Infor Distribution Storeroom Mobile User Guide (Cloud)

Release 2022.x

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Contents

About this guide

This guide describes how to install, configure, and use the Infor Distribution Storeroom Mobile application.

Intended audience

This document is intended for Storeroom Mobile users who issue and return products, receive purchase orders, ship and receive warehouse transfers, and perform inventory counts in Storeroom-managed warehouses.

Organization

This table shows the chapters included in the guide.

Section	Description
Overview	The section describes the Infor Storeroom Mobile application, screens, and navigation.
Getting started	This section contains usage requirements and instructions to set up, access, and customize Storeroom Mobile on your mobile device.
Issuing products	This section contains instructions for issuing products online and offline, editing products on an issue, and exporting issues to a `.csv` file.
Returning products	This section contains instructions for returning products to Storeroom online and offline.
Receiving purchase orders	This section contains instructions for receiving and submitting purchase orders online and offline.
Shipping and receiving warehouse transfers	The section contains instructions for shipping and receiving warehouse transfers online and offline.
Counting products	This section contains instructions for performing and submitting counts online and offline and exporting counts to a `.csv` file.

Section	Description
Inquiring on products	This section contains instructions for viewing product detail information about products online.

Related documents

You can find these documents in the product documentation section of the Infor Support Portal, as described in Contacting Infor:

- *Infor CloudSuite Distribution Integration Guide for Infor Distribution Storeroom*
- *Infor Distribution Storeroom Administrator Guide*
- *InforDistribution Storeroom User Guide*

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Overview

Storeroom Mobile is a web-based mobile application that supports the issue, return, receipt, transfer, and counting of products in Storeroom-managed warehouses. You can use Storeroom Mobile on mobile devices with iOS or Android operating systems.

To enter values in the application, you can use the device's camera or scanner, or a separate Bluetooth barcode scanner. If you use a scanner, follow the manufacturer's instructions to program the scanner.

You can use Storeroom Mobile in an online or offline mode. Storeroom Mobile synchronizes with the Storeroom application when you are online.

Screens, modules, and menu items

The Storeroom Mobile application contains these screens, modules, and menu items:

- **Home**
  Use the **Home** screen to access Storeroom Mobile functions, the menu, and theme settings. The **Home** screen is displayed after you sign in to the application.
- **My Account**
  Use the **My Account** menu item to select a default language, activate the camera barcode scanner, and sign out of the application. The User ID and Customer Number that you specified to sign in to the application are displayed in this menu item.
- **Configuration**
  Use the **Configuration** menu item to select fields to include on the **Issues**, **Cycle Count Entry**, and **Cycle Count Quick Entry** screens.
- **Issues**
  Use the **Issues** module to enter issues.
- **Returns**
  Use the **Returns** module to enter returns.
- **PO Receipts**
  Use the **PO Receipts** module to receive purchase orders.
- **Warehouse Transfers**
  Use the **Warehouse Transfers** module to ship and receive warehouse transfers.

- **Cycle Count**

  Use the **Cycle Counts** module to perform physical and cycle counts.
- **Inquiry**

  Use the **Inquiry** module to access details about products.
- **System**

  Use the **System** menu item to view information about the application , such as version, build, and database information, or clear lookup history.

Navigation icons

This table shows the icons you can use to navigate Storeroom Mobile.

Icon	Description
☰	Menu. Tap to open and close the menu.
⌄ ⌃	Open and close. Tap to open and close menu items.
•••	More. Tap to view additional buttons, settings, and options that may not be displayed on a small device.
←	Left arrow. Tap to return to the previous screen. If the screen does not contain a **Save** or **Update** button, the changes you made on the screen are saved when you tap this icon.
→	Right arrow. Tap to open a record.
	Lookup. Tap to access the lookup window. Lookups are not available offline.
	Camera. Tap to scan barcodes with your device's camera.

Grids

Grids display a list of related records in a table format. From a grid, you can review, select, and drill down into a record for further processing. Grids are used in functions throughout the application and in lookup windows.

You can use these options to change the appearance of a grid. The settings do not persist after you leave the screen.

- Row Height

  Tap **More** to access the row height options.
- Grid pagination

  Use the **Records Per Page** setting to change the number of records that are displayed per page. This option is not available on small screens.

