



inFlow inventory

user manual

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Overview

Getting Started with inFlow Inventory

Thank you for choosing or evaluating inFlow Inventory for your business.

We recommend beginning by doing the Startup Questionnaire if you have not already done so. To access it, select Get Started from the General menu through the inFlow menu button. Now click Startup Questionnaire. This will guide you through setting up your basic company information and some options related to inventory and taxing.

Learning inFlow Inventory

inFlow is designed to be easy to learn. Here are some ways that we suggest you become familiar with the system.

To get help, you can use our built-in tooltips by leaving your mouse over the button or field label, search for help in the Knowledge Base, or visit our Online Forum at <http://www.inflowinventory.com>.

[More information on where to find help](#)

Inventory also has a Sample Database that you can experiment with to become familiar with the system before entering information into your real database.

[More information on the Sample Database and Real Database](#)

To get an overview of the functionality that inFlow provides, take a look at the [system overview help article](#). You may also wish to look at the [user interface overview help article](#) to get an introduction on how to use inFlow.

Setting up your Business Data

inFlow Inventory keeps track of various different types of business data related to your products, customers, vendors and inventory.

We recommend putting all of your information into inFlow. The more information you keep in inFlow, the easier it will be to take customer orders and the more informative the reports will be.

Importing Data using the Import Tool

If you already keep your data in a computerized system, like Excel or Quickbooks, then you can use the Import option from the inFlow menu to bring the data into inFlow.

[More information on Importing Data](#)

Importing Data Manually

If you do not already keep your data in a computerized system, you will quickly see the benefits in terms of ease of access and order entry. We recommend starting by entering your Product Information.

[How to enter product information](#)

Overview

Once you have entered your product information, you should enter in how much inventory you have in stock and where it is stored. The easiest way to do this would be by using the Adjust Stock function from the Inventory module.

How to adjust stock

You can then enter your Customer Information.

How to enter customer information

Alternatively, you can choose to add in customer information gradually as you take orders.

You can also choose to enter Vendor Information now if you do a lot of purchasing from different vendors.

How to enter vendor information

Once you have familiarized yourself with the basics of inFlow by experimenting with sample data or browsing help articles, and you have entered your business data, you're all set to start using inFlow to improve your daily operations.

System Overview

inFlow Inventory is divided up into four main modules:

- **Sales** – Sales Orders and Customer Information
- **Purchasing** – Purchase Orders and Vendor Information
- **Inventory** – Product Information, Stock Quantities, Stock Adjustments, etc.
- **Reports** – Reports offered by inFlow to gather and share information

Sales Module Overview

From the Sales Module, you can:

- Keep track of customer information
- Take sales orders from customers
- Issue quotations to customers
- Process customer orders, including picking, packing, and shipping
- Send invoices to customers
- Mark customer invoices as paid
- Handle customer returns

More Information on Sales

Purchasing Module Overview

From the Purchasing Module, you can:

- Keep track of vendor information and product catalogs
- Issue purchase orders to vendors
- Receive goods from a vendor
- Issue payment to a vendor
- Handle goods to be returned to a vendor

Overview

[More Information on Purchasing](#)

Inventory Module Overview

From the Inventory Module, you can work on the following areas:

- **Products** – set up your product information, including prices
- **Product Categories** – set up a categorization for your products
- **Transfer Stock** – move stock from one location to another within your company
- **Adjust Stock** – correct erroneous stock levels by making adjustments to stock quantities
- **Count Stock** – do a cycle count or physical count of your inventory to verify stock quantities and correct and track down discrepancies
- **Current Stock** – look at a detailed breakdown of what stock you have and where it is
- **History** – view a full history of stock movements or search by date or product
- **Reorder Stock** – automatically create purchase orders for products that are low in stock
- **Work Order** – create one product from other products.

[More Information on Inventory](#)

Reports Module Overview

From the Reports Module, you can:

- View reports with information on various aspects of your business
- Print reports
- Save reports in PDF format to be saved or e-mailed out
- Save report data in Excel format
- Customize reports to suit your needs

Sample reports that are available include:

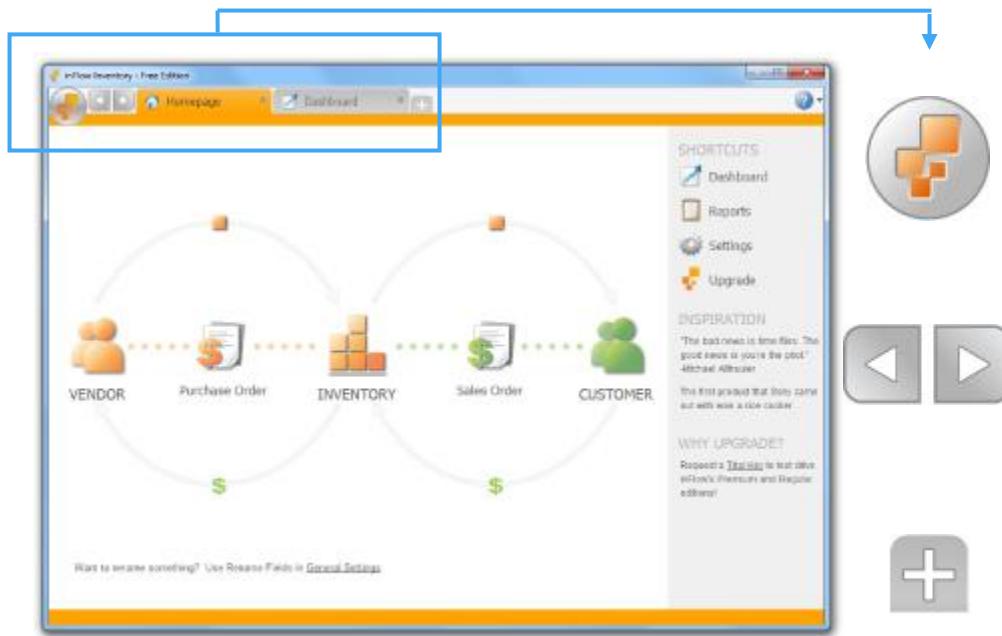
- **Sales by Product Summary** – what are my best-selling products?
- **Customer Payment Report** – who still owes me money?
- **Sales Order Operational Report** – what orders are waiting to be shipped out?
- **Purchase Order Status** – how much stock am I expecting to receive from vendors?
- **Inventory Summary** – how much of each product do I have in stock?
- ... and many more

[More Information on Reports](#)

Overview

User Interface Overview

The inFlow homepage



The main menu button gives you access to all of inFlow inventory's features.

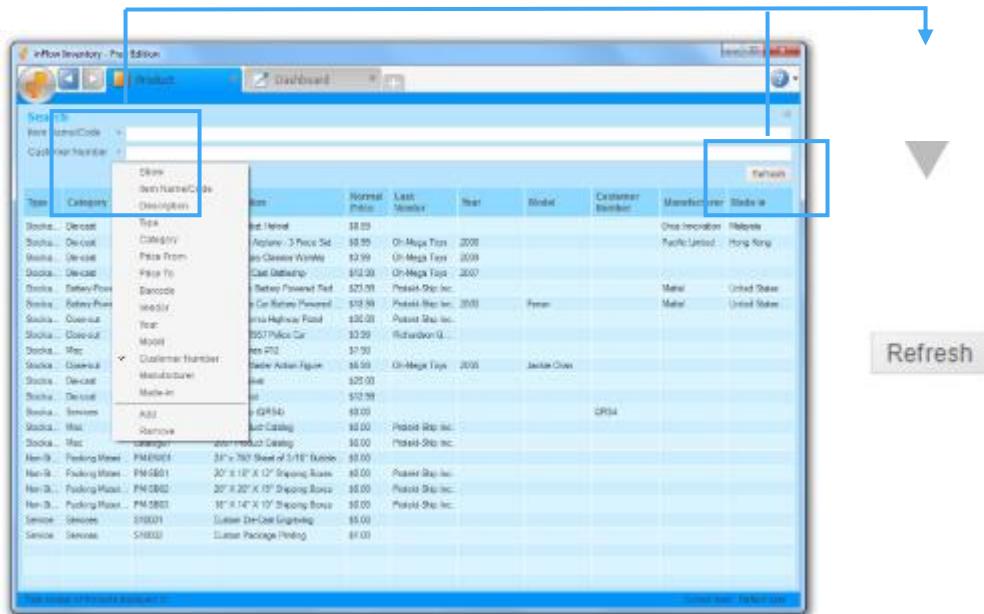
The navigation buttons let you jump back and forth through screens.



The new tab button allows you to open an additional screen so you can work on multiple aspects of your inventory at the same time

The **Home page** includes inFlow's most popular features and provides quick access to different stages of your inventory's journey from purchase to sale. You can hover over any of the icons to see more options and clicking the icon itself will open a blank record for you to use

inFlow listings view



Lists are sorted by filters. Change the filter by clicking the drop down arrow. You also add or remove filters here too.



Clicking Refresh updates the list. Right clicking it will also clear all filters.

inFlow uses **Listing Views** to show you what products you have in inventory, what sales orders you have on the go etc. You can control what you see in the list using the **Search** section at the top.

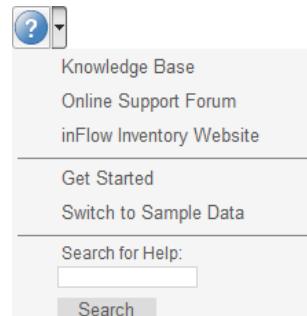
Overview

1. Help

The *Help* button (blue question mark in the top right corner of your screen) helps you find answers to your questions using our articles, and community forum. It also allows you to switch to a sample database so you can test out features without making any changes to your own info

To switch to the sample database simply:

1. Click the *Help* button.
2. Choose *Switch to Sample Data*



When you're finished, switch back to your data by clicking the link on the homepage or simply:

1. Click the *help* button
2. Choose *Switch back to Your Data*.

2. Shortcuts

On the right panel there are few shortcut links to Dashboard, Reports, Settings and Upgrade.

3. Most commonly used features

The icons in the centre of the screen represent the five main sections: Vendor, Purchase Order, Inventory, Sales Order and Customer are there and when you move the mouse over the icon, the other shortcut links for that particular section are displayed above and below it.

Typical screen in inflow

A typical screen in inFlow Inventory has Search Box and Listing Panel on the left where you can search through a list of Orders, Customers or some other type of entity. On the right, we have the Details Panel where you can view or edit the detailed information for a particular entity.

You can use the search screen to locate items in the mini listing to the left while working within a specific record.

You can also switch filters or add or remove filters by clicking on the existing search term and choosing "add" or "remove" from the dropdown.

You can sort the listing view by clicking the header at the top of the column you wish to sort by.



The toolbar shows up in a few places in the program and will look a little different depending on where you are. It lets you do important things like save the record you're working on or create a new one.

Overview

Tool Bar

The Toolbar at the top of the details panel contains buttons for working with the current entity:

New	Creates a new entity of the same Type
Save	Saves the current entity
Preview	Under this menu, you will find a list of documents available (incl. custom docs) and the option to Preview, Print or Export. You can export it as a PDF, Microsoft Excel or Microsoft Word file.
Copy	Create a duplicate or similar copy of the current entity.
Versions	Allows you to view old versions of this entity. You may wish to look at the old versions to see a history of changes or track down errors. The newest version will be shown at the top.
Sticky	Sticky Notes are a useful way of keeping internal notes on an entity and will not be shown in the printed documents.

Deactivate/Reactivate



Entities can be deactivated so that they will be inactive and not shown in normal usage of inFlow. Entities cannot be deleted entirely, so you have a full record of previous entities.

Reactivate

To view Inactive entities, select the "Show" filter in the Listing Panel. Now select Inactive from the drop-down box. An inactive entity can then be re-activated by clicking the Reactivate button on the right.

Attachments

You can add file attachments to most entities. To do this, click the Attachment icon in the toolbar. This will bring up a dialog where you can add new attachments or delete existing ones.

1. Close Button

The Close button near the top right of the Details Panel allows you to close the current entity when you are finished with it.

2. Details Panel (Header, Table and Footer)

The Details Panel is the largest section on the right comprising the header, table and the footer. This is where you can fill in the specific information for the order, customer or other entity.

3. Status Bar

The status bar shows the status of the current action taken on the current page on the left and the current user on the right.

Overview

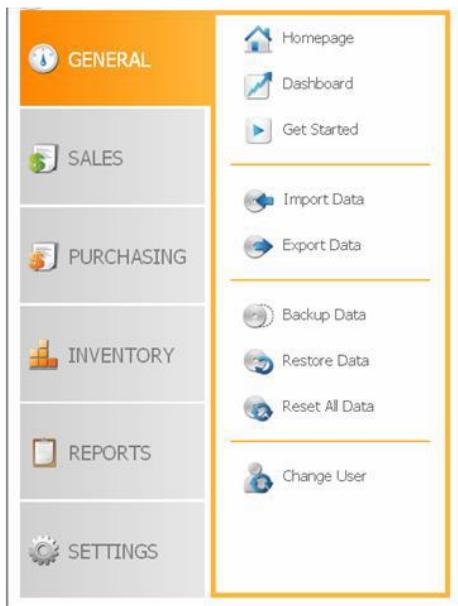
inFlow Menu Button



Click the inFlow Menu Button to see a full list of functions available in inFlow. It has six main sub menus: General, Sales, Purchasing, Inventory, Reports and Settings.

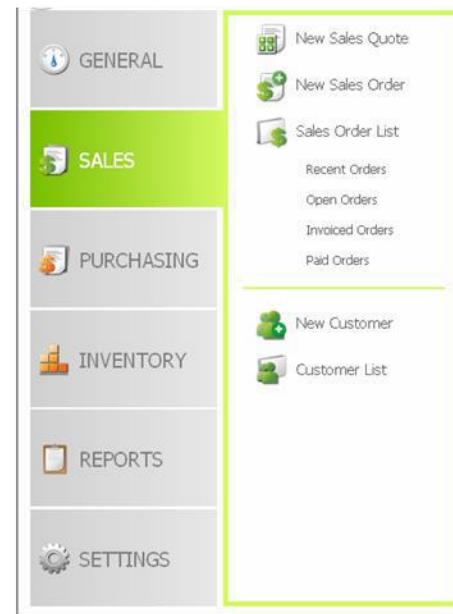
General

Click General menu to go to Homepage from any other page. The General menu contains the following menu items:



Sales

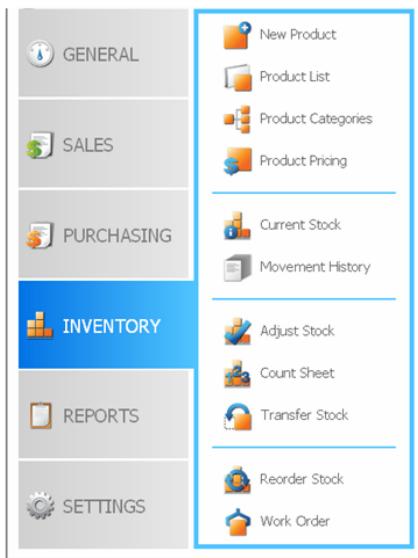
The Sales menu gives you quick links to various aspects of inFlow related to taking and processing customer orders or customer information. It contains the following menu items:



Overview

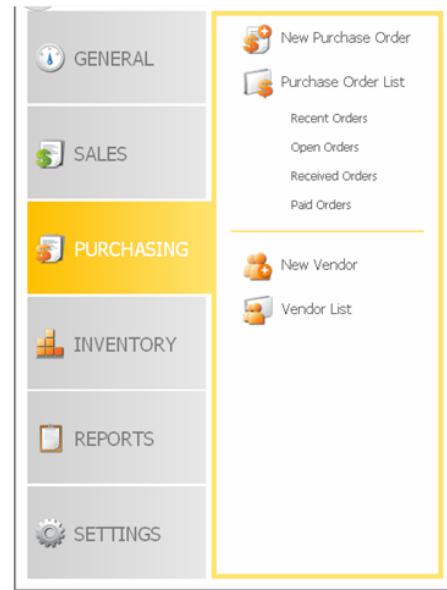
Purchasing

The Purchasing homepage gives you quick links to various aspects of inFlow related to placing purchase orders to your vendors, receiving shipments or vendor information. Purchase menu contains the following menu items:



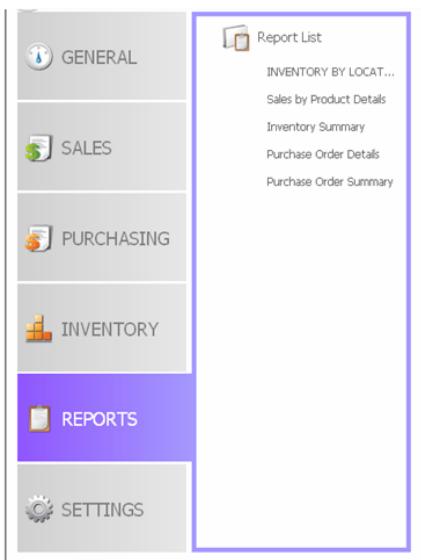
Inventory

The Inventory menu gives you quick links to various aspects of inFlow related to your product list, prices, current inventory levels or inventory management tasks. Inventory menu contains the following menu items:



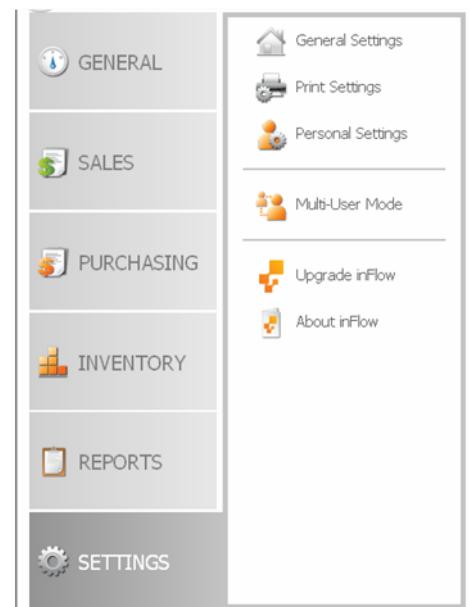
Reports

inFlow Inventory has a variety of reports for gathering, printing out and sharing info about sales trends, payment, inventory levels or other aspects of your business. Reports menu contains the following menu items:



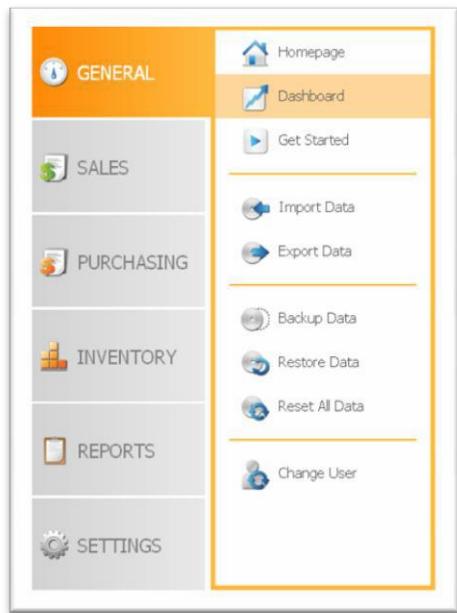
Settings

The Settings menu gives you quick links to manage Company as well as Personal Settings of inFlow. It contains the following menu items:



Overview

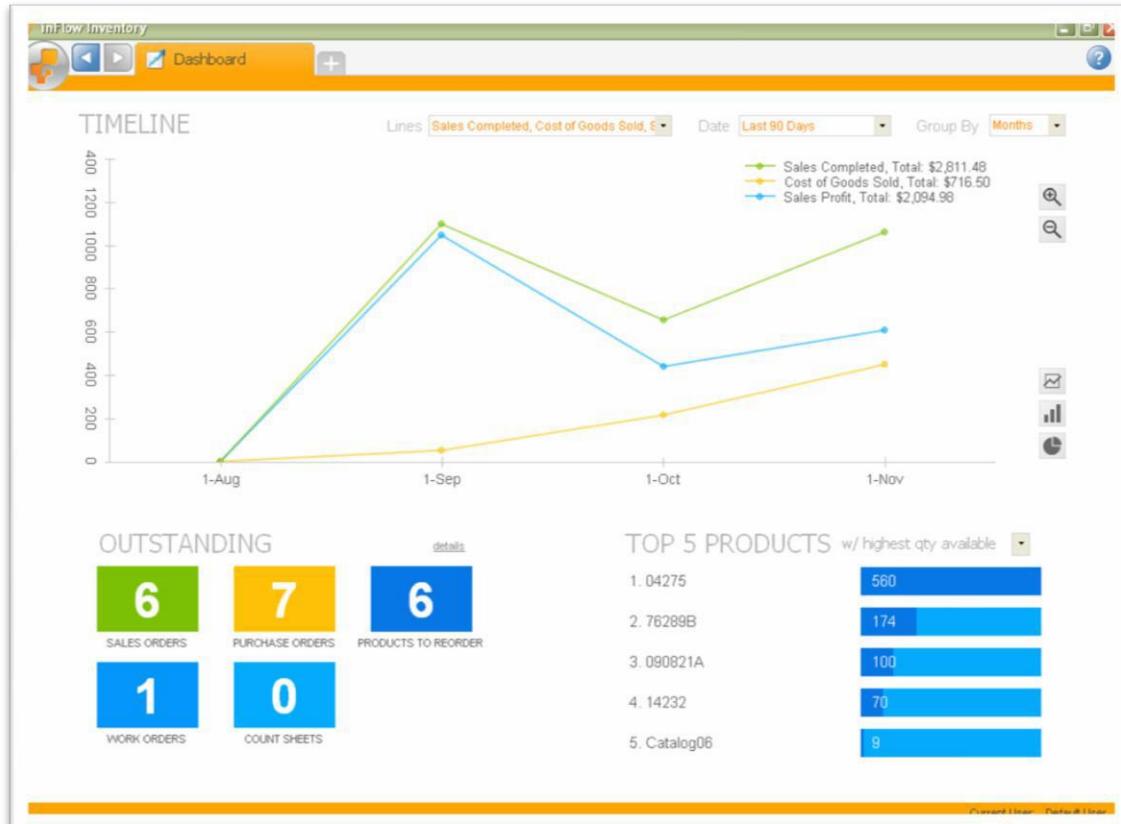
Dashboard



You can use Dashboard to get an overview of your business's progress, which your most important customers are or data on product sales trends etc.

To access Dashboard, click the inFlow menu button, go to General and click Dashboard.

The Dashboard will open in the same window.

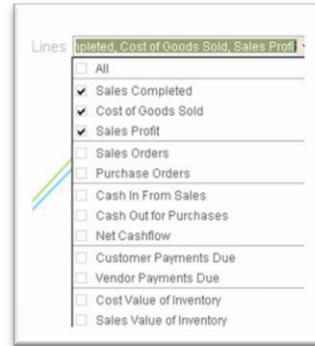


Overview

Timeline

You can see a graph of how your business has been doing over time.

- **Lines** – You can select the type of data you want to see in the graph from the drop-down box.



- **Date** – You can select the date range for the data in the graph from the drop-down box.



- **Group By** – You can choose the „Group By“ options for your data i.e. to show each point as a day, week, month, quarter or year.



- **Zoom in/ Zoom out** – You can use these buttons to zoom in or out of the graph.
- **Graph format** - You can choose to view the graph as a line graph, bar graph or pie graph from these buttons.



Overview

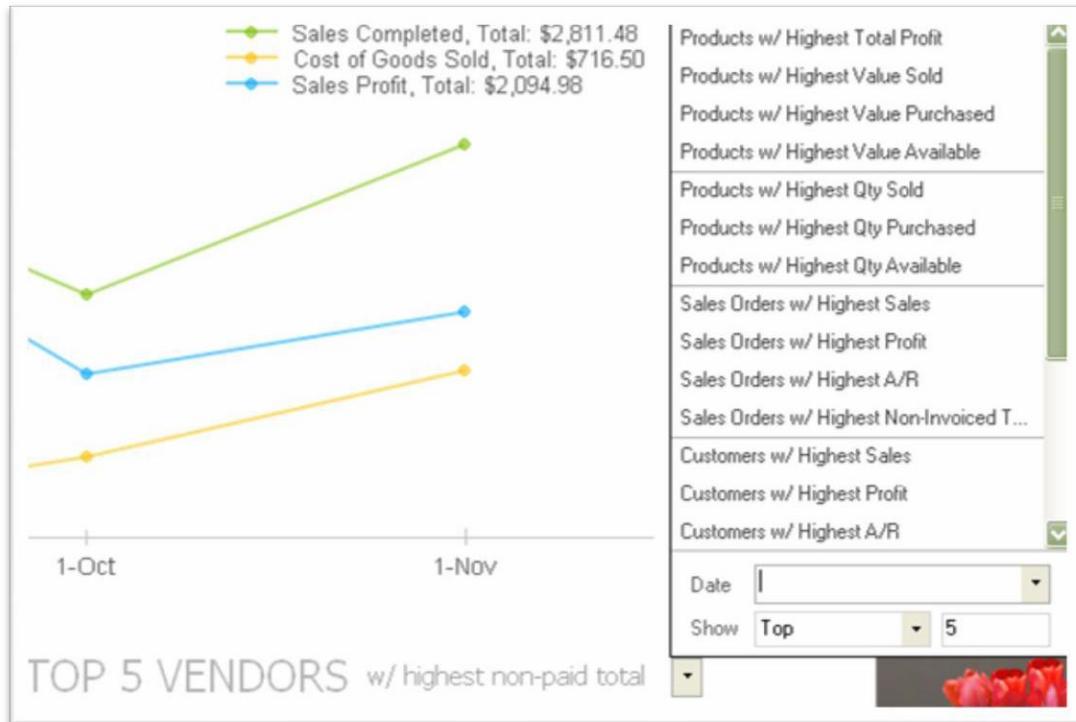
Outstanding

Here you can see the actions that need your attention related to the entities like Sales Order, Purchase Order, Reorder, Work Orders and Count Sheets. Click on the detail link to view them in detail.

OUTSTANDING	
0	Sales Quotes
3	Open Sales Orders
0	In Progress Sales Orders
0	Fully Shipped Sales Orders
3	Invoiced Sales Orders
5	Open Purchase Orders

Top 5 Products

Here you see the most important products, customers, vendors etc. You can choose the entity from the drop-down box, select the date and show (top/ bottom) number (type any number, default is 5).



You can right-click on the graph to save it for use elsewhere.

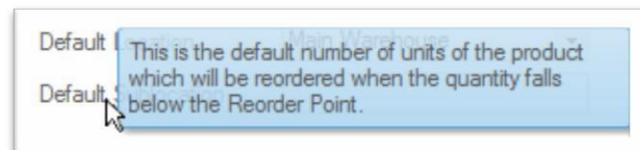
Overview

Help Overview

There are three main ways you can find help on how to use inFlow Inventory. Firstly, there are tooltips for quick on-screen descriptions as you use inFlow. Secondly, you can search the Help Center Knowledge Base for more detailed step-by-step instructions. Finally, you can connect with our support staff and other inFlow users by visiting the online forums at <http://www.inflowinventory.com/Forum/index.php>.

Tooltips

By leaving your mouse cursor over a button or label for a second or two, inFlow will show you a short description of the highlighted item.



You can also use this function to see totals converted into your home currency when dealing with a foreign currency sale or purchase order.

Help

You can bring up the Help menu by clicking the Help button at the top right.



From the Help Menu, you can browse the help articles or search for content on a particular topic. It also displays quick links to the articles of the section in which you are currently working. For example if you are working in the Sales section, the Help Menu may have the following items:

1. inFlow Inventory Website – This takes you to <http://www.inflowinventory.com/>.
2. Get Started – This opens a page in the same window where you can watch online overview video, fill in the startup questionnaire and make use of other tips to help you start using inFlow.

Overview

3. Switch to Sample Data – This allows you to switch to a sample database and test out features without affecting your own data.
4. Search for Help (online) – This searches our online Support Centre for articles that will help walk you through what you want to do. Can't find what you're looking for? It will also allow you to connect up with our staff and other users to find the answers you need.

Sample Database and Real Database

To help you learn how to use inFlow Inventory, we provide a Sample Database with which you can freely experiment. The Sample Database is kept completely separate from the Real Database where you can store your business" data, so changes you make in the Sample Database will not affect the Real Database.

To switch from your Real Database to the Sample Database:

- Select Switch to Sample Data from the Help menu or from the Home page. inFlow will then restart with the sample database.

To switch from the Sample Database to the Real Database

- Select Switch back to My Data from the Help menu or from the Home page. inFlow will restart with the real database.

Support Services

We can provide support for any aspect of using inFlow Inventory with your business.

Support Centre

By visiting our support centre you'll be able to search our knowledge base as well as our forum for helpful answer to questions you have about the software! What's more, if you're not able to find what you're looking for you'll be given the opportunity to contact us for more help: <http://www.inflowinventory.com/software-support.aspx>

E-mail Support

If you have a questions which involved private information or are having trouble with the forum you can also e-mail our support staff for assistance directly at support@inflowinventory.com.

Live Chat

If you have a time sensitive question that you were unable to answer via the support centre then feel free to get in touch with us via our live chat. Please log into our live chat here: <http://www.inflowinventory.com/software-contact-info.aspx> anytime between 10am and 6pm EST (UTC/GMT -4 hours) Monday-Friday and we'd be happy to help!

Overview

Keyboard Shortcuts

inFlow includes many keyboard shortcuts to make your daily dealings easier to navigate. If you'd like to know the shortcut for something, hover your mouse over the button to see a tooltip with the shortcut listed. For a full list of keyboard shortcuts please see below:

System Level Shortcuts

This would be general navigation around inFlow, switching tabs etc.

Ctrl + T	Open new top level tab
Ctrl + Tab	Move to next top level tab (to the right)
Ctrl + Shift + Tab	Move to previous top level tab (to the left)
Ctrl + W OR Ctrl + F4	Close currently selected tab

Record Level Shortcuts

This would be major functionality within the records like saving, creating a new record etc.

Ctrl + N	Create a new record
Ctrl + S	Save the current record
Ctrl + P	Print/Preview/Export documents related to this (when in order)
Ctrl + D	Create a copy of the current record (or order)
Ctrl + V	Open versions window to review changes
Ctrl + I	Deactivate the current record (when in product, vendor, customer record)
Ctrl + M	Add an attachment

Settings

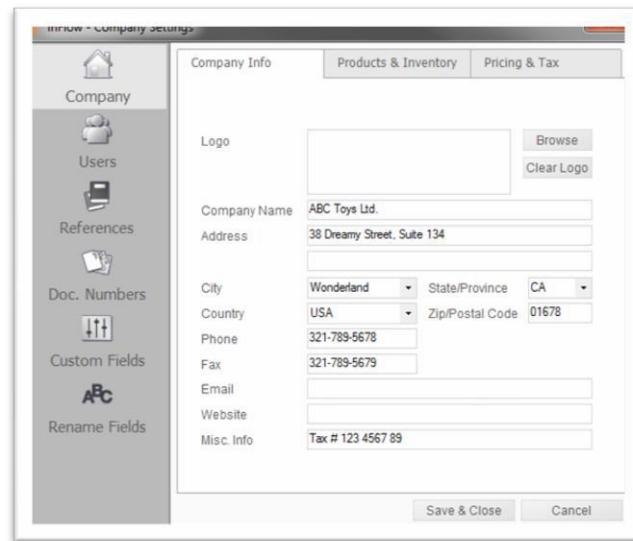
Company Settings

The Company Settings dialog is for defining company-wide settings within inFlow. You can get to it by selecting Settings from the inFlow menu and choosing General Settings.

Company Info

The information under Company Info contains basic information about your company that will be shown in printed documents and reports. All fields, including the logo, are optional. The company address entered here will be used as the default receiving address for Purchase Orders.

The Misc. Info field can be used to keep any extra information that you want shown in the header of your printed documents and reports. For example, you can print a tax identification number (VAT #, GST #, etc.) for your business here. Or you could choose to show a company slogan here.



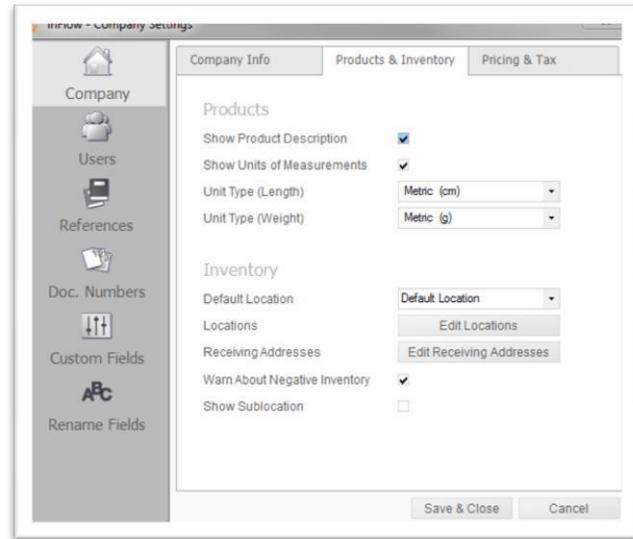
Products and Inventory - Products

Show Product Description

Checking the Show Product Description option will show the description in:

- Product details
- Product listing
- Product dropdown in Sales Order/Purchase Order line items
- Printed docs (ie. Sales Order, Invoice, Purchase Order etc.)
- Reports

Un-checking it will hide Product description everywhere.



Show Units of Measurements

The Show Units of Measurements option allows you to assign a Unit of Measurement (UoM) to each of your products. For example, you might use a UoM of “pieces” for some products but a UoM of “packs” for others. Check this option if you want the UoM for each product shown alongside the quantities, e.g. “5 pieces” instead of just “5”. Leave the option unchecked if you want quantities shown as just the number.

Checking the Show Units of Measurements option will:

Settings

- Allow the user to enter in different UoM in Product Details in the Extra Info tab of Product information.
- Show different UoM when entering in Quantity in Sales Order or Purchase Order line items.
- Enable conversion from Sales/Purchasing UoM to Standard UoM .

Un-checking it will hide UoM everywhere and conversion will not be performed

inFlow Inventory allows you to choose which type of units of measurement(Unit Type Length and Weight) you use for measuring the length and width of your cases and products. For length, you can choose to measure in Metric units (mm, cm or m) or Imperial units (inches or feet). You can also choose to measure the weight in Metric (g or kg) or Imperial (lbs or oz).

Products and Inventory – Inventory

Default Location

Locations in inFlow are major places where you keep inventory, like your Main Warehouse, Secondary Warehouse, Receiving Dock, etc. The set of locations should be set up in advance, and locations will be chosen from a list.

Sublocations can be used for extra information to keep track of inventory more precisely.

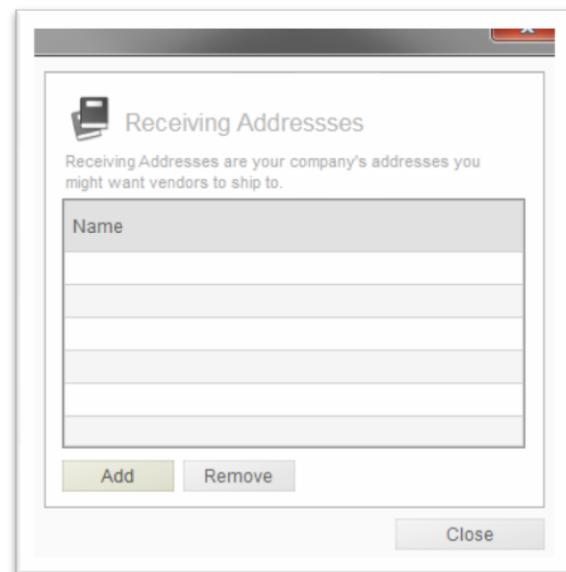
Sublocations will typically be a short code describing the location, such as the aisle number or bin number.

