

Digital Barcode Users Guide



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Setting Up Digital Barcode

Overview

To begin using Digital Barcode you must prepare your warehouses, bins and current inventory items by affixing them with a barcode labels. In addition to labeling all of your current in-stock items, you also need to start placing barcode labels on all future inventory items that enter your warehouses. Once your inventory items are all tagged with a barcode label you can then use the barcode labels as an item identification tool during inventory counts, sales transactions, item transfers or any time you need to identify items in e-automate. Using barcode labels for identification offers a more accurate way to identify an item and reduces human entry error. Use this topic to identify your inventory items and print barcode labels for your barcode setup.

In addition to tagging all of your inventory items, Digital Barcode requires that you tag your warehouses and bins with barcode labels for quick and accurate identification using your barcode scanner during Digital Barcode transactions.

You use this topic to configure your system for use with Digital Barcode and to prepare and print the necessary barcode labels. You prepare your labels by first identifying what labels you want to print. You can print labels based on what you currently have on hand in your warehouses, as well as manually add additional inventory item labels to be printed. In order to print labels you first must configure the computer in which you intend to print labels with a barcode printer as the default printer. e-automate provides barcode printing formats for standard and Avery labels as well as Zebra barcode printers 3844 and ZM4 and Dymo LabelWriter 400 Turbo. You can view the barcodes in the Crystal viewer before you print them. Once you have selected a format you can then go in and specify what information you would like to appear on your barcode labels.

Setting Your Windows Default Printer

Before printing barcode labels, if you are using a Zebra or a Dymo printer for barcode labels you must install the print drivers for the printer, set your intended barcode printer as the **Barcode printer** under **Tools > Client Settings > Printers**, and identify the paper source for the printer prior to printing barcode labels.

Note: Zebra printers work best when they have the correct driver. Go to Zebra's website (<http://www.zebra.com>), click on **Drivers** and **Downloads**, and then on the left most of the three columns, select your printer. The **Designer Driver** works better for Barcode printing than does the Universal driver.

1. If the printer is not already installed, follow the manufacturer's instructions and install the print drivers for your barcode printer.

Note: If you are planning to print barcode labels using your standard laser printer with Avery labels, you do not have to adjust your printer settings. Be sure you go through exercises with the Zebra printers.

2. From the Windows **Start** menu, select **Devices and Printers** to open the Devices, Printers, and Faxes window.



- Note:** This step may differ depending on what version of Windows you are using. You just need to get to the **Printers and Faxes** window.
3. Locate the printer on which you intend to print your labels and right-click and select **Printing preferences...**
 4. Do one of the following:
 - For Zebra 3844 and Z4M Thermal printers do the following:
 - a. On the **Document** tab, in the **Paper Output** section, locate paper source.
 - b. In the **Paper Source** field identify the size of label you are printing, 4"x2" or 2"x1"
 - c. Click [**OK**] close the printing preferences window.
 - For the Dymo LabelWriter 400 Turbo do the following:
 - a. Click [**Advanced**].
 - b. Click the "+" next to **Paper Output** and locate paper source.
 - c. In the Paper source field use the down arrow to identify the size of the label you are printing. For 1 1/8" x 3 1/2" labels select "30252 Address." For 2 5/16" x 4" labels select "30256 Shipping."
 - d. Click [**OK**] to close the **Advanced** window.
 - e. Click [**OK**] to close the printing preference window.
 5. With the printing preference identified you are ready to set your Windows default printer.
 6. Locate the barcode printer on which you intend to print barcodes, right-click and select **Set as default printer**.
 7. With the Barcode Printer set you can print barcode labels.

Manually Installing Barcode Font Support

Digital barcode font support should install with the e-automate installer. If font support fails to install, a warning is listed in the progress/summary window that displays when the install has finished. When you start e-automate, the system checks to see if you are a machine administrator. If you are a machine administrator, the system attempts to install font support. If the font support installation is successful you are asked if you want to restart your computer. You must restart in order for font support to work. If barcode font support is not installed, when you try to print barcode labels in e-automate you will get a message informing you that you need to install barcode fonts.

