?

Look on the bottom of the FTS Cloud Control Box. You only need this if the cabinet has a locking mechanism.

Can I assign a cabinet to more than one station?

No. Each cabinet belongs to exactly one [Station](#).

Related Topics

- [Cabinets/Virtual Cabinets \(Overview\)](#)
- [Stations/Station Groups](#)
- [Creating a New Station](#)
- [Cabinet Types](#)

Locations

A **Location** (sometimes called a *bin*) is the smallest unit of storage inside a cabinet. Every item in FTS must be assigned to a location so its quantity, min/max levels, and activity can be tracked.

Locations are defined in a **grid pattern** inside each cabinet — made up of drawers, columns, and rows (similar to Excel).

Also known as: *Bins, Cabinet Locations, Storage Locations*

Why Locations Matter

- **Inventory Tracking:** Each location holds the current quantity of its assigned item.
 - **Purchasing Control:** Min/Max values on a location determine when items are re-ordered.
 - **Flexibility:** Locations can be created manually, in bulk with Cabinet Builder, or with a spreadsheet import.
 - **Accuracy:** Keeping item assignments and counts tied to locations ensures clean reporting and auditing.
 - **Mobility:** Items can be moved between locations when needed, and all of their data (open POs, transactions, on-hand quantities, alerts, etc.) moves with them.
-

Methods to Create Locations

There are three ways to create locations inside a cabinet. Each method is best for a different situation.

Method	Best For	How It Works	Example Use Case
Create a New Location	One-off, single locations	Manually add a single location by selecting drawer, column, row, and optional item details.	You need to add a new location in drawer 3, row 5, column B.
Cabinet Builder	Building many empty locations quickly	Select drawers, rows, and columns to auto-generate multiple locations at once.	You're setting up a new cabinet with 10 drawers, each with 6 columns and 5 rows.
Location Import	Assigning items or updating many locations	Fill out an Excel template with locations, items, Min/Max, Capacity, etc., then upload it.	You want to update 200 locations to assign items and adjust Min/Max values.

Quick Recommendations

- Use **Create a New Location** for *one location at a time*.
 - Use **Cabinet Builder** for *bulk creation of empty grids*.
 - Use **Location Import** for *bulk updates or assigning items to many locations*.
-

FAQ

What is a location?

A location (or bin) is a storage spot inside a cabinet, defined by drawer, column, and row.

Do items have to be assigned to a location?

Yes. Every item must be tied to a location so the system can track quantities and purchasing rules.

Can I move items between locations?

Yes. Items can be moved to a new location using the **Move** link. When an item is moved (or swapped), all of its associated data — including open purchase orders, transactions, on-hand quantities, unreturned inventory, alerts, and min/max settings — moves with it.

Which method should I use to create locations?

- **Few locations** → Create a New Location
- **Lots of locations** (rows/columns) → Cabinet Builder
- **Lots of items or updates** → Location Import

Can a location hold more than one item?

Yes, if **Location Expansion** is enabled.

Related Topics

- [Cabinets \(Overview\)](#)
- [Creating a New Cabinet](#)
- [Creating a New Location](#)
- [Cabinet Builder](#)
- [Location Import](#)
- [Items](#)

Additional Location Tabs

Each location in a cabinet has several tabs that provide extra details and controls. These tabs are visible when viewing a location.

Open POs

Displays information about the **open purchase orders** for this location.

- Shows details of any active POs.
 - Provides a link to navigate directly to the PO.
-

Alerts

The **Alerts** tab is used to set up critical quantity notifications for a location.

When the quantity falls to or below a set point, alerts are sent to the station and/or supplier.

How to Open the Alerts Tab

1. Navigate to the **Cabinets** module from the [Dashboard](#).
 2. Select the cabinet that contains the location you want to set alerts for.
 3. Click on the location.
 4. Open the **Alerts** tab.
-

How to Set an Alert

1. Type in the **Alert Quantity** (the level at which you want to be notified).
 2. Optionally, add a **Note** to remind you why you set the alert.
 3. Click the **plus (+) button** to save the alert.
 4. Choose one or more notification options:
 - **Email Supplier:** Send an alert to the Supplier's email(s).
 - **Email Supervisor:** Send an alert to the Station's Notification email(s).
 - **Alert Once:** Only send the email once when the quantity reaches the alert level. If unchecked, emails will be sent every time the quantity is reduced to or below the alert level.
-

FAQ: Alerts

What is an Alert Quantity?

A threshold you set for an item's on-hand quantity. When the item reaches or falls below this number, an alert is triggered.

Who gets alerted?

- [Suppliers](#): if “Email Supplier” is checked.
- **Station Supervisors**: if “Email Supervisor” is checked.

What does “Alert Once” mean?

- **Checked**: Sends a single alert the first time the quantity hits or drops below the alert level.
- **Unchecked**: Sends an alert **every time** the quantity decreases while at or below the alert level.

Can I add notes to alerts?

Yes. Notes are optional and can help remind you why an alert was created (e.g., “Critical for maintenance” or “Backup supplier delay”).

Can I set multiple alerts for the same location?

Yes. You can create more than one alert with different quantities or notification options.

History

Shows the [Transactions](#) for this location.

- Similar to Station History, but limited only to this location.
 - Use grid filters to search by date, item, or transaction type.
-

Audit Logs

Shows all changes that have been made to this location since it was created.

- Includes **who** made the change and **when** it was made.
 - Useful for compliance and tracking adjustments.
-

Related Topics

- [Locations Overview](#)
- [Creating a New Location](#)
- [Cabinet Builder](#)
- [Location Import](#)
- [Stations/Station Groups](#)

Creating a New Location (Adding a Location)

See [Locations Overview](#) for more about what locations are and the different ways to create them.

Also known as: *Create Location, Add Location, Set Up Location, Bin*

To create a new location inside a cabinet, follow these steps:

1. Navigate to the **Cabinets** module from the [Dashboard](#).
2. Click on the cabinet where you want to create a location.
3. Click on **Create New Location**.
4. Fill in the location details (see below).
5. Click **Save** to add the location.

Tip: Locations are defined in a grid pattern inside drawers — with rows and columns, similar to Excel.

Location Fields

(same as before — *Drawer, Column, Row, Item, Min, Max, Capacity, Location Expansion, Restock*)

Moving an Item to a New Location

When an item is assigned to a location, a **Move** link will appear. This lets you move the item to a different location.

What Moving Includes

When you move an item to a new location (or swap it with another item), all data tied to the original location moves with it. This includes:

- Open purchase orders
- Transaction history
- Quantity on hand
- Unreturned inventory
- Alerts
- Min/Max values
- Capacity setting

In short: moving an item is a **full relocation** of the item and its associated data.

How to Move an Item

1. Click the **Move** link next to the item.
2. A modal window will open.
3. Choose the destination:
 - **Station**
 - **Cabinet**
 - **Drawer**
 - **Column**
 - **Row**
4. Select the new location:
 - You may choose an empty location, or
 - You may choose a location that already has an item.

If the Destination Location is Empty

- The item (and all associated data) will be moved directly to that location.

If the Destination Location Already Has an Item

- A confirmation dialog will appear asking if you want to **swap locations**.
- Click **Yes**: The two items (and all their associated data) will switch places.
- Click **No**: The move process is canceled.

FAQ

What is a location?

A location is a *bin* inside a cabinet. Each location is defined by a drawer, column, and row.

Do I have to assign an item when creating a location?

No. Items can be assigned later if needed.

How do Min and Max affect purchasing?

- **Min**: When stock falls to or below this amount, the item appears on the next PO.
- **Max**: The PO will order enough to bring the quantity back up to this amount.

What's the difference between Capacity and Max?

- **Capacity**: Theoretical number of items that could fit in the location.
- **Max**: How much the system will order up to.
Capacity does not restrict receiving or purchasing.

How do I move an item to a new location?

Click the **Move** link, choose the destination, and confirm. If the new location has an item, you can choose to swap them or cancel.

What happens when I move an item?

All of the item's data moves with it — including open POs, transactions, on-hand quantity, unreturned inventory, alerts, min/max, and capacity settings.

Related Topics

- [Locations Overview](#)
- [Creating a New Cabinet](#)
- [Cabinet Builder](#)
- [Location Import](#)
- [Items](#)

Creating Multiple Locations with Cabinet Builder (Cabinet Builder Tool)

See [Locations Overview](#) for more about what locations are and the different ways to create them.

Also known as: Cabinet Builder, Bulk Location Creator, Build Multiple Locations

The **Cabinet Builder** tool is used to create many locations (bins) in a cabinet all at once. This is especially helpful when you are setting up a new cabinet or adding rows and columns to an existing one.

Tip: Even if you don't plan to use every bin right away, it's best practice to build out as many physical locations as possible. This makes it easier to assign items later.

When to Use Cabinet Builder

- **New Cabinet Setup:** Fill out all drawers, rows, and columns during the initial cabinet build.
- **Expanding an Existing Cabinet:** Add new drawers or bins to cabinets that already have some locations created.
- **Not for Single Locations:** If you only need one location, use [Creating a New Location](#).

Steps to Use Cabinet Builder

1. Navigate to the **Cabinets** module from the [Dashboard](#).
2. Find the cabinet you want to build out and click the **gear icon** on the right side.
3. Choose **Cabinet Builder** from the menu.
4. Set up the cabinet drawers, columns, and rows (see details below).
5. Confirm and create the locations.
6. Use the links provided to either:
 - Create more locations, or
 - Go directly to the locations you just built.

Drawer Setup

Select the drawers you want to build.