Sublocations can be freely typed and new sublocations will be added automatically when first used.

The Default Location should be set to the location you use most often, e.g. your main warehouse. Creating a new Product will default to the use of this location.

Each user in inFlow can set Default Location in Personal Settings to override this.

You can add/remove/update Locations in the Receiving Address dropdown in a Purchase Order. Move down to the Receiving Address and click Edit Receiving Addresses. Click Add to add new Receiving address and Remove to remove the existing one.



Setting Up Locations

The Edit Locations button allows you to add or remove locations from inFlow.

Removing locations that have previously been saved does not actually delete the location, but instead deactivates it so that it won't be used in the future. Clicking the Show All checkbox allows you to view inactive locations and reactivate them.

You can also click Edit Sublocations to modify the set of sublocations within each of your main locations. The list of sublocations is primarily as a reference of sublocations that have previously been used. Users may enter new sublocations not in the list of known sublocations.

Settings

Setting up Receiving Addresses

The receiving addresses are the addresses at which your company commonly receives stock. These addresses are saved so that they can easily be chosen in Purchase Orders. The Company Address set up in Company Info is already included as a choice in Purchase Orders, so it is not necessary to add the Company Address separately as a Receiving Address.

Receiving addresses have a name to describe their location. To edit an existing Receiving Address, double click the name of the address. Clicking Add lets you add a new receiving address, and highlighting an existing address and clicking Remove removes it.

Warn About Negative Inventory

In many companies, inventory is not precisely tracked, so inventory quantities in the system may drop below zero. inFlow Inventory will normally give a warning before this occurs and require confirmation.

To allow negative inventory without a warning, uncheck the “Warn About Negative Inventory” option. Leaving it checked will pop up a warning dialog whenever you are about to fire inventory transactions that will make inventory go negative (i.e. Adjust Stock, SO pick, etc.).

Clicking Proceed in the popup will make the transaction happen. Clicking Cancel in the popup will not make any transaction happen. Un-checking the warning option means that the system will not popup a warning dialog whenever you are about to fire an inventory transaction that will make inventory go negative.

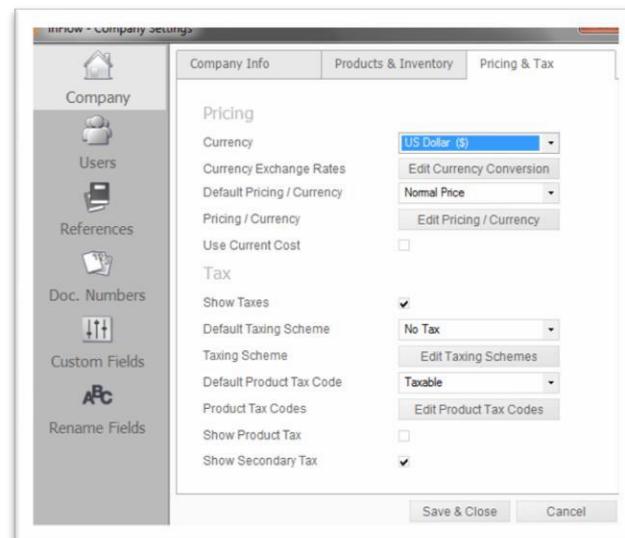
Show Sublocation

The usage of sublocations is optional. You can choose to track inventory more precisely by using them or to keep things simpler by not using them. To use sublocations, check the Show Sublocation option.

Pricing and Tax

Currency

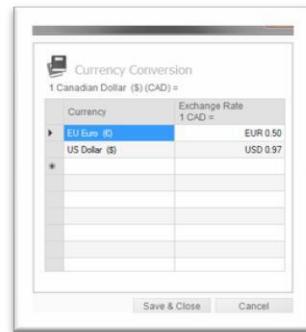
You can set the currency that you deal in by selecting the appropriate option from the Currency dropdown. Unless otherwise specified, inFlow will use your default currency (which was selected when you first installed the program). If you set a different currency for a Vendor, Customer or Pricing scheme than your default, the program will ask you to specify a conversion. Once set, this conversion will not change until you make adjustments however, it can be updated directly from the sales order or purchasing modules.



Settings

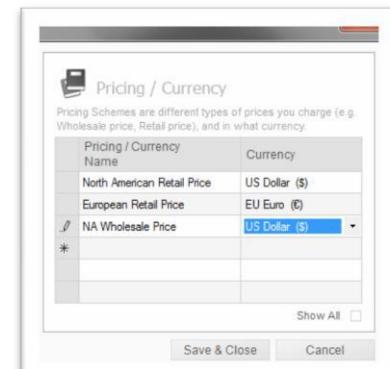
Currency Conversion

When dealing in multiple currencies, inFlow will need you to set up the conversion rate so that it can complete calculations while you use the program. For instance, if you are a company that works out of Canada but have customers in the US and Europe, you're going to want to send your customers invoices in their own currency. However in order to keep your books in order, you'll have to know what you've been paid in your own currency. inFlow can do the conversion for you, if you tell it what the conversion rate is. This can be done directly from the sale itself or by clicking the Currency Conversion button as in the example shown here.



Pricing/Currency Schemes

Pricing Schemes are sets of prices that you charge your customers under different circumstances. For example, you might have one pricing scheme for Wholesale orders, another pricing scheme for Retail orders and a third pricing scheme for Employee purchases. Pricing schemes allow you to quickly choose the correct prices when taking an order.



You can modify the pricing schemes you use by clicking the Edit Pricing Schemes button. This will bring up a dialog where you can modify the list. Removing pricing schemes that have previously been saved does not actually delete the pricing scheme, but instead deactivates it so that it won't be used in the future. If you add/remove/update Pricing Scheme, it will be reflected in the Pricing Scheme dropdown list whenever applicable (i.e. SO/PO, Product Details screen, report filter, etc.).

Pricing schemes are currency specific so if you do deal in more than one currency you will need to set up similar pricing schemes for each currency that you deal in. Customers' pricing schemes will also serve to set their default currency so if you have a customer who is in another country, setting their default pricing scheme will also set their default currency. If there is no scheme set sales orders will use your default company scheme (and thus your default company currency).

Tax Settings

Show Taxes

Checking Show Taxes will include the Taxing Scheme field in SO/PO, reports, customer, customer Tax Exempt #, Product Tax Code, etc. Un-checking it will not show anything related to tax anywhere. If your business never charges sales tax on top of your normal prices, then you can uncheck the Show Taxes option to avoid showing taxes altogether.

Taxing Schemes

The sales taxes that should be charged typically vary according to the location of the customer that you're shipping to. For example, foreign customers may be charged a different tax rate than your local customers, or they may be tax-exempt. This can be set up in inFlow by using different Taxing Schemes for different customers.

If you set the Default Taxing Scheme, new SO/PO will always use this taxing scheme if no taxing scheme is specified for the customer/vendor. If you add/remove/update Taxing Scheme, it will be

Settings

reflected in the Taxing Scheme dropdown list whenever applicable (i.e. SO/PO, Product Details screen, report filter, etc.).

You can set up the different Taxing Schemes by clicking the Edit Taxing Schemes button in Company Settings, under Pricing & Tax. For each taxing scheme, you should set:

Name	A descriptive name assigned to this taxing scheme.
Primary Tax Name	The name of the primary tax to be printed on the invoice. e.g. "Tax", "GST" etc.
Primary Tax Rate	The rate of the primary tax, as a percentage.
Secondary Tax Name	The name of the secondary tax to be printed on the invoice. Leave this blank if no secondary tax is charged.
Secondary Tax Rate	The rate of the secondary tax, as a percentage. Leave this as zero if no secondary tax is charged.
Add Secondary Tax on top of Primary	Most commonly, secondary taxes are calculated as a percentage of the pre-tax base amount. Check this option if the secondary tax should instead be calculated as a percentage of the amount after applying the primary tax. This is sometimes known as a Piggyback Tax.
Tax On Shipping	Set this option on if tax should be calculated on top of the charges for freight. In most places, shipping costs are taxable, but this varies depending on local tax laws.

Removing previously saved taxing schemes does not actually delete the taxing schemes, but instead deactivates them so that they won't be used in the future. Clicking the Show All checkbox allows you to view inactive taxing schemes and reactivate them.

Product Tax Codes

Some products may be tax-exempt. For example, in Washington, USA, no sales tax is charged on food items. inFlow also allows you to set certain products to be tax-exempt by using Product Tax Codes. If you have set the Default Product Tax Code, newly created Products will use this tax code by default. If you add/remove/update Product Tax Code, it will be reflected in the Product Tax Code dropdown list whenever applicable (i.e. SO/PO, Product Details screen, report filter, etc.).

If your business taxes all products in the same way, then you can uncheck the Show Product Tax option to avoid showing whether products are taxable or not on your invoices. Checking it will show Product Tax Code in Product Details and PO/SO line items. Un-checking it will hide Product Tax Code everywhere.

In the United States, sales taxes from different levels of government are usually combined and shown together on invoices. However, in other locations, two different types of taxes may be calculated and shown separately (such as separating federal and provincial tax). If you charge two types of taxes, then you should check the Show Secondary Tax option to show both types of taxes. On the other hand, if you only deal with a single tax, then unchecking the Show Secondary Tax option will simplify matters. Checking it will show the Secondary Tax column in Taxing Schemes, PO/SO totals, tax reports. Un-checking it will hide Secondary tax everywhere, and will not include secondary tax.

Settings

Product Tax Codes can be edited by clicking the Edit Product Tax Codes button in Company Settings under Pricing & Tax. For each Product Tax Code you should set:

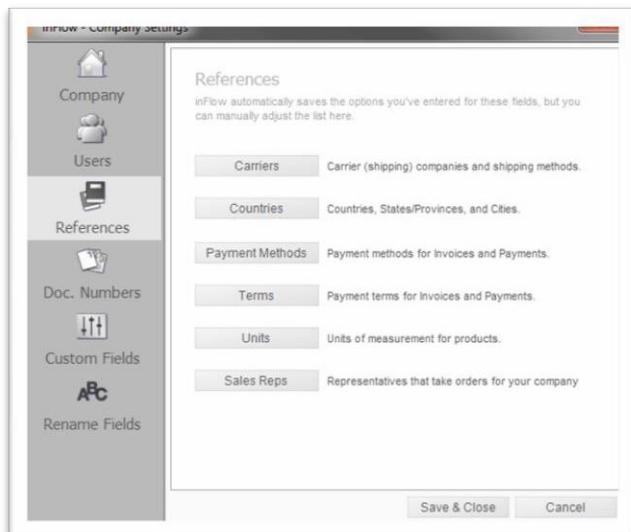
Name	A name describing the Product Tax Code
Code	A short tax code to describe this Product Tax Code on printed documents like invoices.
Primary Tax Applicable	Check this if the primary taxes should apply to these products.
Secondary Tax Applicable	Check this if the secondary taxes should apply to these products.

Removing product tax codes that have previously been saved does not actually delete it, but instead deactivates it so that it won't be used in the future. Clicking the Show All button allows you to view inactive product tax codes and reactivate them.

For most businesses, the default Taxable and Non-taxable Product Tax Codes will be sufficient. If however, you sell products in which only one tax is applicable (e.g. a PST exempt product in Ontario, Canada) you may add a Product Tax Code for this. You may also want to add different Product Tax Codes with different code values to explain why an item is tax-exempt.

References

inFlow Inventory keeps track of some of the values that you have previously typed in and provides the past choices as suggestions in the future. This makes entering data faster and more accurate. These lists of saved values are known as References. When a new value is entered into a Reference field, the value is automatically saved as a future suggestion. You can choose to edit these lists.



Editing a References List

To edit a References List:

- From the inFlow Menu button, select Settings.
- Click General Settings.

Settings

- From the Company Settings dialog that will appear, click the References button.
- Click the button of the references list you wish to modify.
- Modify the references list from the dialog that will pop up.

Payment Methods

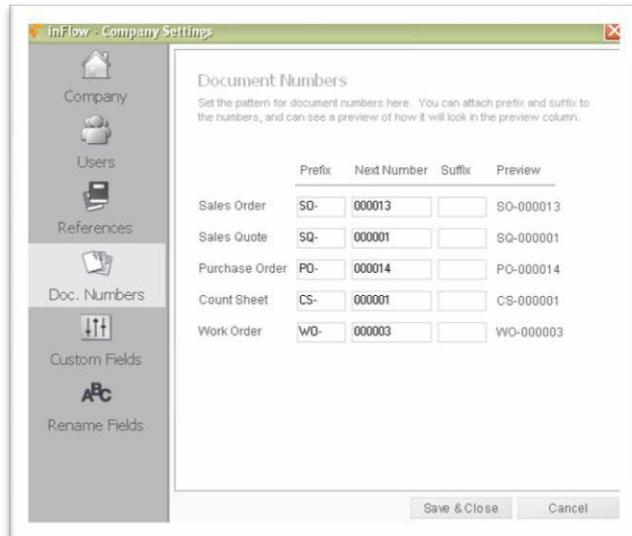
The Payment Methods references list is slightly different from the others in that it also keeps track of the Days Due. For example, the Net 30 Payment Terms specifies that payment should be due 30 days after the invoice. This will be used in calculating a suggested Payment Due Date for your invoices. The Days Due can also be changed from the Terms references list.

Customizing Document Numbers

Normally, when you save a document like a Sales Order for the first time, a document number will be automatically created. inFlow allows you to customize these document numbers.

You can customize the document number for a single document by directly changing the document number in an entity. For example, you can change the Order # field for a Sales Order, which also shows as the Invoice number.

Alternatively, you can change the way document numbers will be generated. To do this, click the inFlow menu button and under Settings, click General Settings. Now click the Doc Numbers tab in the inFlow Company Settings dialog box. There, you can set up how document numbers will be created.



You can set the Prefix and Suffix for a document number type to set what you want to show before and after the main number. You can also set the Next Number here; future document numbers will be generated starting from this. You can also set the number of leading zeroes here.

Document numbers need to be unique. For instance, you can't have two purchase orders both with Order # PO-000001. In addition, Sales Orders, Invoice w/o Order and Sales Quotes cannot share document numbers. Each document number has a maximum length of 16 characters and the Next Number cannot be a negative number.

Settings

Custom Fields

Each business is unique and keeps track of slightly different data. To allow for this, inFlow Inventory allows you to define your own custom fields in your Products, Sales Orders, Customers, Purchase Orders and Vendors.

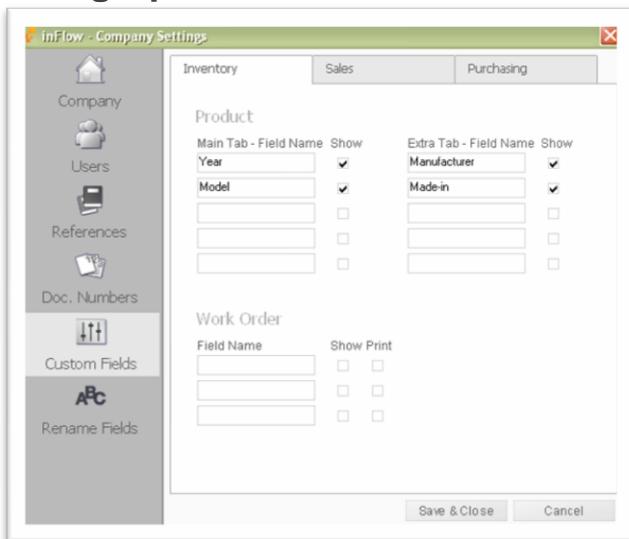
Some examples:

- A clothing manufacturer might want to keep track of the type of material for their products.
- You may want to keep track of the country of origin of your products.
- You may want to keep track of some extra information for your customers, like a credit check status, whether they should receive your newsletters, etc.

The custom fields that have been set up will then be visible in the main screen for the entity.

You can set up to 3 custom fields for Sales Orders and Purchase Orders, and up to 10 for Products, Customers and Vendors. Check the Print checkboxes if you want these custom fields in Sales Order, Purchase Order and Work Orders to show up in the printed documents. You will also find that custom fields can be added as columns to your reports for further analysis.

Setting Up Custom Fields



To set up Custom Fields:

1. From the Settings menu, select General Settings.
2. From the Company Settings dialog that will pop up, click the Custom Fields button.
3. Select the tab of the entity you wish to create custom fields for.
4. Enter the custom field name to be displayed and check the box next to it under Show.
5. For Work Orders, Sales Orders, and Purchase Orders, also check the box next to it under Print if you want this custom field to be shown on your printed documents.

Your custom fields will then be visible to all users of inFlow in your company when they view the corresponding entity.

Settings

What's more, if you match the field name in your customer record to one in the corresponding sales order then any information in the custom field on that customer's record will be copied to this field automatically. This is also true between Vendor and Purchase Order custom fields.

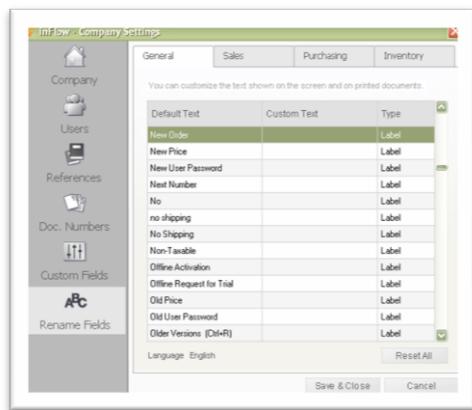
The screenshot shows two windows side-by-side. On the left is a 'Purchase Order' window with fields for Customer (Budget-Minding Collectibles), Contact (Bob Weiss), Phone (843-555-1337), Billing Address (Box 491, Isle Of Palms, SC, USA, 29451), Terms, P.O. #, Sales Rep, Location (no ship), and Tax Code (1234567890). On the right is a 'Customer Record' window for 'Budget-Minding Collectibles' with sections for Basic (Name, Balance), Addresses (Business Address: Box 491, Isle Of Palms, SC, USA, 29451), Contact (Name: Bob Weiss, Phone: 843-555-1337, Fax: 800-555-0349, Email, Website), Purchasing Info (Pricing / Currency: Wholesale Price, Discount: 0 %, Payment Terms, Taxing Scheme, Tax Exempt #), Remarks, and Custom Info (Tax Code: 1234567890). Both the Tax Code fields in both windows are highlighted with a red box.

Rename Fields

You can customize the text shown on the screen and on printed documents. Right click the field you want to rename and you will see the Customize option.



Select Customize and you will be taken to the Rename Fields under Company Settings.



Alternatively click the inFlow menu button, select Settings and then General Settings. This will open the Company Settings dialog box where you can select the Rename Fields tab.

Default Text This is the text shown on the screen and on printed documents

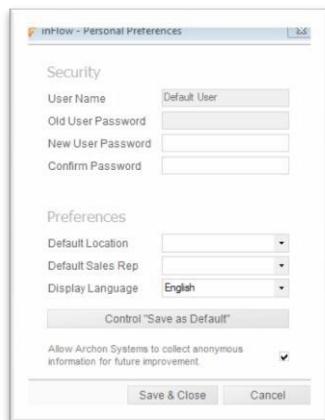
Custom Text Enter the new name here for this field.

Type This is the type of the field. It could be Label or Message. Labels are the field names shown on the screen as well as on the printed documents. Messages are short bits of text shown to help the users as tool tips.

Settings

Click Save and Close to save the changes you have made. The screen will be immediately updated to show the changes. If you don't want to save the changes, click Cancel.

Personal Preferences



Personal Preferences are options that are applied just for the current user. In contrast, the options in Company Settings affect all users of the system. To access the Personal Preferences screen, select Personal Settings from the Settings menu through the inFlow menu button.

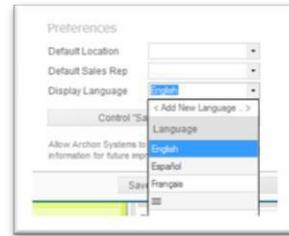
Security

You can modify your password here by typing in a new password and confirming it.

Preferences

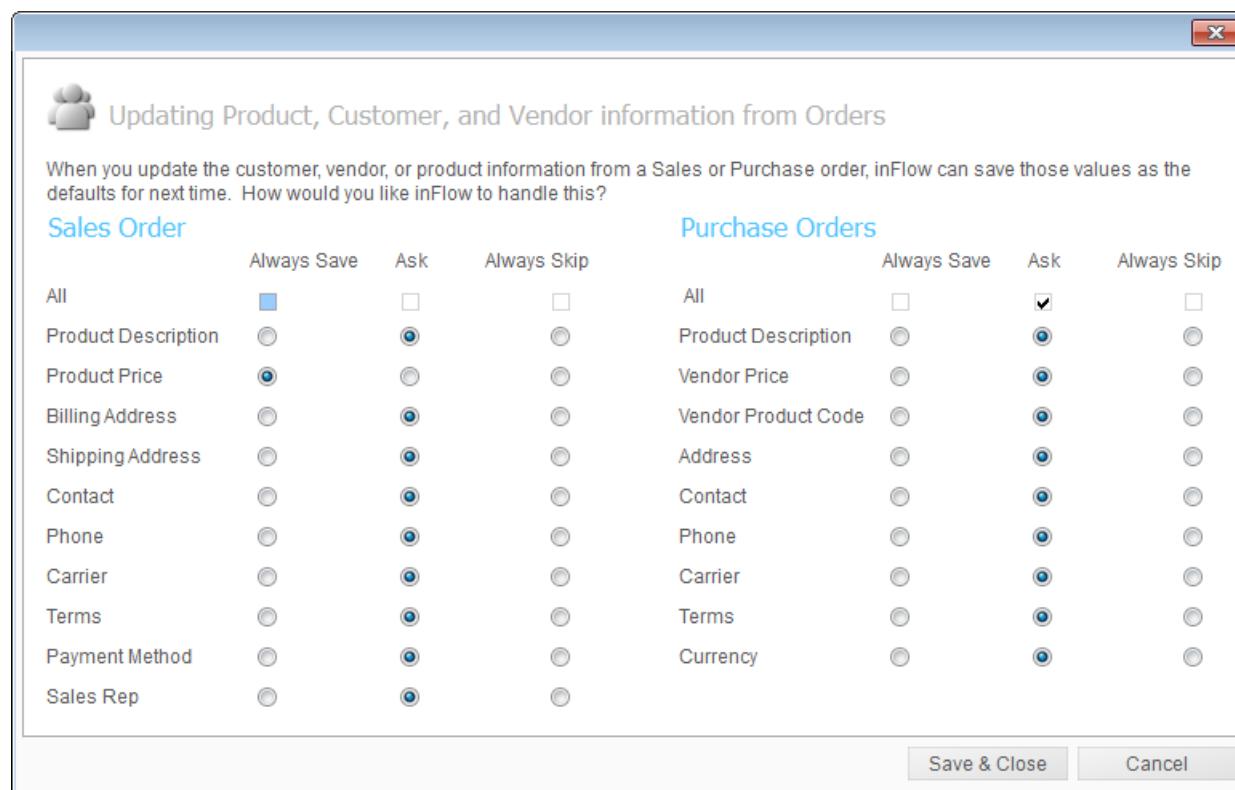
You can set the Default Location from the drop-down box.

A new Purchase Order/Sales Order/Work Order will use your default location instead.



Control “Save as Default”

You can save changes back to your records (Customers, Vendors etc.) directly from the Sales or Purchase Orders. inFlow records your chosen preferences to your personal settings. If you would like to change your settings you may do so by clicking this button and making your choices in the resulting dialogue box.

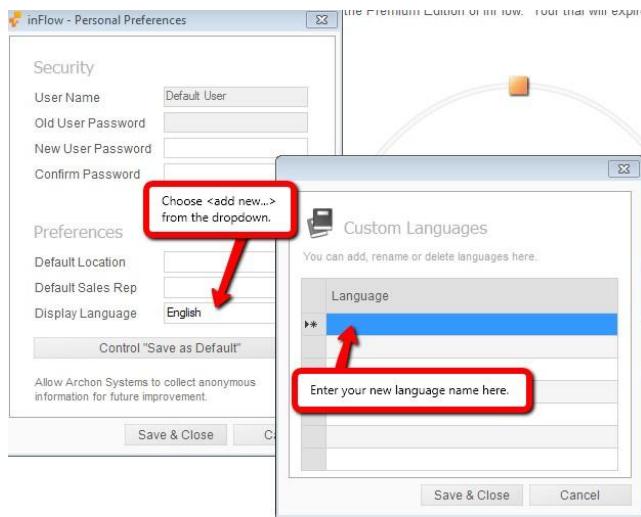


Sales Order			Purchase Orders				
	Always Save	Ask	Always Skip		Always Save	Ask	Always Skip
All	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	All	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
Product Description	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Product Description	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Product Price	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Vendor Price	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Vendor Product Code	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Shipping Address	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Address	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Contact	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Contact	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Phone	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Phone	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Carrier	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Carrier	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Terms	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Terms	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Payment Method	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Currency	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Sales Rep	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>				

Settings

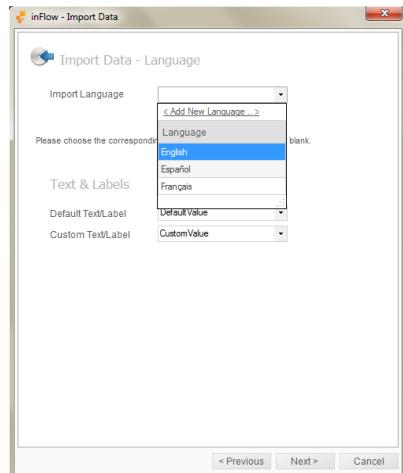
Display Language Settings

You also have the option here to set the Display Language from the drop-down box. Select a language from the drop-down list or click Add New Language if you would like to add a new language.



From this screen, you can add a new language or right click the selected language to delete it from the list. If you check the „Allow Archon Systems to collect anonymous information for future improvement“ option, the system will save the required data in the background to facilitate saving your settings.

Importing Languages



inFlow allows the user to customize and create a language scheme of their own using the import/export functions. In order to export a template for changing labels simply choose Main Menu→General→Export Data. Choose “language” as the type of data that you’d like to export then save the language file to your computer. This file will be exported as a CSV file, which you can then edit using *Microsoft Excel* or any other program which will allow you to work with a CSV file and resave it.

Once you are satisfied with the language entries you can import the language back into the program in the same manner.

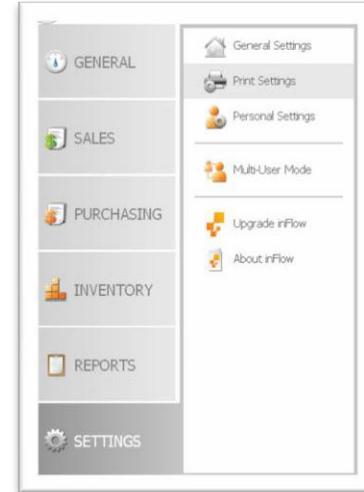
1. Choose Main Menu →General→Import Data and choose “language” as your type.
2. Click next and choose a language name to import. Select the “<Add new Language..>” and enter the name to create a new one.
3. Click “save and close” then choose the language name you just added from the updated drop down list and click next to import the language.

Settings

Print Settings

You can customize the Print Settings that will be applied to all your documents i.e. Sales Order, Purchase Order, Work Order etc. To access Print Settings, click the inFlow menu button, go to Settings and click Print Settings.

The screenshot shows the 'inFlow - Print Settings' window. On the left is a sidebar with icons for General, Templates, and Custom Docs. The main area is divided into several sections: 'Common Header' (Logo, Company Name, Address, City, Country, Phone, Fax, Email, Website, Misc. Info), 'Sales Doc Footer' (Per-page Footer, End-of-doc Footer), 'Purchasing Doc Footer' (Per-page Footer, End-of-doc Footer), 'Inventory Doc Footer' (Per-page Footer, End-of-doc Footer), and 'Reports Doc Footer' (Per-page Footer, End-of-doc Footer). At the bottom are 'Save & Close' and 'Cancel' buttons.



The Print Settings will open in a new window.

General

The information found under the General section contains the company info that will be shown on the first page of your printed documents and will allow you to customize how it appears when printed. Within this window you can also set Per-page Footer, End-of-doc Footer for Sales, Purchasing, Inventory and Reports.

Templates

The screenshot shows the 'inFlow - Print Settings' window with the 'Templates' section selected. On the left is a sidebar with icons for General, Templates, and Custom Docs. The main area shows a preview of an invoice template with fields for Customer ABC, Shipping address, and Billing address. It includes a table of items with columns for Item, Description, Quantity, Unit Price, and Sub-Total. At the bottom are 'Save & Close' and 'Cancel' buttons.

Settings

You can change the Font / Size / Color for the printed text here. The changes will be registered and will update any newly printed Sales Order /Purchase Order /Work Order / Count Sheet etc. InFlow now allows users to choose from three different style sets for their invoices.

The image displays three side-by-side screenshots of invoice templates. The first, 'Modern', has a light gray background with black text. It includes sections for shipping and billing addresses, payment terms, and a detailed product table with columns for item ID, description, quantity, unit price, and subtotal. The second, 'Classic', has a white background with black text. It follows a similar structure but with slightly different styling. The third, 'Clean', has a green header bar and a white body. It also includes sections for addresses and payment terms, and features a large green button labeled '\$117,257.50'.

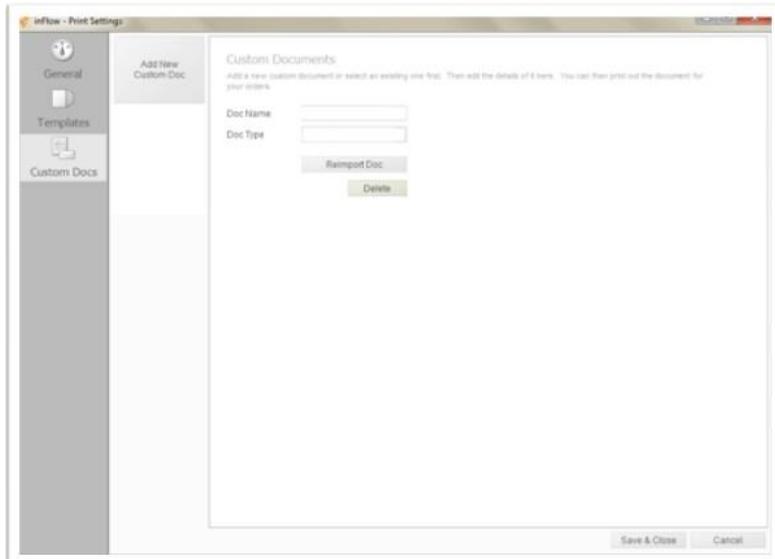
Modern, a sleek template allows you to give your customers the information they require in a modern looking new style.

The **Classic** invoice; for companies who value the traditional style of their documents.

Clean, a no-nonsense template allowing you to get your information across quickly and effectively. No muss, no fuss, just clean

Custom Docs

If you find that these styles are not quite what you're looking for, why not create your own? InFlow allows the user to create a custom template in whatever style they choose and import it into the program for direct use. InFlow uses the mail merge feature in *Microsoft Word* to allow users to quickly and effectively create customized, professional documents straight from their Inventory program.



Settings

Creating customized templates (guided)

In order to use the custom feature you will first have to create and import the file into *InFlow*. To begin you must:

1. Go to the Print Settings menu (via Main Menu→General Settings→Print Settings)
2. Choose Custom Docs icon from the list on the left.
3. Click the “Add New Custom Doc” button. This will open the Custom Document selection window which will allow you to choose from four types of custom documents.
4. Click the *sample* option in step 1; this will open the document in Microsoft Word.
5. Make the necessary changes to your template (be sure that preset fields are not disturbed as it could affect the integrity of the information which is imported later).
6. Save and close the template (take note of what it was named and where it was saved).
7. Go back to the *InFlow* Print Settings screen (it will still be open) and click the “browse” button beside step 2.
8. Locate and select the document you wish to use and click “open”.
9. Enter a name for the template you just created
10. Click the “OK”. *InFlow* will quickly open your template to take a screen shot of your document for your future reference. This will happen quickly and Word will subsequently be closed.
11. You should now be looking at the Print Settings Window and if you are satisfied with your changes you may now click “Save and close”.

Creating customized templates (advanced)

This process is quite similar if you’re looking to create a document of any kind by hand. There are a few Excel templates which have been included with your updated files and are available so that you may choose to link your Word document in order to create the custom fields you require.

In order to begin creating this custom document you will first have to create a word document and use the mail merge function to link it to one of our included spreadsheets. Please note that this version of the instructions is optimized for Microsoft Word 2007. To begin:

1. Open Microsoft Word and select the Main Menu button → New and choose “Blank Document”.
2. Under the “Mailings” tab you will need to click the “Start Mail Merge” button and choose “directory” as your type of document.
3. Next, click the “Select Recipients” button and choose “Use Existing List...”
4. This will open a window in which you should choose one of the sample documents which have been provided with the program. The documents will be located in the directory to which *InFlow* has been saved, for instance:
32-bit computers: C:\Program Files\inFlow Inventory\CustomDocument\
64-bit computers: C:\Program Files(x86)\inFlow Inventory\CustomDocument\

Settings

5. Once you have chosen your file you can begin entering fields. In order to be sure that you are marking the correct information for inclusion, open the excel file you are using and examine the data included.
6. Insert the available field names via the “Insert Merge Field” button; there will be a dropdown list of available items.
7. Once you’re satisfied with the document you’ve created save it and take note of the name and where it is located.*
8. Return to the program Go to the Print Settings menu (via Main Menu→General Settings→Print Settings)
9. Choose Custom Docs icon from the list on the left.
10. Click the “Add New Custom Doc” button. This will open the Custom Document selection window which will allow you to choose from four types of custom documents.
11. Skip step 1 and click the “browse” button beside step 2.
12. Locate and select the document you wish to use and click “open”.
13. Enter a name for the template you’ve just created.
14. Click the “OK”
15. You should now be looking at the Print Settings Window and if you are satisfied with your changes you may now click “Save and close”.

Congratulations! You have imported your template into inFlow Inventory and are now ready to use it to create a document.

***Please note:** If you're creating a custom document using this method you will need to be careful to tell the program where to look and when to stop. For instance, if you're including sales order information in a letter to your client you will need to tell the program to **stop** entering information if the next line in the source is blank. If you take a look at our example templates you will find that we have added a rule to the document which states that **if** the next <<ItemName>> field is blank inFlow should stop entering data. This is also done via the rules in the mail merge tab (see below).

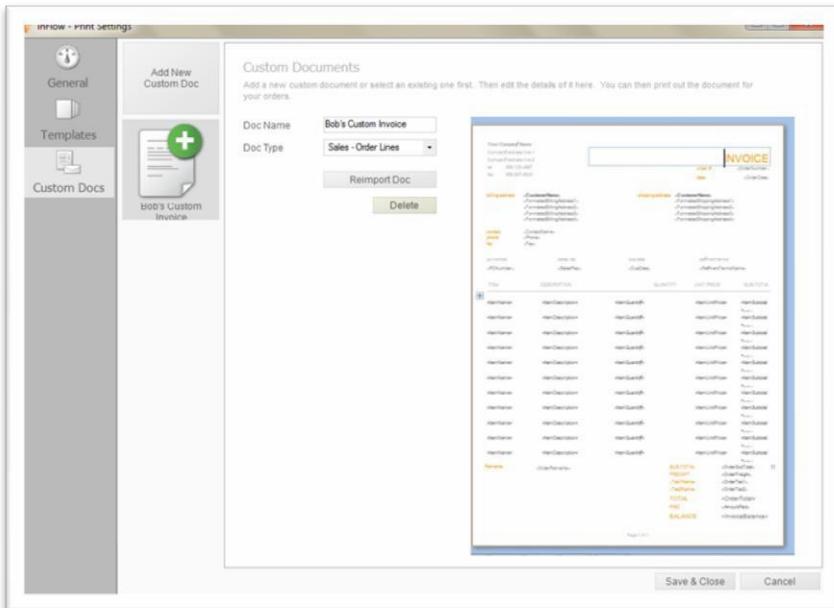
Using your customized templates

Now that you have imported your template you will be able to access it through *InFlow*. The custom documents are now listed under the “Preview” drop down where you would normally be exporting or printing your documents (such as invoices, purchase orders etc.).