To advance to a particular page, specify the page number in the **Page** field, and then press **Enter** or the equivalent key on your device.

Grids icons

This table shows the icons that pertain to grids:

Icon	Description
•••	More. Tap to view additional buttons, settings, and options that may not be displayed on a small device.
☐	Check box. Tap to select a record.
→	Right arrow. Tap to open a record.
▲▼	Sort Order. Tap to change the sort order of the column.
◀	Previous page. Tap to return to the previous page.
▶	Next page. Tap to advance to the next page.
|◀	First page. Tap to return to the first page.
▶|	Last page. Tap to advance to the last page.

Grid filters

When you select **Show Filter Row** in the **More** menu, a filter for each column is displayed in the grid header row. The type of filter available depends on the values in the column, for example, alpha, numerical, or date values. Each type of filter offers several filter options, such as Contains, Starts With, and Equals.

To apply a grid filter, use these instructions:

1. Tap **More > Show Filter Row**.
2. Specify a value in a filter field.
3. Select the filter type to apply the filter.

   Alternatively, tap **More > Run Filter** to apply the filter.

Most recently used

The most recently used (MRU) feature is available in all fields with a lookup except for these fields:

- Customer Number on the **Sign In** screen
- Serial
- Lot

MRU is available in online or offline mode. If you select an MRU value when you are online, it is validated. If you select an MRU value that was deleted or inactivated since you last selected the value, an invalid value message is displayed.

Clearing MRU lookup history

1 On the **Home** screen, tap **Menu > System > Advanced**.
2 Tap **Clear Lookup History**.

Features not supported

You cannot export drafts of issues, returns, or cycle counts.

Chapter 2: Getting started

This guide provides information and instructions about the features and functions in the Storeroom Mobile application.

Usage requirements

To use Storeroom Mobile on your mobile device, the Storeroom-SM.StoreroomMobile role must be assigned to your Storeroom user record.

You must also meet these requirements:

- You must have an mobile device that is compatible with one of these operating systems:
    - iOS 11.0 or later
    - Android 5.1 or later
- You must know your Infor Ming.le user ID and password.
- You must have the QR code for Storeroom Mobile that was provided by your Storeroom system administrator.

iOS

For the 11.21.4 release, changes to Storeroom Mobile to support iOS v11.0 affect how local data is stored on the mobile device. If you use iOS, local data that is stored in existing instances of the mobile app is not retained when the app is updated to the 11.21.4 release. This data is affected:

- Drafts
- Server settings
- User settings
- Most recently used (MRU) values in lookups

Before the 11.21.4 update, we recommend that you submit drafts for issues, returns, and other documents. After the update, you must re-enter your server settings and user settings.

See Downloading and configuring the Storeroom Mobile application on page 13 and Personalization on page 14.

Important: If you disable the App Updates settings on your iOS device, you will receive notification when the update for Storeroom Mobile v11.21.4 is available, but it will not install automatically. You can then install the update manually after you have submitted the drafts and are prepared to reconfigure the server and user settings. If the App Updates setting is enabled, the update for Storeroom Mobile v11.21.4 will automatically install after the 11.21.4 release becomes available on April 17, 2021.

Tasks

This list shows the tasks that you must perform to set up, access, and customize Storeroom Mobile:

1. Download and configure Storeroom Mobile.
2. Sign in to the application.
3. Personalize the application.

Downloading and configuring the Storeroom Mobile application

1. Download the Storeroom Mobile application from the App Store or Google Play Store. It is free.
2. Tap **Install**.
3. After the installation is complete, tap the Storeroom icon to open the mobile application.
4. Select `Authenticate with ION`.
5. Tap **Settings**.
6. Tap **Server Settings**.
7. Tap **Scan Code**, and then select `Camera` or `Scanner`.
8. Scan the QR code.

   If you used a scanner to scan the code, tap **OK**.
9. Tap **Save**.

Signing in to the application

After you sign in, your session remains active when you are online. After 12 hours of inactivity, the application closes your session. If you are offline for two hours, you must sign in to use the application in the online mode.

1. Open the Storeroom Mobile application.
2. Verify that `Authenticate with ION` is selected.
3. Tap **Sign In**.
4. Specify your user name and password for Infor Ming.le.
5. Tap **Sign In**.
6. Tap **Allow**.