- On a computer: click the starting drawer (e.g., **01**), hold **Ctrl**, and click the ending drawer (e.g., **11**).
- All drawers between those numbers will be selected.

Columns Setup

Choose how many **columns** the drawer should have.

- Columns are labeled alphabetically: A, B, C, D, etc.
 - Example: Selecting **A-F** creates 6 columns.
-

Rows Setup

Choose the **rows** for each column.

- **From Row:** The starting row (e.g., **01**).
 - **To Row:** The ending row (e.g., **05**).
 - You don't have to start at 1 — you can continue from the last row used (e.g., start at **06**).
-

Locations Created

When the builder runs, you'll see a confirmation of how many new locations were created.

- Click the first **link** to create more locations.
 - Click the second **link** to go directly to the newly created locations.
-

FAQ

What is Cabinet Builder?

A tool that lets you create multiple locations (bins) in a cabinet at once, instead of creating them one by one.

When should I use Cabinet Builder vs. Create Location?

- Use **Cabinet Builder** for bulk setup (entire drawers, rows, or columns).
- Use **Create Location** for one-off, manual locations.

Can I add more locations to a cabinet later?

Yes. You can use Cabinet Builder again to add new drawers or expand existing ones.

Related Topics

- [Cabinets/Virtual Cabinets \(Overview\)](#)
- [Creating a New Cabinet](#)
- [Creating a New Location](#)

- [Stations/Station Groups](#)

Mass Importing and Updating Locations (Location Import Tool)

See [Locations Overview](#) for more about what locations are and the different ways to create them.

Also known as: *Location Import, Bulk Location Upload, Mass Update Locations*

The **Location Import Tool** lets you add or update many cabinet locations at once using an Excel template. This saves time when setting up a new cabinet, assigning items to locations, or updating details like Min/Max, Capacity, or Restock status.

Tip: Use Location Import when you have many locations to load. If you only need one location, use [Creating a New Location](#). For building drawers, rows, and columns, use [Cabinet Builder](#).

Before You Begin

- **Item IDs must already exist** in the system before you can import them into a location.
- Each location must be **unique** — two items cannot share the same drawer/row/column unless Location Expansion is enabled.
- Use the Western Tool & Supply Item ID whenever possible. This makes purchasing smoother and avoids having to redo imports later.

Steps to Import Locations

1. Navigate to the **Cabinets** module from the [Dashboard](#).
2. Select the cabinet you want to update.
3. Click the **cloud upload button** in the top right corner.
4. Download the **Location Import Template** (Excel).
 - You can download a blank template or a sample template (delete sample rows before using).
5. Fill out the template with your location details and item assignments:
 - Drawer, Column, Row
 - Item ID (must already exist in Items)
 - Min, Max, Capacity, Restock, Expansion (as needed)
6. Save the file to your computer with a clear name (e.g., `Cabinet1_LocationImport.xlsx`).
7. Return to the **Import Page** and click **Choose File** to upload your template.
8. Review the preview for errors (see below).
9. Click **Import** to create the new locations.

Updating Existing Locations

If locations already exist and you want to change them:

1. On the Import Page, toggle from **Create** (default) to **Update**.
2. Upload your updated template file.
3. Review the preview to confirm changes.
4. Click **Update** to apply changes.
5. Verify that your updates appear in the cabinet.

Tip: For large changes, first run an **Export** from the Import Page. This gives you a pre-filled template with your current cabinet data. Update only what you need, then re-import.

Common Errors and Fixes

Item ID Not Found

- Cause: The item doesn't exist in the system or the ID is incorrect.
- Fix: Add the item to [Items](#) or correct the ID in your template.

Number Formatting

- Cause: Excel may drop leading zeros (e.g., **01** becomes **1**).
- Fix: Change the cell format to **Text** before saving.

Duplicate Locations

- Cause: Two rows in the template define the same drawer/row/column.
- Fix: Remove duplicates and re-import.

Import vs Update

- Cause: Importing a location that already exists.
 - Fix: Switch toggle to **Update** when modifying existing locations.
-

FAQ

When should I use Location Import vs Cabinet Builder?

- **Location Import:** Best for assigning items, updating Min/Max, or editing many locations.
- **Cabinet Builder:** Best for creating a grid of drawers, rows, and columns during initial setup.

Can I assign items to locations during import?

Yes. Add the Item ID to the row for the location. The item must already exist in [Items](#).

What happens if my file has errors?

The import preview will highlight issues. Fix the file (e.g., wrong Item ID, duplicates, bad formatting) and upload again. Nothing is saved until you click **Import** or **Update**.

Can I undo an import?

No direct undo. To fix mistakes, correct the template and re-import with the **Update** option.

Related Topics

- [Cabinets \(Overview\)](#)
- [Creating a New Cabinet](#)
- [Creating a New Location](#)
- [Cabinet Builder](#)
- [Items](#)

Categories

Categories are used to group items together for easier searching and purchasing. Think of them like **e-commerce website categories** — you can organize items into logical groups to make them easier to find.

Also known as: *Item Categories, Groups, Custom Categories*

What Categories Are (and Are Not)

- An **Item** can be assigned to zero, one, or many categories.
- Categories are **only used** for:
 - Assisting with searching for items.
 - Grouping items together for purchasing.
- **Most common use:** Grouping like items, or grouping all items needed for a specific process, part, or run.
- **Not used for reporting:** Categories do not appear in reports and cannot be used to report on historical transactions or spend.
 - If you need to capture data for reporting (e.g., job number, part number, cost code), use [Reporting Fields](#) instead.

Creating and Managing Categories

1. Navigate to the **Categories** module from the [Dashboard](#).
 2. Click the **plus (+) button** at the bottom of the Categories list to add a new category.
 3. Enter the following details:
 - **Category Name:** A clear name that identifies the group.
 - **Image (Optional):** You can upload an image to visually represent the category.
 4. Click **Add** to create the category.
 5. Add items to the category either directly in the **Categories module** or from within the **Items module**.
-

Subcategories

- You can create **subcategories** for further organization under a parent category.
 - Click the **plus (+) button** next to a category to add a subcategory.
 - Subcategories can have their own name, image, and assigned items.
 - Add as many levels of subcategories as needed.
-

Adding Items to Categories

1. After creating a category or subcategory, click **View Items**.
2. Click **Add/Remove** or use the **plus (+) button** to assign items.
3. Use the checkboxes to select or deselect items.
4. Click **OK** to save changes.

Tip: If you need more details about an item before adding it, click **View** to open the [Items module](#) and see its information.

FAQ

Can an item be in more than one category?

Yes. Items can be in multiple categories or no categories at all.

Are categories required?

No. Items do not have to belong to a category, but categories make searching and grouping easier.

Do categories affect purchasing or reporting?

Categories can group items for purchasing convenience, but they are **not used** in reporting and do not affect historical data or spend.

Can I use images for categories?

Yes. You can upload images to categories or subcategories for easier recognition.

Related Topics

- [Items](#)
- [Creating a New Item](#)
- [Cabinets](#)
- [Stations](#)

Dashboard

Overview

The dashboard is where you can access each module within FTS. Each of the modules are listed below with a link to find out more.

- **Cabinets** – Manage your vending machines and cabinets.

[Learn More](#)

- **Purchase Orders** – Create and manage purchase orders.

[Learn More](#)

- **Items** – Add and manage your inventory items.

[Learn More](#)

- **Suppliers** – Add and manage your suppliers.

[Learn More](#)

- **Employees** – Add and manage your employees.

[Learn More](#)

- **Stations** – Add and manage your stations.

[Learn More](#)

- **Reporting Fields** – Add and manage your reporting fields.

[Learn More](#)

- **Categories** – Add and manage your item categories.

[Learn More](#)

- **Reports** – View and generate reports.

[Learn More](#)

- **Access Control** – Manage employee access to cabinets and items.

[Learn More](#)

- **Gaging** – View and manage gaging data.

[Learn More](#)

Employees

The **Employees** module is where you manage the people who can access and use FTS. Employees can be added individually or imported in bulk.

Also known as: *User Management, Employee Records*

What Employees Are

- Every person who uses FTS is tracked as an **Employee record**.
- Employees can be given permissions that define what they are allowed to do at kiosks or in the system.
- Permissions can range from basic checkout functions to advanced supervisor tasks like restocking and adjusting.

What You Can Do in the Employee Module

- **Add New Employees:** Create records for employees one at a time (see [Adding an Employee](#)).
- **Import Employees:** Upload multiple employees at once from a template (see [Employee Import](#)).
- **Edit Employees:** Change permissions or update employee information.
- **Search/Filter:** Quickly find employees by name or by specific permissions.
- **Deactivate Employees:** Hide employees without deleting their history (keeps reports accurate).

Permissions Overview

Employee permissions control what users can do. Here is a typical setup for **Regular Users** and **Supervisors**.

Permission	Regular User	Supervisor
Issue items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Undo (cancel checkout before drawer closes)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adjust (return consumables)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Return (return semi-consumables and durables)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configure Kiosk	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Restock (receive POs)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Permission	Regular User	Supervisor
Physical (inventory counts)	✗	✓
Adjust All (for any employee)	✗	✓
Return All (for any employee)	✗	✓
Require Password (extra security for kiosk access)	✗	✓

Related Topics

- [Adding an Employee](#)
- [Employee Import](#)
- [Stations](#)
- [Cabinets](#)

Additional Employee Tabs

Each employee record in FTS has additional tabs that provide extra information or custom setup options.

History

Shows the [Transactions](#) for this employee.