Removing your custom templates

On occasion it becomes necessary to remove documents you have already imported into *InFlow*. You will have to do so through the Print Settings window (Main Menu→General Settings→Print Settings). Once open select the “Custom Documents” icon. You will see your own custom documents listed here as well. Select the document you would like to remove by clicking its icon. You will now see a preview of that template on the right and a button marked “Delete”. Click the delete button and your document will be removed from the program.

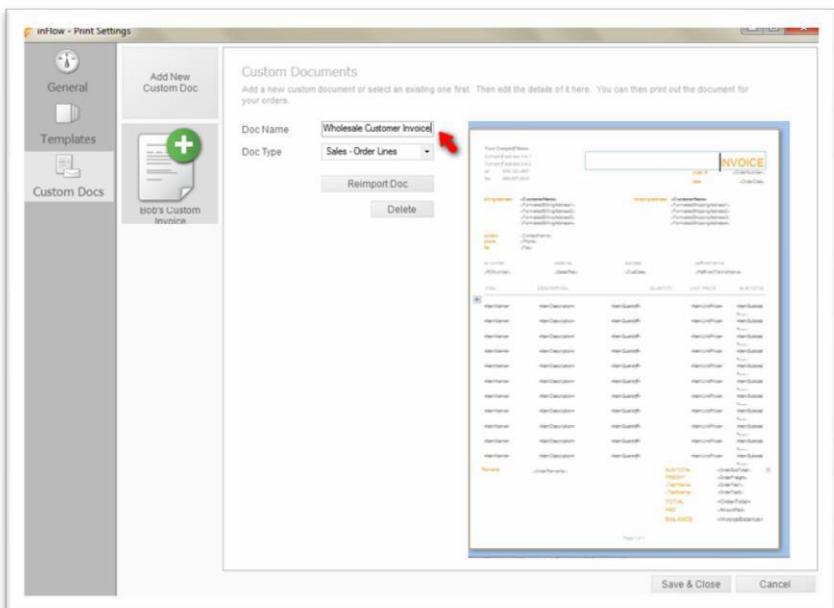
Settings



In this example, you will see that “Bob’s Custom Invoice” is the document we wish to be removed. It has been selected above by clicking the icon and once you see the preview you can click “delete” to remove it. However, it is important to note that deleting this document through the print settings window only removes your document from inFlow; it does not remove the template from your hard drive. In order to clear the document from there you will have to navigate to it through windows explorer and remove it manually.

Renaming your custom documents

As with removing the template it sometimes becomes necessary to rename your documents to make them easier to identify within the program. To do so you will again be starting by accessing the Print Settings Menu (Main Menu→General Settings→Print Settings) and selecting the document you’d like to change from the icon list. Once you’ve done so you can use the naming field to rename your document.



Settings

As you can see in the figure above, we have chosen to rename this template “Wholesale Customer Invoice”. Once you’re satisfied click “save and close” at the bottom of the window to make the change. The window will close and the existing template which was previously imported will be renamed.

Re-importing custom documentation

InFlow allows you to quickly and easily make changes and re-import the document so you don’t have to start from scratch. In order to re-import a document you must first make your changes to that document in word. Open the in *Microsoft Word*, make the necessary changes and re-save it.

Now that you have made changes you can re-import using the Print Settings (Main Menu→General Settings→Print Settings) window. Select the document you’d like to re-import from the icons on the left and you will see a preview of the document. Select the “Re-import doc” button and browse to the document you want to re-import. Click open and *InFlow* will import the document, and save it in your custom documents.

Exporting custom documentation

InFlow allows you to quickly and easily grab a copy of a previously imported custom document for further editing. Simply open the Print Settings window and select the corresponding document from your list. Once selected you will see the “export” button and you will be able to export the document and save it wherever you like for further editing.

General Usage

Import Data into inflow

You can import data from other sources into inflow, which can save you time by eliminating the need to manually retype your existing data.

Six types of data can be imported into inflow: Sales Orders, Purchase Orders, Products, Bill of Materials, Customers, Vendors and Inventory. All types of data can be imported from the widely-used Comma Separated Value (CSV) format, and Products, Customers, and Vendors can also be imported from the IIF format used by QuickBooks.

CSV File Format

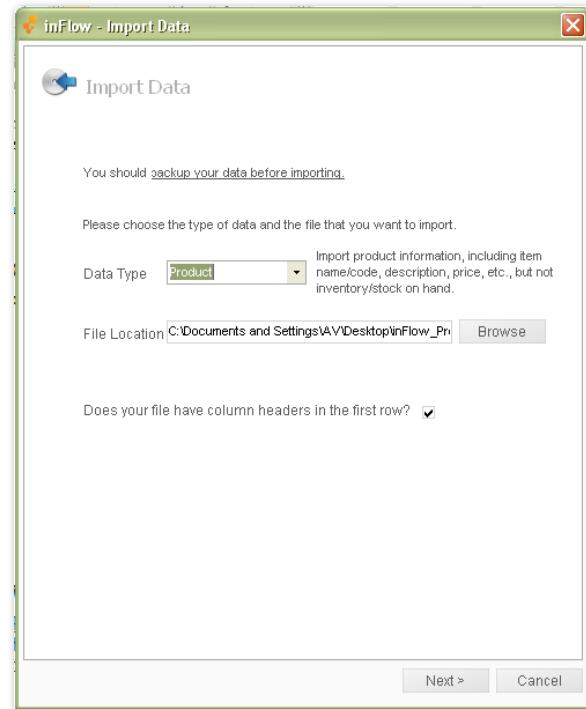
The CSV format is the most common data format and most programs should be able to export to this text-based format. For example, in Microsoft Excel, a spreadsheet can be converted to a CSV file by selecting the CSV file type from the Save As dialog. The first row can optionally contain column headers describing the contents of the data in each column. This is recommended but not required.

The exact set of columns in the CSV file and their order are flexible, since you will have a chance to rearrange them when importing the data.

Importing CSV Files

To import data from CSV Files into inflow:

1. From the inflow menu button, select the General option.
2. Click Import Data.
3. Select the type of data.
4. Click Browse and the select the CSV file to import from.
5. If your CSV file does not have a description of the data in the first row, uncheck the option "Does your file have column headers in the first row?"
6. Click Next.
7. Match the columns in inflow with the columns in your CSV file. If your CSV file had column headers, then they will be shown there. Most columns are optional, so they can be left blank.
8. Click Next to start the importing.



IIF File Format

The IIF format is used by QuickBooks. If you wish to import your data from QuickBooks, then the IIF format may be the easiest. Please refer to your QuickBooks documentation for how to export lists to IIF format. In some versions of QuickBooks, this may be done by going to the File menu, clicking Utilities, clicking Export and then selecting Lists to IIF Files.

General Usage

Importing IIF Files

To import data from IIF Files into inFlow:

1. From the inFlow menu button, select the General option.
2. Click Import Data.
3. Select the type of data and the IIF file to import from.
4. Click Next to start the importing.

Importing Sales Orders and Purchase Orders

Importing Sales Orders and Purchase Orders is designed to help quickly enter new orders from external sources. Imported orders will have automatically generated order numbers and have their status set to Open; the order number and status cannot be imported.

Sales Orders and Purchase Orders can be imported from a variety of CSV file types, with each line containing information about the order (e.g. Customer, Billing Address) and each line within the order (e.g. quantity of product ordered). For a sample of the expected file format, you can export the Sales Order or Purchase Order data from inFlow's Sample Database.

Each CSV file to be imported can contain information for multiple orders, with each one possibly having multiple lines. If all fields are empty, inFlow will group a line in the same order as the line above it or it will assign the same value as the line above, except for the following fields:

- Order Date (so that two items ordered by the same customer on different dates can be combined into one order)
- Any field within the Item Info section

For eBay sellers, we recommend setting the Custom Label field for your eBay products to match inFlow's Item Name/Code.

When importing orders with new customers, products, taxing schemes, etc., the associated entities will automatically be added to inFlow.

Importing Inventory

Importing Inventory will update the quantities at the location and sublocation specified in the import file. You have three choices by which you can update this number: set inventory levels to what's being imported, add it to the existing inventory levels, or subtract it from the existing inventory. If the location and sublocation aren't specified when importing, the default location for that product will be assumed.

Importing Other Types of Data

When importing Customers, Vendors, Products and Bill of Materials you can either import entirely new entries or update existing entries. Customers and Vendors will be updated when an existing entry is found with the same Name. Products will be updated when an existing entry is found with the same Item Name/Code. Otherwise, a new entry will be created.

General Usage

Export Data from inflow

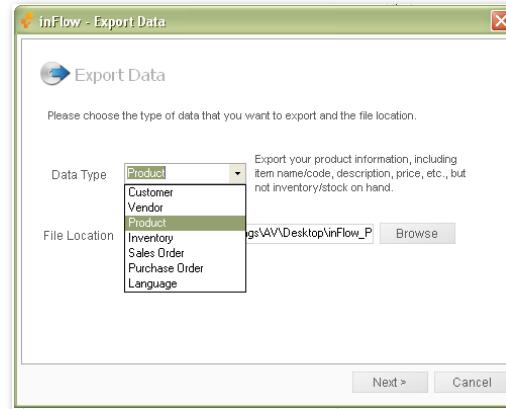
You can export your data from inFlow Inventory so that it can be accessed in other programs such as Microsoft Excel. inFlow allows you to export your Sales Order, Purchase Order, Product, Customer, Vendor and Inventory data. Deactivated data will not be exported. If you also wish to export these entities, you should reactivate them first in inFlow.

Exporting the Product type will export the product information like its name, description, price, etc. Exporting the Inventory type will export the information about how much stock you have for each product and where it is stored. This is split into two since inFlow allows you to keep inventory for a given product in multiple places.

Exporting Sales and Purchase orders will export the main contents of the order, but not the order processing information like how much has been shipped or received. This will export all orders that have not yet been cancelled.

To export your data:

1. From the inFlow Menu button, select the General menu and click Export Data.
2. Under Data Type, select the type of entities to export.
3. Click Browse and select a location and file name in which to save the exported data.
4. Click Next to export your data.



The data will be exported in the widely used CSV (Comma Separated Value) format, which can be opened by Microsoft Excel and any other text editing programs. Unfortunately, Excel does not currently support Unicode in CSV format. Therefore, if you work with international languages, you will need to use another program to handle the exported data from inFlow.

Backing Up and Restoring Data

In case of hardware failure or other error, it is a good idea to periodically back up your data. It's best to have your backups kept separately from your main database, e.g. on a USB key, portable hard drive or a separate computer. This will prevent you from losing both your database and your backups in the event of a failure.

Backing up Data Manually

To back up your data:

1. Click the inFlow Menu button, go to General and then select Backup Data.
2. In the dialog that pops up, choose a location in which to save the backup file.
3. Click Save.

The backed up data will be in the form of a file with an .IFI extension containing the entire contents of your inFlow Inventory database.

Restoring Data Manually

In the event of an error, you can restore your database from a backup. This should be done with caution, since all changes made after the backup will be lost.

General Usage

To restore your data from a backup:

1. Click the inFlow Menu button, go to General and then select Restore Data.
2. Proceed through the warning that pops up.
3. Select the backup file to restore from.
4. Click Open.

inFlow Inventory will then restart with the restored data.

Reset All Data

This will back up your database and then reset it to be blank, deleting all existing data.

To Reset All Data:

1. Click the inFlow Menu button, go to General and then select Reset All data.
2. Proceed through the warning that pops up.
3. In the dialog that pops up, choose a location in which to save the backup file.
4. Click Save.

inFlow Inventory will then restart with the blank data.

Automatically Backing up Data

inFlow can also automatically back up your data. You can set this up from Company Settings, under Auto Backup. You can set how often you want to backup and how long to keep the old backup files. For example, inFlow defaults the settings to Backup every 1 day and Keep Backups for 30 days. inFlow will check if it needs to do an automatic backup every time you close inFlow, or every two hours when inFlow is running.

These automatically created backups will be shown under Current Backups on the settings page. To restore your data to one of these backups, click the Restore to the backup link next to it.

These backup files will be stored under the application data folder on the server computer. On Windows XP, this folder is usually C:\Documents and Settings\All Users\Application Data\inFlow Inventory\Backup. On Windows Vista, this folder is usually C:\ProgramData\inFlow Inventory\Backup. For additional protection, you may wish to copy these automatic backups to another location, like a USB key.

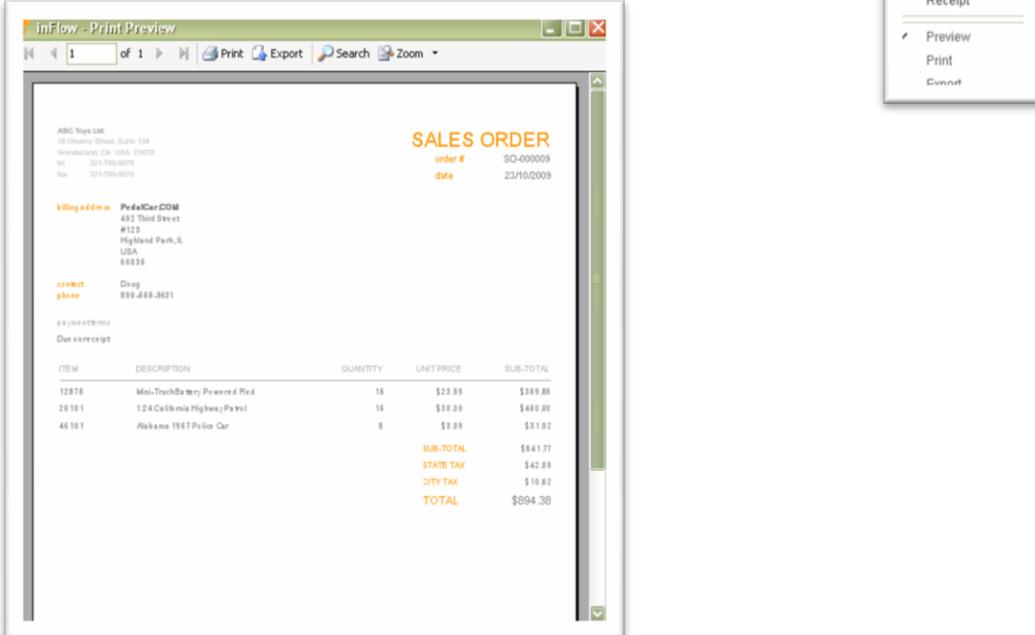
General Usage

How to Print and Export Documents

Numerous documents may be printed from inFlow or exported in another format such as PDF, Microsoft Word or Microsoft Excel.

The default method of printing or exporting a document is through the Preview pop-up:

- Select the document you want from the Preview menu.
- You will then see the Preview pop-up.



- Select Print from the Preview menu tool bar to print the document.
- To export the document, select Export from the tool bar and in the Save As dialog box set the Save as type: to Adobe PDF (*.pdf) or another file format of your choice.
- Click Save.

Alternatively, as a faster way of printing, you can print or export the document directly from the details panel toolbar.

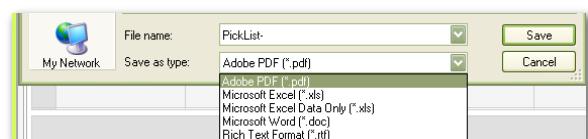
To print the document:

- Click the Preview button in the details panel toolbar of the current entity (e.g. Sales Order).
- From the Preview menu, select Print.
- Now from the Print menu select the type of document to print.



To export a document as a PDF or other file format:

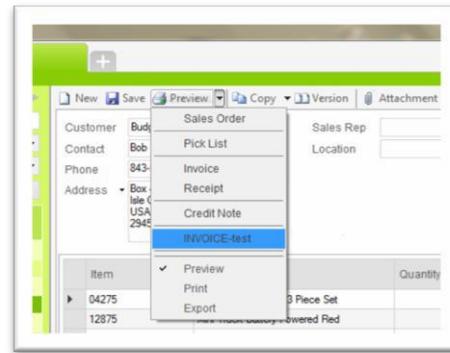
- Click the Preview button in the details panel toolbar of the current entity (e.g. Sales Order).
- From the Preview menu, select Export.
- Select the type of document to export.
- In the popup window, set the Save as type: to Adobe PDF (*.pdf) or another file format of your choice.
- Click Save.



General Usage

To export a document using a custom template:

- Click the Preview button in the details panel toolbar of the current entity (e.g. Sales Order).
- From the Preview menu, select the custom document you would like to use.
- Select the type of file you would like to export to.
- In the popup window, set the Save as type: to Adobe PDF (*.pdf) or another file format of your choice.
- Click Save



Documents printed using the Free Edition of inFlow Inventory will show the text "Printed by inFlow Inventory" in the bottom left corner. This will not be shown on documents printed using the Regular or Premium Editions.

Barcode Support

You can use a barcode scanner for fast product entry in various places throughout inFlow Inventory.

Setting up Barcodes

Before you can use barcode entry to take orders or other operations, you need to set up the barcodes in your Product Information.

A screenshot of the 'Storage Info' section of the product information screen. It contains four input fields: 'Barcode' (empty), 'Reorder Point' (50 ea.), 'Reorder Quantity' (100 ea.), and 'Default Location' (Main Warehouse). There is also a dropdown arrow next to the location field.

To set up the barcode:

- Click the inFlow menu button.
- Select the Inventory menu and go to the Product Information screen for the products by clicking Product List.
- Select the appropriate product to view its detailed information.
- Click into the Barcode field to place the cursor there.
- Using a barcode scanner, scan the product. Alternatively, you can type in the barcode of the product here.

Entering Barcodes

Once you have set up your barcodes, you can use the barcodes to quickly enter products when taking customer orders, adjusting stock, etc.

	Item	Description	Quantity	Unit Price	Discount	Sub-Total
*			0	\$0.00	0 %	\$0.00

General Usage

To do this:

1. Click in the Item column of a table on a new row, where you would normally select a product.
2. Using a barcode scanner, scan the product. This will select the product you just scanned. You can then scan the product again to increase the quantity, or start scanning a different product.

Multiple Barcodes

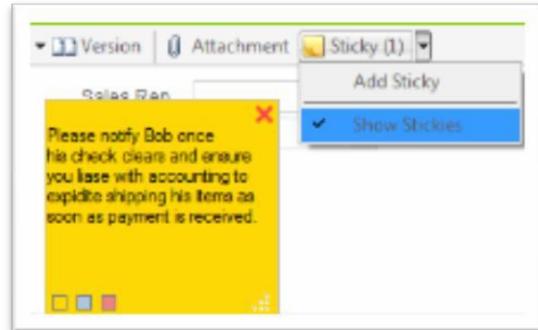
Some companies may have multiple different barcodes for a single product. This might happen if a vendor changes the barcode or multiple vendors use different barcodes. To support this, you can enter all the different barcode numbers into the barcode field of the product information, separating them with a space.

Using Sticky Notes

You can use sticky notes to keep or share notes within the Sales Order, Purchase Order or Count Sheet screens in inFlow. These notes will be saved and will appear next time the screen is opened by any user. The sticky notes will not be shown on any printed documents.

To add a sticky note, click the Sticky button in the toolbar and select Add Sticky. This is only available in the Sales Order, Purchase Order and Count Sheet screens.

A Sticky Note will appear on top of the screen you're currently working on. To edit the contents of the sticky note, click into the middle portion of the sticky note, and then begin typing. To move the sticky note, click and drag the sticky note near the top of the note. To resize the sticky note, click and drag the bottom right corner of the sticky note. To change the color, click one of the three color boxes at the bottom left of the sticky note. To delete the sticky note, click the red X at the top right of the sticky note.



To temporarily hide all sticky notes, click the Sticky button in the toolbar and uncheck the "Show stickies" option. To show them again, check Show Stickies. Sticky notes will also be shown again when the entity is reloaded.

Using Detailed Entity Combo Boxes

inFlow lets you select products, customers, or vendors using what we call the Detailed Entity Combo Boxes, which provide you with additional information to help find the entity to select.

The most commonly used Detailed Entity Combo Box is for selecting products. The other entities work in a very similar way.

General Usage

When you click into the cell of the table or combo box, the dropdown automatically appears. From here, you can select a product by clicking on it. For products, the dropdown shows the Category, Item Name/Code, Description, Normal Price and Details.

You can begin typing the Item Name/Code of the product to help find the product you are looking for. You can also scroll up and down by using the mouse wheel or pressing the up and down keys on your keyboard. Once the product you want is selected, you can confirm the selection by pressing Tab or Enter on your keyboard.

Item	Description	Quantity		
Category	Item	Description	Normal Price	Details
Die-cast	00303A	Army Combat Helmet	\$8.99	View
Die-cast	04275	4" Classic Airplane - 3	\$8.99	View
Die-cast	090821A	3.75" Military Classics	\$3.99	View
Die-cast	10201	1:700 Die Cast Battleship	\$12.99	View
Battery-Powered	12875	Mini-Truck Battery	\$23.99	View
Battery-Powered	14232	Mini-Sports Car Battery	\$18.99	View

SEARCH: Item Name/Code
Description Refresh
ADD NEW: (quick and simple) (with full details)

The Details column allows you to get extra information on the entity. By putting your mouse over the View link for a product, more detailed information on the product quantities is shown. Clicking on this link will also bring up the detailed Product Information in a new tab window. You can resize the dropdown by clicking and dragging the bottom right corner. You can select Add New to pop up a Product Information screen where you can create a new product to select.

Also, if you click Search, you can narrow down the list of products. For example, you can search for products only within a certain category. This search will stay in effect until it is subsequently changed. To clear a search, click Refresh and then Search.

Adding and Removing Rows From a Table

Tables appear frequently in inFlow, such as when entering lines in an order.

Item	Description		Quantity	Unit Price	Discount	Sub-Total
	Police Basket		!	2	\$25.00	0 %
*	Category	Item	Description	RSP	Details	Inventory Info: 9400
	Die-cast	9400	Police Basket	\$25.00	View	Qty on Hand 0
	Die-cast	9500	Boat Basket	\$12.99	View	Qty Available -3
						Qty Reserved 3

To add a new line to a table, click into the table row with the * icon next to it. You can then start typing into this row. Once any changes have been made, the new row will be preserved and the * icon will move down to the next row.

To delete a row from the table, you must first select the entire row by clicking on the gray box to the left of the Item cell (the row header). To select more than one row, click on the row to select it and drag the mouse to select adjacent rows. To select all rows in a table, click in the cell at the top left corner of the table. Once you have selected the rows to delete, you can delete the rows by right clicking and select Delete Selected Rows or by pressing the Delete button on your keyboard.



You can also insert lines into any table by clicking into the row below where you'd like to add and then clicking the "+" sign in the Data Grid Toolbar which pops up at the base of the table. You can also move rows within the table using the up and down arrows in the Data Grid Toolbar.

General Usage

Customizing Column Widths in Printed Documents

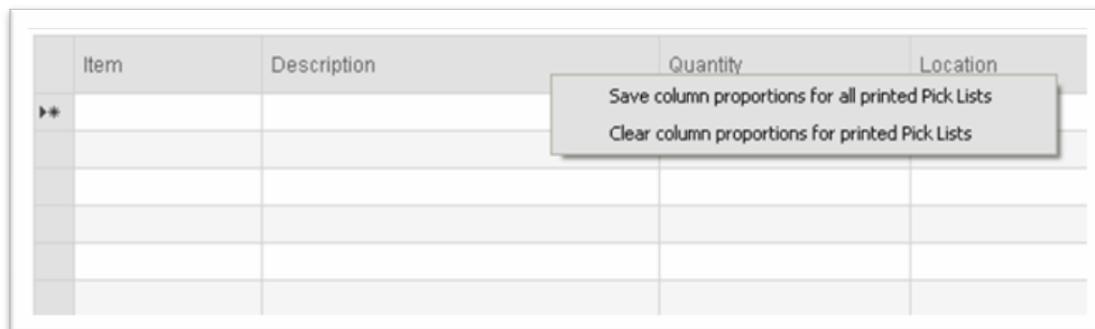
If you have long item names, quantities, etc., you may sometimes find that these get truncated in printed documents like invoices. To correct this, you can customize the widths of the columns in the printed documents.

To change the width of columns, you can drag the column headers as shown below.

Item	Description	Quantity
► 00264	3.5" Train Set - 6 pieces	2
04275	4" Classic Airplane - 3 Piece Set	2
12875	Mini-Truck Battery Powered Red	2
12876	Mini-Truck Battery Powered Blue	2
67817	Chevy Series #12	6

The widths of the columns in the corresponding printed document will follow the same proportions as you have set on screen. For example, you can customize the column widths of the printed Sales Invoice by changing the column widths in the Invoice tab of a Sales Order.

Once you have set column widths, you can save this to be used by everyone in your company by right clicking in the column header and choosing to „Save column proportions” for the appropriate document.



Once you have saved the column proportions, you can change the widths of the columns on the screen without changing the widths on the printed documents.

You can also choose to „Clear column proportions”, which will delete the saved column proportions. The printed documents will then once again follow the same column proportions as shown on the screen.

Other users will need to restart their copies of inFlow before the changes from saving or clearing column proportions will take effect for them.

Inventory

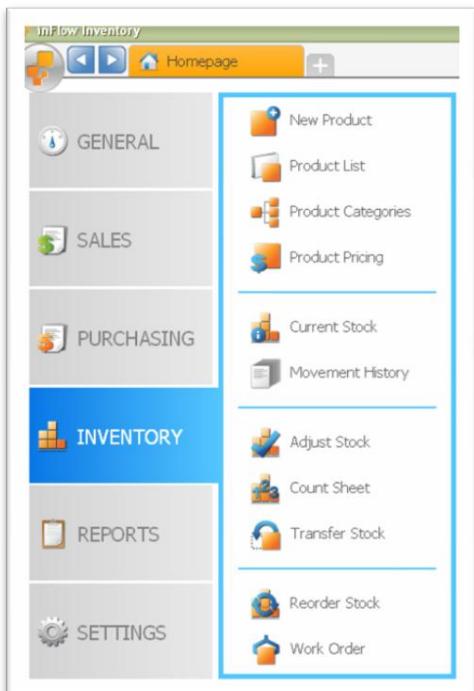
Inventory Menu

The Inventory Menu gives you quick links to various aspects of inFlow related to your product list, prices, current inventory levels or inventory management tasks.

An Inventory Menu is available at the Homepage...



...or the full Inventory menu can be accessed from the inFlow Menu button



Inventory

Inventory Menu

New Product	Add a new product or service to your product list.
Product List	View or modify your list of products and services.
Product Categories	See or manage the categories you organize products into.
Product Pricing	You can either set the prices directly under the Sales Info section of the Product information, or you can set them by using the Product Pricing tool in the Inventory module.
Current Stock	View the inventory you currently have in stock, broken down by location and sublocation.
Movement History	View a full, searchable, history of inventory transactions.
Adjust stock	Adjustments to stock quantities can be made to correct previous errors.
Count Sheet	Do a physical counting (or cycle count) of the stock level in storage. A count sheet can be used to record the counted quantities. After everything is counted, stock adjustments can be made to the software to correct discrepancies found during the count.
Transfer Stock	Stock can be transferred from one location to another.
Reorder Stock	When stock levels are low, you can choose which products should have their stock reordered from which vendor. After choosing them, the appropriate Purchase Orders will be generated.
Work Order	A work order is a document that helps you in the process of putting together raw materials to create a finished product.

Entering Product Information

Your Product Information keeps track of what products you buy or sell, its pricing, barcode and other information. Three types of products are supported, Stockable Products, Non-Stockable Products, and Services.

Stockable products will track inventory as per usual and allow you to see the system movements for that item.

Non-Stockable indicates a physical product for which you don't want to track inventory, let's say packaging materials for instance. inFlow will not track inventory levels for items of this type.

Services are used to indicate service fees and apply additional intangible charges such as labour costs etc. to your orders. inFlow will not track inventory levels for items of this type.

To create a new Product, click the New Product link from the Home Page or from the inFlow Menu button. To make changes in the existing product's information, select the product from the left panel and the form will be populated with the existing products data.

Inventory

The screenshot shows the 'Product' tab in the inFlow Inventory software. On the left, there's a search bar and a list of categories and items. The main area is divided into several sections: 'Basic' (Item Name/Code, Category, Type, Description), 'Picture' (with a browse and clear button), 'Sales Info' (Normal Price, Retail Price, Wholesale Price), 'Costing Info' (Costing Method, Edit / History), 'Inventory' (a table with Location, Quantity, and a Default Location row), 'Custom Info' (Year, Model), and tabs for 'Product Info', 'Extra Info', 'Product Vendors', 'Movement History', and 'Order History'. At the bottom, there are buttons for 'New Product', 'Current User: Default User', and a help link.

Basic Section

Item Name/Code The name or item code for this product. No two products or services can have the same Item Name/Code.

Category The product category in which you put this product. Add New brings up new Category tab which can be named and saved.

[More Information](#)

Type The type of product; Stockable Product, Non-Stockable Product or Service. This is set when the product is created but it can be changed later. The default value is Stockable.

Description A text description of this product. This shows in other places where the description is used, e.g. reports and printed sales orders. This can be hidden or shown as per the company setting for Show Descriptions.

Picture

You can add a picture of your product right into the product information. To do this, click the Browse button and then select a picture of the product. The common picture formats supported are JPG, GIF, PNG and BMP. Extremely large images are resized down to be smaller. To clear an existing picture from your product information, click the Clear button.

This section is not available for service items

Inventory

Sales Info

Price

You may have one or more pricing fields here depending on the pricing schemes you have defined in Company Settings. You can enter the price you normally charge under those pricing schemes here. If you're using different units of measure, the price should be for one unit of the sales unit of measure. If the product Cost is filled in, then the Markup will automatically be calculated and shown. You can either type in the price directly or type in the desired markup and inFlow will set the appropriate price to match the markup over this product's costs.

Keep in mind that pricing schemes are currency specific so if you're setting up a Retail scheme for two currencies you'll have to set up two schemes (one for each currency)

Purchasing Info

Costing Method

The method used to keep track of the unit cost of this product. This defaults to Moving Average Cost for Stockable Products and Last Purchase for Non-Stockable Products and Services.

If you select Moving Average as the Costing Method, you can view history or edit it by clicking the Edit/History link. Last Purchase Cost is not editable; it is automatically set when a PO is completed and includes shipping costs. For the Manual method, you can enter any cost. You may choose to take various factors into consideration, like purchase, shipping, storage, and tooling costs in addition to purchase costs.

Inventory

Location

This column contains the locations for this product. This includes the default location and many other locations can be added.

Sublocation

This column may be hidden depending on the Company Settings. This is the sublocation (e.g. Aisle Number) within the Location where the product is located.

Quantity

This is the quantity of the product at that location.

Quantity on Hand

This is the total quantity of a product that you have in your inventory storage.

Custom Info

This section contains fields as per the settings made under the Company Settings. You can add up to 5 custom fields in this section from the Company Settings. If there are none added, this section will not appear here.

Add Custom Fields: You can use this link to add custom fields.

Inventory

Extra Info tab

Storage Info

Barcode	The barcode for this product. Barcode can be entered in here and used in other parts of the system. You can enter multiple barcodes, separating them with a space. Scanning any of those barcodes will select this product.
Reorder Point	(Stockable Products only) The number of units that will trigger the need for a reorder.
Reorder Quantity	(Stockable Products only) The default number of units that will be reordered when the quantity falls below the reorder point.
Default Location	(Stockable Products only) The default storage location where the product is most often stored. List of choices and total inventory is shown in the dropdowns.
Last Vendor	The vendor for the last Purchase Order for this product. This is automatically set when completing a PO for this product but can also be set by importing data. The last price paid to this vendor will also be saved to the record.

Unit of Measure

This is an optional suffix to your quantity which indicates your unit. Here you can set up the names of your standard, sales and purchasing units, and set up the conversion rates between the units. For example, if you buy by the dozen, you might call your standard unit ea. (short for “each”), your purchasing unit cases, and set up the conversion factor: e.g. 1 cases = 12 ea.*

Standard UoM	You can enter the name of the Standard UoM here. For example ea, set, case, box etc.
Sales UoM	You can enter the name of Sales UoM here. As soon as you enter a value the option of setting up a conversion appears where you can enter a conversion rate for this UoM.
Purchasing UoM	You can enter the name of Purchasing UoM here. As soon as you enter a value the option of setting up a conversion appears where you can enter a conversion rate for this UoM.

Measurements

The measurements in this section use the metric/imperial Unit Types set up in the Company Settings.*

Length	The length of one unit of this product.
Width	The width of one unit of this product.
Height	The height of one unit of this product.
Weight	The weight of one unit of this product. Weight is used for calculations in Sales Order for Freight weight calculations.

*Unavailable for service items.

Inventory

Remarks

Remarks Any remarks you have about the product.

Bill of Materials

You can specify the subcomponents here. This will be used when creating work orders.

Component Item This is a component you bring in to create one unit of this product.

Description This is the description of the component. This column may be hidden depending on the Company Settings.

Quantity This is the quantity of Component Items needed to create one unit of this product.

Cost This is the cost of the component item as per its product record. The system will provide you with the total cost below.

Movement History tab (Stockable Products Only)

This shows you a history of inventory transactions that have taken place for this product. Double clicking on one of the lines in this table will bring up the relevant Sales Order or Purchase Order that caused the transaction, if applicable. Order remarks will appear here so that is a good place to put items of note to do with the order for later reference.

Order History tab

This shows you a history of Sales Orders or Purchase Orders that have taken place for this product. For Stockable Products, this tab shows you the current quantity on hand. It also shows some other summary quantity information.

For Non-Stockable Products and Services, only the Quantity Reserved and Quantity on Order will be shown. You can adjust your stock by changing the contents of this table. When you click the Save button, a Stock Adjustment or Stock Transfer form will come up showing you the changes and allowing you to confirm before they're changed.

Deactivating and Reactivating Products

The screenshot shows the 'Search' panel of the inFlow software. On the left, there's a search bar labeled 'Item Name/Code'. Below it, a 'Show' dropdown menu is open, showing four options: 'Active' (which is highlighted in blue), 'Inactive', 'Active', and 'Show All'. At the bottom of the panel, there are buttons for 'Category' and 'Item'.

Deactivate Products can be deactivated so that they will be inactive and not shown in normal usage of inFlow. Products cannot be deleted entirely, so you have a full record of previous products.

Reactivate To view Inactive products, select „Show“ from the drop-down list in the Listing Panel for the products.

Now select Inactive from the drop-down box. An inactive product can then be re-activated by clicking the Reactivate button, which takes the place of the Deactivate button in the toolbar for the product.

Inventory

Product Types

inFlow Inventory supports three types of products. The most common type is the Stockable Product. The Non-Stockable Product type can be used for products which you don't want or need to keep a careful check on inventory. Finally, the Service type can be used for intangible items that you may buy or sell.