   If you have access to one company and one customer within that company, you are automatically signed in. If you have access to multiple companies or customers, continue to the next step.
7. Specify a Storeroom company and customer.

8 Tap **Sign In**.

Personalization

After you sign in, the **Home** screen opens. From the **Home** screen, you can personalize these features and functions:

- Default language for titles, labels, and messages
- Camera barcode scanner
- Color theme for the application
- Field availability in Issues, Cycle Count Entry, and Cycle Count Quick Entry

Changing the default language

1. On the **Home** screen, tap **Menu > My Account > Settings**.
2. Select a language.
3. Tap **Save**.

Activating the camera barcode scanner

Activate the camera barcode scanner to scan barcodes in lookup fields throughout the application.

1. On the **Home** screen, tap **Menu > My Account > Settings**.
2. Select `On` in the **Camera Barcode Scanner** field.
3. Tap **Save**.

Scanning barcodes with your device's camera

The barcode scanner feature is available in any field that meets these criteria:

- The cursor is in the field.
- The **camera** icon is displayed to the right of field.
  Note: The **camera** icon may partially display on screens that are four inches or less, but it is still functional.

To use the camera barcode scanner:

1. Tap the **camera** icon.
2. Align the red line horizontally with the barcode.
3. Hold the device in place until barcode comes into focus.

The camera is then deactivated, and the Storeroom screen is displayed with the barcode value in the field.

Changing the theme

1. On the **Home** screen, tap the **More** icon.
2. Select a theme.

Configuring field availability

1. Tap **Menu > Configuration**.
2. Select a function.
3. Select the fields to include in the function.
4. Tap **Save**.

Signing out

1. On the **Home** screen, tap **Menu > My Account**.
2. Tap **Sign Out**.

Chapter 3: Issuing products

Use the Issues module to create issues when you are online or offline. When you are online, you can create and immediately submit issues to Distribution SX.e, or you can save the issues as drafts on your device. When you are offline, you can create issues and save them as drafts. To submit a draft to Distribution SX.e, you must be online. All drafts are listed on the **Draft Issues** screen until they are submitted or deleted.

If an order is successfully submitted, the order number is displayed. If an issue contains an error, the error is displayed. Correct the error to resubmit the issue.

Tasks

This list shows the tasks that you can perform in **Issues**:

- Enter an issue
- View and edit products on an issue
- Submit a draft issue

Entering an issue

1. In online or offline mode, tap **Issue** on the **Home** screen.
2. Specify the information on the Initialize screen, and then tap **Continue**. Optionally, tap **Notes** to add a note to the issue.
3. Specify the product.
4. Specify the requested quantity and the issued quantity.

   If the issued quantity is the same as the requested quantity, tap the **Issued** field to populate the field.
5. If the requested quantity is greater than the available quantity, tap `Yes` to submit a backorder.
6. If the product is a serial-controlled product:
   a. Tap **Serials**.
   b. Select serial numbers from the grid, or tap **New** to specify serial number information.
7. If the product is a lot-controlled product:
   a. Tap **Lots**.
   b. Tap the right arrow to open a lot record that is listed in the grid.

c Specify the quantity, or tap **New** to specify lot number information.

8 Tap **Add** to add the product to the issue.

9 Tap **Submit** or **Save Draft**.

Viewing and editing products on an issue

1 In online or offline mode, navigate to the **Select Products** screen of an issue.

To access a draft issue, tap **Menu > Issues > Draft** and then tap the right arrow to open the issue.

2 Tap **My Cart**.

3 Tap **Edit Cart** to view the products in a grid.

Optionally, tap a product in your cart to open the product record.

4 From the grid, you can perform these actions:

- To edit a product, tap the right arrow, make the edit, and then tap **Update**.
- To delete a product, select the product in the grid, and then tap **Delete**.
- To add a product to the issue, tap **Add**.

5 Tap **Submit** or **Save Draft**.

Submitting a draft issue

1 In online mode, tap **Menu > Issues > Draft**.

2 Select the issue in the grid.

3 Tap **Submit**.

Chapter 4: Returning products

Use the Returns module to return products to Storeroom warehouses when you are online or offline. When you are online, you can create and immediately submit returns to Distribution SX.e, or you can save the returns as drafts on your device. When you are offline, you can create returns and save them as drafts. To submit a draft to Distribution SX.e, you must be online. All drafts are listed on the **Draft Returns** screen until they are submitted or deleted.