- Similar to the **History tab** on Stations or Locations.
 - Displays all issues, returns, adjustments, and other activity tied to the employee.
 - Use filters to narrow by date, transaction type, or item.
-

Access Control

Lists any [Access Controls](#) applied to this employee.

- Controls which cabinets, stations, or items the employee can see or use.
 - Useful for limiting visibility or restricting access by role.
-

Reporting Field Default Values

Allows you to pre-fill [Reporting Fields](#) for this employee.

- When the employee issues an item, the selected fields will already be filled in.
- Saves time for employees who usually use the same reporting field values.
- Commonly used for:
 - Departments (e.g., "Maintenance" pre-filled as the department).
 - Jobs or cost centers where the employee rarely switches.

How to Set Defaults

1. Open the employee record.
2. Go to the **Reporting Field Default Values** tab.
3. Select or type the default values for the available reporting fields.
4. Save changes.

Tip: Defaults can be changed anytime if the employee's role or reporting needs change.

FAQ

What is Employee History used for?

It shows all transactions for that employee (issues, returns, adjustments). It's helpful for audits and tracking activity.

Can I restrict which stations or cabinets an employee can use?

Yes. Use the **Access Control** tab to apply limits.

What happens if I set Reporting Field Default Values?

Those values will automatically appear when the employee issues an item. The employee can change them if needed (unless the field is restricted).

Do defaults affect reporting?

Yes. The defaults are written to the item's reporting field at checkout, ensuring consistent data entry.

Related Topics

- [Employees \(Overview\)](#)
- [Adding an Employee](#)
- [Employee Import](#)
- [Reporting Fields](#)
- [Access Controls](#)
- [Transactions](#)

Creating a New Employee (Adding an Employee)

Also known as: Add Employee, New Employee, Set Up Employee

To add a new employee:

1. Navigate to the **Employees** module from the [Dashboard](#).
 2. Click on **Add New Employee** (or click the blue **plus (+)** button).
 3. Fill in the employee details:
 - o **Employee ID:** Usually the employee's number, but can be any unique numeric value.
 - o **First Name / Last Name:** The employee's name (or a role/generalization like "Tool Crib").
 - o **PIN:** A numeric PIN (recommended 4 digits) used for kiosk login.
 4. Set the correct permissions for the employee (see below).
 5. Click **Add Employee** to save.
-

Permissions

Regular User Permissions

- **Undo:** Cancel a checkout before the drawer is closed (avoids incorrect issues).
- **Adjust:** Return unused **consumable** items back into inventory.
- **Return:** Return **semi-consumable** or **durable** items after use.

Supervisor Permissions

Includes all regular user permissions plus:

- **Configure Kiosk:** Manage cabinet visibility, kiosk settings, timeouts, etc.
 - **Restock:** Receive purchase orders into inventory.
 - **Physical:** Perform inventory counts and verifications.
 - **Adjust All:** Adjust items for any employee.
 - **Return All:** Return items for any employee.
 - **Require Password:** Force employees to enter a numeric PIN for extra security.
-

Editing Employees

- Select an employee from the list to change details or permissions.
 - Use search or filters to find employees by name or permission.
 - Click **Update Employee** to save changes.
 - **Delete Employee** hides the record (keeps history intact for reports).
-

FAQ

Do employees need an Employee ID?

Yes. It must be unique. If no official number exists, create one (e.g., 1001, 1002).

Can an employee log in without a PIN?

No. A PIN is required for kiosk access.

What happens if I delete an employee?

The record is hidden but not removed — history and reporting remain intact.

See Also

- [Additional Employee Tabs](#) — Configure employee history, access controls, and reporting field default values.
-

Related Topics

- [Employees \(Overview\)](#)
- [Employee Import](#)
- [Stations](#)

Importing Employees (Employee Import Tool)

Also known as: *Bulk Employee Upload, Employee Import File*

The **Employee Import Tool** lets you add or update many employees at once using an Excel template.

Required Fields

Each employee record in the import file must include:

- **Employee ID**: A unique numeric identifier (employee number or any unique number).
 - **First Name / Last Name**: The employee's name or a role/generalization (e.g., "Tool Crib").
-

Suggested Fields

- **PIN**: A numeric PIN (recommended 4 digits).
- **Permissions**: Select Regular User or Supervisor permissions.

Regular User Permissions

- Undo, Adjust, Return

Supervisor Permissions

- All Regular User permissions plus: Configure Kiosk, Restock, Physical, Adjust All, Return All, Require Password
-

Steps to Import

1. Navigate to the **Employees** module from the [Dashboard](#).
 2. Click the **cloud upload button** in the top right corner.
 3. Download the **Employee Import Template**.
 - Blank template for new employees.
 - Sample template for reference (delete sample data before use).
 4. Fill out the template with employee details.
 5. Save and upload the file.
 6. Choose whether to **Append** (add new employees) or **Replace** (clear and replace all records).
 7. Review and confirm the import.
-

FAQ

What's the difference between Append and Replace?

- **Append:** Adds new employees while keeping existing ones.
- **Replace:** Clears all existing employees and replaces them with the uploaded list.

Can I set permissions during import?

Yes. Include the appropriate permission settings in the template file.

What happens if I import duplicates?

The system will flag errors. Update the file and re-upload.

Related Topics

- [Employees \(Overview\)](#)
- [Adding an Employee](#)
- [Stations](#)

Gaging

Items

The **Items** module is where you manage every item in FTS. Items can represent anything from cutting tools to maintenance supplies, and they are the backbone of the system.

Also known as: *Inventory Items, Parts, Tools*

What Items Are

- Each item has a unique **Item ID** that identifies it in the system.
 - Items can be linked to [Suppliers](#), [Categories](#), [Locations](#), and [Reporting Fields](#).
 - Items can be issued, returned, adjusted, or scrapped depending on their type.
 - An item may have additional settings that appear based on its type (e.g., Semi-Consumables).
-

Item Types

There are three main item types in FTS:

- **Consumable:** Items that are not expected to be returned once issued.
 - Example: inserts, paper, cleaning supplies.
 - Can be **Adjusted** (returned unused into stock).
- **Semi-Consumable:** Items that may be reused but are eventually scrapped.
 - Extra options:
 - **Usage Tracking Enabled:** Prompts for usage details when the item is returned. Data appears in the [Transaction Report](#).
 - **Auto Scrap:** After a set number of days (set at the [Station](#) level), the item is automatically scrapped if not returned.
 - **Return As Other Item:** Allows the item to be returned as a different item (commonly used for returning “used” versions).
 - Example: drill bits, end mills, safety gear with limited life.
 - Can be **Returned** (back into stock).
- **Durable:** Items that must be returned to remain in inventory.
 - Extra option:
 - **Usage Tracking Enabled:** Prompts for usage details when returned. Data appears in the [Transaction Report](#).
 - Example: gages, power tools, staplers.
 - Must be **Returned** (cannot be adjusted like consumables).

Item Flags

In addition to the three item types, items can be marked with special flags:

- **Used:** Marks the item as used. This is for reference only — FTS does not treat it differently in inventory.
- **Assembly Kit Enabled:** Makes the item an [Assembly Kit](#). The item itself becomes a virtual container for its component items.

Item Type Comparison

Feature / Action	Consumable	Semi-Consumable	Durable
Can be Adjusted (put back unused)	✓	✗	✗
Can be Returned (after use)	✗	✓	✓
Usage Tracking Enabled	✗	✓	✓
Auto Scrap	✗	✓	✗
Return As Other Item	✗	✓	✗

Quick Tip:

- Use **Consumable** for items that are gone once issued.
- Use **Semi-Consumable** when items may come back, but eventually expire or get scrapped.
- Use **Durable** for items that must always be returned and reused.

Item Flags

In addition to the three item types, items can be marked with special flags:

- **Used:** Marks the item as used. This is for reference only — FTS does not treat it differently in inventory.
- **Assembly Kit Enabled:** Makes the item an [Assembly Kit](#). The item itself becomes a virtual container for its component items.

Key Item Fields

- **Item ID:** Unique identifier for the item.
- **Supplier:** [Supplier](#) used when generating purchase orders.
- **Reference Item ID:** Secondary identifier (often an internal part number).
- **Barcode:** Barcode data, used for scanning and searching.
- **Commodity Code:** Code used to track spend by group (often tied to GL codes).
- **Minimum Order Quantity:** Minimum base-unit quantity required for purchase.
- **Default Purchase Unit Size:** Order multiples for the item.

Note: Commodity Codes are used for spend reporting. If you need to capture job/part/cost center data at checkout, use [Reporting Fields](#) instead.

Item Tabs

When viewing or editing an item, you will see several tabs:

- [Unit Info](#)
- [Locations](#)
- [Categories](#)
- [Open POs](#)
- [History](#)
- [Notes](#)
- [Access Control](#)
- [Assembly](#) (if enabled)
- [Audit Logs](#)

See [Additional Item Tabs](#) for details.

FAQ

What's the difference between Adjust and Return?

- **Adjust:** Used for **Consumable items**. If a consumable is issued but not actually used, it can be adjusted back into stock.
- **Return:** Used for **Semi-Consumable and Durable items**. These items are expected to come back after use, so they are returned into stock rather than adjusted.

Why can't Consumables be Returned?

Consumables are treated as "used up" once issued. If you need to put one back, it must be done through an **Adjust**, not a Return.

Why can't Durables be Adjusted?

Durables must always be returned to stay in inventory. Adjust is reserved for unused consumables only.

Which item types can use Auto Scrap?

Only **Semi-Consumables**. After a set number of days (configured at the [Station](#) level), unreturned Semi-Consumables will be automatically scrapped.