Stockable Product	A stockable product is the most common type of tangible product. inFlow will keep a careful inventory of this type of product and where it is stored. Most businesses will use this product type for almost all products that they buy or sell.
Non-Stockable Product	A non-stockable product is a tangible product that you may buy or sell, but don't carefully keep a track of inventory. For example, you may wish to use a Non-Stockable Product for supplies that are regularly used up, like packing materials. This allows you to create Purchase Orders for these supplies and track their receiving status without requiring you to update inventory counts when supplies are used up.
Service	A service is an intangible item that you may buy or sell; e.g. selling an extended warranty on your products or hiring a consultant. Inventory is not kept for services but this product type is necessary so that they can be included on Sales Orders or Purchase Orders etc.

The type of product is set when the product is created but it can be changed later. The default value is „Stockable“.

Units of Measurement

You can use units of measurement to help count the product quantities in different ways. For example, if you buy by the case and sell by the item, this will be useful for you.

inFlow allows you to set up three different units of measure (UoM):

- The Standard UoM is the basic unit used in your inventory records
- The Sales UoM is the unit in which you typically sell a product
- The Purchasing UoM is the unit in which you typically buy a product

You can set up your units of measurement in the Extra Info tab of the product screen. You can set up the names of your standard, sales and purchasing units, and set up the conversion rates between the units. For example, if you buy by the dozen, you might call your standard unit ea. (short for “each”), your purchasing unit cases, and set up the conversion factor:

1 cases = 12 ea.

You can also choose to leave the unit name blank to show just the number without the unit name on your invoices, etc.

Selecting units when entering orders

Once you've set up your units of measure, you can use them to help you enter orders in inFlow. When you're entering a quantity, you can just type the quantity followed by the name of the unit you want to use. You'll also be shown a dropdown that shows you the different unit choices along with how much that would represent in standard units.

Inventory

When you're entering a sales order, the Sales UoM will be used by default. Similarly, the Purchasing UoM will be used by default in purchase orders. In other parts of inFlow, the Standard UoM will be used by default. The default UoM is the one shown at the top of the quantity dropdown.

Changing the UoM in an order will change the unit price too (e.g. if you have 1 piece at \$10, changing to 1 dozen should change the price to \$120).

Units of measure and pricing

The prices that you charge are for one sales unit. For example, if you set up your Sales unit as a box of 6 with a sales price of \$20, your customers will be charged \$20 for a box of 6.

Similarly, the prices that your vendor charges you should be set for one purchasing unit. If you buy by the case, set the vendor's price to be the price for one case.

Changing units

If you change your sales or purchasing unit name or conversion factor, this won't affect your old orders, but it will affect how you enter new orders.

You can't change what your standard unit is; you can only rename it. If you do want to change the standard unit, we recommend creating a new product record.

Product Costing

inFlow can help you to figure out the costs of your products and understand how profitable your business is. You can manually set the cost per unit of your product by choosing "manual" as your costing method. Alternately there are two methods you can use to have inFlow estimate your product costs:

Moving Average Cost (MAC) Let inFlow automatically calculate the moving average cost per unit of your products. This is only available for stockable products and MUST be used for items with a BOM.

Last Purchase Cost Let inFlow automatically calculate the cost per unit of your item based on your last purchase order.

Calculating MAC

The MAC is a costing method available for stockable products that gives you accurate costs on the inventory you have in stock. This is updated whenever you get new stock through a Purchase Order or Work Order.

Updating MAC through Purchase Orders

When you complete a Purchase Order, the MAC is updated by averaging the cost of the newly ordered products with those already in stock. For example, if you had 10 units of a product in stock with a MAC of \$5, and you purchased 20 more units at \$8, then your inventory would be updated to have 30 units at an MAC of \$7.

You can use the non-vendor costs field in the Purchase Order to keep track of extra costs that are part of the order, but not paid to the vendor. For example, credit card processing fees, customs fees, etc.

Inventory

Note that the costs are updated when the Purchase Order is completed, not when the stock is received into inventory. In practice, this mostly occurs at the same time anyway.

There may be differences between the quantities and prices ordered, received and invoiced. The MAC uses the quantity received and the cost based on the invoice.

Freight and ancillary expenses are included in the MAC calculations, but tax is not. This is because many taxing schemes, especially the Value Added Tax (VAT) or Goods & Services Tax (GST) may later be refunded. If you do want to include the taxes into your costs, you can do this by setting the ancillary costs to include them. These extra costs are divided up into the products received in proportion with their base cost.

Cancelling a purchase order reverses the inventory movements, but does not reverse the cost updates, since you may have made other changes in the meantime. You may wish to manually update the MAC in this case.

Updating MAC through Work Orders

The MAC is also updated when products are produced as finished products in Work Orders. The cost of each product is assigned as follows. First, a base cost for each finished product is calculated by adding up the costs of all the raw materials that went into creating that finished product. Then, the costs in the Other Costs field are divided up into the finished products proportional to their base cost. The inventory and costs are both updated when the work order is completed.

Update MAC When Picking - The base cost for products is looked up for raw materials, then propagated up hierarchically to the finished products. Other Costs are allocated to the finished products proportional to their base costs. MAC for raw materials is removed at their current MAC.

Update MAC when putting away - The base cost for a product is looked up for raw materials, then propagated up hierarchically to the finished products. Other Costs are allocated to the finished products proportional to their base costs. MAC for finished products is updated based on these calculated costs.

Update MAC when cancelling - When cancelling pick transactions, put them back at the costs they were taken out at. When cancelling put-away, take them back out at the costs they were put in at.

Viewing the MAC log and adjusting the MAC

When inventory quantities are about to go negative or 0, the MAC will remain unchanged. When the quantity goes positive again, it is set to the MAC of the transaction that brought it positive.

You can view the full history of the MAC and make manual adjustments. To do this, open the product information, set the Costing Method to Moving Average and click the Edit / History link. A window will pop up showing you the history of adjustments to the costs.

To make a manual adjustment to the costs, you can type in a value into the New Unit Cost field and optionally specify the Reason for the adjustment.

Inventory

Product Categories

You can organize your products into different categories. For example, a clothing distributor might first categorize clothing by the brand name and then subcategorize by the type of clothing articles (T-shirts, Pants, etc.).

To see and manage your product categories, click Product Categories from the Inventory menu through the inFlow Menu button.

inFlow Inventory allows you to set up your categories to any depth. Also, categories do not all need to be the same depth; so you can subdivide just some of your categories if necessary.

Item	Description	Normal Price	Cost	Last Purchase Price
12875	Mini-Truck Battery Powered Red	\$23.99		\$500.00
14232	Mini-Sports Car Battery Powered Red	\$18.99		\$12.00

To add a new Category, click the Add button. This will prompt you for the name of the new category. A Category can be added to any level, as a root or as a leaf.

Empty categories that have no subcategories within them can be deleted. To do this, select the empty category, click the Remove button. Category with products in them cannot be deleted.

You can view the Product Information for a product by selecting the relevant category and then double clicking the product line on the right side.

Reorganizing your Categories

You may drag and drop your categories using the tree on the left side of the Product Categories screen to rearrange them. You can move Categories to any level of the structure. For example, you may promote a leaf category to be a top-level category by clicking and dragging the category onto the Product Categories item. If you need a little more space the width of the category menu can be readjusted by simply clicking and dragging the divider between the sections.

Reorganizing your Products

You may also drag and drop products into different categories. To do this, select the category containing the relevant product. Then click on and drag the product from the right side of the Product Categories screen onto the relevant new category.

You can also select a number of products at once by clicking the first one, then holding shift and clicking the last one in a list. All of these products can then be dragged to another category at once.

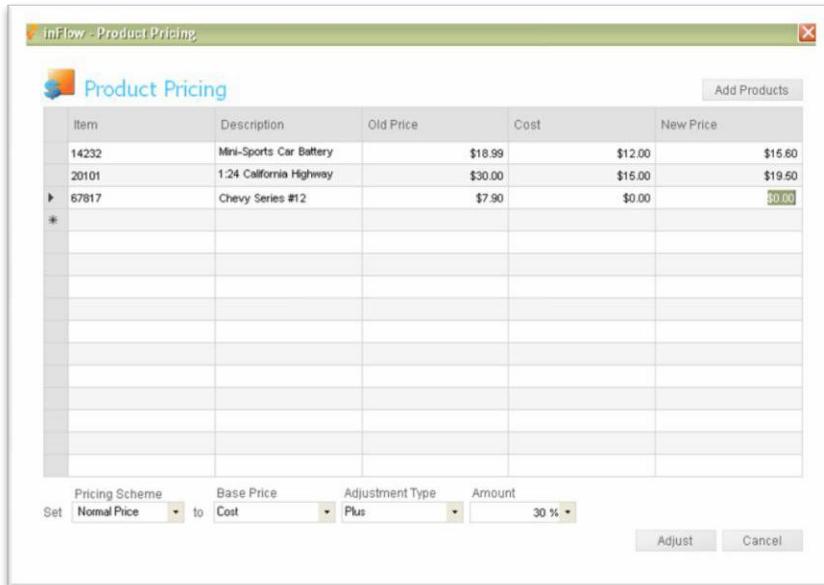
Each category is collapsible and expandable.

Inventory

Adjusting Product Prices

inFlow gives you two methods for setting up the prices that you charge to your customers. You can either set the prices directly under the Sales Info section of the Product information, or you can set them by using the Product Pricing tool in the Inventory module.

Select Product Pricing from the Inventory menu through the inFlow Menu button.



The Product Pricing tool is particularly good for setting prices for many products at once. You can also have it help you calculate prices. You can choose which products to adjust prices for by clicking the Add Products button and selecting a number of products, or by adding them one by one into the table directly.

Pricing scheme Select the pricing scheme for which you want make price changes under Pricing Scheme. You can also use this tool to help calculate prices following a variety of methods. You can adjust the formula and then click the Update button to set the prices into the table. This will let you review or modify these prices by changing the values in the New Price column. Clicking the Adjust button at the bottom will update all the product prices and close the Product Pricing Window.

Base Price This is the figure that you're setting prices relative to. Options include:

Exactly set the new price directly to some new value

Current set the new price relative to the current price

Cost set the new price relative to the product cost, using the costing method set for each product

Moving Average Cost set the new price relative to the Moving Average Cost of the product

Manual Cost set the new price relative to the Standard Cost set for that product

Inventory

Adjustment Type

This is the way that prices are being adjusted from the Base Price. This won't show up if the Base Price is set to Exactly. Options include:

- Plus to add a percentage or fixed amount
- Minus to subtract a percentage or fixed amount
- Multiplied By to multiply by some number
- Divided By to divide by some number

The Amount field is the number to adjust by or to. This should be a currency figure when the Base Price is set to Exactly. It can be either a percentage or a currency figure when the Adjustment Type is set to Plus or Minus, or just a number when the Adjustment Type is set to Multiplied By or Divided By.

Example 1: Setting all prices for a product category to \$29.99

First, select the products within the category using the Add Products button and the pricing scheme to update. Then under Base Price, select Exactly, and set the Amount to \$29.99. Click the Update button to have this show up in the New Prices column.

Example 2: Setting prices to a 25% markup over your cost

Set the Base Price to Cost, the Adjustment Type to Plus, and the Amount to 25%. After clicking the Update button, if you want to round or adjust the prices, you can then make changes in the New Price column.

Example 3: Raising prices by \$2.00

Set the Base Price to Current, the Adjustment Type to Plus, and the Amount to \$2.00.

Example 4: Changing prices to include taxes

This might be helpful when you want to set the price including sales tax to be a nice round number, like \$20.00. This is a common practice in the United Kingdom, for example, where the sales tax rate / VAT is 17.5%. In this case, first set the prices to the target final prices, e.g. \$20.00. Then, use the Adjust Price tool to set the Base Price to Current, the Adjustment Type to be Divided By, and the Amount to 1.175. Note that because of rounding issues, the actual price after tax can sometimes end up slightly different than intended.

Inventory

Important Quantities

There are numerous ways to keep track of inventory quantities for different business applications. Four important quantities are:

Quantity on Hand

This is the total quantity of a product that you have in your inventory storage. This does not include products that have been picked for a Sales Order or Work Order. This type of quantity is the most commonly shown when working with your inventory, such as in the Current Stock screen.

Quantity Reserved

This is the quantity of the product that has been ordered by a customer, but has not yet been picked or shipped out. This represents the quantity of the product that would be required to fulfill all existing Sales Orders.

Quantity on Order

This is the total quantity of this product that has been ordered from vendors but not yet received. This represents the extra amount of the product that is expected to be received in the future.

Quantity Available

This is the quantity of the product that is on hand and has not yet been promised to a customer, so is available for sale.

$$\text{Quantity Available} = \text{Quantity on Hand} - \text{Quantity Reserved}$$

These quantities can be viewed through the Inventory Summary report or in the Current Quantity tab of the Product Information screen.

Current Stock

You can view your current stock at all locations by clicking the Current Stock link from the Home Page or from the inFlow Menu button. This shows you a detailed breakdown of all products stored in all locations. You can search or sort through the current stock listing panel.

Also, if you double click an entry in the Current Stock panel, it will pop up the detailed product information screen for the selected product.

Item	Description	Location	Quantity
00303A	Army Combat Helmet	<PICKED>	2
00303A	Army Combat Helmet	Main Warehouse	47
04275	4" Classic Airplane - 3 Piece Set	Main Warehouse	556
04275	4" Classic Airplane - 3 Piece Set	<PICKED>	4
090821A	3.75" Military Classics Warship	Main Warehouse	100
10201	1:700 Die Cast Battleship	Default Location	0

Inventory

Current Stock Columns

Item	The item name or item code for the product.
Description	A text description of the product. This field will be shown, only if Show Product Description is set in the Settings.
Location	The storage location where the product is located.
Sublocation	This column may be hidden depending on the Company Settings. The sublocation (e.g. Aisle Number) within the Location where the product is located.
Quantity	The quantity of the product located at the specified location.

Search

Search can be based on filters such as Item and Location. Other filters can be accessed from the drop-down button. Filters can be added/ removed but all filter options cannot be removed. The Category filter shows category hierarchy and works hierarchically, e.g. selecting a parent category shows products in subcategories. Filters that have been removed no longer restrict the search.

Stock Transaction History

To see a full, searchable, history of inventory transactions, click the Movement History from the Inventory menu through the inFlow Menu button. This allows you to see a history of inventory movements. You can search or sort through the history listing panel. Stock Transactions can be any one of the following types:

Stock Adjustment	due to a need to correct stock levels (damages, stock count etc)
Stock Transfer	due to a Stock Transfer
Picking	due to picking goods for a Sales Order
Shipping	due to shipping goods out to a customer for a Sales Order
Restocking	due to restocking returned goods for a Sales Order
Receiving	due to receiving goods from a vendor for a Purchase Order
Unstocking	due to returning goods to a vendor for a Purchase Order
Inventory Import	due to the importing of inventory from an external source
Purchasing Costs	due to the purchasing costs
Cost Adjustment	due to a cost adjustment
Work Order Use	due to the Work Order use
Work Order Put Away	due to the putting away of finished goods from a Work Order into inventory
Work Order Picking	due to the Picking of goods for a Work Order



Inventory

If you double click an entry, it will pop up the document responsible for that inventory transaction. The exceptions to this are Stock Adjustments and Stock Transfers.

The screenshot shows the 'inFlow Inventory' application window titled 'Movement History'. The interface includes a toolbar with icons for search, movement history, and refresh. A search bar at the top has dropdown menus for 'Transaction Type' and 'Item'. Below the search bar is a table with the following columns: Transaction Type, Date, Item, Description, From Location, To Location, Quantity, User, and Remarks. The table lists several entries:

Transaction Type	Date	Item	Description	From Location	To Location	Quantity	User	Remarks
Stock Adjustment	21/11/2009 8:29 PM	00303A	Army Combat Helmet	Main Warehouse		1	Default User	
Unstocking	21/11/2009 10:10 AM	12875	Mini-Truck Battery Powered Red	Default Location		50	Default User	PO-000014
Unstocking	21/11/2009 10:10 AM	00303A	Army Combat Helmet	Main Warehouse		100	Default User	PO-000014
Receiving	21/11/2009 9:06 AM	12875	Mini-Truck Battery Powered Red		Default Location	50	Default User	PO-000014
Receiving	21/11/2009 9:06 AM	00303A	Army Combat Helmet		Main Warehouse	100	Default User	PO-000014
Shipping	19/11/2009 3:10 PM	Catalog05	2006 Product Catalog	<PICKED>		1	Default User	SO-000014

History Columns

Transaction Type	The type of stock transaction (as above)
Date	The date and time that this inventory transaction occurred.
Item	The item name or item code.
Description	This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
From Location	The storage location from where the product was moved. It will be empty if it was created or moved from an external source.
From Sublocation	This column may be hidden depending on the Company Settings. This is the sublocation (e.g. Aisle Number) within the From Location from which the product was moved.
To Location	The storage location from where the product was moved. It will be empty if it was removed or moved to an external destination.
To Sublocation	This column may be hidden depending on the Company Settings. This is the sublocation (e.g. Aisle Number) within the To Location to which the product was moved.
Quantity	The quantity of the product that was moved.
User	The user in inFlow who did the transaction.
Remarks	A description of why the inventory transaction took place.

Search

Search can be based on filters like Transaction Type and Item. Other filters can be accessed from the drop-down button. Filters can be added/ removed but all filter options can't be removed. Category filter shows category hierarchy and works hierarchically, e.g. selecting a parent category shows products in subcategories. Filters that have been removed, no longer restrict the search.

Inventory

Inventory

Adjust Stock

The screenshot shows the 'inFlow - Adjust Stock' window. At the top, there's a toolbar with icons for back, forward, and close. Below it is a title bar with 'Adjust Stock'. The main area is a table with columns: Item, Description, Location, Before Quantity, After Quantity, and Difference. A single row is selected for '12875 Mini-Truck Battery Powered Red' at 'Default Location', with 'Before Quantity' as 15, 'After Quantity' as 14, and 'Difference' as -1. At the bottom left is a 'Remarks' text area, and at the bottom right are 'Adjust' and 'Cancel' buttons.

Item	Description	Location	Before Quantity	After Quantity	Difference
12875	Mini-Truck Battery Powered Red	Default Location	15	14	-1

Adjust Stock Columns

Item	The item name or item code for the product to be adjusted. Items can be selected from the drop-down box or can be entered by scanning the barcodes. For this you have to setup product barcodes, click into the Item field and scan. If the item is scanned repeatedly, then the quantity will be decreased by 1 to make it easier to use up items from inventory.
Description	This is a text description of the product or service being adjusted. This field will be shown only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
Location	The storage location at which to adjust the inventory.
Sublocation	This column may be hidden depending on the Company Settings. The sublocation (e.g. Aisle Number) within the Location at which to adjust the inventory.
Before Quantity	The previously known quantity of the product at the specified location. This will be automatically filled based on the product and location, and cannot be modified.
After Quantity	The quantity of the product that will be expected to be in the specified location after the adjustment. Modifying this field will automatically recalculate the amount in the Difference field.
Difference	The change in the product quantity due to this adjustment. Modifying this field will automatically recalculate the amount in the After Quantity field.
Remarks	You may use the Remarks field to make a note of why this adjustment is being made.

You can use the Adjust Stock function to make corrections to the inventory levels. For example, if some products go missing from your inventory, you can correct the inventory levels here.

To begin adjusting stock, select the Adjust Stock option from the Inventory menu through the inFlow Menu button or else click the Adjust Stock link on the Home Page.

Inventory

Adjusting

To complete the stock adjustment and update the inventory, click the Adjust button. This will immediately update the inventory and close the Adjust Stock window. The adjustment will be made based on the Difference column.

To cancel without adjusting inventory, click the Cancel button.

Count Stock

Periodically, you will need to do a physical count (or cycle count) of the stock level in storage. A count sheet can be used to record the counted quantities. After everything is counted, stock adjustments can be made to the software to correct discrepancies found during the count.

The Count Sheet process works as follows:

1. Create a Count Sheet.
2. Add products and locations to the Count Sheet to schedule them for counting.
3. Take an Inventory Snapshot of the inventory quantity in the system.
4. Physically count the product quantity at each location in the count sheet at the time of the Inventory Snapshot and enter these quantities into the count sheet.
5. Make a Stock Adjustment to correct the inventory discrepancies found.

It is not strictly necessary to lock down operations while an inventory count is in progress, but care must be taken to ensure that the counting process counts the inventory quantity at the time the Inventory Snapshot was taken. For example, if more products are moved into a location during the counting process and after an Inventory Snapshot is taken, they should not be included in the count.

Create a Count Sheet

To create a new Count Sheet, click the inFlow Menu button, select the Inventory menu and click Count Sheet. You can also view or modify existing Count Sheets from the listing there.

The screenshot shows the 'Count Sheet' window in the inFlow application. At the top, there's a search bar with fields for 'Sheet #' and 'Status', and a 'Refresh' button. Below the search is a table with columns 'Sheet #' and 'Status'. A single row is selected, showing 'CS-000001' and 'In Progress'. To the right of the search bar is a toolbar with icons for New, Save, Preview, Copy, Version, Attachment, Sticky, and Close. Below the search area is a section titled 'Add Items By...' with a dropdown menu. The main body of the window contains a table with columns 'Item', 'Description', 'Location', 'System Quantity', and 'Counted Quantity'. Five items are listed:

Item	Description	Location	System Quantity	Counted Quantity
76289B	Kung Fu Master Action Figure	NY Warehouse	173	
00303A	Army Combat Helmet	Main Warehouse	47 ea	
04276	4" Classic Airplane - 3 Piece Set	Main Warehouse	556	
090821A	3.75" Military Classics Warship	Main Warehouse	100	
20101	1:24 California Highway Patrol	Main Warehouse	7	

At the bottom of the window, there are buttons for 'Counted By' (with a text input field), 'Remarks' (with a text input field), and three action buttons: 'Take Snapshot', 'Stock Adjustment', and 'Cancel Count Sheet'.

Inventory

Count Sheet Contents

Count Sheet Header

Sheet #	A unique number by which you can refer to this count sheet. This will be automatically filled in the first time you save your count sheet. You can edit this Sheet # directly, or set the pattern of how sheet numbers will be created under Company Settings. If sheet # is set before saving sheet, no number is generated.
Started Date	The date on which the counting process started. This will default to the current date.
Completed Date	The date on which the counting process finished. This will default to the current date when the counting process is completed.
Status	A short description of the status of this Count Sheet. The possible Status values are:
<i>Open</i>	Before an Inventory Snapshot has been taken for this Count Sheet
<i>In Progress</i>	After the Inventory Snapshot has been taken for this Count Sheet
<i>Complete</i>	After the entire counting process, including a Stock Adjustment has been completed.
<i>Cancelled</i>	If the Count Sheet was cancelled before being completed. No stock adjustments would have been made.

Adding Products and Locations for Counting

You can manually add in products and locations for counting, but inFlow also provides some shortcuts for common counting patterns.

If you typically count by Product(s), i.e. count the quantity of one or more products at every location, you can quickly add all known inventory locations where those products are stored. To do this:

1. Click the Add By button.
2. Click Product.
3. An advanced search dialog appears allowing you to search for products to add. Specify some search criteria (e.g. the Product Name) and click Search. All known inventory locations where products matching your search criteria will be added to the Count Sheet. A line will also be added for the default location of the product, even if there's nothing in stock there.

If you typically count by Location(s), i.e. count the quantity of all products stored in a certain location, you can quickly add all products known to be stored in that location. To do this:

1. Click the Add By button.
2. Click Location.
3. Select the Location(s) you wish to count, and click Add.

Inactive products will not be included by Add By Product or Location functions.

Inventory

A Count Sheet cannot have two lines for the same product at the same location and sublocation.

Count Sheet Columns

Item	The item name or item code for the product to be counted.
Description	A text description of the product being counted. This column may be hidden depending on the Company Settings. Location – The inventory location at which to count this product.
Sublocation	This column may be hidden depending on the Company Settings. The inventory sublocation (e.g. Aisle Number) at which to count this product.
System Quantity	The quantity which inFlow Inventory had stored for the specified product at that location when the snapshot was taken.
Counted Quantity	The actual quantity of the product at that location, as determined by the physical counting process.

Count Sheet Footer

Counted By	The person responsible for the physical counting process.
Remarks	Any extra remarks you wish to make about the count. These remarks will be shown on the printed Count Sheet.

Taking Inventory Snapshots

Once you have added some products and locations to count, you can click the Take Snapshot button to take an inventory snapshot. This will record the quantity known by inFlow at that time, into the System Quantity column. The Take Snapshot button is enabled when the Count Sheet is in Open or In Progress status and there are some lines that have not yet have their snapshot taken.

You cannot change the product or location on lines which have their System Quantity column filled in by a snapshot. However, these lines can still be deleted from the Count Sheet to cancel that counting.

Counting the Quantities

Once you have prepared your count sheet and taken a snapshot, you need to arrange for a physical count to take place. You may wish to print out a Count Sheet document to allow workers to record the counted quantities, and then enter the counted quantities into the Counted Quantity column in inFlow.

Adding to an In Progress Count Sheet

You may find it necessary to add new items to a count sheet. For example, if you are counting by location and you find an unexpected product in that location, you can add the discovered product into the count sheet to correct the inventory.

Once you have added these new lines, you will need to update the inventory snapshot by clicking the Take Snapshot button. This will only take a snapshot of the new lines which do not have a snapshot, and will not update the snapshots of the existing lines.

Inventory

Adjusting Stock Levels

Once you have completed the counting process, you can adjust the inventory to correct discrepancies found during the count. Once all lines have been counted, the Stock Adjustment button becomes enabled. Click this button to create a Stock Adjustment correcting the errors found. This will pop up an Adjust Stock window, allowing you to view or modify the adjustments to be made.

Clicking the Adjust button on the Adjust Stock window will update your inventory records and mark the Count Sheet as complete. This will change the status of the Count Sheet to Complete and fill the Completed Date field with today's date. No further edits will be allowed to the Count Sheet.

Cancelling a Count Sheet

A Count Sheet may be cancelled any time before it is completed. To cancel a count sheet, click the Cancel Count Sheet button. A cancelled count sheet cannot be re-opened, but you may use the Duplicate button to quickly create a copy of the cancelled count sheet. No inventory transaction is filed if the Count Sheet is cancelled and its status changes to Cancelled.

Transfer Stock

Item	Description	From Location	To Location	Quantity
**				1

Remarks

Transfer Cancel

Use the Transfer Stock function to record the movement of inventory between two locations within your company. You may wish to do this if you are transferring inventory from one warehouse to another, or reorganizing the locations of stock within a warehouse.

To begin a stock transfer, click the inFlow Menu button, go to Inventory menu and click Transfer Stock. You can add items individually in the table or by location using the "Add by location" button.

Transfer Stock Columns

Item	The item name or item code for the product to be transferred
Description	This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will be defaulted to the description from the product information, but can be changed here.
From Location	The location to move the product out of.
From Sublocation	This column may be hidden depending on the Company Settings. This is the inventory sublocation (e.g. Aisle Number) within the From Location to move the product out of.
To Location	The location to move the product into.

Inventory

To Sublocation

This column may be hidden depending on the Company Settings. This is the inventory sublocation (e.g. Aisle Number) within the To Location to move the product into.

Quantity

The quantity of the product to be transferred. This is defaulted to 1.

Remarks

You may use the Remarks field to make a note of why this transfer is taking place.

Transferring

To complete the transfer and update the inventory, click the Transfer button. This will immediately update the inventory and close the Transfer Stock window. This will update current stock and movement history.

To cancel the transfer without adjusting inventory, click the Cancel button. No stock/inventory will be changed.

Reorder Stock

The screenshot shows the 'Reorder Stock' dialog box. It has a grid of products with the following data:

Item	Description	Qty Available + on Order	Reorder Point	Reorder Quantity	Vendor
10201	1:700 Die Cast Battleship	-10	50	100	Oh-Mega Toys
20101	1:24 California Highway Patrol	-8	0	8	Protek-Ship Inc.
67817	Chevy Series #12	0	200	200	Richardson Quick Liquidation
9500	Boat Basket	0	1	1	Richardson Quick Liquidation

At the bottom, there is a 'Suggest Products to Reorder' dropdown and 'Reorder' and 'Cancel' buttons.

The Reorder Stock function is a quick way to reorder products from your vendors. You can use this to quickly examine the stock levels of your products and then create purchase orders to reorder them if necessary.

To use this, click Reorder Stock from the Homepage or else click the inFlow Menu button, go to Inventory menu and click Reorder Stock. This will bring up the Reorder Stock dialog.

Reorder Stock Columns

Item

The item name or item code for the product to be restocked.

Description

This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.

Quantity Available + on Order

The quantity reserved by an unfulfilled customer order) and the quantity you have already reordered. This cannot be modified here.

Reorder Point

The number of units of this product in stock, which will trigger the need for a reorder. This is copied from the Product Information.

Inventory

Reorder Quantity

The number of units of the product that will be reordered when the quantity falls to or below the Reorder point. This is defaulted from the Product Information but can be changed here.

Vendor

The vendor from which you would normally reorder this product. This is defaulted to the Preferred Vendor from the Product Information, but may be changed here.

Add Products Suggested

When you start select the reorder function it will automatically come up with a list of suggested products that you might like to reorder based on your presets. You may choose to add or subtract entries in this window manually or adjust the items found here by selecting one of the two filtering options:

Include out-of-stock Items

Unchecking this option adds only items whose reorder points suggest you should be reordering. The program does take into account open Purchase Orders, Work Orders and Sales Orders when completing these calculations.

Checking this option adds the above items plus anything that is down to zero stock.

Include Products assembled with a bill of materials

Add products which would otherwise be build using a Work Order (this can be useful if you need to subcontract the building of that item to another firm for whatever reason).

Reordering

Once the table has been filled with some entries, you can click the Reorder button to generate Purchase Orders to reorder stock.

One purchase order will be generated for each vendor containing all the items to be reordered from that vendor. For all items that do not have a vendor specified, another purchase order will be generated, with the vendor left unspecified.

The quantity that will be reordered will be determined by the value in the Reorder Quantity column.

Work Order and Bill of Materials Overview

inFlow includes some tools to help you handle situations where you create one product from other products. For example:

- A manufacturer who creates finished products from raw materials
- A retailer who bundles a few products together into one package

You can use the Bill of Materials table in the Extra Info tab of the product information (stockable products only) to set up the raw materials that go into making one unit of a finished product. For example, you could set up the bill of materials for a bicycle as having two wheels, two handlebars, one frame, etc.

Inventory

The bill of materials may be multi-level. That is, the raw materials that go into one product might themselves be put together from other raw materials, e.g. the wheels that go into the bicycle could be made up of 32 spokes and one tire.

After you've set up the bill of materials, a Work Order helps you handle the process of putting together these products. You can set up the raw materials and finished products that make up a Work Order, and when completed, the Work Order will:

- Deduct the inventory of the raw materials
- Increase the inventory of the finished products
- Update the costs of the finished products

Work Order Toolbar

The Work Order Toolbar is visible in all the Work Order windows and contains the following menu items:



New Creates a new Work Order. If you have another Order open, the system will prompt you for saving changes to that Order.



Save Saves the changes to the Order. The system will save the Order with an automatically generated Order # if the Order # is blank.



Preview Previews the document to be printed (Work Order, Pick List, Put Away).

The Preview menu has the following items:

Print – Click Print to print the documents (Work Order, Pick List, Put Away).

Export – Click Export to export the documents (Work Order, Pick List, Put Away) to PDF, Microsoft Word, Microsoft Excel or Rich Text Format.



Copy Creates a copy of the old WO with all the appropriate fields and lines copied. Order number and dates are not copied. Attachments are not duplicated.



Version Click to look at older versions of this Work Order. Old versions are saved correctly and are read-only.



Attachment Click to add attachment files to this Work Order. This opens a pop-up dialogue box to add new attachments and save them. Attachments can be saved, deleted or opened properly. The number of attachments is shown next to the button. When there are many attachments, scroll to the one you need.

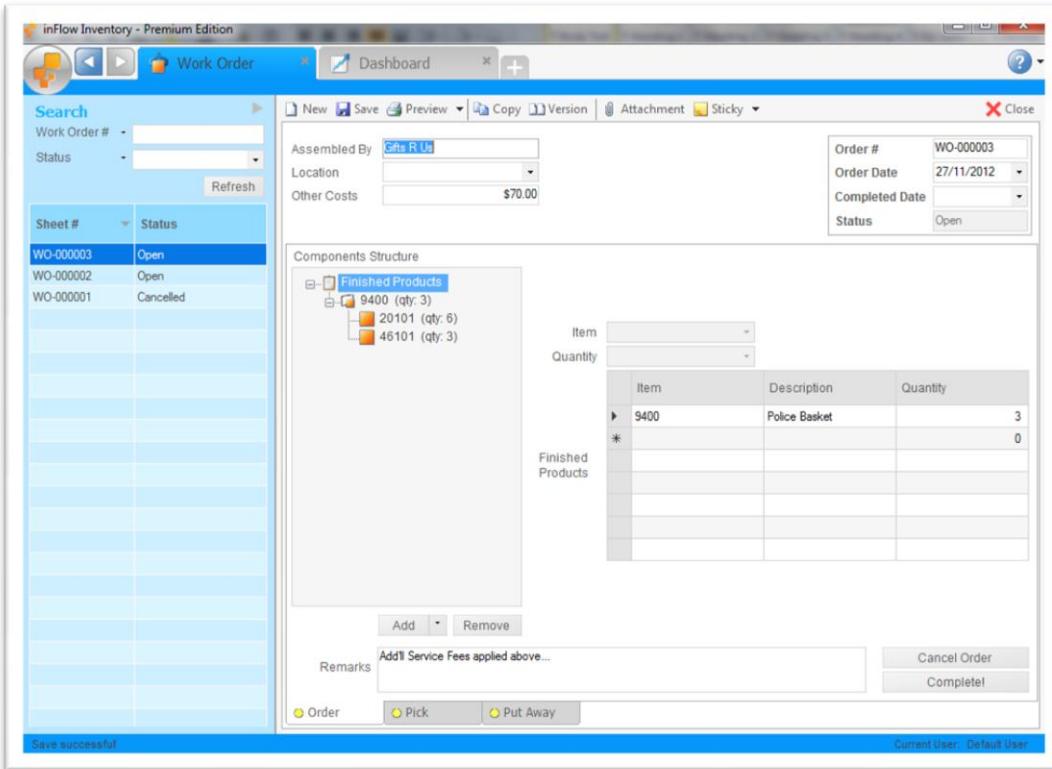


Sticky – Click to add sticky notes to this Work Order. Sticky notes are not included in printed documents. Stickies can be moved, resized, changed color or closed. Opening a document again shows the stickies.

Inventory

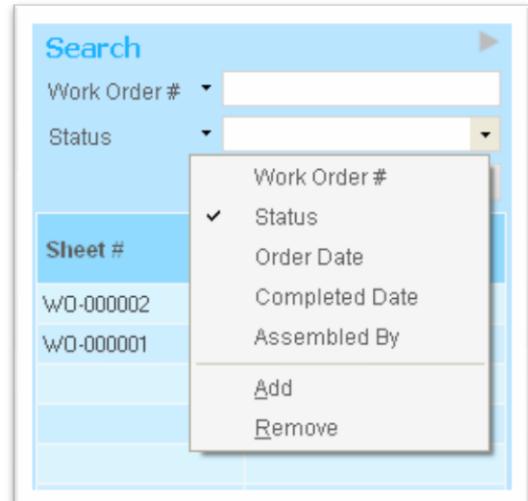
Work Order List

A Work Order is a document that helps you to put together raw materials to create a finished product. A listing of these Work Orders can be accessed by clicking Work Order in the Inventory menu through the Start Menu.