If barcode font support does not install with the installer, you will need to install barcode support manually. There are seven windows fonts that you must install and one .dll file that must be registered with regsvr32. The regsvr32 (Microsoft Register Server) is a command-line utility in the Microsoft Windows operating system used for registering and unregistering dlls and ActiveX controls in Windows Registry. All the files you need are located in the **e-automate Client** folder. To install the barcode fonts, do the following:

1. Locate the following seven files in C:\Program Files\Digital Gateway\e-automate client.
 - code128.ttf
 - c39n3.ttf
 - c39w3.ttf
 - c39hdm3.ttf
 - c39hdn3.ttf



- c39hdw3.ttf
 - c39m3.ttf
2. Individually right-click on each of the seven files and select **Install** to install the files.
 3. After you have installed all seven .ttf files you must register the CRUFL128.dll file with regsver32. To do so, do the following:
 4. Make sure you are logged into windows as an administrator.
 5. Click **Start>All Programs>Accessories**.
 6. Right-click on **Command Prompt** and select **Run as administrator**. The **Command Prompt** window displays.
 7. In the **Command Prompt** window type **regsver32" C:\Program Files\Digital Gateway\e-automate client\CRUFL128.dll"** and hit **ENTER**.
 8. A window displays informing you the file was registered successfully. Click **[OK]**.
 9. Close the **Command Prompt** window.

Printing Labels for Inventory Items

You use this tool to print labels for inventory items whether in-stock or items that are currently at zero quantity. Printing labels for inventory items is especially useful when you print labels for Digital Barcode setup. To print barcode labels for in-stock items you must identify the warehouse, bin, and associated quantity of the item. To print labels for inventory items with zero quantity you must identify the item and the item serial number.

When printing barcode labels you have the ability to sort the order in which you want barcode labels to print. You can sort by any of the following in ascending or descending or by clicking the corresponding column name in the **Items to print** region of the **Inventory – [Print barcode labels for in stock inventory]** window.

- Line number
- Item number
- Serial number
- Description
- Quantity
- Bin
- Pick order

To print labels for inventory items, do the following:

1. From the **Inventory** menu, select **Barcode labels** and then select **Inventory...** to open the **Inventory – [Print barcode labels for in stock inventory]** window.
2. In the **Warehouse** field, use the lookup to select a warehouse containing items for which you want to print barcodes.
3. You use the **Start bin** and **End bin** fields to identify a range of bins containing inventory items for which you want to print barcode labels.
4. Click **[QuickAdd]** to add the items associated with the warehouse and bin range to the **Items to print** region.
5. If you want to add items from additional Warehouse, and bin range combinations, repeat steps 2 - 4.