If a return is successfully submitted, the return merchandise sales order (OE RM) number is displayed. If a return contains an error, the error is displayed. Correct the error to resubmit the return.

Note: You cannot return nonstock products in the Storeroom Mobile application.

Tasks

This list shows the tasks that you can perform in **Returns**:

- Enter a return
- View and edit products on a return
- Submit a draft return

Entering a return

1. In online or offline mode, tap **Return** on the **Home** screen.
2. Specify the information on the **Initialize** screen, and then tap **Continue**. Optionally, tap **Notes** to add a note to the issue.
3. Specify the product.
4. Specify the quantity to return.
5. If the product is a serial-controlled product:
   a. Tap **Serials**.
   b. Tap **New** to specify serial number information.
6. If the product is a lot-controlled product:
   a. Tap **Lots**.
   b. Tap **New** to specify lot number information.

7 Tap **Add** to add the product to the return.

8 Tap **Submit** or **Save Draft**.

Viewing and editing products on a return

1 In online or offline mode, navigate to the **Select Products** screen of a return.

To access a draft return, tap **Menu > Returns > Draft**, and then tap the right arrow to open the return.

2 Tap **My Cart**.

3 Tap **Edit Cart** to view the products in a grid.

Optionally, tap the product in your cart to open the product record.

4 From the grid, you can perform these actions:

- To edit a product, tap the right arrow, make the edit, and then tap **Update**.
- To delete a product, select the product in the grid, and then tap **Delete**.
- To add a product to the return, tap **Add**.

5 Tap **Submit** or **Save Draft**.

Submitting a draft return

1 In online mode, tap **Menu > Returns > Draft**.

2 Select the return in the grid.

3 Tap **Submit**.

Chapter 5: Receiving purchase orders

Use the PO Receipts module to receive purchase orders when you are online or offline. When you are online, you can search for a purchase order, receive the products, and immediately submit the receipt to Distribution SX.e. When you are offline, you must specify information manually and save the purchase order as a draft receipt.

You can also store purchase orders as drafts when you are online, and then receive the purchase order when you are online or offline. If you store a purchase order as a draft, you are not required to enter each line manually when you receive the products offline.

You must be online to submit new or draft receipts. All drafts are listed on the **Draft Receipts** screen until they are submitted or deleted.

If a purchase order receipt is successfully submitted, the purchase order number is displayed. If a receipt contains an error, the error is displayed. Correct the error to resubmit.

When you receive a purchase order, the record is automatically saved each time you update a line item.

Tasks

This list shows the tasks that you can perform in **PO Receipts**:

- Receive and submit a purchase order online
- Store a purchase order on your device
- Receive a purchase order draft
- Receive a purchase order offline
- Submit a purchase order draft

Receiving and submitting a purchase order online

1. In online mode, tap **PO Receipt** on the **Home** screen.
2. Specify the information on the **Initialize** screen, and then tap **Continue**.
3. Tap the right arrow to open a line.
4. If the quantity received equals the quantity ordered, tap **Receive as Complete**.
5. If the quantity received does not equal the quantity ordered, specify the quantity received.

If you received less than the quantity ordered but do not want to create a back order, tap **Complete** to indicate the line is complete.

6 Optionally, select these options:

Inspection
Select to require an inspection of the line item before receiving is complete and Distribution SX.e is updated. Select this option if `Unavailable` is also selected.

Unavailable

Select this option to receive the line item as unavailable. You must also specify an unavailable reason in the **Reason** field.

To receive an individual serial- or lot-controlled product as unavailable, specify the unavailable reason only. Do not select `Unavailable` on this screen.

Complete
Select if this line is complete. If you received less than the order quantity, select this option to close the transfer after you submit it.

7 If the product is a serial-controlled product that is assigned serial numbers at receiving:
   a Tap **Serials**.
   b Tap **New**.
   c Specify the serial number.
   d Optionally, select `Unavailable` to receive the product as unavailable.
   e Tap **Add**.
   f Tap the back arrow to return to the **Edit Line** screen.
   g Tap **Update**.

8 If the product is a lot-controlled product:
   a Tap **Lots**.
   b Tap **New**.
   c Specify the lot and quantity.
   d Optionally, specify the amount of products to receive as unavailable.
   e Tap **Add**.
   f Tap the back arrow to return to the **Edit Line** screen.
   g Tap **Update**.