Which item types can use Usage Tracking?

Both **Semi-Consumable** and **Durable** items can have **Usage Tracking Enabled**, so extra details are logged when they are returned.

Related Topics

- [Creating a New Item](#)
- [Unit Info](#)
- [Assembly Kits](#)
- [Additional Item Tabs](#)
- [Suppliers](#)
- [Categories](#)
- [Reporting Fields](#)
- [Reporting Fields](#)
- [Transactions](#)

Additional Item Tabs

Each item record in FTS includes several tabs that provide more detail, history, or configuration.

Locations

Shows all [Locations](#) this item is assigned to.

- Lists every cabinet, drawer, column, and row containing the item.
 - Helpful for quickly seeing where stock is stored.
-

Categories

Lists all [Categories](#) the item belongs to.

- Items can be assigned to zero, one, or many categories.
 - Add or remove categories from this tab.
 - Click the **plus (+)** next to a category name to create a subcategory directly under it.
-

Open POs

Displays any **open purchase orders** that include this item.

- Shows PO number, supplier, and quantity.
 - Provides quick navigation to the PO.
-

History

Shows the [Transactions](#) for this item.

- Includes all issues, returns, restocks, and adjustments.
 - Similar to the History tab on Stations or Employees, but scoped to a single item.
-

Notes

Provides a space to record **internal notes** for the item.

- Notes are not emailed in reports.
 - **Show Notes in Vend:** If checked, the note will display at the kiosk when employees issue the item.
 - Useful for warnings, safety reminders, or usage instructions.
-

Access Control

Lists any [Access Controls](#) applied to this item.

- Restricts which employees or groups can issue the item.
 - Works the same way as Access Control on Stations and Locations.
-

Audit Logs

Shows all changes made to the item since it was created.

- Includes **who** made the change and **when**.
 - Useful for compliance, accountability, and troubleshooting.
-

FAQ

Can I assign an item to multiple locations?

Yes. An item can exist in multiple cabinets or bins at the same time.

Can an item belong to multiple categories?

Yes. Categories are flexible and items can be in multiple groups for easier searching.

What's the difference between Notes and Audit Logs?

- **Notes:** Internal messages or reminders for employees.
- **Audit Logs:** System-generated record of changes (who/when).

Will notes show up when issuing an item?

Only if **Show Notes in Vend** is enabled.

Related Topics

- [Items Overview](#)
- [Creating a New Item](#)
- [Unit Info](#)
- [Assembly Kits](#)
- [Categories](#)
- [Locations Overview](#)
- [Access Controls](#)

Assembly Kits

Also known as: Item Assemblies, Kit Items, Assembly Build

The **Assembly** tab allows you to create items that represent a sum of other items. When enabled, an "Assembly Kit" becomes its own item but is tied to the quantities of its component parts.

Enabling an Assembly Kit

1. Navigate to the **Items** module from the [Dashboard](#).
2. Create or edit the item you want to use as a kit.
3. Check **Assembly Kit Enabled**.
 - o The **Assembly** tab will appear.
4. On the Assembly tab, add the component items and their required quantities.
5. Save changes.

How Assemblies Work

- The Assembly Kit is issued like a normal item.
- When issued, the system automatically deducts quantities of the **component items** from inventory.
- The kit itself does not hold stock — inventory is tracked at the component level.

Example:

Assembly Kit = Starter Pack

- 1 × Safety Glasses
- 2 × Gloves (Pair)
- 1 × Dust Mask

Issuing 1 Starter Pack deducts these items from inventory.

Editing or Removing Assemblies

- To **edit quantities**, change the number on the Assembly tab.
- To **remove an item** from the assembly, delete it from the list.
- To **disable the assembly kit**, remove all items from the Assembly tab and uncheck **Assembly Kit Enabled**.

Assembly Kits at the Kiosk

- Employees see the Assembly Kit as one item.
 - When they check it out, the linked items are deducted automatically.
 - If any component is out of stock, the system will not issue the kit.
-

FAQ

What is the difference between an Assembly Kit and a regular item?

An Assembly Kit is a “virtual item” that consumes multiple other items when issued.

Can an item be both a normal stock item and part of an assembly?

Yes. Items can be issued individually and also be part of one or more assembly kits.

What happens if one of the components is out of stock?

The assembly cannot be issued until all required items are available.

Can assemblies be nested?

No. You cannot include an assembly kit inside another assembly kit.

Related Topics

- [Items Overview](#)
- [Creating a New Item](#)
- [Unit Info](#)
- [Additional Item Tabs](#)
- [Suppliers](#)

Creating a New Item (Adding an Item)

Also known as: Add Item, New Item, Set Up Item

To create a new item:

1. Navigate to the **Items** module from the [Dashboard](#).
 2. Click on **Add New Item** (or the **plus (+)** button).
 3. Fill in the item details (see below).
 4. Click **Save** to create the item.
-

Item Details

Item ID

A unique identifier for the item. Must be unique across all items.

Supplier

The supplier that will receive purchase orders for this item.

Reference Item ID

Another identifier for the item (often an internal part number).

Barcode

The item's barcode data, used when searching with a barcode scanner.

Commodity Code

Code used to group and report spend (often a GL code).

Tip: Commodity Codes are used for spend reporting. For tracking job/part/cost center data, use [Reporting Fields](#).

Minimum Order Quantity

The minimum number of units that must be ordered before the item appears on a purchase order.

Default Purchase Unit Size

Defines multiples in which the item is ordered.

Type

Determines how the item behaves in inventory:

- **Consumable**: Not expected to be returned.
 - **Semi-Consumable**: May be reused or scrapped. Enables extra fields: *Usage Tracking Enabled, Auto Scrap, Return As Other Item*.
 - **Durable**: Must be returned to remain in inventory.
 - **Used**: Marks the item as previously used.
 - **Assembly Kit Enabled**: Turns the item into a kit (sum of other items). Opens the [Assembly](#) tab.
-

Saving the Item

Once the core details are filled in:

- Click **Save** to create the item.
 - Additional tabs will appear (see [Unit Info](#), [Additional Item Tabs](#), and [Assembly](#)).
-

FAQ

Can an item have more than one ID?

Each item has one **Item ID**, but it may also have a **Reference Item ID** and a **Barcode**.

What's the difference between a Commodity Code and a Reporting Field?

- **Commodity Code** groups spend for reporting by item type or GL code.
- [Reporting Fields](#) capture additional data at checkout (job, part, cost center).

Why don't I see the Assembly tab?

The **Assembly Kit Enabled** box must be checked for the Assembly tab to appear.

Do I need to set a Minimum Order Quantity?

Not always. Use it only if suppliers require minimum purchases.

Related Topics

- [Items Overview](#)
- [Unit Info](#)
- [Assembly Kits](#)
- [Additional Item Tabs](#)
- [Suppliers](#)

- [Categories](#)
- [Reporting Fields](#)

Unit Info (Units of Measure)

Also known as: Item Units, Unit Info, Units of Measure

The **Unit Info** tab defines how an item is measured, issued, and purchased in FTS. It ensures consistent quantities across purchase orders, stocking, and employee checkouts.

Key Unit Fields

Base Unit

The smallest measurable unit of the item.

- All other unit conversions are calculated from the base unit.
- Example: **Each** drill bit, **Box** of 10, **Case** of 100.
- Reports and purchasing always calculate back to the base unit.

Default Issue Unit

The unit most commonly issued to employees at the kiosk.

- Example: If base unit is **Each**, you may set **Pack of 5** as the default issue.
- At checkout, this unit will be pre-selected.

Default Purchase Unit

The unit most commonly used when ordering from a supplier.

- Example: A supplier may only sell in **Boxes of 10**.
- When creating purchase orders, this unit will be the default.

Allow Issue

Determines which units are allowed to be issued at the kiosk.

- You may allow multiple units (e.g., Each, Pack, Box).
 - Employees can choose any of the allowed units when checking out the item.
-

How Units Work Together

- **Base Unit** = the foundation (1 unit).
- **Default Issue** = what employees most often take.
- **Default Purchase** = how suppliers deliver it.
- **Conversions** ensure that every transaction converts back to the base unit for accurate tracking.

Example:

- Base Unit = **Each**
- Default Issue = **Pack of 5**
- Default Purchase = **Box of 20**

If an employee checks out 1 pack, the system deducts **5 Each** from stock.

If a purchase order is placed for 1 box, the system adds **20 Each** into stock.

FAQ

What's the difference between Base Unit and Default Issue Unit?

- **Base Unit:** The smallest measurement the system uses for calculations.
- **Default Issue Unit:** The unit pre-selected for employees when they check out the item.

Can I have multiple purchase units?

Yes. You can define multiple purchase units, but one must be set as the **default**.

Do all items need a Barcode tied to their units?

No. A barcode is optional, but recommended if items are scanned at checkout.

What happens if I change the Base Unit later?

Changing the Base Unit will affect all transactions, reporting, and conversions. Avoid changing it once items have history.

Related Topics

- [Items Overview](#)
- [Creating a New Item](#)
- [Additional Item Tabs](#)
- [Suppliers](#)
- [Reporting Fields](#)

Purchase Orders (POs)

The **Purchase Orders (POs)** module is where all orders to suppliers are managed in FTS. You can create new purchase orders, review open or past orders, approve pending orders, export, or reverse receipts.

Also known as: *POs, Supplier Orders*

Types of Purchase Orders

FTS supports three types of purchase orders:

- **Manual PO:** Create anytime, for any item, directly from the Purchase Orders module.
- **Automatic PO:** Runs automatically on a schedule based on min/max requirements. Sent directly to the supplier without review.
- **Unapproved PO:** Runs automatically, but requires manual approval before sending. If not approved in time, it expires.