The left panel gives you to a listing of Work Orders and the option to search for Work Orders by entering the search parameters. When viewing full listing mode, double-clicking an order opens up the details. When details are open as well, clicking a listing entry selects that order.

Filter Work Order List



You can select and use filters in the Search section.

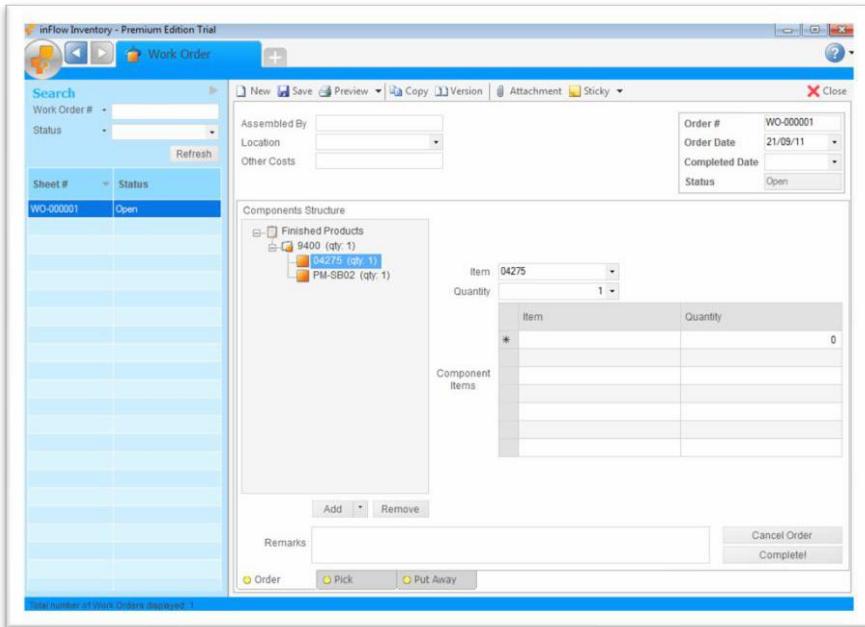
Searches based on Work Order # or Status are available. Many other search options are also available from the drop-down button.

You can Add/Remove filters, but you can't remove all filter options. Custom fields are supported based on previous settings. Filters that have been removed will not restrict the search.

Inventory

Creating a Work Order

A Work Order is a document that helps you to put together raw parts and materials to create a finished product. To create a new Work Order, from the inFlow Menu button, under Inventory, select Work Order.



Entering Header Information

The header of a Work Order contains general information about the order. It has the following fields:

- Assembled By** The name of a person responsible for putting together the products in this Work Order.
- Location** The location where this Work Order takes place. If a location is specified here, then by default raw materials will only be picked from that location and finished products will be put away into that location. All auto-stock transactions (pick, put-away etc) will default to this location. It is automatically filled in with the user's default location in user preferences.
- Other Costs** You can specify the total costs (other than the raw materials) of putting together this Work Order, e.g. total labor costs, by typing in a currency amount. This will be divided up among the finished products when updating the Moving Average Cost.
- Order #** A unique number by which you can refer to your Work Orders. This will be automatically filled in the first time you save your order. You can also edit the order number directly or set the pattern of how order numbers will be created under Company Settings. If Order # is set before saving order, no number is generated.
- Order Date** The date of this Work Order, usually the date that the Work Order was placed or when the work started.

Inventory

Completed Date	The date on which the Work Order was completed. It is Auto-filled upon clicking Complete.
Status	A short description of the status of this Work Order: Open, In Progress, Completed or Cancelled.

Entering the Main Work Order Parts

The main order tab of the Work Order allows you to set up the raw materials you're using up and how they fit together to create finished products. The tree on the left shows graphically how the materials combine and the panel on the right makes it easier to set up the Work Order. Finished Products, intermediate products, and Raw Materials will be shown with different icons on the Work Order tree. The Finished Products are shown at the first level of the tree.

A green light is shown on the Order tab when the order is completed. A yellow light will be shown when there is anything entered there, and a red light if empty.

You can enter in items into your Work Order in a few different ways. Clicking the Add button at the bottom of the tree will add a new item to your Work Order as a raw material of the currently selected product. You can also click the triangle to the right of add and choose "suggest low-stock items" to have inFlow supply suggestions based on the reorder points you've set. To add a finished product, first click on the Finished Products listing. Drag and drop items in the Work Order tree to rearrange them. To adjust an item to become a finished product, drag it onto the Finished Products node at the top.

You can also use the table in the right panel to set up your Work Order. If you click on Finished Products in the tree on the left, then you can enter all the finished products into the tree at the right. Alternatively, if you have an item selected, the table on the right will allow you to enter all the raw materials that make up that product.

When you have an item selected boxes for the Item and Quantity will appear in the right panel to let you change them. For items that have their own Bill of Materials set up, you can also click the Reset to standard components link to quickly set up the Work Order so that this product is made up of the parts as set up in its Bill of Materials. You can use the Remarks box to add in any extra remarks about the order you would like. These remarks will be shown on the printed Work Order document.

If the items you've added have a Bill of Materials defined, it will include that into the tree structure. The components will be picked out from inventory where possible or if they are sub-assemblies that aren't in stock, it will hierarchically create them from sub-components. It uses standard UoM by default. Clicking the Remove button will remove the selected line from the Work Order.

You can use the Complete button to complete the Work Order, deduct inventory for the raw materials and add inventory for the finished products. This button will be enabled when both the pick and put-away tabs are either empty or fully filled-in. If they are empty, the Work Order will automatically suggest places to pick stock from and put stock away into. The status of the order will also be set to Completed. Completing will also update the moving average costs of the finished products.

When just the order tab is filled in and the Work Order is saved, you can Cancel Order by closing the window. This sets the status as cancelled. When other tabs are also filled in, cancellation wipes out everything except the order tab. Cancelling will reverse all inventory transactions for that Work Order and clear out the Pick and Put Away information. You can Reopen Order by clicking the Reopen button which shows up only after the Order has been cancelled.

Inventory

Picking for Work Orders

Item	Description	Quantity	Location
20101	1:24 California Highway Patrol	7	Main Warehouse
20101	1:24 California Highway Patrol	3	Main Warehouse
46101	Alabama 1957 Police Car	5	Main Warehouse
*		0	

Remarks

Total Required 15

Total Picked 15

Auto Fill

Order Pick Put Away

Picking is the process of taking raw materials from your inventory and getting it ready to be used up in a work order. This is represented in the Pick tab of a work order.

Many businesses won't need to worry about using the Pick tab of a work order, since clicking the Complete button on the Order tab will automatically pick and update inventory from suggested locations. However, the pick tab allows you to specify exactly where you want to pick inventory from.

The main part of the pick tab is a table where you can specify what raw materials you have picked or plan to pick, and where you are picking them from. It has the following columns:

Item	The item name/code of the product to be picked.
Description	This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
Quantity	This is the quantity of the item being picked from this location. This will default to the remaining quantity needed to be picked or 1 if no more is required. All quantities use Standard UoM.
Location	The inventory location from which this item is picked.
Sublocation	The inventory sublocation (e.g. aisle number) from which this item is picked. This column may be hidden depending on the Company Settings.

A green light will be shown on the Pick tab if all the items are correctly picked to fulfill the raw material needs of the order. A yellow light will be shown if the Pick tab is empty and a red light if the picking is incomplete.

The Remarks field can be filled in with any remarks that you would like to show up on the printed Pick List document, such as picking instructions.

The Total Required shows you the total quantity of raw materials expected to be picked for this work order. This number is measured in the standard stock-keeping units for each item involved.

The Total Picked shows you the total quantity that has been picked, measured in the standard stock-keeping units for each item involved. This allows you to quickly compare what has been picked (Total Picked Quantities) with what should be picked (Total Raw Material Quantities).

When products are put into the Pick tab and the Work Order is saved, the items will be moved from the source location into a location called <Work Order>, to indicate that they are in use.

Inventory

Auto-Fill

The Auto Fill button provides you with intelligent suggestions on how the picking could be done. If you have set the Location field of the work order, then it will restrict the picking to within that location.

The Auto Fill function will add lines to your pick table to fulfill the order, but won't remove any existing lines you have. It will add pick lines so that the total quantity picked matches the total quantity required for the raw materials of this work order.

It will pick from the location specified in the Work Order. When the location isn't specified for the work order, it tries to pick in order of priority as follows:

1. From the Default Location and Sublocation for that product.
2. From the Default Location for that product and other sublocations.
3. From the Default Location set in General settings.
4. Any other locations

If there are ties within the same priority level (e.g. default location for the product isn't set, but there are two different sublocations within the same location), then it will pick from the location with highest quantity first.

Putting Away for Work Orders

Put-Away is the process of placing the finished products that come out of the Work Order into your inventory. This is represented in the Put Away tab of a Work Order.

Item	Description	Quantity	Location
▶ 9400	Police Basket	5	Main Warehouse
*		0	
Remarks		Finished Qty	5
Auto Fill		Put-Away Qty	5
Order	Pick	Put Away	

Many businesses won't need to worry about using the Put Away tab of a Work Order, since clicking the Complete button on the Order tab will automatically suggest places to put the finished products into. However, the Put Away tab allows you to specify exactly where you'd like to put the finished products.

The main part of the put-away tab is a table where you'd like to put away the raw materials when the Work Order is completed. It has the following columns:

Item The item name/code of the finished product.

Description This is a text description of the product or service being ordered. This field will be shown only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.

Inventory

Quantity	This is the quantity of the item being put away to the location. This will default to the remaining expected to be put away, or 1 if no more is expected. All quantities use Standard UoM.
Location	Put away all finished products into the location specified for the Work Order or the default location for that product.
Sublocation	The inventory sublocation (e.g. aisle number) into which this item is put away. This column may be hidden depending on the Company Settings.

A green light will be shown on the Put Away tab if all the items are correctly picked to fulfill the raw material needs of the order. A yellow light will be shown if the Put Away tab is empty, and a red light if it's incomplete.

The Remarks field can be filled in with any remarks that you would like to show up on the printed Put-Away List document, such as inventory handling instructions.

The Total Finished Product Quantities shows you the total quantity of finished products expected to be picked for this Work Order. This number is measured in the standard stock-keeping units for each item involved.

The Total Put-Away Quantities shows you the total quantity that has been specified to be put away, measured in the standard stock-keeping units for each item involved. This allows you to quickly compare what you've entered to put away (Total Put-Away Quantities) with the total output of the Work Order (Total Finished Product Quantities).

The items specified in the Put Away will update the inventory when the Work Order is completed.

Auto Fill

The Auto Fill button helps give an intelligent suggestion on how the finished products could be put away, based on the contents of the order. It will not modify or delete any of the existing lines in the put-away table.

This function will put away all finished products into the location specified for the Work Order, or the default location for that product using the Standard UoM.

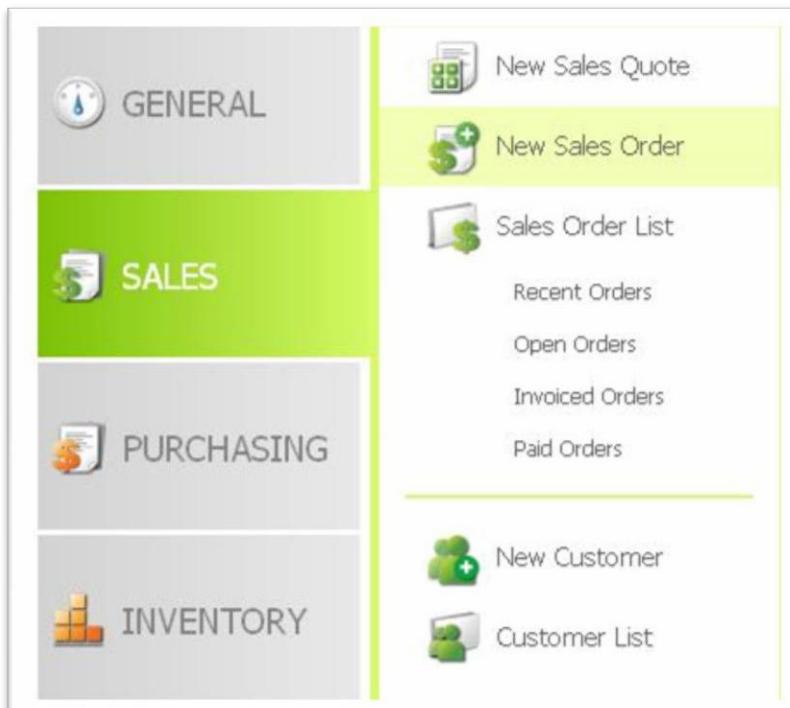
Sales

Sales Menu

A brief Sales Menu is available on the Home Page.



The full Sales Menu through the inFlow Menu button gives you quick links to various aspects of inFlow related to taking and processing customer orders or customer information.



Sales

Sales Menu

The Sales Menu shows the following items:

New Sales Quote

Create a new Sales Quotation.

New Sales Order

Create a new Sales Order.

Sales Order List

This contains the following items:

Recent Orders:

Shows a list of recently created Sales Orders.

Open Orders:

Shows a list of Orders that are in the Open or In Progress states and that are ready to begin processing, i.e. picking, packing, etc.

Invoiced Orders:

Shows a list of Orders that have been fully shipped and invoiced but await payment.

Paid Orders:

Show a list of Orders that have been shipped, invoiced and fully paid.

New Customer – Creates a new Customer entry.

Customer List - Shows a list of Customers and their details.

Entering Customer Information

You can keep track of your customer information and preferences to make it easier to contact them and to take future orders.

Much of this Customer Information is used as defaults when taking a Sales Order from this customer, but this information can be changed in the Sales Order to make an exception for that order. Changing the Customer Information will cause all subsequent Sales Orders created for that customer default to the new information.

To create a new customer, click the inFlow Menu button, select Sales menu and click New Customer. To make changes in the existing customer's information, select the customer from the left panel and the form will be populated with the existing customer's data. Click the box next to Customer name to enter customer information.

The screenshot shows the inFlow Inventory software interface for creating a new customer. On the left, there is a search bar and a list of existing customers: Budget-Minding Collectibles, PedalCar COM, Serious Deals For You, and Wal-Mart. The main window displays a form for a new customer named "Serious Deals For You". The "Basic" section shows a balance of \$215.19. The "Addresses" section lists a business address: P.O. Box 2103, Mountain View, CA, USA, 94043. The "Contact" section includes fields for Name (Debra Ignatoff), Phone (310-555-4932), Fax (714-484-0740), Email (deb@inflowsampledata.com), and Website. The "Purchasing Info" section includes fields for Pricing / Currency (NA Wholesale Price), Discount (0 %), Payment Terms (Net 15), Taxing Scheme, and Tax Exempt #. The "Remarks" section contains a note: "Their credit check has cleared, go ahead and sell to this customer." The "Custom Info" section has fields for Alternate Contact, Alternate Contact 2, Alternate Contact 3, and Emergency Phone. At the bottom, there are tabs for Customer Info, Extra Info, and Order History, along with a link to Add Custom Fields and a note that the current user is Default User.

Sales

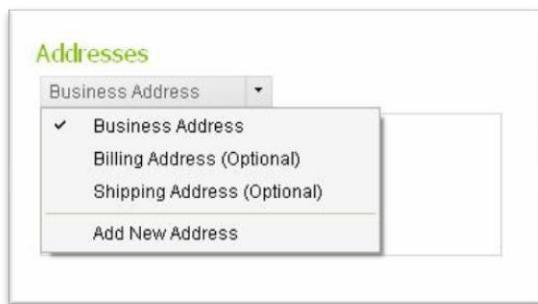
Basic Section

Name	This is the name of your customer; usually the name of a person or company. Two customers cannot have the same name.
Balance	This is the total amount of money that this customer owes you. This is calculated by adding up the balance owed on all invoices for this customer and subtracting any credits or refunds owed to this customer from their returns.

Addresses Section

There are three special types of addresses for a customer:

Business Address	This is the default address for the customer. If the customer only has one address, we recommend saving it as the Business Address.
Billing Address	This is the default billing address for the customer. If this is blank, the Business Address is used as the default.



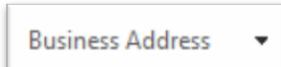
Shipping Address This is the default shipping address for the customer. If this is blank, the Business Address is used as the default.

Add New Address You may also store an unlimited number of other addresses for this customer, such as other locations that may receive shipments. These additional locations can be identified with an address name, e.g. New York Warehouse.

Modify Existing Address:

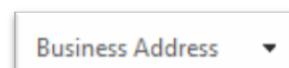
To modify or set an existing address, including one of the three special addresses:

1. Click on the arrow next to the name of the selected address to show a dropdown of the available addresses.
2. Select the address you wish to modify.
3. Move your mouse into the main address box and click. A dialog box will pop up in which you can change the address details.



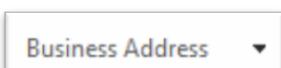
Add a new address:

1. Click on the arrow next to the name of the selected address to show a dropdown of the available addresses.
2. Select Add New Address.



Delete an address:

1. Click on the arrow next to the name of the selected address to show a dropdown of the available addresses.
2. Select the address to be deleted.
3. Move your mouse into the main address box and click. A dialog will pop up allowing you to delete the address details.



Sales

Contact Section

This section contains basic contact information for the current customer.

Name	The name of the person to contact when you are corresponding with this customer.
Phone	The phone number to contact this customer.
Fax	A fax number for this customer.
Email	An e-mail address for the contact person at this customer.
Website	A website address for this customer

Sales Info Section

This section contains information about the default prices and taxes that are applicable for this customer. Sales Orders created for this customer will use this information as defaults.

Pricing Scheme	The default Pricing Scheme under which products are priced for this customer. This lets you select from a user-created list of pricing schemes and indicates your customer's default currency. The scheme set up by default is Normal Price. Select Add New to create a new Pricing Scheme for this customer.
Discount	A default percentage discount that you give to this customer.
Payment Terms	The usual payment terms that you give this customer describing, for example, the number of days credit after date of invoice.
Taxing Scheme	The default Taxing Scheme under which taxes are calculated for this customer's orders. Select Add New to create a new Taxing Scheme for this customer.
Tax Exempt #	If this customer is tax exempt, you may need to keep a tax exemption number for tax purposes, to explain to the Government why taxes were not charged.

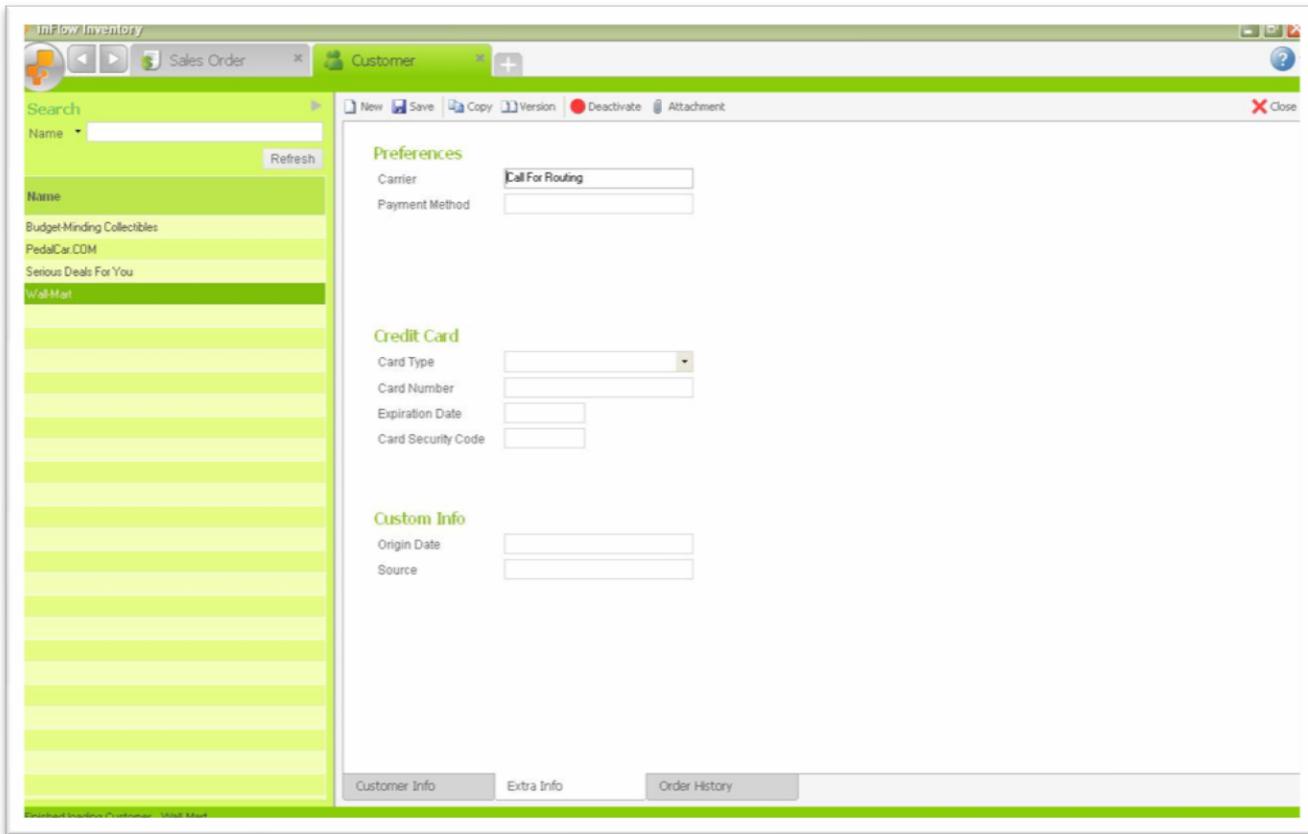
Misc. Section

Remarks	Any remarks you wish to make about the customer can be entered here. These remarks will not be shown to the customer or anybody outside your company.
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You may also define up to ten custom fields for the customer, where you can store any extra data and by matching the name of one of your sales order fields to that in your customer record the system will automatically supply that information to the sales order.

Sales

Extra Info Tab



Preferences

Carrier

The default shipping carrier and shipping method that you normally use to deliver products to this customer.

Preferred Payment Method

The usual method by which this customer pays you.

Credit Card

Card Type

Select the card type from the drop-down box.

Card Number

Enter the card Number of the customer.

Expiration Date

The date when the credit card expires.

Card Security Code

The security code of the credit card.

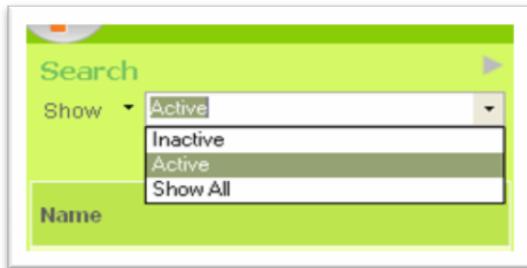
Order History

The Order History tab shows you a history of all the orders this customer has placed in the past. It also shows the payment and balance status of the orders, so you can quickly discuss payment with the customer. Double clicking on one of the rows will show you the details of that order in a popup window.

Sales

Deactivating and Reactivating Customers

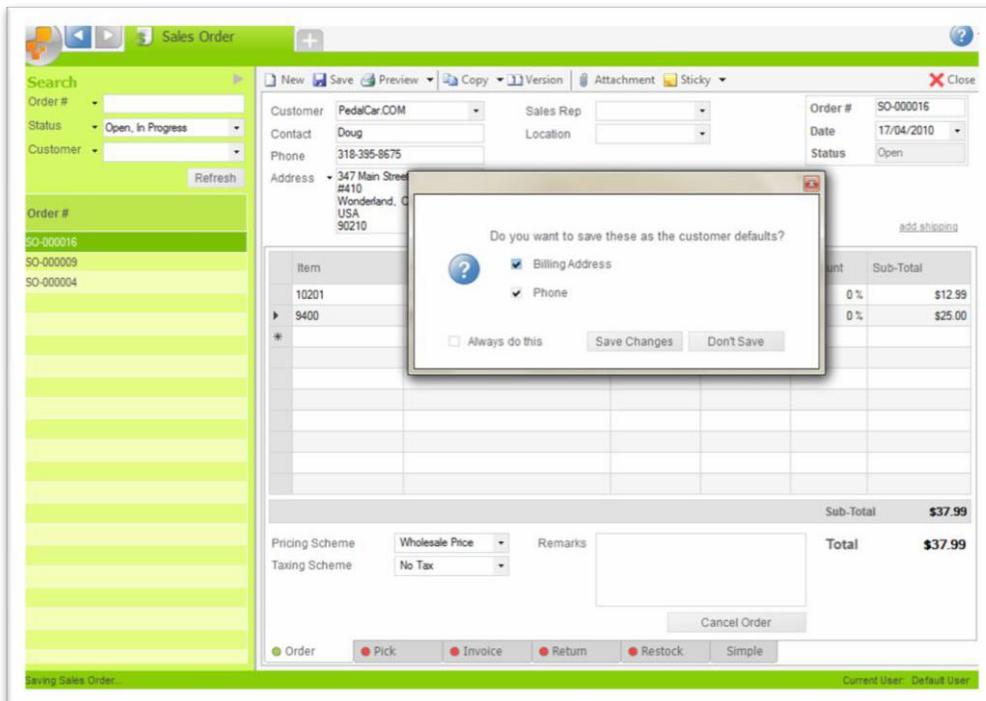
- Deactivate** Customers can be deactivated so that they will be inactive and not shown in normal usage of inFlow. Customers cannot be deleted entirely, so you retain a full record of previous customers. The Deactivate button is located along the top toolbar.
- Reactivate** To view Inactive customer, select „Show“ from the drop-down list in the Listing Panel for the customer.



Now select Inactive from the drop-down box. An inactive customer can then be re-activated by clicking the Reactivate button, which takes the place of the Deactivate button in the toolbar for the customer.

Entry changes within sales orders

inFlow makes it possible to save the changes you have made during your sales order back to the customer entry, allowing you to complete two important tasks simultaneously. To do so, simply make the necessary changes to the customer details within the sales order itself. When you save the order, InFlow will ask you if you would like to save any changes and provide you with an easy to navigate list of the changes you have made.



For instance, as in the example, if you have made changes to both the customer's address and phone number but you only want to amend the address and not the phone number, you may choose to do so here by simple un-checking the box indicating the Phone number has changed. In this way you can effectively manage your customer details from the sales order window without needing to go back to your customer records and make the changes twice.

Sales

Sales Quotations

A customer might ask you to give them a price for a certain order before committing to actually placing that order. We call this a Sales Quotation or Quote.

To create a new Quote, from the inFlow Menu button, select Sales and then New Sales Quote.

The contents of the Quote, like choosing the customer and products ordered, are the same as the contents of an order.



When a customer places the order, a valid Quote can be converted to a Sales Order at any time. To do this, simply click the Convert To Order button on the Quote page.

A quote number will be created for your Quote when you first save it. It will be of the format SQ-#####. The number sequence for Quotes and for regular Orders is different, so when you convert a quote to an order, the Quote number will be discarded and replaced with a new Order number. You can customize the quote numbers on each quote, or set up the pattern for new quote numbers in Company Settings.

Once you have created a Quote in inFlow, you can print it out or export it to another file format, such as PDF or Microsoft Word.

Creating a Sales Order



A Sales Order is a document that represents an order placed by one of your customers, where they ask you to give them a certain set of products or services at a certain price. In inFlow Inventory, all of the work related to an order is saved alongside the order, including information on order processing, shipping, invoicing and customer returns. This makes it easy to find all the information related to an order and its status.

To create a new Sales Order; from the inFlow Menu button, select Sales and then New Sales Order.



Alternatively, you can click the New Order link from the Home Page

Sales

Entering Header Information

The screenshot shows a software interface for entering sales order header information. At the top, there's a toolbar with options like New, Save, Preview, Copy, Version, Attachment, Sticky, and Close. Below the toolbar, there are four dropdown menus: Customer, Contact, Phone, and Address. To the right of these are fields for Sales Rep (dropdown), Location (dropdown), and three status boxes: Order # (text input), Date (date picker set to 17/11/2009), and Status (button set to Open). A link labeled "add shipping" is located at the bottom right of the header area.

The header of the Sales Order contains the common information about the order that is visible throughout the sales order process, both in the Simple Workflow and the Advanced Workflow.

The following fields are in the Sales Order header:

Customer	This field must have an entry. Select the Customer that is placing this order; usually it will be the company name of your customer.
Contact	The person who is your contact at the customer regarding this order.
Phone	A phone number you can call at your customer's place of business.
Address	The Address to which you should send the order invoice. This will be renamed to Billing Address when you click on the add shipping link.
Sales Rep	Your Sales Representative who was responsible for this order.
Location	The inventory location associated with this order. Items will be picked and restocked into this location by default.
Order #	A unique number by which you can refer to your customer orders. This is also used as an invoice number. This will be automatically filled in the first time you save your order. You can edit this Order # directly or set the pattern of how future order numbers will be created under Company Settings.
Date	The date of the order, usually the date on which the order was placed. You may change this date.
Status	A short description of the status of this Sales Order.

If you make changes to a customer's information during an order, inFlow will prompt you upon saving the order to see if you would like to save that information to the customer file. This allows you to speed up your customer interaction by helping you complete two important tasks at once.

Showing / Hiding Shipping Information

You can hide the shipping information for the order by clicking the **no shipping** link. If you want to turn it back on, click the **add shipping** link.

When shipping information is hidden, the Shipping Address field will be hidden and the Billing Address field will be renamed to just Address. In this case, the Address used will be defaulted to the Business Address of the customer. The P.O.# and Terms fields will also be hidden. There will also be other changes to the order that depend on whether it's in the Simple Workflow or Full Workflow.

Sales

The screenshot shows a software interface for creating a sales order. On the left, there are dropdown menus for Customer, Contact, Phone, and Billing Address. To the right of these are input fields for Terms, P.O. #, Sales Rep, and Location. Below these is a 'Shipping Address' section with a dropdown menu. A small modal window is open in the top right corner, displaying 'Order #' followed by a field containing '17/11/2009' and 'Status' set to 'Open'. At the bottom of the shipping address section, it says 'no_shipping'.

When you click **add shipping** link, the following fields are added to the header:

Terms

Payment Terms for this order, i.e. an agreement between you and your customer about how the customer should pay you for this order. You can select from a list of existing Payment Terms, or add a new type by selecting <Add New...> from the dropdown list.

P.O.

Your customer's Purchase Order number.

Shipping Address

The customer's address to which this order should be shipped. This may or may not be different from the billing address. This will be hidden when the order has **no shipping** set.

You may also add up to three custom fields into Sales Orders. These will show up underneath the Sales Rep field.

Custom Fields

Billing and Shipping Addresses

When you select the Customer the billing and shipping addresses will be completed according to the stored customer information. If you have set the Billing Address or Shipping Address in the customer information, then the appropriate Address fields will be completed. Otherwise they will default to the customer's Business Address.

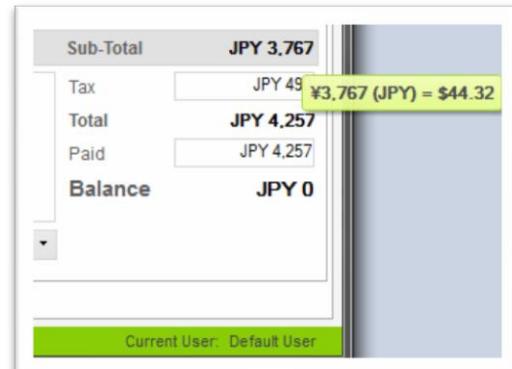
To select another customer address, click the small arrow next to the address field, and select the name of the address to use.

To edit the address, move your mouse into the main address box and click the Edit link. A popup will appear allowing you to edit the various parts of the address. Changes to the address here will not be saved back to the main customer information, but will be kept for this Sales Order only.

Foreign Currency Orders

If you are working in a currency other than your own, the order will appear in the currency which corresponds to the customer's pricing scheme. However, if you would like to know what this order amounts to in your home currency

(your company currency) holding your mouse over any of the totals will show a tooltip with the currency converted into your company currency.



Sales

Sales Simple Workflow vs Advanced Workflow

inFlow lets you choose between the Simple Workflow and the Advanced Workflow when working with an order. The Simple Workflow lets you get the basics done in a snap. You can switch to the Advanced Workflow for any order when you want to exploit the full power of inFlow.

The Simple Workflow is a single step process where you can take a customer order, mark it as paid and update the inventory with one click. With the Advanced Workflow, you can track the order, order processing, shipping, invoicing and customer returns.

You can switch from the Simple Workflow to the Advanced Workflow for any of your orders by clicking the More tab. You can switch from the Advanced Workflow back to the Simple Workflow by clicking the Less tab. There are a few cases when you can't switch from the Advanced Workflow to the Simple Workflow, when it would hide important information such as:

- The order isn't completed yet and the pick, pack, or ship tabs are partially filled out.
- The return or restock tabs are partially filled out.

Shipping Information

With both Simple Workflow and Advanced Workflow, you can choose whether or not to include shipping information. This can be accessed through the **add shipping** link in the header of the Order tab. If you ship out products to your customers, you can include the shipping information to track freight charges, shipping addresses, etc. You can turn it off by clicking the **no shipping** link to simplify things. You can then turn it back on by clicking the **add shipping** link



Sales Order Simple Workflow

The Simple Workflow for a Sales Order offers a one-step process for quickly taking and handling a customer order. Most of the steps in processing a sales order in the simple workflow are discussed in

You can switch to Simple Workflow by clicking the Simple button from the bottom of a Sales Order. You can click the Advanced button to revert back to full workflow.

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Item	Description	Quantity	Unit Price	Discount	Sub-Total
*		0			

Taxing Scheme Remarks
 Pricing / Currency Sub-Total **\$0.00**
 Total **\$0.00**
 Paid **\$0.00**
 Balance **\$0.00**

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Simple Workflow Order Columns

The simple order workflow table has the following columns:

Item	The item name or item code for the product or service being ordered.
Description	This is a text description of the product or service being ordered. This field will only be shown if Show Product Description is enabled in the Settings and shows the product information description. The description can be edited here if necessary.
Quantity	The order quantity defaults to the UoM if it has been setup, but can be changed here as required.
Unit Price	The Unit Price is per UoM. Changing the UoM updates the Unit Price (e.g. changing to a pack of 2 from a single item, doubles the Unit Price)
Discount	A discount given to the customer on the price of this item. This will default to the default percentage discount given to this customer. You can also enter in a fixed-amount per-unit discount by typing in the discount as a currency figure (e.g. \$5).
Tax	This may be hidden, depending on your company settings. The Product Tax Code for this item determines whether it is taxed in a special way, e.g. tax exempt. This defaults to the Product Tax Code in the product information.
<u>Company Settings</u>	
Sub-Total	The total cost of this item for the given quantity, after applying discounts, but before applying taxes and freight. This is calculated based on the Unit Price, Quantity and Discount and cannot be modified.

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Simple Workflow Order Footer

The order footer contains more information about the order and pricing.