9 Tap **Update**.

10 Receive the remaining lines.

11 Tap **Submit**.

Storing a purchase order on your device

1 In online mode, tap **PO Receipt** on the **Home** screen.

2 Specify the information on the **Initialize** screen, and then tap **Continue**.

3 Tap **Save Draft**.

Receiving a draft purchase order

1. In online or offline mode, tap **Menu > PO Receipts > Draft**.
2. Tap the right arrow to open a purchase order.
3. Tap **Continue**.
4. Tap the right arrow to open a line.
5. Receive the line.

   See Receiving and submitting a purchase order online on page 20.
6. Tap **Save Draft**.

Receiving a purchase order offline

1. In offline mode, tap **PO Receipt** on the **Home** screen.
2. Specify the information on the **Initialize** screen, and then tap **Continue**.
3. Tap **New**.
4. Specify the line information.

   See Receiving and submitting a purchase order online on page 20.
5. Tap **Save Draft**.

Submitting a draft purchase order

1. In online mode, tap **Menu > PO Receipts > Draft**.
2. Select the PO receipt.
3. Tap **Submit.**

Chapter 6: Shipping and receiving warehouse transfers

Use the **Warehouse Transfers** module to process warehouse transfers when you are online or offline. When you are online, you can search for a warehouse transfer, ship or receive products, and immediately submit the warehouse transfer to Distribution SX.e. When you are offline, you must specify information manually and save the warehouse transfer as a draft.

You can also store warehouse transfers as drafts when you are online, and then process the drafts when you are online or offline. If you first store a warehouse transfer as a draft, you are not required to enter each line manually when you are offline.

You must be online to submit drafts. All drafts for warehouse transfers are listed on the **Draft Warehouse Transfer** screen until they are submitted or deleted.

If a warehouse transfer is successfully submitted for shipment or receipt, the warehouse transfer number is displayed. If a warehouse transfer contains an error, the error is displayed. Correct the error to resubmit.

You can ship warehouse transfers that are in the Ordered or Picked stage. You can receive warehouse transfers that are in the Shipped stage.

You must create the warehouse transfers in Distribution SX.e. You can transfer inventory from a Storeroom-managed warehouse or a distributor's warehouse. If you transfer inventory from distributor's warehouse, you can only receive the warehouse transfer in Storeroom Mobile. You must ship the warehouse transfer in Distribution SX.e.

If products are transferred between Storeroom-managed warehouses and the receiving warehouse is set up to automatically receive transfers, the warehouse transfer is shipped and received in one step.

You cannot automatically ship or receive warehouse transfers that contain include these products:

- Serial-controlled products
- Lot-controlled products

Tasks

This list shows the tasks that you can perform in **Warehouse Transfers**:

- Ship and submit a warehouse transfer online
- Receive and submit a warehouse transfer online
- Ship and automatically receive a warehouse transfer online

- Store a warehouse transfer on your device
- Process a draft warehouse transfer offline
- Process a warehouse transfer offline
- Submit a draft warehouse transfer

Shipping and submitting a warehouse transfer online

1. In online mode, tap **Warehouse Transfer** on the **Home** screen.
2. Specify this information on the **Initialization** screen:

   Warehouse
   Specify the warehouse that will receive the transfer.

   Warehouse Transfer #
   Specify the number of the warehouse transfer.

3. Tap **Continue**.
4. To ship all lines on the warehouse transfer as complete without reviewing each line and verifying the quantity, tap **Ship as Complete** and then tap **Submit**.
5. To review an individual line, tap the right arrow to open the line.
6. If the actual quantity to ship does not equal the value in the **Shipped** field, specify the correct value in the **Shipped** field.
7. If the product is a serial-controlled product that is assigned serial numbers at receiving:
   a. Tap **Serials**.
   b. Tap **New** to specify serial number information.
8. If the product is a lot-controlled product:
   a. Tap **Lots**.
   b. Tap **New** to specify lot number information.
9. Tap **Update**.
10. Process the remaining lines on the transfer.
11. Tap **Submit**.

Receiving and submitting a warehouse transfer online

1. In online mode, tap **Warehouse Transfer** on the **Home** screen.
2. Specify this information on the **Initialization** screen:

   Warehouse
   Specify the warehouse that will receive the transfer.