Note: Do not confuse **Unapproved POs** with **draft POs**.

- A **draft PO** is created when you uncheck the **Approved** box while creating a PO. Draft POs are incomplete orders, not tied to the approval workflow.
- The **PO Approval Process workflow** applies only to Approved POs and must be completed before the PO is sent to the supplier.

Approval Process

Purchase Orders can optionally use an **Approval Process**:

- Create a chain of approvers.
- Apply spending limits per person.
- Require final approval before sending to supplier.

See [Purchase Order Approval Process](#).

Common Tasks

- [Create a Manual PO](#)
- [Create an Automatic PO](#)
- [Create an Unapproved PO](#)
- [Export a PO](#)

FAQ

What's the difference between Automatic and Unapproved POs?

- **Automatic PO:** Sent directly to the supplier as soon as it runs.
- **Unapproved PO:** Requires manual approval first; if not approved, it expires.

Can I run POs for a single station?

Yes. When creating an Auto or Manual PO, you can select **All Stations** or a single station.

Can I export POs for recordkeeping?

Yes. Use the **Export** option to download POs in Excel format. See [Exporting Purchase Orders](#).

Related Topics

- [Suppliers](#)
- [Items](#)
- [Stations](#)
- [Employees](#)
- [Reporting Fields](#)

Creating a Manual Purchase Order (Adding a PO)

Also known as: Add Manual PO, Create PO, New PO

A **Manual Purchase Order** is created directly in the Purchase Orders module. Use this when you want to order items outside of automatic or scheduled runs.

Steps to Create a Manual PO

1. Navigate to the **Purchase Orders** module from the [Dashboard](#).
 2. Click on **Create Manual PO** (or the **plus (+)** button).
 3. Fill in the header details:
 - **Supplier** (the vendor you are ordering from).
 - **Station** (choose All Stations or a single station).
 - **Delivery Date** (when items should arrive).
 - **Reference Number** (optional reference ID).
 - **Notes** (any instructions for the supplier).
 4. Add items to the PO:
 - Click **Add Line Item**.
 - Select the **Item**, then enter **Quantity** and **Unit**.
 - Repeat for each item needed.
 5. Review the PO for accuracy.
 6. Click **Save** to create the PO.
-

After Saving

- The PO appears in the Purchase Orders list.
 - From here you can:
 - Print or email the PO.
 - Send to supplier (if electronic ordering is enabled).
 - Track open quantities.
-

FAQ

What's the difference between a Manual and Automatic PO?

- **Manual PO:** Created directly by a user.
- **Automatic PO:** Created by the system based on min/max levels or schedules.

Can I create a PO for one station only?

Yes. When creating the PO, choose the station instead of All Stations.

Can I add notes to the supplier?

Yes. Use the **Notes** field in the header section. Notes will appear on the printed/mailed PO.

What happens after I save the PO?

The PO becomes active in the system. You can then send it, export it, or track its progress.

Related Topics

- [Purchase Orders Overview](#)
- [Creating an Automatic PO](#)
- [Creating an Unapproved PO](#)
- [Exporting a PO](#)

Creating an Automatic Purchase Order (Auto PO)

Also known as: Add Automatic PO, Scheduled PO, Auto Order

An **Automatic Purchase Order** runs based on min/max rules or schedules. It is sent directly to the supplier without manual review.

Steps to Create an Automatic PO

1. Navigate to the **Purchase Orders** module from the [Dashboard](#).
 2. Click on **Create Auto PO**.
 3. Fill in the header details:
 - **Supplier** (the vendor you are ordering from).
 - **Station** (choose All Stations or a single station).
 - **Delivery Date** (optional expected delivery date).
 - **Reference Number** (optional).
 4. Select items for the PO:
 - The system will suggest items based on **Min/Max levels**.
 - You can review, add, or remove items as needed.
 5. Confirm and save the PO.
 6. The system automatically transmits the order to the supplier (if electronic ordering is enabled).
-

After Saving

- The PO is immediately active and typically sent to the supplier.
 - Employees can track the order in the Purchase Orders list.
 - No approval step is required.
-

FAQ

What's the difference between Automatic and Unapproved POs?

- **Automatic PO:** Sent directly to the supplier with no manual approval.
- **Unapproved PO:** Created automatically but requires manual approval before sending.

Can I edit items in an Auto PO before sending?

Yes. Before saving, you can add or remove items. After saving, the PO is locked once transmitted.

Can I run Auto POs for one station only?

Yes. Select the station instead of All Stations.

Related Topics

- [Purchase Orders Overview](#)
- [Creating a Manual PO](#)
- [Creating an Unapproved PO](#)
- [Exporting a PO](#)

Creating an Unapproved Purchase Order (Unapproved PO)

Also known as: Add Unapproved PO, Pending Approval PO, Approval Required PO

An **Unapproved Purchase Order** is created automatically by the system but requires manual approval before being sent to the supplier. If not approved within the expiration window, it is canceled.

Steps to Create an Unapproved PO

1. Navigate to the **Purchase Orders** module from the [Dashboard](#).
 2. Click on **Create Unapproved PO**.
 3. Fill in the header details:
 - **Supplier** (the vendor you are ordering from).
 - **Station** (choose All Stations or a single station).
 - **Delivery Date** (optional expected delivery date).
 - **Reference Number** (optional).
 4. Select items for the PO:
 - Suggested automatically from **Min/Max levels**.
 - Review, add, or remove items as needed.
 5. Save the PO. It is now marked as **Unapproved**.
 6. A notification is sent to the designated approvers.
-

Approval Workflow

- Approvers must log in to review and approve the PO.
 - If approved, the PO is transmitted to the supplier.
 - If not approved before the expiration period, the PO is canceled.
 - Approvers can add notes or comments as part of the approval process.
-

FAQ

What happens if an Unapproved PO isn't approved in time?

It expires and is automatically canceled. No order is sent to the supplier.

Can I change items in an Unapproved PO?

Yes. Items can be adjusted while the PO is pending approval.

Who gets notified when an Unapproved PO is created?

Approvers set in the [Approval Process](#) will be notified.

Can I resend approval requests?

Yes. Approval requests can be resent if an approver did not respond.

Related Topics

- [Purchase Orders Overview](#)
- [Creating a Manual PO](#)
- [Creating an Automatic PO](#)
- [Approval Process](#)
- [Exporting a PO](#)

Exporting Purchase Orders

Also known as: *Download POs, PO Export, Print PO*

The **Export** feature lets you download purchase orders from FTS into Excel format. This is useful for recordkeeping, offline analysis, or sharing with stakeholders.

Steps to Export a Purchase Order

1. Navigate to the **Purchase Orders** module from the [Dashboard](#).
 2. Locate the PO you want to export.
 3. Click on the **Export** button.
 4. Choose **Excel** format and confirm.
 5. The file will be downloaded to your computer.
-

Export Options

- **Single PO:** Export only the selected purchase order.
 - **Multiple POs:** Use filters (date range, supplier, station) to select multiple POs and export them together.
 - **PO Lines:** Each PO line includes item details, quantities, and pricing.
-

What's Included in the Export

- PO header (Supplier, Station, Delivery Date, Reference Number).
- Line items (Item IDs, descriptions, quantities, unit prices).
- Totals and spend amounts.

Tip: Exported files are formatted for Excel, making them easy to filter, sort, or pivot.

FAQ

What format is the export?

All exports are generated in Excel format ([.xlsx](#)).

Does exporting affect the PO in FTS?

No. Exporting only downloads a copy; it does not change or lock the PO.

Can I re-export the same PO later?

Yes. You can export any PO as many times as needed.

Related Topics

- [Purchase Orders Overview](#)
- [Creating a Manual PO](#)
- [Creating an Automatic PO](#)
- [Creating an Unapproved PO](#)
- [Approval Process](#)

Purchase Order Approval Process

Also known as: *PO Approvals, Approval Chain, Approval Workflow*

The **Purchase Order Approval Process** ensures that certain POs are reviewed and approved before being sent to suppliers. This is most commonly used for **Unapproved POs**, but can also apply when company policy requires oversight based on spend or item type.

How Approvals Work in POs

1. A purchase order is created.
 - If the supplier has an **Approval Process workflow**, the PO cannot be marked **Approved** until the full workflow is complete.
 - This is different from creating a draft PO by unchecking the **Approved** box. Draft POs are simply incomplete orders and are not tied to the approval workflow.
 2. If the workflow applies, the PO is marked **Pending Approval**.
 3. Approvers are notified by email and inside FTS.
 4. Each approver reviews the PO:
 - Approve (moves to the next approver or to supplier if final).
 - Reject (sends the PO back to the creator).
 - Add notes or comments to explain decisions.
 5. Once the final approver approves, the PO is considered **Approved** and ready to send to the supplier.
-

Approval Chains

- You can configure multiple approvers in a **chain**.
 - Each approver must approve in order before the PO is sent.
 - Approvers can have **spending limits**, so higher-value POs require additional sign-off.
 - If an approver rejects a PO, it stops the approval process until corrected.
-

Spending Limits

- Each approver can have a **dollar threshold**.
 - If the PO amount is below the threshold, that approver can finalize it.
 - If the PO amount is above the threshold, it moves on to the next approver in the chain.
-

Notifications

- Approvers are automatically notified when a PO needs their approval.

- Creators are notified once the PO is approved, rejected, or expired.
 - Approval requests can be **resent** if an approver does not respond.
-

FAQ

What happens if a PO is not approved in time?