Invoiced Date	The date from when the invoice is effective. The default is the current date.
Due Date	The date on which the customer's payment is due. This is calculated by taking the Invoiced Date and adding the number of days specified by the Payment Terms for this order. You can also set this date manually. This field is hidden when the shipping information is not shown.
Requested Ship Date	This is the date that the customer requests that you ship the order on. This field is hidden when the shipping information is not shown.
Payment Method	Shows the method by which the customer paid you for this invoice.
Pricing/Currency	The Pricing Scheme for this order. Changing this updates all the prices for this order. If no price is set on the current pricing scheme, inFlow will use the default pricing scheme instead of zero. If you create a new scheme with a different currency during the order, you will be prompted to enter the exchange (eg. 1 USD = €0.50).
Taxing Scheme	The Taxing Scheme for this order. Changing this updates the tax calculations.
Remarks	Any extra remarks for this order. These remarks will be printed out when you print out any documents in the Simple Workflow. They will also appear in the movement history of any products sold on this order.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows amount of tax charged for this order. You may change the amount of tax charged here, but if the order is later changed, the tax will be automatically recalculated.
Freight	The amount of freight or other surcharges applied to this order. Tax is charged on this amount if <i>Tax On Shipping</i> is selected for this taxing scheme. You can click the arrow beside freight to see the estimated weight. This field is hidden when the shipping information is not shown.
Total	The total amount that the customer should pay for this order.
Paid	The amount that the customer has paid for this order.
Balance	The remaining amount that the customer needs to pay you for this order. It is calculated by subtracting the amount Paid from the Total field.
Complete & Pay	You can click the Complete & Pay button to update the inventory for this order and mark the order as fully paid. If you click the dropdown arrow next to this button, you can do a partial update by selecting

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one of the two options:

- **Deduct Inventory** – Marks the order as fully shipped and updates inventory
- **Receive Payment** – Marks the order as fully paid

In the Simple Workflow, inFlow will do the same work behind the scenes as in the Full Workflow. For example, the **Complete & Pay** button will automatically pick items from your inventory. You can switch to the Full Workflow if you want to inspect or have full control over these processes.

To cancel the order and avoid further processing, click the Cancel Order button (which will show up once the order is saved). It will then show a Re-open Order button which you can use to start handling the order once again.

Sales Order Advanced Workflow Overview

This is an outline of the Advanced Workflow for taking and fulfilling customer orders. The entire process is tracked within a single entity in inFlow Inventory, the Sales Order, making it easy for you to keep track of the order status and what needs to be done.

1. (Optional) Customer asks for a Sales Quotation

A customer might ask you to give them a price for a certain order before committing to actually placing that order. We call this a Sales Quotation or Quote. inFlow can help you issue printed Quotes and allow you to convert them into Sales Orders if the customer later decides to place the order. Usually the workflow will begin with the customer placing an order. If you choose to do a New Quote from the Sales Order menu, the workflow will start at step one.

2. Customer Places an Order

When a Customer places an order, you can use inFlow to keep track of products, quantities, and prices for that order. Once you have entered the order into inFlow, you can print out a copy of the order for your records or to issue to the customer.

3. Products are Picked from storage for the order

In this step, products are picked out of storage locations for order fulfilment. inFlow can help suggest where to pick the products from. It should then be updated with the actual picked locations so that inventory counts can be updated accordingly.

4. Products are Packed into containers

Once products have been picked out of storage, the next step is to pack the products into containers to get ready to ship to the customer. The containers may be boxes or pallets depending on your business. Some orders may require multiple containers. In this step, you tell inFlow what goes into which container and then print out Container Labels with the shipping address and contents of each container.

5. Shipping out to the customer

Once products have been packed, they need to be shipped out to the customer. inFlow can help you keep track of when you shipped each box and the associated tracking numbers.

Steps 3-5 can be done multiple times. For example, you might process and ship part of the order while waiting for goods before shipping the rest of the order.

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6. Invoicing Customer and Receiving Payment

Once you have shipped out the order, an invoice should be sent to the customer. The invoice may be different than the original order placed, if perhaps you were short on stock and shipped slightly less than the customer originally ordered.

Once the invoice has been sent, you need to wait for the customer to pay you. You can use inFlow to track the payment status along with the invoice.

7. (Optional) Customer returns some products

If you allow customer returns, inFlow can help you track when customers return products to you and any credit or refund you give them.

8. (Optional) Returned products may be restocked

If the products that the customer returned are not damaged, then you can restock them back into your inventory storage to be resold later.

9. Order Cancellation

The Cancel Order button will only be available when the order hasn't been processed at all. If it has (e.g. it has been partly shipped out or some items have been picked, etc.) then instead the "Re-open Order" button will be shown. Clicking it wipes out all the inventory movements, payments, etc., leaving just the original order.

Workflow Flexibility

The workflow is designed to provide a common structure for your order handling but also to allow you the flexibility to do things in a different sequence when it makes sense to do so. For example, you can choose to invoice for an order before picking, if this is more convenient for your business.

Order Status

inFlow Inventory uses a detailed Order Status to quickly describe the status of an order. The following are the possible order statuses:

- **Quote** – when a Sales Quote has been created but not yet converted into an order.
- **Open** – when a Sales Order has been placed but no picking has taken place.
- **In Progress** – when order processing (picking, packing, and shipping) have begun for an order, but before the order has been marked Fully Shipped.
- **Fully Shipped** – when an order has been marked Fully Shipped but not yet invoiced.
- **Invoiced** – when an order has been marked Fully Shipped, has been invoiced, but has not yet been fully paid by the customer or had any items returned.
- **Paid** – when an order has been invoiced and fully paid by the customer.
- **Cancelled** – when an order has been marked Cancelled.

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Sales Order Advanced Workflow – Order

The Order tab in the Advanced Workflow is where you can enter the customer order. This is discussed in [Creating a Sales Order](#).

A green light on the Order tab is shown when the order is not empty. Otherwise, a red light will be shown.

The screenshot shows the 'Order' tab of the Sales Order Advanced Workflow. At the top left is a red circular icon with a white dot, indicating the order is not empty. The main area is a table for entering items:

Item	Description	Quantity	Unit Price	Discount	Tax	Sub-Total
00303A	Army Combat Helmet	10 set	\$8.99	0 %	Taxable	\$89.90
PM-BW01	24"x 750' Sheet of 3/16" Bubble Wrap	5	\$5.00	0 %	Taxable	\$25.00
PM-SB03	16" X 14" X 10" Shipping Boxes	1	\$0.50	0 %	Taxable	\$0.50
Catalog06	2006 Product Catalog	1	\$0.00	0 %	Taxable	\$0.00
*		0				

Below the table are tax and currency settings:

Taxing Scheme	CA Tax	Req. Ship Date	Sub-Total	\$115.40
Pricing / Currency	Retail Price	Remarks	State Tax	\$9.52
			Freight	
			Total	\$124.92

At the bottom are buttons for navigation and actions:

Order Pick Pack Ship Invoice Return Restock Simple

Order Tab Columns

The Order tab table has the following columns:

Item	The item name or item code for the product or service being ordered.
Description	This is a text description of the product or service being ordered. This field will only be shown if Show Product Description is set in the Settings. The default description will be taken from the product information, but it can also be changed here.
Quantity	The quantity of the item to be ordered. Quantity is defaulted to Sales UoM and can be entered in any UoM.

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Unit Price	The price charged per unit of the item. Unit Price is per UoM selected in the Quantity column. Changing the UoM updates the Unit Price (e.g. changing to a pack of 2 from a single item doubles the unit price).
Discount	A discount given to the customer on the price of this item. This will default to the default percentage discount given to this customer. You can also enter in a fixed amount per unit discount by typing in the discount as a currency figure (e.g. \$5).
Tax	This may be hidden, depending on your company settings. The Product Tax Code for this item determines if it is taxed in a special way, e.g. tax exempt. This defaults to the Product Tax Code in the product information for this product.
Sub-Total	The total cost of this item for the quantity given and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount, and cannot be modified.

Order Tab Footer

The order tab footer has the following:

Taxing Scheme	The Taxing Scheme for this order. Changing it updates the tax calculations shown.
Pricing/Currency	The Pricing Scheme for this order. Changing it updates all the prices for this order. As Pricing schemes are currency specific you will also be prompted for the conversion rate if using another currency.
Requested Ship Date	This is the date that the customer requests that you ship the order out on. This field is hidden when the shipping information is not shown.
Remarks	Any extra remarks on this order. These remarks will be printed out when you print out the Sales Order. They will also appear in the movement history of any products sold on this order.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows amount of tax charged for this order.
Freight	The amount of freight or other surcharges applied to this order. Tax is applied to this field if the selected Taxing Scheme has Tax On Shipping set. Clicking the dropdown arrow next to this will show you the estimated total weight for this order. You might use this to help you calculate estimated shipping costs. This field is hidden when the shipping information is not shown.
Total	The total amount that the customer should pay you for this order.

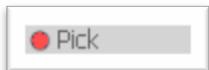
To cancel the order and avoid further processing, click the Cancel Order button, which will show up once the order has been saved. It will then show a Re-open Order button which you can use to start handling the order once again.

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Sales Order Advanced Workflow – Pick

Picking is the process of taking goods out of your inventory storage and moving them to some location so they are ready to be packed and shipped out.

The Pick tab shows you information on the picking for an order, and is accessible by clicking the Pick button from the bottom of a Sales Order.



A green light on the Pick tab is shown when any items have been picked. Otherwise, a red light will be shown.

The picking information cannot be modified after the Order has been marked Fully Shipped. Also, pick lines that have been shipped out cannot be modified.

Item	Description	Quantity	Location				
▶ 76289B	Kung Fu Master Action Figure	1	NY Warehouse				
14232	Mini-Sports Car Battery Powered Red	1	Default Location				
14232	Mini-Sports Car Battery Powered Red	1	Default Location				
*		0					
Remarks		Ordered Quantity	3				
		Picked Quantity	3				
Auto Fill							
Order	Pick	Pack	Ship	Invoice	Return	Restock	Simple

Pick Tab Columns

The main Pick tab table has the following columns:

- | | |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item | The item name or item code for the product or service being picked. |
| Description | A text description of the product or service. This will default to the description from the product information, but can be changed here. This field will be shown, only if Show Product Description is set in the Settings, otherwise hidden. |

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Quantity	The quantity of the item being picked. This will default to the quantity remaining to be picked in Standard UoM for this order when the Name is selected.
Location	The inventory location from which the item is picked. For a Stockable product, if location for this order is set, this becomes the default. Otherwise the product default is used. For unstocked products, it will be left blank.
Sublocation	This column may be hidden depending on the Company Settings. This is the inventory sublocation (e.g. Aisle Number) from which the item is picked. For a Stockable product, this will default to the default sublocation of the selected product. For unstocked products, it will be kept blank.

Pick Tab Footer

The main Pick tab footer has the following:

Remarks	The Remarks field allows you to enter in any extra remarks you have about picking. These remarks will be shown on the printed Pick Lists.
Ordered Quantity	Total quantity ordered in the standard UoM of each product.
Picked Quantity	This is the total quantity that is already picked. If the whole order has been picked, this quantity equals the Ordered Quantity in the standard UoM of each product.
Auto Fill	The Auto Fill button gives you intelligent suggestions on how the picking could be done. Most businesses will usually be able to rely on Auto Pick to automatically suggest how to do the picking based on the quantity in stock. The Auto Fill function will add lines to your Pick table to fulfill the order, but will not remove any existing lines. It will add pick lines so that the total quantity picked matches the total quantity ordered. If a location for this sales order is specified, then Auto Pick will be restricted to inventory in that location. A warning is shown if there is not enough stock. If Order Location is set, then the above is restricted to that location. UoM is done in standard UoM (not sales). The description is copied from the Order where possible. If a warning isn't given, the system picks from locations where the product is in stock in the following order: <ol style="list-style-type: none">1. From the Default Location and Sublocation for that product.2. From the Default Location for that product and other sublocations.3. From the Default Location set in General settings.4. Any other locations. If there are ties within the same priority level (e.g. default location for the product isn't set, but there are two different sublocations within the same location), then the system will pick from the location with highest quantity first.

Picking and Inventory

When a Sales Order is saved, the inventory stored in inFlow is automatically updated to match the picking as shown in the Pick tab. Products will be moved from the location indicated by the Picking into a special location called <Picked>. When shipped, the products will be moved from the

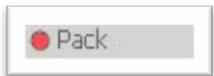
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<Picked> location out to the customer. If these products are later removed from the Picking, or the order is cancelled, they will be moved back from the <Picked> location into their original location.

Sales Order Advanced Workflow – Pack

Packing is the process of taking goods that have been picked and putting them into containers so they are ready to be shipped out.

The Pack tab shows you information on the packing for the order and is accessible by clicking the Pack button from the bottom of a Sales Order.



A green light on the Pack tab is shown when all the picked products have been packed. A yellow light is shown when the order is partially packed. Otherwise, a red light is shown.

The packing information cannot be modified after the Order has been marked *Fully Shipped*. Also, pack lines that have been shipped out cannot be modified.

Item	Description	Quantity	Box Number
76289B	Kung Fu Master Action Figure	1	1
14232	Mini-Sports Car Battery Powered Red	1	1
14232	Mini-Sports Car Battery Powered Red	1	2
*		0	

Remarks: [Text Box]

Packed Boxes: 2
Estimated Weight: 0 kg

Auto Fill

Buttons: Order, Pick, Pack, Ship, Invoice, Return, Restock, Simple

Pack Tab Columns

The main Pack table has the following columns:

Item	The item name or item code for the product being packed.
Description	This is a text description of the product or service being ordered. This field will be shown only if Show Product Description is set in the Settings. It can be modified on the order. This will default to the description from the product information, but can be changed here.

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Quantity	The quantity of the item being packed. This will default to the quantity remaining to be packed for this order when the Name is selected.
Box/Pallet Numbers	The number of the container (box, pallet, or other) into which these products are being packed. It is also possible to name the container as text instead of a number. Commas or whitespace are not allowed.

Pack Tab Footer

The main Pack tab footer has the following:

Remarks	The Remarks field allows you to enter any extra remarks you have about packing. These remarks will be shown on the printed Pack Lists.
Packed Boxes	This is the total number of backed boxes.
Estimated Weight	inFlow shows you the estimated total weight of an order in the Estimated Weight box. You can also click the dropdown next to it to see the breakdown of each box's weight and change the weight measurement unit.
Estimated Volume	inFlow shows you the estimated total volume of an order in the Estimated Volume box. You can also click the dropdown next to it to see the breakdown of each box's volume and change the volume measurement unit.
Auto Fill	<p>The Auto Pack button helps give intelligent suggestions on how the packing could be done. The Auto Pack function will add lines to your Pack table to complete the packing, but will not remove or modify any existing lines you have. If your pack table is initially empty, the Auto Pack function will pack all of the items remaining to be packed into a new box. If you already have some items packed, then Auto Pack may combine the packing into old boxes if they have not already been shipped.</p> <p>If you need to split your shipment into multiple containers, you may find Auto Pack a useful helper. For example, to pack 24 units of product A into 2 boxes, you could:</p> <ol style="list-style-type: none">1. Click Auto Pack to initially assign 24 units of product A into box 1.2. Modify the quantity in box 1 to be 12 units.3. Click Auto Pack to assign the remaining 12 units of product A into box 2.

Sales Order Advanced Workflow – Ship

Shipping is the process of sending your products, already packed into containers, to your customer via some delivery service. You may have multiple shipments, each containing one or more boxes, for an order.

The Ship tab shows you information on the shipping for an order, and is accessible by clicking the Ship button from the bottom of a Sales Order.



A green light is shown on the Ship tab once the order has been marked Fully Shipped. Otherwise, a yellow light is shown when there are some entries in the ship table, and a red light is shown if the table is empty.

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The shipping information cannot be modified after the order has been marked Fully Shipped. Also, lines that have been shipped out cannot be modified.

The screenshot shows a software interface for managing shipping. At the top, there's a table with columns: Shipped Date, Carrier, Tracking Number, Box Numbers, and Ship Out. A single row is visible with the date '26/11/2009' and a value '1' in the Box Numbers column. To the right of this column is a yellow 'Ship' button. Below the table is a remarks field labeled 'Remarks'. To the right of the remarks field, it says 'Packed Boxes: 1' and 'Shipped Boxes: 1'. At the bottom of the interface are several buttons: 'Auto Fill', 'Complete', and tabs for Order, Pick, Pack, Ship, Invoice, Return, Restock, and Simple.

Ship Tab Columns

The main Ship tab table has the following columns:

Shipped Date	The date on which a particular shipment was made. This will be defaulted to the Requested Ship Date if set, or else the current date.
Carrier	The carrier and shipping method by which you sent the package. This information is optional and is defaulted to the preferred carrier for the customer.
Tracking Number	A tracking number given to you by the carrier that can be used to track the shipment status. This is optional.
Box Numbers	A list of containers included in this shipment.
Ship Out	A button you can click to finalize and ship out these boxes. This column changes to a check mark icon once it has been shipped. To mark ship lines as shipped out and to finalize its contents, click the Ship button on the ship line. This will modify your inventory levels, shipping out the products from the special <Picked> location as moved out to your customer. Shipping updates the inventory and records the costs at the time of completion. (Costs can just be viewed from reports & dashboard). Shipping the last row gives you the option to Complete.

Ship Tab Footer

The main Ship tab footer has the following:

Remarks	The Remarks field allows you to enter in any extra remarks you have about shipping. These remarks will be shown on the printed packing slips.
Packed Boxes	This is the Total Number of Packed Boxes in the Order.

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Shipped Boxes

Total Number of Shipped Boxes is shown at the bottom to allow you to quickly see how many boxes have been shipped and how many are remaining.

Complete Button

The Complete button can be used to mark off all shipments as shipped and then mark an order as Fully Shipped, signifying that your company has completed processing on this order and all goods have been sent to the customer. This will move the Order status to Fully Shipped, and cannot be undone. The Complete button is enabled when all picked products have been packed and when all packed containers have been shipped. Also, clicking the Complete button marks all ship lines as shipped.

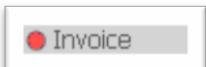
Auto Fill

The Auto Fill button helps give an intelligent suggestion on how the shipping could be done. The Auto Fill function simply selects all containers that are not yet included in the ship table and adds them to a new shipment.

Invoicing for Sales Orders

Invoicing is the process of sending a bill to your customer that details how much they need to pay you. You may need to issue an invoice that is different from the order that the customer placed. For example, prices may have changed or due to stocking issues, the quantity of product shipped was different from that which was ordered. You can also use the information here to keep track of the customer's payment.

The Invoice tab shows you the invoice to be sent to a customer, and is accessible by clicking the Invoice button from the bottom of a Sales Order.



A green light is shown if the invoice is fully paid. Otherwise, a red light is shown if the invoice is empty. A yellow light is shown for an invoice that has not been fully paid. Typically, the invoice will be automatically created for you based on the products that you have picked. Service items will also be automatically included in the invoice.

You may also choose to manually edit the invoice. To do this, uncheck the **Auto Invoice** box at the bottom of the Invoice Tab, inFlow will remember this preference on future orders.

Item	Description	Quantity	Unit Price	Discount	Sub-Total
S10001	Custom Die-Cast Engraving	10	\$30.00	0 %	\$300.00
10201	1:700 Die Cast Battleship	10	\$12.99	0 %	\$129.90
04275	4" Classic Airplane - 3 Piece Set	4 quad	\$8.99	0 %	\$35.96
PM-SB01	20" X 18" X 12" Shipping Boxes	5			

Invoiced Date: 19/11/2009 Due Date:

Remarks:

Auto Invoice

Date	Method	Ref #	Remarks	Amount
01/01/2013	Cash		Deposit	\$100.00
23/01/2013	VISA	098459	Balance of order	\$425.22

Total Paid: \$525.22
Balance: \$0.00
Order Total: \$525.22

OK Cancel

Order Pick Pack Ship Invoice Return Restock Simple

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Invoice Tab Columns

The main Invoice tab table has the following columns:

Item	The item name or item code for the product or service being invoiced.
Description	A text description of the product or service being invoiced. This will default to the description from the product information, but can be changed here.
Quantity	The quantity of the item being invoiced. This will default to one but can be changed to the actual quantity invoiced by the customer.
Unit Price	The price charged per unit of the item.
Discount	A discount given to the customer on the price of this item. This will be defaulted to the default percentage discount given to this customer. You can also enter in a fixed amount per unit discount by typing in the discount as a currency figure (e.g. \$5).
Tax	This may be hidden, depending on your company settings. This is the Product Tax Code for this item, determining if it is taxed in a special way, e.g. tax exempt. This is defaulted to the Product Tax Code in the product information for this product.
Sub-Total	The total cost of this item for the given quantity and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount and cannot be modified.

Invoice Tab Footer

The main Invoice tab footer has the following:

Invoiced Date	The date from which the invoice is effective. It is defaulted to empty but is filled with the current date when the order is completed.
Due Date	The date on which the customer's payment is due. This is calculated by default by taking the Invoiced Date and adding the number of days specified by the Payment Terms for this order. You can also set this date manually. This field is hidden when the shipping information is not shown.
Date Paid	Tracks when you received payment from the customer.
Remarks	Allows you to enter in any extra remarks you have. These remarks will be shown to the customer on the printed Invoice or Receipt.
Sub-Total	Shows the total charged to the customer before taxes and freight.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows the amount of tax charged for this invoice. You may change the amount of tax charged here, but if the invoice is later changed, the tax will be automatically recalculated.
Freight	The amount of freight or other surcharges applied to this invoice. Tax is applied to this field if the selected Taxing Scheme has Tax On Shipping set.

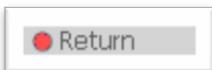
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Total	The total amount that the customer needs to pay for this order.
Paid	The amount that the customer has paid you for this order. You can also click here to open the Payment Details Window which allows you to record payment method or partial payments.
Balance	The remaining amount that the customer should pay you for this order. It is calculated by subtracting the amount Paid from the Total field.
Paid in Full	The Paid in Full button sets the Paid amount to match the Total due and sets the Date Paid to the current date. Click this to set the balance to zero when the customer has paid you the full amount for the invoice.

Handling Returns for Sales Orders

You may allow your customers to return items from their orders, such as when the items are damaged. In this case, you may issue them a refund for the returned products. You can also track credits or refunds to be given to this customer.

The Return tab keeps track of the customer return information. It is accessible by clicking the Return button from the bottom of a Sales Order.



A red light is shown if the return table is empty. A yellow light is shown if a refund has not yet been issued and a green light is shown when the refund has been issued.

The return table can be modified once the order is marked as Fully Shipped.

The screenshot shows the 'Return' tab of a sales order. At the top, there is a table with columns: Item, Description, Quantity, Unit Price, Discount, and Sub-Total. One row is visible, showing item 76289B, Kung Fu Master Action Figure, quantity 1, unit price \$6.99, discount 0%, and sub-total \$6.99. Below the table is a summary section with fields for Sub-Total (\$6.99), Freight (dropdown menu), Total (\$6.99), Fee (\$0.00), Refunded (\$0.00), and Credit (\$6.99). At the bottom, there are buttons for Auto Fill, Refund in Full, and several status indicators: Order, Pick, Pack, Ship, Invoice, Return, Restock, and Simple.

Return Tab Columns

The main Return tab table has the following columns:

Item	The item name or item code for the product or service being returned.
-------------	-----------------------------------------------------------------------

Sales

Description	A text description of the product or service. This will default to the description from the order, but can be changed here. This can be hidden from within the Company Settings.
Quantity	The quantity of the item being returned. This will default to the quantity on the invoice.
Unit Price	The price charged per unit of the item.
Discount	A discount given to the customer on the item price, as a percentage. This will default to the discount given to the customer on the original invoice, or to the customer's default discount. You can also enter a fixed-amount per-unit discount by typing in the discount as a currency figure (e.g. \$5).
Tax	This may be hidden, depending on your company settings. The Product Tax Code for this item determines if it is taxed in a special way, e.g. tax exempt. This is defaulted to the Product Tax Code in the invoice or the product information for this product.
Sub-Total	The total cost of this item for the quantity given and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount, and cannot be modified.

Return Tab Columns

The Return tab footer has the following options:

Return Date	The date the products were returned.
Remarks	This field allows you to enter any extra remarks, which can be issued to the customer on a printed Credit Note.
Sub-Total	The subtotal at the bottom of the return table shows the base amount to be refunded to the customer before taxes, freight and other adjustments.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows the amount of tax refunded to the customer. You may change the amount of tax charged here, but if the return information is later changed, the tax will be automatically recalculated.
Freight	The amount of freight or other surcharges to be refunded to the customer. If you do not refund freight charges, then leave this blank.
Total	The total to be refunded before restocking fees.
Fee	A restocking fee to be charged to the customer for the return. This will be deducted from the amount to be refunded.
Refunded	The amount that you have already refunded to the customer.
Credit	The remaining amount of money that you should refund to the customer or be given as credit.

Sales

Refund in Full This button sets the Refunded amount to match the Total minus the restocking fee. Click this button to quickly set the Credit balance to zero when you have issued a refund.

Auto Fill Clicking the Auto Fill button prompts inFlow to automatically suggest a customer return. This will suggest that the customer returns all products for the entire invoiced order. You may choose to use Auto Fill and then remove the items not being returned.

Restocking for Sales Orders

After a customer has returned some products, you may be able to place them back into your inventory for resale to another customer. This is known as Restocking.

The Restock tab keeps track of the restocking information. It is accessible by clicking the Restock button from the bottom of a Sales Order.



A red light is shown if the Restock table is empty. A yellow light is shown if the table is not empty, but some lines have not been marked as restocked. A green light is shown if all lines have been restocked.

The restocking information can be modified any time after the order is marked Fully Shipped.

Item	Description	Quantity	Location	Restocked ?
▶ 76289B	Kung Fu Master Action Figure	1	NY Warehouse	<input type="button" value="Restock"/>
*		0		

Remarks

Order Pick Pack Ship Invoice Return Restock Simple

Restock Tab Columns

The main Restock tab table has the following columns:

Item The item name or item code for the product or service being restocked.

Sales

Description	A text description of the product or service. This will be defaulted to the description from the invoice, but can be changed here. This field will be shown only if „Show Product Description“ is set in the Settings.
Quantity	The quantity of the item to be restocked. This default amount returned is in standard UoM.
Location	The location into which the returned products should be restocked. If location for this order is set, it defaults to that one, otherwise the product default is used.
Sublocation	This column may be hidden depending on the Company Settings. It is the inventory sublocation (e.g. Aisle Number) into which the returned products should be restocked. This will be the default location for that product, or left blank.
Restocked	A button you can click to finalize the restocking and update the inventory records to include these restocked products.

Restock Tab Footer

The Restock tab footer has the following:

Remarks	The Remarks field allows you to enter in any extra remarks you have. These remarks will not appear on any printed documents.
Restock All	The Restock All button will mark all line items as Restocked, updating the inventory records.
Auto Fill	<p>The Auto Fill button gives you intelligent suggestions on how to restock the amount that was returned using standard UoM. You might use this as a suggestion and modify it based on an inspection of how many of the returned products are fit to be resold. It will add lines to your restock table, but will not remove any existing lines. It will restock the remaining returned stockable product items. For each item, the location will be set in order of priority as follows:</p> <ul style="list-style-type: none">• The location specified for this sales order.• The default location for the product.• The company default location.

Handling Out of Stock for Sales Orders

When a customer orders an item with stock related issues, inFlow will show you a warning sign in the sales order quantity box. It will then help you reorder more stock.

Item	Description	Quantity	Unit Price	Discount	Sub-Total
▶ 00303A	Army Combat Helmet	! 60 ea.	\$4.495	0 %	\$269.70
*			Not enough stock to fulfill this order. Right click for options.		

There are three possible causes for this warning:

1. Insufficient stock to fulfill this order, in all inventory locations. Warning will be in red.
2. Insufficient stock in the location specified for this sales order. Warning will be in red.
3. Insufficient stock on hand in any inventory location to fulfill all open orders. This might happen if you have other open orders for this product as well. Warning will be in orange

Sales

4. Insufficient stock at present, but a currently open Purchase Order will address your needs once received. Warning will appear as clock icon.

When this warning is shown, you can right click the icon to get inFlow to help you replenish the stock so that the order can be fulfilled. You might see up to three options:

1. **Create Purchase Order:** This will create a purchase order to reorder all out-of-stock products for this sales order. If a location is specified for this sales order, the quantity ordered will be the amount necessary to fulfill this order with inventory at that location. If no location is specified, the quantity ordered will be the amount necessary to have enough available stock to fulfill all open orders.
2. **Create Work Order:** If one or more of the products that are out-of-stock have a Bill of Materials defined, you will be given the option to create a Work Order to replenish their stock. The quantities created will be the same as option 1.
3. **Split Order by Inventory Available:** If you have insufficient stock to fulfill this order (either anywhere or within the specified location), this option will be shown. For example, if a customer orders 100 units of a product, but you only have 40 in stock, then you might want to ship an order for 40 units now and have a separate order for the remaining 60. The two orders will have related order numbers with a number added on to the end, e.g. SO-000105-1 and SO- 00105-2.
4. **Split Order by Picked:** If there is sufficient stock for some line items in an order, but insufficient stock for others, partial picking can be done. This splits the order into two separate ones (e.g. SO-000006-1 and SO-000006-2) where the first order contains those items that have been picked.

Sales Order Printed Documents

There are several documents associated with a sales order that you may want to output. These can be accessed by clicking the Print button in the toolbar of a Sales Order.

Each of these documents can be printed directly or exported in PDF, Excel or Microsoft Word format. All documents use the currency of whichever document you are accessing.

Sales Order Document

The printout of the Sales Order can be used for order confirmation purposes or just as a paper record of the order.

Pick List Document

A Pick List is a printed document giving instructions to warehouse workers on which stock to pick and from which locations to satisfy an order. This uses the information from the Pick tab.

In the Simple Workflow, if you print a Pick List before completing the order, it will print out suggested picking locations. If you print out the Pick List after completing the order, it will print out the locations that the products were picked from. The pick list also includes Requested Ship Date if filled in.

Box Content List Document

When you pack your order into a few different boxes, you might want to print out the Box Content List documents to show what items are in each box. You can then include these documents with the boxes so customers can easily verify that the shipment is correct. This

Sales

document is not available when the shipping information has been hidden or in the Simple Workflow.

Box Label Document

You may wish to print box or pallet labels containing the shipping address and contents of each container, and attach these to the container for shipping purposes. This uses the information from the Pick tab. This document is not available when the shipping information has been hidden.

Packing Slip Document

A Packing Slip is a document showing the total contents of all containers within a shipment. You may wish to print this document and include this with your shipment so your customer can easily check the total received stock once they have received all the containers in your shipment. The Packing Slip will also include the box numbers when there is more than one box in your shipment. This document is not available when the shipping information has been hidden.

Invoice Document

You can use the Invoice document to request payment for the order from your customers. In the Full Workflow, this uses the information from the Invoice tab.

Receipt Document

You can use the Receipt document to send to your customers to acknowledge receiving payment from them. This is like the invoice, but includes the amount paid and the balance. In the Full Workflow, this uses the information from the Invoice tab.

Credit Note Document

When a customer has returned some items to you, you may wish to issue a Credit Note to indicate that you will give them a refund or a credit against their next order. This uses the information from the Return tab. This document is not available when in the Simple Workflow.

Custom Document

Depending on your business you may need to export specialized documents allowing you to easily and effectively provide your customers with the information they need in the format you want. This document is created through the print settings window and is unique to your copy of inFlow.

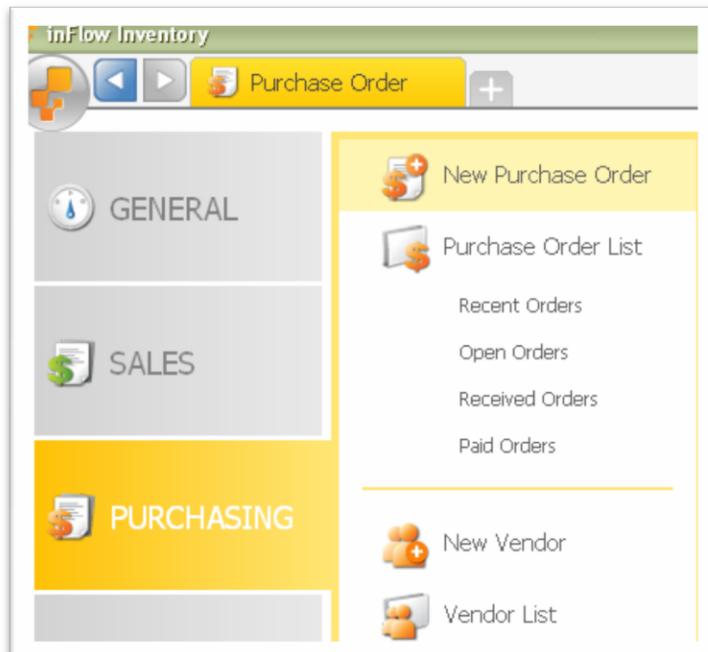
Purchasing

Purchasing Menu

The Purchasing Menu containing a few of the most commonly used links is available at the Home Page.



The full Purchasing Menu can be accessed from the inflow menu button.



New Purchase Order

Create a new Purchase Order.

Purchase Order List

This shows all the Purchase Orders irrespective of their status. This contains the following items:

Recent Orders

Lists orders with order date in the past 30 days.

Open Orders

Shows a list of orders that have been placed but where nothing has been received.

Purchasing

Received Orders

Shows a list of orders that have been marked Fully Received but have not yet been fully paid.

Paid Orders

Show a list of orders that are in paid states i.e. they have been marked Fully Received and have been fully paid.

New Vendor

Create a new Vendor entry.

Vendor List

Shows a list of Vendors.

Entering Vendor Information

You can keep track of your vendor information and their product catalog to make it easier to place orders on them in the future, and also to store contact information.

Much of the Vendor Information is used as defaults when placing a Purchase Order on this vendor, but it can be changed in the Purchase Order to make an exception for that order. Changing the Vendor Information will make all subsequent Purchase Orders created for that vendor default to the new information, but won't change the information on any existing orders.

To create new vendor, click the inFlow menu button, select Purchasing menu and click New Vendor. To make changes in the existing vendor's information, select the vendor from the left panel and the form will be populated with the existing vendor's data.

Basic Section

Name

This is the name of the vendor, usually the company name. Two vendors cannot have the same name.

Balance

This is the total amount of money that you owe this vendor. This is calculated by adding up the balance owed on all orders for this vendor, and subtracting any credits or refunds owed to you from returns.

Purchasing

Addresses Section

There is one special type of address for a vendor:

Business Address This is the default address where you place orders on the vendor. If the vendor only has one address, we recommend saving it as the Business Address.

You may also store an unlimited number of other addresses for the vendor, such as other locations that they may ship or take orders from. These additional locations can be identified with an address name, e.g. New York Office.

To modify or set an existing address, including the Business Address:

1. Click on the dropdown arrow to show the available addresses.
2. Select the address you wish to modify.
3. Move your mouse into the main address box and click. A dialog will pop up allowing you to change the address.



To add a new address:

1. Click on the dropdown arrow to show the available addresses.
2. Select Add New Address.

Addresses

Business Address

✓ Business Address

Add New Address

To delete an address:

1. Click on the dropdown arrow to show the available addresses.
2. Select the address to be deleted.
3. Click on the dropdown arrow again.
4. Select the option to delete the current address.

Addresses

New York Office

Business Address

✓ New York Office

Add New Address

Delete New York Office

Contact Section

This section contains basic contact information for the current vendor.

Name	The name of the person to contact when you are corresponding with this vendor.
Phone	The phone number for this vendor.
Fax	A fax number for this vendor.
Email	An e-mail address for the vendor.
Website	A website address for this vendor.

Purchasing Info Section

Payment Terms	The usual payment terms that the vendor gives you describing, for example, the number of days after which payment is due.
Taxing Scheme	The default taxing scheme for this vendor.

Purchasing

Carrier

The default shipping carrier and shipping method that you and the vendor normally use to have products shipped to you.

Misc. Section

Remarks

Any remarks you wish to make about the vendor here. These remarks will not be shown to the vendor or anybody outside your company.

You may also define up to five custom fields for the vendor, where you can store any extra data you wish.