   Warehouse Transfer #
   Specify the number of the warehouse transfer.

3 Tap **Continue**.
4 To receive all lines on the warehouse transfer as complete without reviewing each line and verifying the quantity, tap **Receive as Complete** and then tap **Submit**.
5 To review an individual line, tap the right arrow to open the line.
6 Specify the received quantity.
7 Optionally, select these options:

Inspection
Select to require an inspection of the line item before receiving is complete and Distribution SX.e is updated. Select this option if `Unavailable` is also selected.

Unavailable

Select this option to receive the line item as unavailable. You must also specify an unavailable reason in the **Reason** field.

To receive an individual serial- or lot-controlled product as unavailable, specify the unavailable reason only. Do not select `Unavailable` on this screen.

Complete
Select if this line is complete. If you received less than the order quantity, select this option to close the transfer after you submit it.

8 If the product is a serial-controlled product that requires serial number assignment:
   a Tap **Serials**.
   b Accept the serial numbers that are listed.
   Optionally, tap **New** to specify different serial numbers for each product.
   c To receive the product as unavailable, tap the right arrow, select `Unavailable`, and then tap **Update**. Tap the back arrow to return to the **Edit Line** screen.
   d Tap **Update**.
9 If the product is a lot-controlled product:
   a Tap **Lots**.
   b Accept the lot numbers and the quantities that are listed.
   Optionally, tap **New** to specify different lot numbers and quantities.
   c To receive some products as unavailable, tap the right arrow, specify the unavailable quantity, and then tap **Update**. Tap the back arrow to return to the **Edit Line** screen.
   d Tap **Update**.
10 Tap **Update**.
11 Receive the remaining lines on the transfer.
12 Tap **Submit**.

Shipping and automatically receiving a warehouse transfer online

1. In online mode, tap **Warehouse Transfer** on the **Home** screen.
2. Specify this information on the **Initialization** screen:

   Warehouse
   Specify the warehouse that will receive the transfer.

   Warehouse Transfer #
   Specify the number of the warehouse transfer.

3. Tap **Continue**.
4. To ship and receive all lines on the warehouse transfer without reviewing each line and verifying the quantity, tap **Ship/Receive as Complete** and then tap **Submit**.
5. To review an individual line, tap the right arrow to open the line.
6. If the actual quantity to ship does not equal the value in the **Shipped** field, specify the correct value in the **Shipped** field.
7. Optionally, select these options:

   Inspection
   Select to require an inspection of the line items before receiving is complete and Distribution SX.e is updated. Select this option if `Unavailable` is also selected.

   Unavailable

   Select this option to receive the line item as unavailable. You must also specify an unavailable reason in the **Reason** field.

   Complete
   Select if this line is complete. If you received less than the order quantity, select this option to close the transfer after you submit it.

8. Tap **Update**.
9. Process the remaining lines on the transfer.
10. Tap **Submit**.

Storing a warehouse transfer on your device

1. In online mode, tap **Warehouse Transfer** on the **Home** screen.
2. Specify this information on the **Initialization** screen:

   Warehouse
   Specify the warehouse that will receive the transfer.

   Warehouse Transfer #
   Specify the warehouse transfer to save.

3 Tap **Continue**.
4 Tap **Save Draft**.

Processing a draft warehouse transfer offline

1 In offline mode, tap **Menu > Warehouse Transfers > Draft**.
2 Tap the right arrow to open the warehouse transfer.
3 Tap **Continue**.
4 Tap the right arrow to open a line.
5 Ship or receive the line.

See Shipping and submitting a warehouse transfer online on page 24 and Receiving and submitting a warehouse transfer online on page 24.

6 Process the remaining lines on the warehouse transfer.
7 Tap **Save Draft**.

Processing a warehouse transfer offline

1 In offline mode, tap **Warehouse Transfer** on the **Home** screen.
2 Specify this information on the **Initialization** screen:

Warehouse
Specify the warehouse that will receive the transfer.

Warehouse Transfer #
Specify the number of the warehouse transfer.

3 Tap **Continue**.
4 Tap **New**.
5 Specify the line information, including serial or lot information if required.
6 Tap **Update**.
7 Add additional lines to the warehouse transfer.
8 Tap **Save Draft**.