It expires and no order is sent to the supplier.

Can I have multiple approvers for the same PO?

Yes. Approval chains allow multiple approvers in sequence.

Can I set spending limits?

Yes. Approvers can have dollar thresholds. If a PO exceeds their limit, it moves to the next approver.

Can I resend an approval request?

Yes. Approval requests can be resent if an approver does not act.

Can approvers add notes?

Yes. Approvers can include notes or comments when approving or rejecting a PO.

What's the difference between an unapproved PO and a draft PO?

- **Unapproved PO:** A system-created PO type that requires approval before sending. If not approved in time, it expires.
 - **Draft PO (unchecked Approved box):** A PO that has not yet been finalized by the creator. It is not part of the approval workflow and simply sits in draft until marked Approved.
-

Related Topics

- [Purchase Orders Overview](#)
- [Creating an Unapproved PO](#)
- [Creating a Manual PO](#)
- [Creating an Automatic PO](#)
- [Exporting a PO](#)

Reference

- [Transactions](#)

Transactions

Also known as: *Activity Records, Inventory Movements*

A **Transaction** is recorded any time an item's quantity changes in FTS. Transactions provide the history of how, when, and by whom items were used, returned, adjusted, or restocked.

What Creates a Transaction?

Any action that increases or decreases an item's stock creates a transaction:

- **Issue:** Item checked out by an employee.
 - **Return:** Item returned (Semi-Consumable or Durable).
 - **Adjust:** Consumable item added back into stock if unused.
 - **Restock:** Item received into inventory from a purchase order.
 - **Auto Scrap:** Semi-Consumable item automatically scrapped after expiration.
 - **Move:** Item moved from one location to another.
-

Where Transactions Are Used

- **History Tabs:** Found in [Items](#), [Stations](#), [Locations](#), and [Employees](#). Each history tab displays the transactions for that record.
 - **Reports:** Transactions are the foundation of many reports, including Transaction Report, Usage Per Month, and Unreturned Inventory.
 - **Audit and Compliance:** Transactions provide a complete audit trail of all inventory activity.
-

Example Transaction Record

- Date/Time
 - Employee
 - Item ID and Description
 - Station / Cabinet / Location
 - Action (Issue, Return, Adjust, Restock, Scrap, Move)
 - Quantity Change
 - Notes (if provided)
-

FAQ

What's the difference between a Transaction and an Audit Log?

- **Transaction:** Records item quantity changes (e.g., issue, return, restock).

- **Audit Log:** Records *system changes* to item or supplier settings (e.g., Min/Max changed, email updated).

Where can I see all Transactions?

Use the **Reports** module and run a **Transaction Report**.

Do all inventory actions create a transaction?

Yes. Any action that changes item stock creates a transaction.

Related Topics

- [Items](#)
- [Stations](#)
- [Locations](#)
- [Employees](#)
- [Reports](#)
- [Audit Logs](#)

Reporting Fields

Reporting fields are the backbone for tracking usable data in FTS reports. They are used to associate items with additional information (such as part numbers, job numbers, or cost codes) so that the right data is captured at checkout.

Also known as: *Custom Reporting Fields, User-Defined Fields*

What Reporting Fields Are (and Are Not)

- Used to track data that matters for reporting and analytics.
- Can be made **required** at checkout to ensure users enter data.
- Can be configured as **free entry** (user input) or **dropdown selection** (predefined list).
- **Items can be associated with multiple reporting fields.**
- **Employees can be assigned default values** for reporting fields so they don't have to re-enter the same data each time. This is commonly used for departments or cost centers. See [Employee Tabs](#).
- **Not used** for search or browsing: Do not confuse Reporting Fields with [Categories](#).
 - Categories help users **find and group items**, but they are **not included in reporting**.
 - Reporting Fields capture metadata at checkout that is used in reports.

Why Use Reporting Fields

- **Job/Part Tracking:** Track which job, part, or process consumed an item.
- **Cost Allocation:** Assign usage to specific projects or departments.
- **Analytics:** Build custom fields that match your shop's processes for deeper reporting insights.

Field Settings

When creating or editing a reporting field, you can control:

- **Required:** Must be filled out before checkout is allowed.
- **Allow User Input:** Users can type or scan values at checkout. If unchecked, users must choose from a dropdown.
- **Restrict User Input:** Allows users to type into this field, but only accepts values that already exist in the preloaded list.
 - Useful when there are many possible values and you want to prevent mistakes.
 - Works well with barcode scanners — users can scan a valid value instead of typing it.
- **Enable:** Activates or deactivates the field at checkout.
- **Name:** The name of the field (can be edited later).
- **View Order:** Sets the order in which fields appear at the kiosk. Lower numbers show first.
- **Character Min:** Minimum number of characters the user must enter if typing.

- **Character Max:** Maximum number of characters the user can enter if typing.
-

Ways to Add Data

- **Manually:** Add entries one by one to create a dropdown list.
 - **Import:** Upload a spreadsheet of values to create or update a list (see [Importing Data](#)).
-

FAQ

Can reporting fields be required?

Yes. If a field is marked **Required**, users must provide a value before checkout.

Can I use reporting fields as search categories?

No. Use [Categories](#) for grouping and searching items. Reporting fields are only used to capture data at checkout.

Can employees have default reporting field values?

Yes. Employees can be assigned **default values** for reporting fields so they don't have to re-enter the same data every time they issue an item.

- Commonly used for departments, jobs, or cost centers where the values rarely change.
 - Defaults are set in the [Employee Tabs](#).
-

Related Topics

- [Creating a New Reporting Field](#)
- [Importing Data into a Reporting Field](#)
- [Items](#)

Creating a New Reporting Field (Adding a Reporting Field)

Also known as: Add Reporting Field, New Reporting Field, Custom Field

To create a new reporting field:

1. Navigate to the **Reporting Fields** module from the [Dashboard](#).
2. Click on **Add New Reporting Field**.
3. Fill in the reporting field details:
 - **Name:** The field label (e.g., Part Number, Job Number).
 - **Required:** Must be filled out before checkout is allowed.
 - **Allow User Input:** Lets users type or scan data at checkout. If unchecked, users must choose from a dropdown.
 - Useful when there are many possible values and you want to prevent mistakes.
 - Works well with barcode scanners — users can scan a valid value instead of typing it.
 - **Restrict User Input:** Allows users to type into this field, but only accepts values that already exist in the preloaded list.
 - Useful when there are many possible values and you want to prevent mistakes.
 - Works well with barcode scanners — users can scan a valid value instead of typing it.
 - **Enable:** Activates or deactivates the field at checkout.
 - **View Order:** Sets the order in which fields appear at the kiosk. Lower numbers show first.
 - **Character Min:** Minimum number of characters the user must enter if typing.
 - **Character Max:** Maximum number of characters the user can enter if typing.
4. Click **Add Reporting Field**.

After Creating a Field

- Use the **Settings** button to adjust requirements.
- Add data options by either:
 - Typing and clicking the + button (adds a single value).
 - Uploading a list (see [Importing Data](#)).

FAQ

What happens if a field is required?

Users cannot complete checkout unless they provide a value for that field.

Can I change a field's name later?

Yes. The field name can be edited from the Settings screen.

Can I deactivate a field without deleting it?

Yes. Uncheck **Enable** to disable the field at checkout.

What is View Order?

It controls the order in which reporting fields are shown at the kiosk. For example, a field with **View Order = 1** will appear above a field with **View Order = 2**.

What are Character Min and Max?

- **Character Min:** The minimum number of characters a user must enter.
- **Character Max:** The maximum number of characters a user is allowed to enter.
These settings only apply if **Allow User Input** is enabled.

What does Restrict User Input mean?

This setting lets users type into the field, but only accepts values that already exist in the preloaded list.

- Helps prevent typos or invalid entries.
- Often paired with barcode scanners so users can scan valid values directly.

Related Topics

- [Reporting Fields Overview](#)
- [Importing Data into a Reporting Field](#)
- [Items](#)

Importing Data into a Reporting Field

Also known as: *Upload Reporting Field Data, Import Dropdown Values*

The **Import Tool** lets you load many dropdown options into a reporting field at once using an Excel template.

Tip: Importing is the fastest way to populate large dropdown lists (e.g., job numbers, part numbers).

Steps to Import

1. Navigate to the **Reporting Fields** module from the [Dashboard](#).
2. Select the reporting field you want to import data into.
3. Click the **cloud upload button**.
4. Download the **Import Template** (Excel).
 - o Blank template for new data.
 - o Sample template for reference (delete sample data before using).
5. Fill out the template with your data list.
6. Save the file and upload it using **Choose File → Open**.
7. Select whether to **Append** (add new data to the list) or **Replace** (clear and replace all data).
8. Click **Import** to load the data.

Error Handling

- **Duplicates:** If duplicate values exist, import will fail until fixed. Remove duplicates in the file or cancel them in the upload list.
- **Replace Warning:** If you choose Replace, you must confirm before existing data is cleared.
- **Import Failed:** If issues remain, you'll see a failure screen. Repair the file and re-upload.

At Checkout

- If the field has a dropdown list, users will see only those options.
- If **Allow User Input** is enabled, users can either pick from the list or type a new value.
- If disabled, they must select from the list only.

FAQ

Can I import into multiple reporting fields at once?

No. Imports are done one field at a time.

What's the difference between Append and Replace?

- **Append** keeps existing values and adds new ones.
- **Replace** deletes all current values and loads only the new list.

What happens if I forget to delete the sample data?

It will be imported into your list unless removed before upload.