Extra Custom Fields

In addition to the five custom fields that are next to the Remarks box of the Vendor Info tab, you can also define five more in the Extra Info tab. The Extra Info tab will only be visible if you have custom fields set to be shown there.

Vendor Products

The Vendor Products Tab allows you to set up the product catalog for this vendor.

Item	Description	Vendor Product Code	Cost
PM-BW01	24" x 750' Sheet of 3/16" ...	S-3928	\$40.00
PM-SB01	20" X 18" X 12" Shipping ...	S-4200	\$1.73
PM-SB02	20" X 20" X 15" Shipping ...	S-4862	\$2.11
PM-SB03	16" X 14" X 10" Shipping ...	S-4392	\$1.13
*			

Item

The Item Name or Item Code that you use to refer to this product or service.

Description

A text description of the product or service. It can be hidden depending on the Settings.

Vendor Product Code

The Item Name or Item Code that the Vendor uses to refer to this product or service. This is used in Purchase Orders when placing an order on this vendor.

Cost

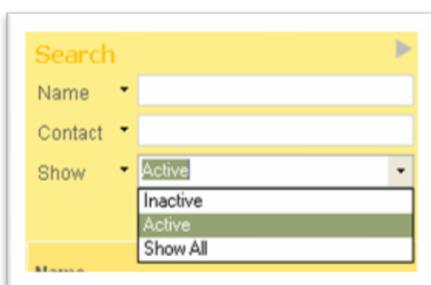
The unit price that this vendor typically charges you for this product or service. This is used in Purchase Orders when placing an order on this vendor.

Order History

The Order History tab shows you a history of all Purchase Orders you have placed on this vendor. It also shows the payment and balance status of the orders, so you can quickly review any payment owing. Double clicking on one of the rows will show you the details of that order in a popup window.

Purchasing

Deactivating and Reactivating Vendors



Deactivate Vendors can be deactivated so that they will be inactive and not shown in normal usage of inFlow. Vendors cannot be deleted entirely, to ensure that you have a full record of previous vendors.

Reactivate To view an Inactive vendor, select „Show“ from the drop-down list in the Listing Panel for the vendors. Now select Inactive from the drop-down box. An inactive vendor can be reactivated by clicking the Reactivate button, which replaces the Deactivate button in the vendor toolbar.

Entry changes within purchase orders

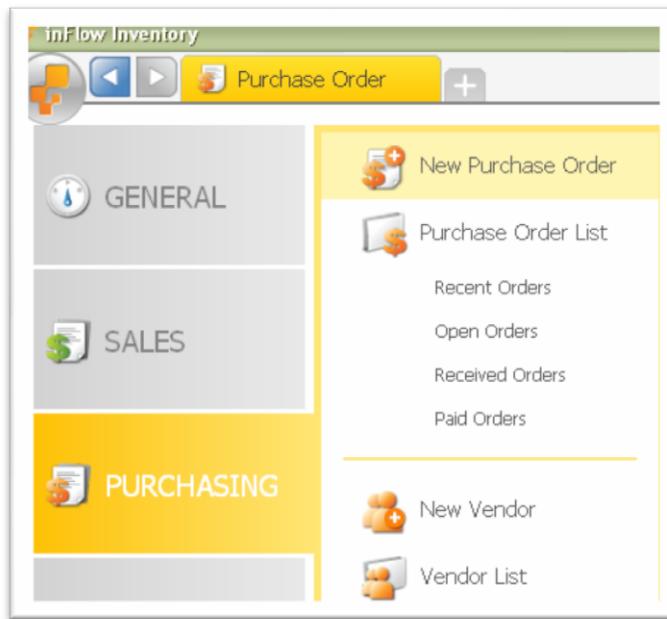
inFlow makes it possible to save the changes you have made during your purchase order back to the vendor or product entries, allowing you to complete two important tasks simultaneously. To do so, simply make the necessary changes to the vendor or product details within the purchase order itself. When you save the order, InFlow will ask you if you would like to save any changes and provide you with an easy to navigate list of the changes you have made.

A screenshot of the inFlow Purchase Order window. The main window shows a list of purchase orders on the left and a detailed view of order PO-000004 on the right. A modal dialog box is overlaid on the screen, asking if the user wants to save changes as vendor defaults. The dialog lists four items: Address, Phone, Default Taxing Scheme, and Vendor Price, with the 'Address' checkbox checked. At the bottom of the dialog are 'Save Selected' and 'Skip' buttons. The background window shows vendor details for Richardson Quick Liquidation, including address, phone number, and contact information. The bottom right of the window displays a summary of the purchase order with sub-total, tax, total, paid, and balance amounts.

For instance, as in the example, if you have made changes to both the vendor's address and phone number but you only want to amend the address and not the phone number, you may choose to do so here by simple un-checking the box indicating the phone number has changed. In this way you can effectively manage your vendor details from the purchase order window without needing to go back to your vendor records and make the changes twice.

Purchasing

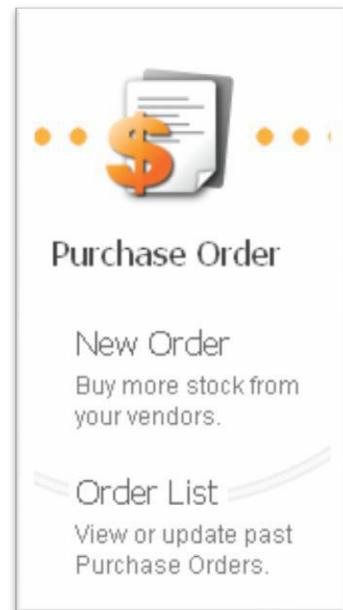
Creating a Purchase Order



A Purchase Order is a document that represents an order placed by you to one of your vendors, where you ask them to supply you with a certain set of products or services at a certain price. In inFlow Inventory, all of the work related to a purchase order is saved alongside the order, including receiving goods, payment and possibly returning products. This makes it easy to find all the order information in one place and see the order status at a glance.

To create a new Purchase Order, click the inFlow Menu button, select Purchasing and then select New Purchase Order.

Alternatively, you can click the New Order link from the Home Page



Entering Header Information

A screenshot of the Purchase Order Header entry screen. At the top is a toolbar with buttons for New, Save, Preview, Copy, Version, Attachment, Sticky, and Close. Below the toolbar are four input fields: 'Vendor' (dropdown), 'Contact' (text box), 'Phone' (text box), and 'Vendor Address' (text box). To the right of these are three dropdown menus: 'Location' (dropdown), 'Order #' (dropdown), 'Date' (dropdown set to 21/11/2009), and 'Status' (dropdown set to Open). At the bottom right is a link labeled 'add shipping'.

The Header of the Purchase Order contains the common information about the order that is visible throughout the purchasing workflow.

The following fields are in the Purchase Order Header:

Vendor (Required)

Here you select the Vendor's name. This will usually be the name of a company.

Contact

The contact person at your vendor regarding this order.

Phone

A phone number you can call at your vendor's place of business.

Vendor Address

The address to which this purchase order should be sent. These addresses are filled in from vendor information. You can use the dropdown to select other vendor addresses. You can modify an address by clicking into it or tabbing & typing.

Purchasing

Location	The inventory location associated with this order. Items will only be picked and restocked into this location by default.
Order #	A unique Purchase Order number by which you can refer to this order. This will be automatically filled in the first time you save your order. You can edit this Order # directly or set the pattern of how order numbers will be created under Company Settings. If Order # is set before saving order, no number is generated.
Date	The date of the order, usually the date on which the order was placed. You may change this date.
Status	A short description of the status of this purchase order.

Showing / Hiding Shipping Information

You can hide the shipping information from the order by clicking the No Shipping link. You can't do this when Freight, Vendor Order Number or requested ship date have been set. When shipping information is hidden, the Terms and Vendor Order # fields will be removed from the header and the freight fields (order, payment & return), requested ship date, due date, vendor order number, terms and carrier are also hidden.

If you want to turn it back on, click the Add Shipping link and it then shows up both on screen and in printed documents.

The screenshot shows a software window for managing a purchase order. At the top, there are standard file operations: New, Save, Preview, Copy, Version, Attachment, Sticky, and Close. Below these are several input fields: Vendor (set to Oh-Mega Toys), Contact, Phone, Terms (set to Net 60), V. Order #, Location, Order # (empty), Date (set to 21/11/2009), and Status (set to Open). On the right side, there's a section for the Ship-To Address, which is currently set to ABC Toys Ltd., 39 Dreamy Street, Suite 134, Wonderland, CA USA, 01678. Below this address, there is a link labeled "no_shipping".

Ship-To Address The address to which the vendor should ship the goods for this order.

Terms Payment terms for this order, i.e. an agreement between you and your vendor about how you should pay them for the order. You can select from a list of existing payment terms or add a new type by selecting <Add New...> from the dropdown list.

Vendor Order # An order number that your vendor may use to refer to this order.

You may also add up to three custom fields into Purchase Orders. These will show up underneath the Vendor Order # field.

Working with Addresses

For the Vendor address, you can select from the addresses defined for this vendor in the Vendor Information by clicking the small arrow next to the address field and selecting the address to use.

Purchasing

For the Ship-To Address, you can select from the addresses you have set up in your Company Information or Receiving Addresses under Company Settings. You can also add a new receiving address here by selecting Add New Address from the dropdown.

To edit the Vendor or Ship-To Addresses, move your mouse into the main address field and then click. A popup will appear allowing you to edit the various parts of the address. Changes to the addresses here will be kept for this purchase order only.

Entering the Main Order Contents

The main part of the purchase order is visible under the Order tab. To view this, click on the Order tab at the bottom of the Purchase Order screen.

Item	Description	Vendor Product Code	Quantity	Unit Price	Discount	Sub-Total
00303A	Army Combat Helmet		10 case	\$20.00	0 %	\$200.00
*			0			
+ - ↑ ↓						
Taxing Scheme	CA Tax	Remarks	Sub-Total	\$200.00		
Non-Vendor Costs			Tax 1	\$16.50		
Currency	US Dollar (\$)		Total	\$216.50		
			Paid	\$0.00		
			Balance	\$216.50		
		Cancel Order	Receive & Pay			
Purchasing Advanced						

The main Order table has the following columns:

Item

This is the item name or item code for the product or service being ordered. Items can be selected from the drop-down box or can be entered by scanning the barcodes. To do this, you have to setup product barcodes, click into the Item field and scan. The item will be selected. If the item is scanned repeatedly, then the quantity will be incremented accordingly.

Description

This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.

Vendor Product Code

The item name or item code that the vendor uses for the product or service being ordered. This will default to the Vendor Product Code set up in Vendor Information for this vendor and product or will be blank.

Quantity

This is the quantity of the item being ordered. This can be entered manually or selected from the drop-down box. Quantities can be entered in any UoM. Unit Price is per UoM displayed. Changing the UoM updates the Unit Price (e.g. changing to a pack of 2 doubles the

Purchasing

unit price). This will default to 1 but can be changed to the actual order quantity.

Unit Price

This is the price per unit that the vendor charges you for this item. In order of priority, this will default to the Cost set up in Vendor Information for this vendor and product, then the Costing Method set up in Product information for this product, then the unit price you last purchased this item at, and then zero.

Discount

A percentage discount given by the vendor on the price of this item. This can be entered manually or selected from the drop-down box. Discount can be entered as a percentage or as a dollar amount.

Tax

This may be hidden, depending on your company settings. The Product Tax Code for this item determines if it is taxed in a special way, e.g. tax exempt. This defaults to the Product Tax Code in the product information for this product.

Sub-total

The total cost of this item for the quantity given and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount, and cannot be modified.

To add in a new line item, first select a product in the Item column. Then, you may choose to modify the other columns. The Purchase Order information cannot be modified once the order has been marked Fully Received.

Foreign Currency Orders

If you are working in a currency other than your own, the order will appear in the currency which corresponds to the vendor's pricing scheme. However, if you would like to know what this order amounts to in your home currency (i.e. your company currency) holding your mouse over any of the totals will show a tooltip with the currency converted into your company currency.

Sub-Total	GBP 34.75
Tax 1	GBP 4.52
Freight	
Total	GBP 39.27
Paid	GBP 0.00
Balance	GBP 39.27

£39.27 (GBP) = \$78.54

Current User: Default User

Purchasing

Purchasing Simple Workflow vs Advanced Workflow

inFlow lets you choose between the Simple Workflow and the Advanced Workflow when working with an order. The Simple Workflow lets you get the basics done in a snap and you can switch to the Full Workflow for any order when you want to exploit the full power of inFlow.

The Simple Workflow is a single step process where you can place an order to your vendor, receive inventory and mark it as paid, with one click. With the Advanced Workflow, you can track things in more depth, including the order, goods received and returned goods.

You can switch from the Simple Workflow to the Advanced Workflow for any of your orders by clicking the **Advanced** tab at the bottom. You can switch from the Advanced Workflow back to the Simple Workflow by clicking the **Simple** tab at the bottom. There are a few cases when you can't switch from the Advanced Workflow to the Simple Workflow, for example when it would hide important information such as:

- The order isn't completed yet but the receive tab is partially filled out.
- The return or unstock tabs are partially filled out.

Purchase Order Simple Workflow

The Simple Workflow for a Purchase Order offers a one-step process for quickly placing and receiving a purchase order.

You can switch to Simple Workflow by clicking the **Simple** button from the bottom of a Sales Order. You can click the Advanced button to revert back to advanced workflow.

Most of the steps in the simple workflow are discussed in *Creating a Purchase Order*.

The screenshot shows the Purchase Order Simple Workflow interface. At the top, there is a table for entering items with columns: Item, Description, Vendor Product Code, Quantity, Unit Price, Discount, and Sub-Total. Below the table, there is a summary section with fields for Due Date, Payment Method, Taxing Scheme, Non-Vendor Costs, Currency, and Remarks. To the right of the remarks field is a summary table showing Sub-Total (\$0.00), Tax 1 (\$0.00), Freight, Total (\$0.00), Paid, and Balance (\$0.00). At the bottom, there are buttons for Receive & Pay, and tabs for Purchasing (selected) and Advanced.

Purchasing

Simple Workflow Order Footer

The order footer contains more information about the order and pricing.

Due Date	The date by which the vendor expects payment from you. When the order is marked Fully Received, this date is calculated by taking the last receipt date and adding the number of days specified by the Payment Terms for this order. You can also set this date manually. This field is hidden when the shipping information is not shown.
Payment Method	The method by which you will pay the vendor.
Taxing Scheme	The type of taxes that will be charged to you for this order.
Non Vendor Costs	Any extra costs related to this order that should be included in the calculations for updating the moving average cost of the products received. This may be either a currency value or a percentage of the total base costs (not including tax, freight, and other extra costs).
Currency	The currency in which you intend to conduct the order. For companies that deal in one currency this will be your default and need not change. Companies that deal in more than one currency can choose to change the order currency (you will be prompted for the conversion rate if not already specified).
Remarks	Any extra remarks on this order. These remarks will be included when you print out purchasing documents. As well as the movement history of any product included in the purchase.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows the amount of tax charged for this order. You may change the amount of tax charged here but if the order is later changed, the tax will be automatically recalculated.
Freight	The amount of freight or other surcharges applied to this order. Tax is applied to this field if the selected Taxing Scheme has Tax On Shipping set. This field is hidden when the shipping information is not shown.
Total	The total amount that you will owe the vendor for this order.
Paid	The amount that you have already paid the vendor for this order. You can also click this field to open the Payment Details Window for partial payment control and payment method entry.
Balance	The extra amount that you are expected to pay to the vendor for this order.
Receive & Pay	You can click the Receive & Pay button to receive inventory for this order, update the moving average cost (MAC) for your products and mark the order as fully paid. If you click the dropdown arrow next to this button, you can do a partial update by selecting one of the two options:
<i>Receive Inventory</i>	Marks the order as fully received and updates inventory and moving average costs for your products.
<i>Pay Vendor</i>	Marks the order as fully paid.

Purchasing

In the Simple Workflow, inFlow will do the same work behind the scenes as in the Advanced Workflow. For example, the Receive & Pay button will automatically pick locations to place your items into inventory. You can switch to the Advanced Workflow if you want to inspect or have full control over these processes.

To cancel the order and avoid further processing, click the Cancel Order button (which will show up once the order is saved). This will reverse any inventory, payment and cost updates already made. It will then show a Re-open Order button which you can use to start handling the order once again.

Purchase Order Advanced Workflow Overview

This is an outline of the Advanced Workflow for ordering products from your vendors. The process is tracked within a single entity in inFlow Inventory, the Purchase Order, making it easy for you to keep track of the order status and what needs to be done.

1. You place a Purchase Order to your vendor

A Purchase Order is a request to your vendor or supplier to send you some products at a certain price. inFlow can help you create Purchase Orders and print or e-mail them to your vendors.

2. You Receive products from your vendor into your warehouse

After you have placed the order, the vendor will ship the products to you. When the products arrive at your warehouse, you need to receive those products into your warehouse, putting them away into storage locations, and verifying that the quantity received matches the quantity ordered.

3. You Pay the vendor for the goods received

Once you have received the goods, you need to pay the vendor for the purchase order. You can keep track of when you have paid the vendor and the payment methods using inFlow.

4. (Optional) You may Return some items to the vendor

If some of the items you have received are defective, you might request a refund from the vendor for those items.

5. (Optional) You Unstock the returned items

You can remove returned items from your inventory if they are defective or need to be sent back to the vendor.

Note, steps 4 and 5 are often done at the same time, and can be done in any order.

Purchasing

Receiving without an Order

In some cases, you might receive products without having first placed a formal Purchase Order. In this case, you can also choose to fill in the information on Receive first, and then the Order details, such as pricing, afterwards.

Marking an Order as Fully Received

Once you have received all the expected goods from the vendor and agreed upon the price to be paid, you can mark the order as Fully Received to finalize it. The products that have been received must match the products that were ordered. To mark the order as Fully Received, click the Complete button on the Receive tab of the Purchase Order.

Order Cancellation

You may choose to cancel a Purchase Order once it has been saved. This can be done by closing the window. If this is done after any items have been received or payment made, then the inventory movements and payments will be reversed. You may choose to re-open a cancelled order at a later date by clicking the Re-open Order button, which shows up once the order has been cancelled.

Order Status

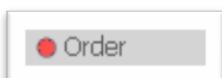
inFlow Inventory uses a detailed Order Status to quickly describe the state of an order. The following are the possible status values for purchase orders:

Open	when the purchase order has been placed but nothing has been received yet.
In Progress	when the purchase order has been placed and some receiving information has been entered.
Fully Received	when the purchase order has been marked Fully Received but has not yet been fully paid.
Paid	when the purchase order has been marked Fully Received and has been fully paid.
Cancelled	when the purchase order has been marked cancelled.

Purchase Order Advanced Workflow – Order

The Order tab in the Advanced Workflow is where you can enter the purchase order. This is discussed in *Creating a Purchase Order*.

A green light on the Order tab is shown when any items have been ordered. Otherwise, a red light is shown.



Purchasing

Item	Description	Vendor Product Code	Quantity	Unit Price	Discount	Tax	Sub-Total
14232	Mini-Sports Car Battery Powered Red		50	\$12.00	0 % Taxable		\$600.00
▶ PM-BW01	24" x 750' Sheet of 3/16" Bubble Wrap		1	\$0.00	0 % Taxable		\$0.00
*			0				
Sub-Total \$600.00							
Carrier	<input type="button" value="▼"/>	Req. Ship Date	<input type="button" value="▼"/>	Tax	<input type="button" value="\$78.00"/>		
Taxing Scheme	<input type="button" value="HST"/>	Remarks	<input type="button" value=""/>	Freight	<input type="button" value=""/>		
Non-Vendor Costs	<input type="button" value=""/>	Total			\$678.00		
Currency	<input type="button" value="Canadian Dollar (\$)"/>						

Order Receive Payment Return Unstock Simple

The footer of the purchase order shows the following information about the order and pricing:

- Carrier** A selection on the carrier and shipping method that the vendor should use to ship products to you.
- Taxing Scheme** This is the type of taxes that will be charged to you for this order. Changing the taxing scheme updates the tax calculations and the display.
- Non-Vendor Costs** Any additional cost on this order. This may be either a currency value or a percentage of the total base costs (not including tax, freight, and other extra costs). These are extra costs to be included in the product moving average cost but not charged by the vendor, e.g. customs or handling charges. These can be a percentage or a fixed amount and will be included in the product costing (moving average cost and last purchase cost).
- Currency** The currency in which you intend to conduct the order. For companies that deal in one currency this will be your default and need not change. Companies that deal in more than one currency can choose to change the order currency (you will be prompted for the conversion rate if not already specified).
- Requested Ship Date** A date that you want the vendor to ship the goods to you on. When shipping information is not added, this field will be hidden. Freight fields (order, payment & return), due date, vendor order number, terms and carrier are also hidden.

Purchasing

Remarks	Any extra remarks on this order. These remarks will be included when you print out the Purchase Order. In Simple Workflow, same remarks are shown on all documents. In Advanced, each document shows the remarks for the most appropriate tab.
Sub-Total	The total cost of this purchase order before tax and freight is applied.
Tax	You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows the amount of tax charged for this order. You may change the amount of tax charged here, but if the order is later changed, the tax will be automatically recalculated.
Freight	The amount of freight or other surcharges applied to this order. Tax is applied to this field if the selected Taxing Scheme has Tax On Shipping set.
Total	The total amount that you will owe the vendor for this order.
Cancel Order/ Re-open Order	When just the order tab is filled in and the order is saved, you can Cancel Order. This sets the status as cancelled. When other tabs are also filled in, cancellation wipes out everything except the order tab. You can Reopen Order by clicking the Reopen button which shows up only after the Order has been cancelled.
Auto Fill	<p>The Auto Fill button can be used to quickly set the order to match the goods received. This may be useful when you do not place a purchase order before receiving goods. The Auto Fill function will add lines to your Order table to match the received quantities, but will not remove any existing lines you have. It will add order lines so that the total quantity ordered matches the total quantity received.</p> <p>In addition, if you select the vendor for a new order and click the autofill button without any data entered in the receive tab, the system will supply any items that it believes you should be re-ordering from that vendor for a quick and easy way to reorder stock.</p>

Purchase Order Advanced Workflow – Receive

Receiving is the process of taking goods that have been delivered to you from your vendor and placing them into your inventory storage.

The Receive tab shows you information related to receiving an order and is accessible by clicking the Receive button from the bottom of a Purchase Order.



A green light on the Receive tab is shown when the order has been marked Fully Received. Otherwise, a yellow light will be shown when some items have been received, or a red light when the receive table is empty.

Purchasing

The receiving information cannot be modified after the order has been marked Fully Received. Also, lines that have been marked received cannot be modified.

Item	Description	Vendor Product Code	Quantity	Location	Receive Date	Received
00303A	Army Combat Helmet		10 case	Main Warehouse	21/11/2009	<input checked="" type="checkbox"/>
12875	Mini-Truck Battery Powered Red		50	Default Location	21/11/2009	<input checked="" type="checkbox"/>
Remarks					Total Ordered	150
					Total Received	150
Auto Fill		Completed				
<input type="radio"/> Order	<input checked="" type="radio"/> Receive	<input type="radio"/> Payment	<input type="radio"/> Return	<input type="radio"/> Unstock	<input type="radio"/> Simple	

Receive Tab Columns

The main Receive table has the following columns:

Item	The item name or item code for the product or service being received.
Description	This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
Vendor Product Code	A product code that the vendor uses to refer to the item being ordered. This will default to the Vendor Product Code set up for this vendor and product in Vendor Information.
Quantity	The quantity of the item being received. This will default to the quantity remaining to be received for this order when the Name is selected, or one if there are none expected.
Location	inFlow will use the location set for this order. If no location is set, it will use the product default location.
Receive Date	The date that these items were received. This will default to the date on the line above, or else today's date.
Sublocation	This column may be hidden depending on the Company Settings. This is the inventory sublocation (e.g. Aisle Number) from which the item is

Purchasing

	picked. For a stocked product, this will default to the sublocation of the selected product. For unstocked products, it will be kept blank.
Received	A button you can click to finalize and receive the boxes. This will modify your inventory levels, moving the products into the location specified. This column changes to a check mark icon once it has been received. When the last row is received, the system asks if you want to mark the order as fully-received. Lines that have been received cannot be edited or deleted.

Receive Tab Footer

The receive tab footer has the following options:

Remarks	The Remarks field allows you to enter in any extra remarks you have about the receiving. These remarks will be shown on the printed Receiving Notes.
Total Ordered	The total quantity of items ordered.
Total Received	The total quantity of items received. If all the items have been received, this will be equal to Total Ordered (all in standard UoM).
Complete	The Complete button can be used to mark off all lines as received and then mark an order as Fully Received, signifying that your company has received all expected goods for this order. This will move the Order status to Fully Received, and cannot be undone. The Complete button is enabled when the quantities of all stocked and unstocked products in the order match the quantities received. Service items do not need to be received. Order and Receive tabs cannot be changed after this point.
Auto Fill	The Auto Fill button gives an intelligent suggestion on how the receiving could be done, based on the contents of the order. It will not modify or delete any of the existing lines in the receive table. The Auto Fill function will suggest receiving the remaining products for the order than have not yet been received. Receive defaults to the location specified in the order, or to the default location for each product. UoM is done as per purchasing UoM. The Description is copied from the order where possible.

Purchase Order Advanced Workflow – Payment

After you have received the purchased goods, you will need to pay the vendor.

The Payment tab keeps track of the payment due and payment status for a purchase order and is accessible by clicking the Payment button from the bottom of a Purchase Order.



A green light is shown if the order is fully paid. Otherwise, a red light is shown if order is empty, and a yellow light is shown if the order is not yet fully paid.

Purchasing

Typically, Auto Invoice box at the bottom of the Payment tab will be checked and the invoice will be automatically created for you. For products the invoice will be based on the quantity received. For services, the invoice will be based on the quantity ordered using the same UoM, Vendor Product Code, price, discount and description as order. The invoice will be automatically updated based on the order or items received.

You may also choose to manually edit the invoice if for some reason you want to adjust it separately from the order. To do this, uncheck the Auto Invoice box at the bottom of the Payment tab.

Item	Description	Vendor Product Code	Quantity	Unit Price	Discount	Sub-Total
00303A	Army Combat Helmet		10 case	\$20.00	0 %	\$200.00

Due Date Remarks

Sub-Total	\$200.00
State Tax	\$16.50
Freight	
Total	\$216.50
Paid	\$216.50
Balance	\$0.00

Auto Invoice Paid in Full

Order
 Receive
 Payment
 Return
 Unstock
 Simple

The main Payment table has the following columns:

Item	This is the item name or item code for the product or service being ordered.
Description	This is a text description of the product or service being ordered. This field will be shown, only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
Vendor Product Code	The item name or item code that the vendor uses for the product or service being ordered. This will default to the Vendor Product Code set up in Vendor Information for this vendor and product, or will be blank.
Quantity	The quantity of the item for which the payment is being made. Quantities can be entered in any UoM. Unit Price is per UoM displayed. Changing the UoM updates the Unit Price (e.g. changing to a pack of 2 doubles the unit price). The default will be set to the quantity of the first

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	line of the Order or Receive tabs matching this product, or if there is no quantity, then to a quantity of one.
Unit Price	This is the price per unit that the vendor charges you for this item. In order of priority, this will default to the Cost set up in Vendor Information for this vendor and product, then the Costing Method set up in Product information for this product, then the unit price you last purchased this item at and then zero.
Discount	A percentage discount given by the vendor on the price of this item. This can be entered manually or selected from the drop-down box. Discount can be entered as a percentage or as a dollar amount.
Tax	This may be hidden, depending on your company settings. The Product Tax Code for this item, determining if it is taxed in a special way, e.g. tax exempt. This defaults to the Product Tax Code in the product information for this product.
Sub-total	The total cost of this item for the quantity given and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount, and cannot be modified.

Payment Tab Footer

The payment tab footer has the following:

Due Date	The date by which the vendor expects payment from you. When the order is marked Fully Received, this is calculated by default by taking the last receipt date and adding the number of days specified by the Payment Terms for this order. You can also set this date manually.
Date Paid	The date that you paid for this order.
Remarks	Any special remarks you have about the payment of this order. These will not be shared with your vendor.
Paid in Full	Use this button to quickly set Paid amount to match the total due. Click this to quickly set the balance to zero when you have paid the vendor the full amount for the order. This will also set the Date Paid field to the current date if it was not already set.
Paid	The amount that you have already paid the vendor. You can also click this field to open the Payment Details Window for partial payment control and payment method entry.
Balance	The extra amount that you are expected to pay to the vendor.

Purchasing

Vendor Product Code

The item name or item code that the vendor uses for the product or service being ordered. This will default to the Vendor Product Code set up in Vendor Information for this vendor and product, or it will be blank.

Quantity

The quantity of the item being returned. This can be entered manually or selected from the drop-down box. Quantities can be entered in any UoM. Unit Price is per UoM displayed. Changing the UoM updates the Unit Price (e.g. changing to a pack of 2 doubles the unit price). The default will be the quantity on the first line of the Order or Receive tabs matching this product, or if there is no quantity, then to 1 purchasing unit.

Unit Price

This is the price per unit that the vendor should refund you for this item. In order of priority, this will be defaulted to the cost in the order, then the Cost set up in Vendor Information for this vendor and product, then the Cost set up in Product information for this product, then the unit price you last purchased this item for, then zero.

Discount

A percentage discount given by the vendor on the price of this item. You can also enter in a fixed-amount per-unit discount by typing in the discount as a currency figure (e.g. \$5). This will be deducted from the amount to be refunded.

Tax

This may be hidden, depending on your company settings. The Product Tax Code for this item determines if it is taxed in a special way, e.g. tax exempt. This is defaulted to the Product Tax Code in the product information for this product.

Sub-total

The total amount to be refunded for this item for the quantity given and after applying discounts, but before applying taxes or freight. This is calculated based on the Unit Price, Quantity and Discount, and cannot be modified.

Return Tab Footer

Return Date

The date the products were returned.

Remarks

This field allows you to enter any extra remarks. The remarks here will not be shared with your vendor.

Sub-Total

The subtotal at the bottom of the return table shows the base amount to be refunded to you before taxes, freight and other adjustments.

Tax

This may be hidden, depending on your company settings. You may see one or more Tax fields depending on the Taxing Scheme set for this order. This shows amount of tax refunded to you. You may change the amount of tax charged here, but if the return information is later changed, the tax will be automatically recalculated.

Freight

The amount of freight or other surcharges to be refunded to you. If the vendor does not refund freight charges, then leave this blank.

Total

The total to be refunded before restocking fees.

Fee

A restocking fee to be charged to you by the vendor for the return. This will

Purchasing

Unstock Tab Columns

The main Unstock tab table has the following columns:

Item	The item name or item code for the product or service being unstocked.
Description	This is a text description of the product or service being ordered. This field will be shown only if Show Product Description is set in the Settings. This will default to the description from the product information, but can be changed here.
Quantity	The quantity of the item being unstocked. This will default to the quantity that was returned in purchasing UoM.
Location	The location from which the products should be unstocked. This will be defaulted to the default location for that product, or the company default.
Sublocation	This column may be hidden depending on the Company Settings. This is the inventory sublocation (e.g. Aisle Number) from which the returned products should be unstocked. This will default to the default location for that product, or left blank.
Unstocked	A button you can click to finalize the unstocking process and update the inventory records to remove these products.

Unstock Tab Footer

Remarks	The Remarks field allows you to enter any extra remarks you have. These remarks will not appear on any printed documents.
Unstock All	The Unstock All button will mark all line items as Unstocked, updating the inventory records by removing the stock from the specified locations. Lines cannot be edited or deleted afterwards.
Auto Fill	The Auto Fill button will unstock the amount that was returned using purchasing UoM. It will copy the description from return tab. The Auto Fill function will add lines to your unstock table, but will not remove any existing lines you have. It will unstock all of the remaining returned stockable product items that you are returning. If a location for this purchase order is specified, then Auto Fill will be restricted to inventory in that location.

When the location isn't specified for the Purchase Order, the system tries to unstock in order of priority as follows:

1. From the default location and sublocation for that product.
2. From the default location for that product and other sublocations.
3. From the default location set in General Settings.
4. Any other locations

If there are ties within the same priority level (e.g. default location for the product isn't set, but there are two different sublocations within the same location), then it will unstock from the location with highest quantity first.

Purchasing

Purchase Order Toolbar

The Purchase Order Toolbar is visible in all the Purchase Order windows and contains the following menu items:



Creates a new order. If you have another order open, the system will prompt you for saving changes to that Order.



Saves the changes to the Order. The system will save the Order with an automatically generated Order # if the Order # is blank.



Previews the document to be printed.

The Preview menu has the following items: Print

– Click Print to print the documents.

Export – Click Export to export the documents to PDF, Microsoft Word, Microsoft Excel or Rich Text Format



The copy menu has the following items:

Copy PO - Creates a copy of the old PO with all the appropriate fields and lines copied. Order number and dates are not copied. Attachments are not duplicated.

Create SO (Sales Order) – Copies the lines of the PO to the SO. A sticky is added to the SO saying "Created from PO, PO-#####". Other stickies copied. UoM and custom Descriptions are copied from the PO lines.



Click to look at older versions of this Purchase Order. Old versions are saved correctly and are read-only.



Click to add attachment files to this Purchase Order. This opens a pop-up dialogue box to add new attachments and save them. Attachments can be saved, deleted or opened properly. The number of attachments is shown next to the button. When there are many attachments, scroll to the one you need.



Sticky – Click to add sticky notes to this Purchase Order. Sticky notes are not included in printed documents. Stickies can be moved, resized, changed color or closed. Opening a document again shows the stickies.

Purchasing

Purchase Order List

To access the Purchase Order List click the inFlow Menu button, select Purchase order and then select Purchase Order list.

Purchase Order List	This shows all the Purchase Order irrespective of their status.
Recent Orders	Lists orders with order date in the past 30 days.
Open Orders	Shows a list of orders that are have been placed but for which nothing has been received yet.
Received Orders	Shows a list of orders that have been marked Fully Received but have not yet been fully paid.
Paid Orders	Shows a list of orders that have marked Fully Received and have been fully paid.

When viewing in full listing mode, double-clicking an order opens up the details. When details are open as well, clicking a listing entry selects that order.

Filter Order List

The Purchase Order List header gives you to the option to search for Purchase Orders by entering the search parameters.

The screenshot displays two views of the Purchase Order List screen. On the left is a detailed search panel with dropdown menus for Order #, Status, Vendor, and Order Date. The Order Date dropdown is set to 'Last 30 Days'. Below it, a list of filters includes Order # (PO-000013), Order Date, Status, Vendor, Vendor Order #, Req. Ship Date, Due Date, Total From, Total To, Paid From, Paid To, Balance From, Balance To, and Contact Name. At the bottom of this panel are 'Add' and 'Remove' buttons. On the right is a main table titled 'Purchase Order' showing two rows of data. The columns are Order #, Order Date, Status, Vendor, Vendor Order #, Requested Ship Date, Due Date, Total, Paid, and Balance. The first row corresponds to the filter selected in the search panel.

Order #	Order Date	Status	Vendor	Vendor Order #	Requested Ship Date	Due Date	Total	Paid	Balance
PO-000013	03/11/2009	Open	Protect-Ship Inc.			03/12/2009	\$12.00	\$0.00	\$0.00
PO-000015	22/11/2009	Open	Protect-Ship Inc.			22/12/2009	\$1,290.00	\$0.00	\$0.00

You can select and use filters in the Search section such as Order#, Status, Vendor and Order Date. Many other serach options are also available using the drop-down button.