Submitting a draft warehouse transfer

1 In online mode, tap **Menu > Warehouse Transfers > Draft**.
2 Select the warehouse transfer.
3 Tap **Submit**.

Chapter 7: Counting products

Use the Cycle Count module to perform physical or cycle counts when you are online or offline. You must run the **Cycle Count Report** in Storeroom or the **Product Entry Storeroom Count Report** in Distribution SX.e before you perform any count in Storeroom Mobile.

When you are online, you can use **Count Entry** to look up run numbers, count products, and complete and submit the count to Distribution SX.e. You can also store a run as a draft when you are online, and then perform the counts when you are online or offline.

You can use **Quick Entry** to scan or manually enter products and counts, based on a printed count sheet. You do not store the run on the device before performing the count. You must enter the products in the order that they are listed on the count sheet. You can only specify the counted quantity and identify unavailable products. If your inventory includes serial and lot products, you can update the serial and lot information, and correct other errors, from **Count Entry Draft**.

When you perform a count, the record is automatically saved each time you update a line item. You can also tap **Save** to save your work to Storeroom or **Save Draft** to save your work to your device at any time.

Tasks

This list shows the tasks that you can perform in **Cycle Count**:

- Perform and submit a count online
- Store a run on your device
- Perform a count using a stored run
- Perform a count in Quick Entry online
- Perform a count in Quick Entry offline
- Editing a count in Quick Entry
- Review a count performed in Quick Entry
- Submit a draft count

Performing and submitting a count online

1. In online mode, tap **Count Entry** on the **Home** screen.
2. Specify a run, and then tap **Continue**.

3 Tap the right arrow to open a count item.
4 Specify the counted quantity.
5 If the counted quantity is more than the expected quantity, specify the Inventory Type.
6 If these conditions are met, tap **Serials** or **Lots**, and then tap **New** to specify new control numbers:
   - The product is lot-controlled product or a serial-controlled product that is assigned serial numbers at receiving.
   - The counted quantity is different than the expected quantity.
7 Tap **Update**.
8 Specify counts for the remaining products in the run.
9 Tap **Count Complete**.
10 After you receive email confirmation of the count complete process, tap **Submit**.
11 If the count was a burn-off, tap the **Is this burnoff?** option.
12 Specify the email address to send confirmation of the submit process.
13 Tap **Submit**.

Storing a run on your device

1 In online mode, tap **Count Entry** on the **Home** screen.
2 Specify a run.
3 Tap **Continue**.
4 Tap **Save Draft**.

Performing a count using a stored run

1 In online or offline mode, tap **Menu > Cycle Count > Draft**.
2 Tap the right arrow to open a run.
3 Tap **Continue**.
4 Tap the right arrow to open a count item.
5 Specify the counted quantity and other required information.
   See Performing and submitting a count online on page 28.
6 Tap **Update**.
7 Specify counts for the remaining products in the run.
8 Tap **Save Draft**.

Performing a count in Quick Entry online

Before you perform a count in Quick Entry, print the count sheet.

1 In online mode, tap **Menu > Cycle Count > Quick Entry**.
2 Specify the warehouse and run that is listed on the count sheet, and then tap **Continue**.
3 Tap **New**.
4 Scan or manually specify the product, and then specify the counted quantity.
  If you enter the product manually, specify the customer part number as it is printed on the count sheet. Otherwise, the item is flagged as unmatched when you edit the draft on the **Count Entry Lines** screen.
5 If the product is shown as unavailable on the count sheet, select the `Unavailable` option.
6 Tap **Next** to enter the next product, or tap **Update** when you are finished entering products.
7 Tap **Save Draft**.
  The Cycle Count **Draft** screen opens.
8 Tap the right arrow to open the run.
9 Tap **Continue**.
10 Correct any unmatched items.
  See Reviewing a count performed in Quick Entry on page 31.
11 Tap **Count Complete**.
12 After you receive email confirmation of the count complete process, tap **Submit**.
13 If the count was a burn-off, tap the **Is this burnoff?** option.
14 Specify the email address of the person who should receive email confirmation of the submit process.
15 Tap **Submit**.

Performing a count in Quick Entry offline

Before you perform a count in Quick Entry, print the count sheet.