Related Topics

- [Reporting Fields Overview](#)
- [Creating a New Reporting Field](#)
- [Items](#)

Reports

The **Reports** module lets you track, analyze, and export data from FTS. Reports can be run manually, customized, or scheduled to run automatically.

Also known as: *Analytics, Tracking Reports*

Report Types

Reports help answer questions about usage, spend, and activity. Examples include:

- Transaction report
 - Inventory Value
 - Unreturned Inventory
 - Item Price History
 - Usage Per Month
 - Open PO Lines
 - Purchase Summary
 - Purchase Summary Detailed
-

How to Use Reports

The typical workflow is:

1. [Run a Manual Report](#)
2. [Create a Custom Report](#)
3. [Schedule a Report](#)

Note: Some additional supplier reports (like Open PO Reports) can be scheduled directly in the [Suppliers Automated PO tab](#).

Related Topics

- [Running a Manual Report](#)
- [Creating a Custom Report](#)
- [Scheduling a Report](#)
- [Suppliers Automated PO Tab](#)
- [Purchase Orders](#)

Creating a Custom Report

Also known as: *Custom Analytics, Filtered Reports*

Custom reports let you tailor data views with filters and saved conditions. This is helpful if you often run the same filtered report.

Steps to Create a Custom Report

1. Navigate to the **Reports** module from the [Dashboard](#).
 2. Choose **Custom Report**.
 3. Select your base report type (e.g., Transaction, Inventory Value).
 4. Apply filters:
 - o Field filters (e.g., by Job, Station, Supplier).
 - o Conditions (equals, does not equal, begins with, contains).
 5. Save the report for reuse.
-

Benefits of Custom Reports

- Save time by reusing the same setup.
 - Standardize reporting across departments.
 - Reduce mistakes from re-applying filters manually.
-

FAQ

Can I edit a saved custom report?

Yes. Open it, adjust filters, and save again.

Do custom reports export to Excel?

Yes. All reports can be exported, including custom ones.

Related Topics

- [Reports Overview](#)
- [Running a Manual Report](#)
- [Scheduling a Report](#)

Running a Manual Report

Also known as: *On-Demand Report, Immediate Report*

Manual reports give you up-to-the-minute data from FTS. They are run directly from the Reports module.

Steps to Run a Manual Report

1. Navigate to the **Reports** module from the [Dashboard](#).
 2. Choose the report type you want to run.
 3. Select a **date range**.
 4. Apply any filters (if needed).
 5. Click **Run Report**.
 6. Export to Excel if desired.
-

Filters

- Use the **funnel icon** to filter by field.
 - Options include *equals, contains, begins with, does not contain*, etc.
 - Multiple filters can be combined with **And / Or**.
-

Examples of Manual Reports

- **Transaction:** List all issues, returns, adjustments for a time range.
 - **Inventory Value:** Calculate the current dollar value of stock.
 - **Unreturned Inventory:** Items checked out but not yet returned.
 - **Item Price History:** Track cost changes over time.
 - **Usage Per Month:** Analyze monthly consumption to set Min/Max.
 - **Open PO Lines:** See which purchase orders are still open.
 - **Purchase Summary:** Total spend for a period.
 - **Purchase Summary Detailed:** Detailed spend breakdown.
-

FAQ

Can I export manual reports?

Yes. All reports can be exported to Excel for further analysis.

Are manual reports real-time?

Yes. They run in the cloud and show up-to-the-minute data.

Related Topics

- [Reports Overview](#)
- [Custom Reports](#)
- [Scheduled Reports](#)

Scheduling a Report

Also known as: *Automated Reports, Report Scheduling*

Scheduled reports run automatically at set times and are emailed to chosen recipients.

Steps to Schedule a Report

1. Navigate to the **Reports** module from the [Dashboard](#).
 2. Click **Schedule a Report**.
 3. Choose the **Report Type**.
 4. If you have a **Custom Report**, you can apply it here.
 5. Select timing:
 - Days of week, monthly, or daily.
 - Set the time of day.
 6. Enter **recipient email addresses**.
 7. Set the reporting window (e.g., last 7 days).
 8. Click **Create Scheduled Report**.
-

Notes

- Six main report types are available for scheduling (Transaction, Inventory Value, Unreturned Inventory, Item Price History, Usage Per Month, Purchase Summary).
- Reports are emailed in Excel format.
- Multiple recipients can be added.

Additional scheduled reports are available in [Suppliers → Automated PO tab](#), such as **Open PO Reports**.

FAQ

Can I schedule multiple reports?

Yes. Each report can be scheduled separately.

Can I send scheduled reports to multiple people?

Stations

Stations group a collection of cabinets to represent either the **physical layout** of your facility or to allow **separate purchasing and visibility**. A station is essentially a way to organize cabinets under a common grouping.

Also known as: *Station Groups, Customer Stations, Station Locations*

Why Use Stations?

- **Organize Cabinets:** Cabinets can be grouped by building, floor, or department.
 - **Separate Purchasing:** Each station can have its own purchase orders.
 - **Customer Visibility:** Stations let customers see only the cabinets assigned to their station.
 - **Spoke-Hub Model:** Similar to a distribution model where a central hub manages multiple spokes (stations).
-

Examples

- **Geographic Layout**

- Station 01 – California (Headquarters)
- Station 02 – Nevada
- Station 03 – Colorado

- **Inside One Building**

- Station A – Milling
 - Station B – Deburr
 - Station C – Maintenance
-

Related Topics

- [Cabinets \(Overview\)](#)
- [Purchase Orders](#)
- [Suppliers](#)

Additional Station Tabs

In addition to the main Station details, there are extra tabs that provide more information and control for each station. These tabs are visible when [creating or editing a station](#).

History

Displays all of the [Transactions](#) for this station.

- Use the **Grid Controls** to filter or search transactions.
 - Helpful for reviewing activity such as item movements, checkouts, and returns.
-

Access Control

Lists any [Access Controls](#) applied to this station.

- Controls which users or groups can see or interact with this station.
 - Used to limit visibility or enforce security policies.
-

Audit Logs

Shows all values that have been updated since the station was created.

- Includes **who** made the change and **when** it occurred.
 - Useful for compliance and tracking changes to station settings.
-

Related Topics

- [Stations/Station Groups](#)
- [Creating a New Station](#)
- [Access Controls](#)

Creating a New Station (Adding a Station)

Also known as: *Create Station, New Station, Add Station*

To add a new station to the FTS system, follow these steps:

1. Navigate to the **Stations** module from the [Dashboard](#).
2. Click on the **Create New Station** link.
3. Fill in the station details:
 - **Station ID** (short code, best ≤ 6 characters)
 - **Description** (clear name, e.g., Milling Dept., HQ-CA)
 - **Notification Email(s)** (comma-separated addresses for alerts)
 - **Address** (physical location)
 - **Number of Days Until AutoScrap**
 - **Send Undo Notification Email** (checkbox if you want undone transactions sent to the notification emails)
4. Click **Save** to add the station to the system.

Tip: Stations group [Cabinets](#) so you can organize your shop (by area or department) and manage purchasing/visibility separately.

See also: [Stations \(Overview\)](#) · [Items \(Item Types\)](#)

Required Fields

Station ID

A short, unique code for the station.

- **Best practice:** Keep it **6 characters or fewer** (e.g., **ST01, MILLA**).
- Used in reports, purchase orders, and quick identification.

Description

A clear, unambiguous description of the station.

- Examples: *Headquarters – California, Milling Department, Station 03 – Colorado.*

Notification & Address

Notification Email

The email address(es) that receive station alerts.

- Enter one or more addresses, **comma-separated** (e.g., `lead@shop.com`, `manager@shop.com`).
- Alerts may include:
 - Location alerts
 - Gaging/calibration notices
 - **Undone Transactions** (if the checkbox below is enabled)
 - **Supplier Reference Number expired** notices

Address

The physical address for this station (used on documents and for reference).

Station Rules & Options

Number of Days Until AutoScrap

Number of days until **semi-consumable** items are automatically scrapped at this station.

- Set based on your shop policy and **item type** rules (see [Items](#)).
- Example: If set to **30**, **semi-consumable** items at this station will auto-scrap after 30 days.

Send Undo Notification Email

If checked, **Undone Transaction** alerts are sent to the **Notification Email** list above.

- Useful if you want supervisors alerted whenever a transaction is undone, so they can verify inventory accuracy.
-

FAQ

What is a Station?

A Station is a way to group cabinets together.

Stations can represent physical locations (like California, Nevada, Colorado) or areas inside a shop (like Milling, Deburr, Maintenance).

They help organize cabinets, control purchasing, and limit visibility for users.

What's a good Station ID?

Keep it short and readable (≤ 6 characters). Examples: `ST01`, `MILL`, `DEBURN`, `HQ-CA`.

Can I add multiple Notification Emails?

Yes. Separate each address with a comma: `user1@shop.com`, `user2@shop.com`.

What gets included in Undone Transaction emails?

A brief note that a transaction was undone, including the basic who/what/when details.

How do AutoScrap days relate to item types?

AutoScrap applies to **semi-consumable** item types that are configured for scrapping. Set the days here, and ensure item types are configured correctly under [Items](#).

How do I save a new station?

After entering the required details, click **Save**. The station will be added and available for use immediately.

Related Topics

- [Stations/Station Groups](#)
- [Items \(Item Types\)](#)

Suppliers

Overview

The Suppliers module allows you to add and manage your suppliers within the FTS system. You can create new suppliers, edit existing supplier information, and view a list of all suppliers.