You can Add/Remove filters, but you can't remove all filter options. Custom fields are supported based on settings. Filters that have been removed will not restrict the search.

Purchasing

Purchase Order Printed Documents

There are numerous possible documents associated with a purchase order. You can access these documents by clicking the Print button in the toolbar of a Purchase Order. For each of these documents, you can preview them, print them out or export them to PDF, Microsoft Word, Microsoft Excel or Rich Text Format. Exporting to Microsoft Word to make changes is a simple way of customizing your documents.

Purchase Order Document

The Purchase Order printed document shows what you are ordering from your vendor. You can send this to the vendor to place the order.

Receiving Note Document

You may wish to print out a document showing the goods received and where they were filed. This may be used for your records or as a notice of receipt to your vendor. You may also export it to another format, such as PDF.

Purchase Invoice Document

You can use this to print out the information in the Payment tab of the Purchase Order. In most cases, this would only be done for record-keeping purposes, since most vendors will send you an invoice.

Purchase Return

The Purchase Order printed document shows what you returned to your vendor. You can send this to the vendor to claim the refund for returned products.

Reports

Reports Overview

inFlow Inventory has a variety of reports that you can use to gather, print out and share information about sales trends, payments, inventory levels and other aspects of your business.

Creating a Report

To create a report:

1. Click on Report List under Reports in the inFlow menu.
2. Click on the links (Sales, Purchasing, or Inventory) in the left panel to see a group of reports and its preview in the right panel.
3. Click on the required report to bring up the customization screen for that report.
4. Set the customization options for this report (see below)
5. Click the Generate Report button.

Quickly Access Recent Reports

In the inFlow menu, click Reports, the last 5 reports generated are shown which can be opened directly from there.

Customizing Individual Reports

You can customize various aspects of a report to gather the exact information you need. To show the Customizing options click >>More and to hide them click <<Less.

Filter By

In each report, you can filter the data to be displayed. For example, you might just want to see information on a certain Category of items or only look at Sales information over a certain period of time. The Filter By options includes Filter By: Products, Category, Location, Sublocation, Status, Custom Fields etc.

Options

Other options by which to filter the data to be displayed are Include Zero Quantities and Pricing Scheme. The Options displayed will vary with the type of report.

Display

Showing and Hiding Columns

You may wish to show or hide some columns in the report. Most reports have some columns that are optional. For example, you may not be interested in the Costing information on some reports. To show or hide the columns, check or uncheck the options next to them.

In addition, you will find that you have the ability to show the currency in which you wish your reports to display, choosing to see your sales numbers in the order currency (Foreign) vs. your default currency (Home) or both) as well as the option of adding custom fields as a column within the report.

The screenshots illustrate the report customization interface. The top part shows the 'Filter By' section with dropdown menus for Products (All Products), Category (Battery-Powered), and Location (Main Warehouse). The bottom part shows the 'Display' section with a 'Columns' dropdown set to 'Category, Location, Quantity'. Under 'Orientation', 'Portrait' is selected. Under 'Group By', 'Location' is selected. Under 'First Sort By', 'Item' is selected. Under 'Then Sort By', 'Year' is selected. The 'Report Title' is set to 'INVENTORY BY LOCATION'.

Reports

Orientation

Select the Landscape or Portrait orientation for the report.

Group By

In many reports, you have different options as to how to group the lines together. For example, you may want to group the products in your report by category, or simply show them all as a single group. To select the grouping options, choose from the options in the Group By field.

Sorting

You may choose how to sort the lines in your reports. In the event of a tie, you can set secondary or tertiary sorting methods as well.

To choose a sorting method, set your choice of column to sort by in the First Sort By column. To do subsequent sorting in the event of a tie after the primary sort, you can set other columns in the Then Sort By columns.

Report Title

The Report Title is shown near the top of the printed reports. In each report, a default report title is supplied, but you can change this by editing the text in the Report Title field.

Description

The Report Description is a caption shown underneath the Report Title in the printed reports. By default, the Report Description is set based on the filters you set for this report, but you can also customize the description yourself.

Add to My Reports

Click Add to My Reports to save this report in My Reports so that you can have quick access to it.

Generate Report

After customizing all the options, click Generate Report. The report will be generated and displayed in the right panel.

The screenshot shows the Inflow Inventory software interface. On the left, there is a filter panel titled 'Inflow Inventory' with various dropdown menus and buttons for filtering data. The main right panel displays a report titled 'SALES BY PRODUCT DETAILS'. The report is organized into sections: 'Battery-Powered', 'Close-out', and 'Die-cast'. Each section contains a table with columns: ITEM, ORDER DATE, DATE, ORDER NUMBER, QUANTITY SOLD, and SALES AMOUNT. The tables show specific product details like 'Mini-Truck Battery Powered Red' and 'Kung Fu Master Action Figure' with their respective sales figures. At the bottom of the report, there are totals for each section and a grand total for the entire report.

ITEM	ORDER DATE	DATE	ORDER NUMBER	QUANTITY SOLD	SALES AMOUNT
12895 - Mini-Truck Battery Powered Red	03/11/2009	03/11/2009	SO-000012	5	\$119.95
12895 - Mini-Truck Battery Powered Red	13/09/2009	30/09/2009	SO-000003	30	\$719.70
14232 - Mini-Sports Car Battery Powered Red	03/11/2009	03/11/2009	SO-000012	30	\$719.70
				65	\$1,599.35
Close-out					
2010 - 1:24 California Highway Patrol	04/09/2009	30/09/2009	SO-000005	8	\$240.00
762998 - Kung Fu Master Action Figure	06/10/2009	06/10/2009	SO-000008	1	\$6.94
762998 - Kung Fu Master Action Figure	03/11/2009	03/11/2009	SO-000012	25	\$174.75
762998 - Kung Fu Master Action Figure	04/09/2009	30/09/2009	SO-000002	1	\$6.94
762998 - Kung Fu Master Action Figure	06/09/2009	06/09/2009	SO-000006	1	\$6.94
				36	\$432.57
Die-cast					
34275 - 4" Classic Airplane - 3 Piece Set	03/11/2009	03/11/2009	SO-000012	20	\$44.95
34275 - 4" Classic Airplane - 3 Piece Set	15/09/2009	19/10/2009	SO-000007	16	\$35.95
34275 - 4" Classic Airplane - 3 Piece Set	03/09/2009	30/09/2009	SO-000001	4	\$8.99
390621 A - 3.75" Military Classics Warship	06/10/2009	05/10/2009	SO-000008	50	\$33.92
390621 A - 3.75" Military Classics Warship	06/09/2009	06/09/2009	SO-000006	50	\$33.92
390621 A - 3.75" Military Classics Warship	04/09/2009	30/09/2009	SO-000002	50	\$33.92
10031 - 1:700 Die Cast Battleship	15/09/2009	19/10/2009	SO-000007	10	\$129.90
34001 - Police Basket	18/10/2009	19/10/2009	SO-000010	5	\$125.00
				205	\$446.95

Reports

My Reports

Save to My Reports

When a report is open you can click Add to My Reports to save this report in My Reports.

Open from My Reports

To open saved reports from My Report, click My Reports in the left Report List panel of the Reports List page and click the report that you need.

Update My Reports

If you have made any changes in the Report Settings, click Update My Reports to save the report settings for future use.

Delete from My Reports

To delete something from My Reports, click the close button [X] next to the Report.



Reports Tool Bar

The Reports Tool Bar has the following options:



Back-Forward

If the Report has more than one pages, you scroll through them using the First, Previous, Next and Last buttons.

Print

Once you have created a report, you can choose to print it by clicking the Print button after you have created a report. This will print as per the settings under Print Settings, which can be accessed under the Settings menu through the inFlow menu button.

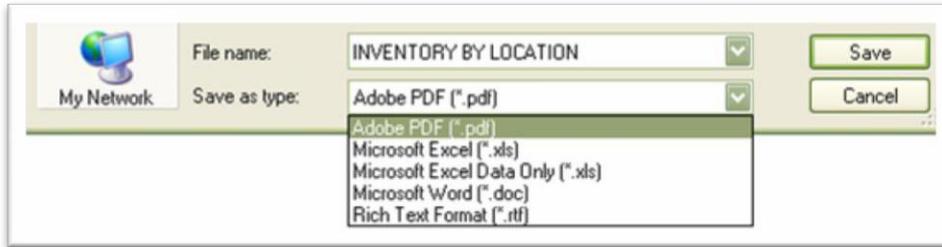
Export

Once you have created a report, you can choose to export it to another format such as PDF.

Reports

To export a report:

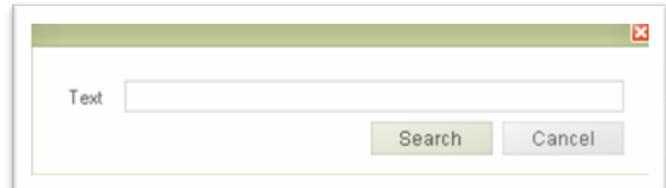
1. Click the Export button after you have created a report.



2. Select the export format from the Save as Type options.
3. Set the export file name.
4. Click Save to complete the export.

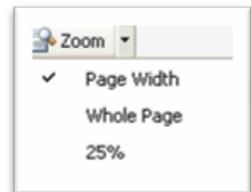
Search

Click Search to search for text in the document. Enter the text and click Search. Click Search again to find the next occurrence of the text.

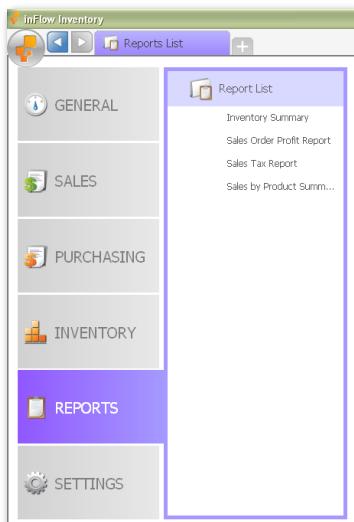


Zoom

Use the Zoom button to zoom in and out of the document for viewing.



Report List

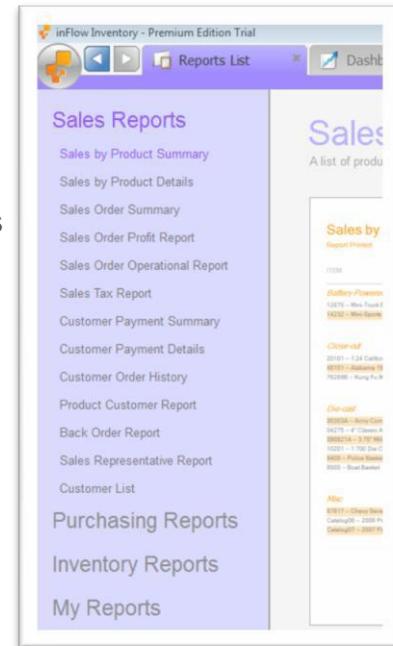


To see a list of reports, click Report List from the Reports menu in the inFlow menu.

Reports

Sales Reports

The following reports are available under the Sales Reports in the left Report List panel. Move the mouse pointer over each report to preview it.



Sales by Product Summary

A list of products showing a summary of how much has been sold and purchased.

Sales by Product Details

A report which breaks down the products and sales orders to show you how well a product has been selling.

Sales Order Summary

Shows a summary of financial information for a number of sales orders.

Sales Order Profit Report

A list of Sales Orders with the gross profit of each one.

Sales Order Operational Report

A list of Sales Orders with their statuses and requested ship dates.

Sales Tax Report

Shows the total amount of Sales Tax that you have collected from customers.

Customer Payment Summary

A list of your customers along with their balance and last order date.

Customer Payment Details

A list of Sales Orders for which you still need to receive Payment.

Customer Order History

The detailed contents of the orders that your customers have made in the past.

Product Customer Report

Shows you all the customers that have ordered a product.

Back Order Report

Shows you the remaining products that you need to ship to satisfy your customers' orders.

Sales Representative Report

Shows you the Sales Orders that each sales representative was responsible for.

Customer List

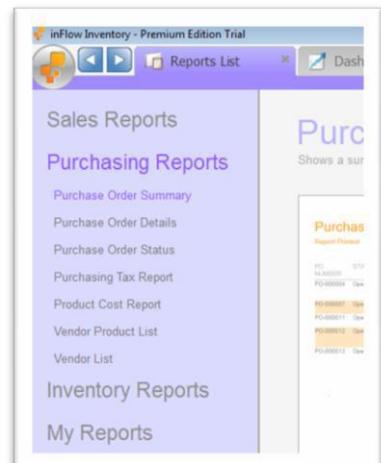
Allows you to run report which lists your clients and allows you to filter by various customer info (country, city etc.)

Reports

Purchasing Reports

The following reports are available under the Purchasing Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

Purchase Order Summary	Shows a summary of a number of Purchase Orders.
Purchase Order Details	Shows you the items you've purchased from vendors.
Purchase Order Status	Shows the Purchase Orders from vendors for different products
Purchasing Tax Report	Shows the total amount of Sales Tax that you have paid to vendors.
Product Cost Report	Shows you the costs at which you purchase products and average cost.
Vendor Product List	A list of products with their related information from Vendors.
Vendor List	Allows you to run report which lists your vendors and allows you to filter by various vendor info (country, city etc.)



Inventory Reports

The following reports are available under the Inventory Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

Inventory Summary	The total quantities of product inventory levels per product.
Inventory Details Report	A detailed list of inventory, including the product, location and quantity.
Inventory by Location	Shows the total amount of each product in a location (added up over sublocations).
Inventory Movement Summary	Shows the amount of stock that has moved in and out of each location over time.
Inventory Movement Details	Shows a full log of how the inventory has moved.
Estimated Inventory Duration	Estimates how long your current inventory stock will last based on how fast each product has been selling recently.
Stock Reordering Report	Shows total quantities of stock available along with



Reports

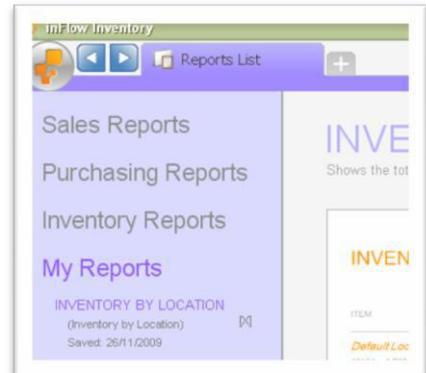
reordering information.	
Product Price List	A list of products with their prices.
Count Sheet Report	Will pull a list of work orders that you have completed with various details.

My Reports

You can save reports under My Reports for quick reference. To add a report to My Reports:

- Open up a standard report.
- Click the “> More” link.
- Click Add to My Reports button.

To view My Reports, click My Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

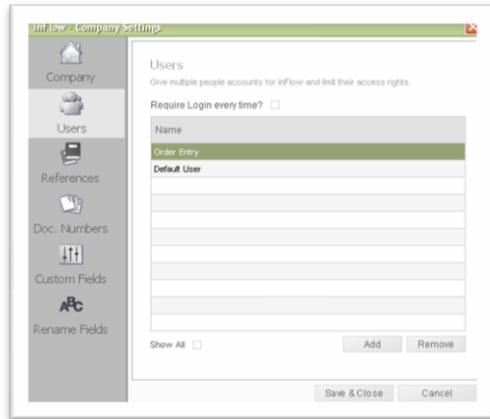


Multi-User

Security and User Access

You can set up different user accounts and passwords for various people to use. This will allow you to control who can see and edit information, and it will also help you to trace who was responsible for some work. The Free Edition of inFlow is limited to a single user.

Setting up Users



To set up users from the inFlow menu start button, select Settings and click General Settings. From the Company Settings dialog box, click the Users button and view the Users tab. From there, you can create new users, or deactivate or modify existing users.

To create a new user, click the Add button.

To deactivate an existing user, highlight that user and click the Remove button. This will prevent that user from signing into the system in the future. Deactivated users can be viewed and reactivated by clicking the Show All button.

Default User and Password

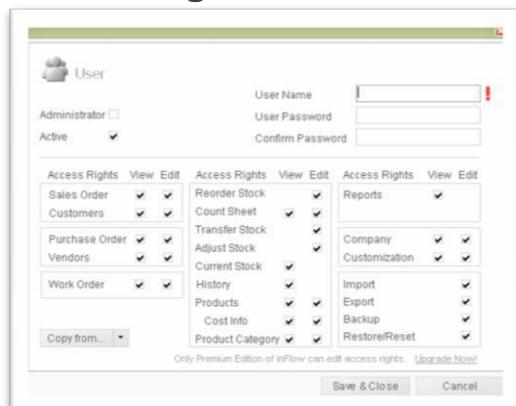
By default inFlow Inventory has a single user that comes pre-installed with all access rights. The default user name is Default User, and the default password is left empty.

Bypassing Login

If you only have one active user with an empty password, then inFlow won't ask you to log in.

Usually, when logging in, users can choose to Log in automatically next time from the login screen. If you want to disable this for security reasons, then you can check the option "Require Login every time?" in the company settings.

Access Rights



A user's access rights determine what he or she is allowed to view or modify in the system. Checkboxes under the View columns determine whether or not that user is allowed to view the details of the corresponding entity. The Edit column determines whether or not that user is allowed to make changes to it. If a user is not allowed to view reports then they will also be restricted from the use of the dashboard.

The Name field is a descriptive name for this user, or the name of the account holder. The password is the initial password for that user. Users can also modify their

passwords by selecting Personal Preferences from the Settings menu.

Checking the Administrator box gives this user administrator access, which allows him or her to make changes to other user's access rights. There must be at least one active administrator in the system. You can quickly assign a group of access rights to a user by copying the access rights from another user. To do this, click the Copy From button and select the user whose rights you

Multi-User

want to copy. You can also select Full Rights or No Rights to quickly grant or take away all rights from this user.

Unchecking the Active box makes this user inactive, which prevents him or her from logging into the system. The user can be reactivated by checking the Active box.

How to Setup Multi-User Mode

When you want to use inFlow in multi-user mode, you will need to chose one computer as your server. The server will host the inFlow data, whilst other computers (called clients) will connect to the server. The server computer should typically be:

- Powered on most of the time, allowing clients to connect
- One of the fastest computers you have available

To set up inFlow in multi-user mode, you need to do the following on the server computer:

1. Install inFlow on the server computer.
2. From the inFlow menu, choose Multi-User Mode under Settings.
3. Click the “Server” button to set this computer up as a server.
4. When it’s done the program will give you the connection info you’ll need to hook up your other computers. You can click the save this file for use on the other computers or simply write it down (this is always accessible through the change connection option when logged into an admin account as well).

Then to set up the other computers to connect with your server

1. Install inFlow on the computer and be sure to choose “client mode” during the install
2. Once it is complete you will be prompted to connect using the settings file you saved when setting up your server or by filling in those details manually below.
3. Once they’ve been entered click “Connect”.

If you are connecting from a computer that was previously running a standalone copy of inFlow simply click the “Multi-user mode” option under Settings and choose “Client” instead of “Server”, then proceed with steps 2 and 3 of the client instructions above. The multi-user mode of inFlow is designed primarily within a local area network (LAN) environment.

Connecting inFlow over the Internet

The multi-user functionality of inFlow is designed mainly for connecting computers over a local area network (LAN). We don’t officially support using inFlow between computers connected over the Internet, but a number of people have done this successfully. Here are some tips that may help if you’d like to try this for yourself as well.

The three main ways of connecting inFlow over the Internet are: using remote desktop, using a virtual private network (VPN) and directly connecting over the internet.

Multi-User

Connecting using Remote Desktop

One way to allow access to inFlow from outside your LAN is to set up one machine on your LAN with inFlow and also as a remote desktop host. Then, other machines can connect to this host via remote desktop, as if they were using that machine directly.

The remote desktop host will need to be running Windows XP Professional, Vista Business or Vista Ultimate to host remote desktop. You may find the links below useful in setting up remote desktop. (Disclaimer: We don't have any affiliation with, or endorse, these links.)

Remote Desktop on XP:

<http://www.online-tech-tips.com/windows-xp/how-to-setup-remote-desktop-on-windows-xp/>

Remote Desktop on Vista:

<http://www.mydigitallife.info/2007/01/26/turn-on-or-enable-remote-desktop-on-windows-vista/>

Connecting using a VPN

You may also want to consider setting up a VPN to allow computers over the internet to access your LAN.

You may find the links below useful in setting up a VPN. (Disclaimer: We don't have any affiliation with, or endorse, these links.)

VPNs on XP:

http://www.onecomputerguy.com/networking/xp_vpn_server.htm

VPNs on Vista:

<http://windowshelp.microsoft.com/Windows/en-US/help/f22a374f-929e-43bf-9583-de62942490e81033.mspx>

Hamachi VPN software:

<https://secure.logmein.com/products/hamachi/vpn.asp?lang=en>

Directly connecting over the internet

If you're not able to set up remote desktop or a VPN, you may also want to have client computers connect directly to the database on the inFlow server over the Internet. Note that inFlow does not encrypt data sent over the network using this method.

To do this, when setting up inFlow to connect to the server for the Server Name, you'll need to put in the internet IP address of the server computer for the Server Name in inFlow. The easiest way to get this IP address is to use a web browser on the server computer, do an internet search for „what is my ip address”, and use the IP address given on one of those sites.

If the server computer is using a router, you may also need to set up port forwarding on the router to correctly direct connections to the server computer.

You may find the link below useful in setting up port forwarding on your router. (Disclaimer: We don't have any affiliation with this site or endorse it.)

Port forwarding for various routers: <http://portforward.com/>

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You'll need to do the port forwarding for SQL Server Browser on port 1434 for the UDP protocol.

Port forwarding for inFlow's SQL Server

To correctly set up port forwarding for inFlow's SQL Server, you'll want it to use the same port each time. To do this:

1. Run SQL Server Configuration Manager. On Windows XP, click Start, Run and type sqlservermanager.msc. On Vista, click Start and type sqlservermanager.msc.
2. Open SQL Server 2005 Network Configuration, Protocols for INFLOWSQL and right click on TCP/IP and select Properties.
3. In the properties dialog, go to the IP Addresses tab and go to the IPAll section at the bottom. If the TCP Dynamic Ports field is set, clear it to be empty. Then, set TCP Port to an unused port number of your choice, e.g. 13724. Click OK.
4. Back in SQL Server 2005 Services, select SQL Server (INFLOWSQL), right click it and choose Restart.
5. Re-open the TCP/IP Properties window and check that the TCP Port is still set correctly to the port you chose. If not, pick another port number and try again.

You should then set up port forwarding for the TCP port number you chose above on your router.

Using an unchanging IP address

Most internet service providers (ISP) do not guarantee that you'll have the same IP address all the time; it may change each time you reconnect, or in less frequent intervals. This makes it less convenient for others to connect to you whether by VPN, Remote Desktop or direct internet connection to inFlow, since they will have to always use the most up-to-date IP address.

If you find this is a problem, you may wish to look into getting an IP address that doesn't change. This is typically called a static IP address, and some ISPs offer this as an extra service, typically for a small charge. Alternatively, you might look into a service which gives you a fixed address which you can keep updated to point to your server. This is often called Dynamic DNS. One site that currently provides this service for free, with some limitations, is linked below:

Dynamic DNS

<http://www.dyndns.com/services/dns/dyndns/>

You can then have client computers, which are connecting directly over the internet, use this as the Server Name instead of the IP address; or as an address when setting up remote desktop or a VPN.

Avoid bandwidth-intensive operations over the Internet

When connected over the Internet (or via a VPN over the Internet), using large pictures or file attachments may cause problems. We recommend using smaller pictures (100-200 kb) for your products and company logo, and to avoid working with large file attachments.

Also, the database backup and restore operations are very bandwidth intensive and may be very slow or fail when initiated from a computer connected to the server over the internet. We recommend performing these operations from the server computer directly or a computer connected to the server over a LAN.

Multi-User

Troubleshooting Multi-User Mode Connections

This article is to help you if you are having problems connecting to the inFlow database.

Typically, you are likely to receive one of the two common errors received when setting up a connection to the inFlow server in the Server Connection screen.

If you are getting an error saying that the database password is incorrect:

Verify that the database password is correct

Ensure that you have correctly typed in the Database Password (required for any access to inFlow). This is a different password from the Web Account Password (used for managing your inFlow licenses) and the inFlow User Passwords (used for individuals within your organization to log in to inFlow). Be careful about entering uppercase and lowercase letters correctly.

Verify that the server name is correct

Make sure that you are trying to connect to the right server. If you are on the server computer itself, you can use just a single dot to indicate this. You can also try using localhost, 127.0.0.1, or your computer's hostname or LAN IP address.

Otherwise, if you are connecting from another computer, you will need to enter the hostname or IP address of the correct server computer. The easiest way to get this information is to log into inFlow from the server computer, and select File, Connection, Change Connection, and look up the Server Name information under Current Connection Info. There, in brackets, it will first show the hostname and then the IP address.

You can also find the hostname as follows:

1. Go onto the server computer. On Windows XP, click Start, Run, and then type cmd. On Vista, click Start, type and select cmd.
2. In the command window, type hostname and press enter. The hostname will be displayed.

Look up the password in the server computer's registry

1. Go onto the server computer. On Windows XP, click Start, Run, and then type regedit. On Vista, click Start, type and select regedit.
2. Browse to the following registry key: HKEY_LOCAL_MACHINE\SOFTWARE\inFlow Inventory
3. Look up the password in the value of SQLPwd. (Note that if you have previously changed the database password, this may be inaccurate.) Go back to inFlow and try again with the new password.

Change the password on the server computer

1. Go onto the server computer. Open a command prompt as an administrator. On Windows XP, from an administrator account, click Start, Run, and then type cmd. On Vista, click Start, type cmd, then right click cmd.exe and select Run as administrator.
2. Type the following line into the command prompt:
sqlcmd -S .\INFOWSQL
3. At the 1> prompt, type the following and press enter, using your own password:
ALTER LOGIN SA WITH PASSWORD = „<password>“
4. At the 2> prompt, type the following and press enter: GO
5. Your database password has now been changed. Press Ctrl-C to exit.

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6. Go back to inFlow, and try again with the new password.

If you are getting an error that you cannot connect to the inFlow database:

Verify that the server name is correct

Make sure that you are trying to connect to the right server. If you are on the server computer itself, you can use just a single dot to indicate this. You can also try using localhost, 127.0.0.1, or your computer's hostname or LAN IP address.

Otherwise, if you are connecting from another computer, you will need to enter the hostname or IP address of the correct server computer. The easiest way to get this information is to log into inFlow from the server computer, and select File, Connection, Change Connection and look up the Server Name info under Current Connection Info. There, in brackets, it will first show the hostname and then the IP address.

Ensure that SQL Server is set to allow remote connections and the services are configured properly.

1. Run SQL Server Configuration Manager. On Windows XP, click Start, Run, and type sqlservermanager.msc. On Vista, click Start and type sqlservermanager.msc.
2. Open up SQL Server 2005 Network Configuration, Protocols for INFOWSQL. Ensure that Named Pipes and TCP/IP are enabled.
3. Open up SQL Server 2005 Services. Right click SQL Server (INFOWSQL) and select Restart.
4. Ensure that the SQL Server Browser service is listed and is Running. If not, right click it and select Start.
5. Ensure that both the SQL Server (INFOWSQL) and SQL Server Browser services are set to start mode Automatic. If not, right click, select Properties, and under the Service tab, set Start Mode to Automatic.

Set your server computer firewall to allow incoming connections to SQL Server (INFOWSQL) and SQL Server Browser from other computers.

The instructions below are for Windows Firewall. If you are using another program as a firewall, you will need to adapt these instructions.

1. On Windows XP, click Start, Settings, Control Panel, then select Windows Firewall. Click the Exceptions tab. On Windows Vista, click Start, then type and select Windows Firewall. Then click Allow a program through Windows Firewall.
2. Run SQL Server Configuration Manager. On Windows XP, click Start, Run and type sqlservermanager.msc. On Vista, click Start and type sqlservermanager.msc.
3. In SQL Server Configuration Manager, under SQL Server 2005 Services, right click SQL Server (INFOWSQL) and select Properties. In the Service tab, look at the value under Binary Path, not including the part at the end: -sINFOWSQL.
4. From Windows Firewall, click Add Program, Browse and select the program you found in step 3.
5. Repeat steps 3 and 4, except select the service SQL Server Browser this time.

Set your firewall to allow outgoing connections from inFlow.

If you are using Windows Firewall (the default firewall that comes with Windows XP SP2 and Windows Vista) or no firewall program, you shouldn't need to do anything. If you're using some

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other program as a firewall, you may need to set it to enable outgoing connections from inFlow on each computer with inFlow installed.

Temporarily turn your firewall off

You can temporarily turn off your firewall to help find out what's wrong when you can't connect with inFlow. The instructions below are for Windows Firewall. If you are using another program as a firewall, you will need to adapt these instructions.

1. On Windows XP, click Start, Settings, Control Panel, then select Windows Firewall. On Windows Vista, click Start, then type and select Windows Firewall.
2. Select off (or back on) and then click OK.

Licensing

Upgrading From Free to Regular or Premium Edition

inFlow Inventory comes in three editions, Free, Regular and Premium. Upgrading to Premium Edition unlocks the full set of features of inFlow to allow you to run your business more smoothly. For example, you can connect unlimited multiple licenses for the Premium Edition to allow you and your colleagues to work together at the same time in multi-user mode.

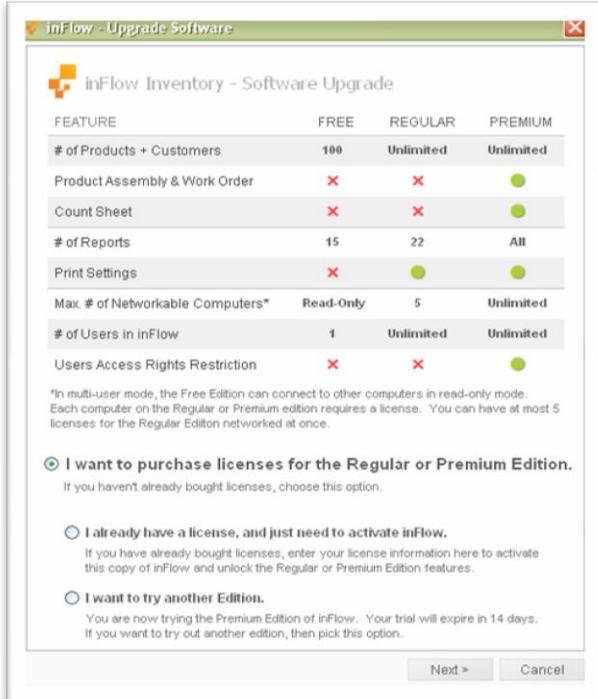
You can compare the two editions online at

<http://www.inflowinventory.com/v2testing/software-purchase.aspx>

To upgrade, you need to first purchase one or more licenses from our website, <http://www.inflowinventory.com/software-editions.aspx>. Once you have completed this, the license keys will be emailed to you immediately. You will also be given a Web Account E-mail and Web Account Password, which you can use to help manage your license keys.

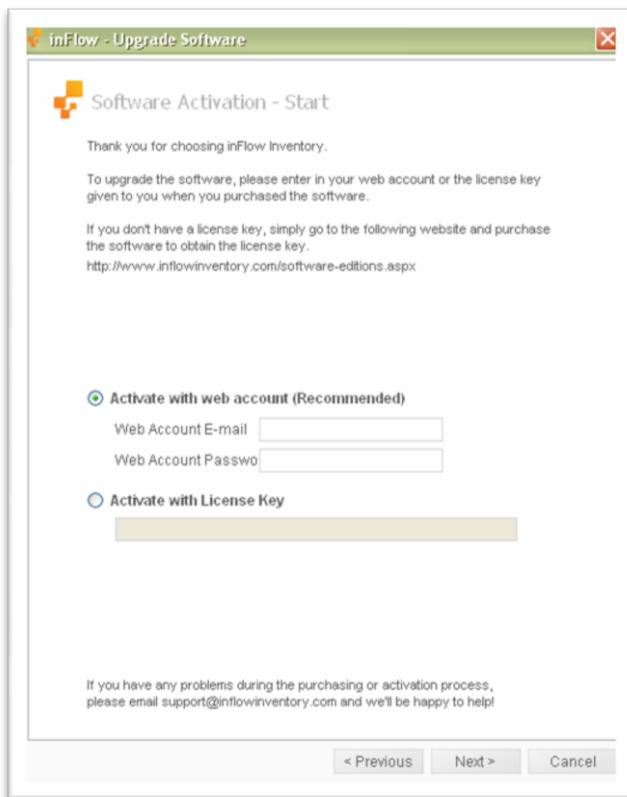
Once you have your license keys, you need to activate your copies of inFlow Inventory. To activate:

1. From the inFlow start menu, select Settings and then select Upgrade inFlow.



2. Select the option "I already have a license, and just need to activate inFlow."

Licensing



3. Enter the Web Account E-mail and Web Account Password into the boxes in the Software Activation dialog that appears.
4. Click Next.
5. If inFlow has detected that you have license keys from another Web Account, it may prompt you to merge the two accounts together. This might happen if both you and a colleague purchased inFlow licenses. Doing this enables you to share the licenses together. This requires the Web Account Password for the other Web Account E-mails to merge.
6. You will then be shown a list of license keys under your account. Choose a license to activate your copy of inFlow.
7. Click Next.

Using the Web Account is recommended if you have more than once license for multi-user mode, since it helps you to keep track of your licenses and which ones have been used. However, you can also activate directly using a license key:

1. In the above screen, select „Activate with License Key“.
2. Enter the license key.
3. Click Next.

If you are connected to the Internet, then this should complete the activation. If you are not connected to the Internet from the computer you wish to activate, you can activate online from another computer.

1. If necessary, return to the Software Activation wizard by selecting Upgrade to Standard Edition from the inFlow menu.
2. Click the Save Key File button, and choose a portable location to save the file to, like a USB drive.
3. Bring the file to another computer that has access to the Internet, and submit the key file to <http://www.inflowinventory.com/software-offline-activation.aspx> to receive your activation key.

Licensing

4. Enter the activation key into the Software Activation wizard on the original computer to be activated.

If you have any problems with activation, e-mail support@inflowinventory.com for assistance.

Regular/Premium Edition Licensing

The Free Edition of inFlow can seamlessly be upgraded to the Regular or Premium Edition by purchasing license keys from our website. Once we have confirmed the payment, you will be e-mailed a License Key. Each license enables you to operate inFlow Inventory Regular/Premium Edition on one computer. The Regular Edition allows 5 such network computers whereas the Premium Edition allows unlimited network computers.

After receiving your license key, you can upgrade to the Regular/Premium Edition by choosing Upgrade inFlow from the Free Edition and entering in the license key. This will activate your copy of inFlow, unlocking the features of the Regular/Premium Edition. For each license key, you are allowed up to two pre-authorized activations. If you need further activations, e.g. if you are transferring your license to a new computer, contact us at support@inflowinventory.com.

Licensing and Multi-User Mode

To use inFlow in Multi-User mode, you will generally need one Regular/Premium Edition license for each computer on which inFlow is installed. The Free Edition of inFlow can be used as a read-only client in multi-user mode; you will be able to view customer information, generate reports, etc., but not make any changes.

If you have one person who uses two different computers (e.g. a desktop computer and a laptop), you may choose to activate inFlow on both computers using the same license key. However, only one computer can be connected to inFlow at any given time.

As mentioned above, the Free Edition is generally read-only in multi-user mode. However, there is one exception to this; a Free Edition user can host inFlow in multi-user mode, allowing other people using the Free Edition to connect to view the same data. In this case, the server computer will not be read-only. This allows customers to try connecting inFlow computers together before purchasing the Regular/Premium Edition.