1 In offline mode, tap **Menu > Cycle Count > Quick Entry**.
2 Specify the warehouse and run that is listed on the count sheet, and then tap **Continue**.
3 Tap **New**.
4 Scan or manually specify the product, and then specify the counted quantity.
  If you enter the product manually, specify the customer part number as it is printed on the count sheet. Otherwise, the item is flagged as unmatched when you edit the draft in online mode on the **Count Entry Lines** screen.
5 If the product is shown as unavailable on the count sheet, select the `Unavailable` option.
6 Tap **Next** to scan another product, or tap **Update** when you are finished entering products.
7 Tap **Save Draft**.
8 If the count is complete, go to online mode and review the count before you submit it.
  See Reviewing a count performed in Quick Entry on page 31.
  If the count is not complete, you can finish it later.
  See Editing a count in Quick Entry on page 31.

Editing a count in Quick Entry

1. In online or offline mode, tap **Menu > Cycle Count > Draft**.
2. Select the Quick Entry draft, and then tap **Edit**.

   Quick Entry opens to the line entry screen.

   Note: If you tap the right arrow to open a draft, the **Count Entry** screen opens.
3. Add products to the run, or tap the right arrow to open an existing line for editing.
4. Tap **Save Draft** when you are finished entering products.

Reviewing a count performed in Quick Entry

A draft that was created in Quick Entry is compared to the corresponding run when you access the saved draft in the online mode. If an item that you entered in Quick Entry does not match the run, it is identified as an unmatched item. These issues result in unmatched items:

- The customer part number does not match the customer product record, to include spaces. Case does not affect unmatched items. For example, you can specify PRODUCT-1 for Product-1.
- The items that were entered in Quick Entry were not entered in the order that they are listed on the printed count sheet.
- The item is unavailable, but the `Unavailable` option was not selected in Quick Entry.

Unmatched items are displayed in the Unmatched Draft Items grid when you open the draft. The items from the run are shown in the Cycle Count Items grid. Use the unmatched items to determine which items to edit in the run. For example, Product 1 is identified as an unmatched item. The correct customer part number, Product-1, is included in the run. Apply the Product 1 count to Product-1.

If an item from Quick Entry does not correspond to a item on the run, you can ignore it. It is not included when you submit the count as complete or import the count in Storeroom.

1. In online mode, tap **Menu > Cycle Count > Draft**.
2. Tap the right arrow to open the run.
3. Tap **Continue**.
4. If an unmatched line item corresponds to an item in the run, perform these steps:
   a. Tap the right arrow to edit the item.
   b. Perform the correction.

      If the product is a serial or lot product, you can assign control numbers.
   c. Tap **Update**.
5. Review the Qty Counted column in the Cycle Count Items grid to ensure that each item in the run was counted.
6. Tap **Save** or **Save Draft**.

Submitting a draft count

1. In online mode, tap **Menu > Cycle Count > Draft**.
2. Tap the right arrow to open the run.
3. Tap **Continue**.
4. Correct any unmatched items.

   See Reviewing a count performed in Quick Entry on page 31.
5. Tap **Count Complete**.
6. After you receive email confirmation of the count complete process, tap **Menu > Cycle Count > Entry**.
7. Specify the run, and then tap **Continue**.
8. Tap **Submit**.
9. If the count was a burn-off, tap the **Is this burnoff?** option.
10. Specify the email address of the person who should receive email confirmation of the submit process.
11. Tap **Submit**.

Chapter 8: Inquiring on products

Use Product Inquiry to view product detail information when you are online.

Inquiring on a product

1 Tap **Product Inquiry** on the Home screen.
2 Specify warehouse and product values.
3 Tap **Continue**.

Appendix A: Troubleshooting

This section describes actions that you can take to solve mobile applications issues.

On-screen keyboard is not accessible on the mobile device

Without access to the keyboard, navigating functions that require both scanned values and manually-entered values is difficult.

`Cause`: After the Bluetooth scanner was enabled for the mobile device, the scanner was not configured to enable and disable the keyboard.

`Solution`: The mobile application supports many models of Bluetooth scanners from different manufacturers. On some scanners, you can configure the scan button or trigger to enable or disable the keyboard. On other scanners, you can use a shortcut button or double-tap the scan button to access the keyboard.

See the manufacturer's documentation for instructions to enable and disable the keyboard.

If you cannot use the scanner to access the keyboard, tap the down arrow at the bottom of the screen to open the keyboard.