How Suppliers Are Used

Suppliers are used when creating [purchase orders](#) to specify where [items](#) are being ordered from. Every [item](#) must have a supplier assigned to it and will use that supplier when creating an [automatic purchase order](#).

Learn More

- [Adding a Supplier](#)
- [Automatic Purchase Orders](#)
- [Additional Supplier Tabs](#)
- [Supplier Features and Settings](#)

Additional Supplier Tabs

In addition to the main supplier options, several extra tabs provide related information about suppliers. These tabs are visible when [creating or editing a supplier](#).

Assigned Items

Shows all of the items currently assigned to this supplier.

Assigned Gages

Shows all of the gages that are assigned to this supplier.

Historical Pricing

Lists each day the supplier has at least one item with a price change, and shows the affected items by date.

Audit Log

Shows all of the values that have been updated since the supplier was created. This includes who made the change and when it was made.

Automatic Purchase Orders

To schedule automatic purchase orders (or related supplier reports), configure the options below and apply the selected report. These settings are available when [creating or editing a supplier](#) under the **Automated PO** tab.

Also known as: *Automated POs, Scheduled PO emails, Supplier auto-order schedule*

See also: [Suppliers](#) · [Adding a Supplier](#) · [Supplier Features and Settings](#)

1) Select Report Type

Use the **Report Type** picker to choose what will be generated/sent for this supplier.

Available Report Types

- **Purchase Order:** Creates and sends an order to the supplier based on inventory levels.
- **Open Purchase Order – Report:** Lists all open (not yet received) purchase orders.
- **Reorder Report:** Shows items that are low or out of stock and need to be reordered based on the **Purchase Method** selected below. This has the same items and quantities as a **Purchase Order** but does not create a PO in the system.
- **Unapproved Purchase Order:** Generates a PO that must be approved before being sent to the supplier. This is great for managers who want to review orders before they are placed.
- **Calibration Order:** Creates an order for tools/gages that need calibration.
- **Calibration Order Report:** A report showing which tools/gages require calibration and their status. This is the same as a **Calibration Order** but does not create one in the system.

2) Purchase Method

Choose the **Method** used when an automated PO/report is generated.

- **At or Below Min:** Runs the Purchase Order (PO) only if the total inventory is at or below the item's Min level.
- **Below Max:** Runs the Purchase Order (PO) only if the total inventory is below the item's Max level.

3) Schedule: Days to Run

Select when the automation should run.

- **Monthly:** Runs the report on the 1st of each month.
- **All Days:** Runs the report every day of the week.

- **Specific Days:** Check individual weekdays as needed.
-

4) Schedule: Time of Day

Set the run time for the automated PO/report.

| Example: 02 : 30 PM

5) Recipients

Email Addresses receives the generated PO/report.

| Tip: Separate multiple addresses with commas (e.g., buyer@acme.com, alt@acme.com).

6) Report-Specific Options

Different reports expose different extra fields.

| Note: **Calibration Orders** and **Calibration Order Reports** are only available if your environment is configured for gaging and the supplier has calibrator enabled.

Purchase Order

- **Minimum Order Amount (\$):** Only generate a PO when this amount is met.

Unapproved Purchase Order

- **Expiration Days:** If an **Unapproved PO** is not approved within this many days, it will be canceled.

Calibration Order / Calibration Order Report

- **% of Gage Usage Left:** Set the threshold for when a gage should be calibrated (based on usage vs. allowed uses).
 - **Number of days until (or within) expiration:** Set how many days before a gage's expiration date it should be included in the order/report.
-

7) Reference Number (Optional)

Reference Number: An optional number you can set to include on the PO when the automated PO/report is generated.

Precedence note: If the Automated PO **Reference Number** is set here, it **overrides** the Supplier's **Default Reference Number** when automated POs are created.

FAQ

Can I run the same supplier on multiple schedules?

Yes. Create additional schedules by selecting another report type (or different days of the week), then click **Apply**.

How do I send automated POs to multiple recipients?

Enter multiple addresses in **Email Addresses**, separated by commas.

Do Reference Number settings conflict with supplier defaults?

If the automated PO has a **Reference Number** here, it takes precedence over the Supplier's **Default Reference Number** from [Supplier Features and Settings](#).

Related Topics

- [Adding a Supplier](#)
- [Supplier Features and Settings](#)
- [Suppliers \(Overview\)](#)
- [Purchase Orders](#)

Creating a New Supplier (Adding a Supplier)

To add a new supplier to the FTS system, follow these steps:

1. Navigate to the Suppliers module from the [Dashboard](#).
 2. Click on the **Create New Supplier** link.
 3. Fill in the supplier details, including:
 - o Supplier Name
 - o Phone Number
 - o Email Address
 - o Address
 4. Click **Save** to add the supplier to the system.
-

For advanced options such as Email Images, setting a Target Order Amount, or Delivery Instructions, see [Supplier Features and Settings](#).

Supplier Features and Settings

When creating or editing a supplier, you'll see additional optional settings.

These are not required when adding a new supplier, but they can be filled out to customize supplier behavior.

Email Images

Determines whether item images are included in emails sent to this supplier.

Email Extended Description

Includes extended item descriptions in supplier communications.

Calibrator Enabled

Enables calibrator tracking for items associated with this supplier.

Supplier Disabled

Disables the supplier without deleting it.

Useful when you no longer order from them but want to keep history.

Default Delivery Instructions

Instructions automatically added to purchase orders for this supplier.

Send Notes

Allows sending the notes below to the supplier on purchase orders.

Notes

Free-form notes for internal or external reference depending if Send Notes is checked.

Payment Terms

Sets the default payment terms for this supplier.

Target Order Amount

Setting a target order amount will display a warning message when creating a PO if the PO total amount is less than the target order amount.

Hide PO Pricing

Hides pricing information on supplier-facing POs.

Prepend Station ID To PO Number

Adds the station ID at the start of the purchase order number.

Default Reference Number

This value will be the 'Default Reference Number' used at the 'Reference Number' on a PO. The Default Reference Number will not be used after the Experation Date below. Note: Automated PO 'Reference Number' takes precedence over Supplier 'Default Reference Number' when automated POs are created and Automated PO 'Reference Number' has a value.

Expiration Date

Defines the expiration date for the Default Reference Number above. An email will be sent to the supplier when the date passes.

PO Approval Process

Configure a chain of approvers and dollar thresholds before POs are sent to this supplier.

- Useful when you want oversight of large or sensitive purchases.
- Approvers are notified when a PO is pending and must approve it before it is sent.
- Final approver sends the PO to the supplier.

See [Supplier PO Approval Process](#) for details.

Supplier Purchase Order Approval Process

Also known as: PO Approval Chains, PO Approval Tab, Supplier Approvals

The **PO Approval Process Tab** inside a supplier record allows you to set up a chain of approvers before purchase orders are sent. This creates checks and balances, ensuring large or sensitive orders are reviewed.

Why Use PO Approval Process?

- Adds oversight to supplier orders.
- Allows setting **dollar limits** for each approver.
- Supports a chain of approvals (e.g., Champion → Supervisor → Owner → Accounting).
- Final approver is responsible for sending the PO to the supplier.

Important: The PO Approval Process workflow applies to **Approved POs**. It prevents a PO from being considered fully approved (ready to send) until all approvers in the chain have signed off. This is different from unchecking the **Approved** box when creating a PO, which creates a **draft PO**. Draft POs are not part of the approval workflow.

Setting Up the Approval Process

1. Navigate to the [Suppliers](#) module from the [Dashboard](#).
 2. Select the supplier you want to configure.
 3. Open the **PO Approval Process Tab**.
 4. Add approvers and assign approval amounts (see below).
 5. Save the supplier record.
-

Selecting Approvers

- Click **Select user here** to add an approver.
 - Choose from the list of approved individuals at your site.
 - Only users with backend access will appear in this list.
-

Approval Amounts

Each approver must have an approval threshold:

- **\$0** → All POs go through this approver.
- **\$X** (any dollar amount) → Only POs greater than that amount require approval.

Example: If set at **\$200**, this approver only reviews POs above \$200. POs under \$200 are auto-approved.

Editing Approvers

- Approvers can be reordered or updated anytime.
 - To edit, click the approver's name and enter a new dollar threshold.
 - Save changes to update the approval chain.
-

Notifications

- Approvers receive an email when a PO requires their review.
 - The email preview shows the PO details and highlights that it is "awaiting approval."
 - Clicking the PO number in the email opens FTS to review, revise, and approve.
-

Reviewing and Approving POs

- **Black Line Item** = Approved & sent to supplier.
- **Red Line Item** = Not approved, PO will not be processed until approved.
- Approvers can:
 - Edit item quantities.
 - Cancel line items.
 - Adjust Min/Max settings if needed.

Each approver clicks **Save** to pass the PO to the next approver.

Final Approval

- The **last approver** finalizes the PO.
 - They enter the supplier's email address and send it off.
 - The PO is now active and marked approved.
 - Any changes can be viewed in **View Audits**.
-

FAQ

What happens if no approval process is set for a supplier?

POs are sent directly without requiring approval.

Can I have multiple approvers?

Yes. You can configure a chain of approvers in sequence.

What does the \$0 threshold mean?

It means all POs for that supplier must go through this approver.

Who sends the PO to the supplier?

The **final approver** in the chain.

Where can I see who still needs to approve?

Click **PO Process Active** on the PO to see the list of approvers and their progress.

Related Topics

- [Suppliers Overview](#)
- [Adding a Supplier](#)
- [Supplier Features and Settings](#)
- [Purchase Orders Overview](#)
- [Purchase Order Approval Process](#)