- Note:** To change the quantity of labels to be printed for an item, select the item from the list, e-automate displays the quantity in the **Quantity** field. Modify the quantity and click **[Update]**.
6. To remove items from the **Items to print** region, select the item and click **[Remove]**.
Note: You can remove multiple items simultaneously by using the windows keyboard shortcut Ctrl + click to select varied items in the list or Shift + click to select a range of items from the list.
 7. If you want to add additional items to the print list outside of your identified warehouse and bin ranges, do the following:
 - a. While still in the **Inventory – [Print barcode labels for in stock inventory]** window, click **[Advanced add...]** to open the **Advanced inventory barcode search** window.
 - b. Use the **QuickSearch** to define a search that will limit your items to the items you want added to the print list. You can use the filters **Bin, Category, Item, Item Desc., Quantity, Serial number,** and **Warehouse** as filters.
Note: This list displays the items meeting your filter criteria for the current on hand quantities.
 - c. Once you have defined your search, click **[Go]** to display the items matching your defined search criteria.
 - d. Click **[OK]** to close the **Advanced inventory barcode search** window and add your list of items to the **Items to print** region.
 8. You can sort the labels to print by any of the column headers in ascending or descending order. You simply need to click on the column header by which you want the barcode labels to print. Clicking the column header repeatedly toggles between ascending and descending order. For example, if you want the barcode labels to print by item number in descending order, you click on the **Item** column header once for ascending order or click on the **Item** column twice for descending order. An arrow pointing up sorts the item numbers in ascending order. An arrow pointing down sorts the item numbers in descending order.
 9. To print your list of item barcode labels, click **[Print...]** to open the Print barcode labels window.
 10. In the **Layout** field, use the lookup to select the barcode layout option matching your printer configuration.
 11. In the **Code** field, use the dropdown menu to select the barcode symbol structure for your barcode label. Digital Gateway recommends Code 128. This is newer and more common barcode structure for barcoding.
 12. You use the **Offset** field to identify the starting position of the label in which you want to begin your print on a partially printed page of labels. This feature allows you to not waste partial printed barcode label pages. Set partially printed pages aside and on subsequent barcode printings, count starting at **zero** the number of barcode label positions from left to right, row by row to identify the label number in which you want to start printing barcode labels. Enter this number in the **Offset** field.
Note: The **Offset** field is only available on Avery label choices.
 13. Verify the **Item barcode layout** tab is forward, if not click on it to bring it forward.
 14. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location.
Note: The number of optional fields displayed depends on which layout you have chosen.
 15. Click the **Serialized item layout** tab to bring it forward.



16. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location for items on your list that may be serialized.

Note: The number of optional fields displayed depends on which layout you have chosen.

Optional fields note: Based on the layout option selected, Digital Barcode determines how many additional fields can be printed on barcode labels based on label size and spacing. For barcode labels that cannot accommodate the additional fields Digital Barcode simply does not display an optional field choice. This instruction set includes instructions for all available fields.

Avery layout note: If you have selected an Avery layout, Digital Barcode displays the **Offset** field.

17. Click [**Print**] to send the barcode labels to the barcode printer.

Note: If the alignment of your barcodes is in correct, confirm that you have installed the correct driver. For example, the Z4MPlus 300 dpi is not the same driver as the Z4MPlus 203 dpi, and using the wrong one may have unpredictable results.

Printing Labels for Items on PO Receipts

You use this tool to print the correct number of barcode labels for items on purchase order receipts.

When printing barcode labels you have the ability to sort the order in which you want barcode labels to print. You can sort by any of the following in ascending or descending or by clicking the corresponding column name in the **Items to print** region of the **Receipt – [Print barcode labels for in stock receipts]** window.

- Line number
- Item number
- Serial number
- Description
- Quantity
- Receipt number

To print labels for items on purchase order receipts, do the following:

1. From the **Inventory** menu, select **Barcode labels** and then select **Receipts...** to open the **Receipt – [Print barcode labels for purchase receipts]** window.
2. In the **Receipt number** field, use the lookup to select a purchase order receipt.
3. Click [**QuickAdd**] to add the items associated with the receipt to the **Items to print** region.
4. If you want to add items from additional receipts, repeat steps 2 - 3.
Note: To change the quantity of labels to be printed for an item, select the item from the list, e-automate displays the quantity in the **Quantity** field. Modify the quantity and click [**Update**].
5. To remove items from the Items to print region, select the item and click [**Remove**].
Note: You can remove multiple items simultaneously by using the windows keyboard shortcut Ctrl + click to select varied items in the list or Shift + click to select a range of items from the list.
6. If you want to add additional items to the print list outside of your purchase order receipts, do the following:



- a. While still in the **Receipts – [Print barcode Labels for purchase receipts]** window, click **[Advanced add...]** to open the **Advanced inventory barcode search** window.
 - b. Use the **QuickSearch** to define a search that will limit your items to the items you want added to the print list. You can use the filters **Bin, Category, Item, Item Desc., Quantity, Serial number, and Warehouse** as filters.
Note: This list displays the items meeting your filter criteria for the current on hand quantities.
 - c. Once you have defined your search, click **[Go]** to display the items matching your defined search criteria.
 - d. Click **[OK]** to close the **Advanced inventory barcode search** window and add your list of items to the **Items to print** region.
7. You can sort the labels to print by any of the column headers in ascending or descending order. You simply need to click on the column header by which you want the barcode labels to print. Clicking the column header repeatedly toggles between ascending and descending order. For example, if you want the barcode labels to print by item number in descending order, you click on the **Item** column header once for ascending order or click on the **Item** column twice for descending order. An arrow pointing up sorts the item numbers in ascending order. An arrow pointing down sorts the item numbers in descending order.
 8. To print your list of item barcode labels, click **[Print...]** to display the **Print barcode labels** window.
 9. In the **Layout** field, use the lookup to select the barcode layout option matching your printer configuration.
 10. In the **Code** field, use the dropdown menu to select the barcode symbol structure for your barcode label. Digital Gateway recommends Code 128. This is newer and more common barcode structure for barcoding.
 11. You use the **Offset** field to identify the starting position of the label in which you want to begin your print on a partially printed page of labels. This feature allows you to not waste partial printed barcode label pages. Set partially printed pages aside and on subsequent barcode printings, count starting at **zero** the number of barcode label positions from left to right, row by row to identify the label number in which you want to start printing barcode labels. Enter this number in the **Offset** field.
Note: The **Offset** field is only available on Avery label choices.
 12. Verify the **Item barcode layout** tab is forward, if not click on it to bring it forward.
 13. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location.
Note: The number of optional fields displayed depends on which layout you have chosen.
 14. Click the **Serialized item layout** tab to bring it forward.
 15. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location for items on your list that may be serialized.
Note: The number of optional fields displayed depends on which layout you have chosen.
Optional fields note: Based on the layout option selected, Digital Barcode determines how many additional fields can be printed on barcode labels based on label size and spacing. For barcode labels that cannot accommodate the additional fields, Digital Barcode simply does not display an optional field choice. This instruction set includes instructions for all available fields.



Avery layout note: If you have selected an Avery layout, Digital Barcode displays the **Offset** field.

16. Click [**Print**] to send the barcode labels to the barcode printer.

Note: If the alignment of your barcodes is in correct, confirm that you have installed the correct driver. For example, the Z4MPlus 300 dpi is not the same driver as the Z4MPlus 203 dpi, and using the wrong one may have unpredictable results.

Printing Labels for Purchase Orders

You use this tool to identify a purchase order and print the correct number of barcode labels for the items on the purchase order. This option allows you to print barcode labels before receiving the purchase order.

When printing barcode labels you have the ability to sort the order in which you want barcode labels to print. You can sort by any of the following in ascending or descending or by clicking the corresponding column name in the **Items to print** region of the **Purchase order – [Print barcode labels for purchase orders]** window.

- Line number
- Item number
- Serial number
- Description
- Quantity
- Purchase order number

To print labels for items on purchase orders, do the following:

1. From the **Inventory** menu, select **Barcode labels > Purchase orders...** to open the **Purchase order – [Print barcode labels for purchase orders]** window.
2. In the **PO number** field, use the lookup to select the purchase for which you want to print labels.
3. Click [**QuickAdd**] to add the items associated with the purchase order to the **Items to print** region.
4. If you want to add items from additional purchase orders, repeat steps 2 - 3.
Note: To change the quantity of labels to be printed for an item, select the item from the list, e-automate displays the quantity in the **Quantity** field. Modify the quantity and click [**Update**].
5. If you want to add additional items to the print list outside of the selected purchase order, do one of the following:
 - To add additional items one at a time, do the following:
 - a. Use the **Lookup** icon to select an idea you want to add.
 - b. If the item selected requires a serial number, use the **Lookup** in the **Serial number** field to selected the item's serial number.
 - c. In the **Quantity** field, enter the quantity of the selected item to add to the print list.
 - d. Click [**QuickAdd**]
 - To add multiple additional items, do the following:
 - a. Click [**Advanced add...**] to open the **Advanced inventory barcode search** window.



- b. Use the **QuickSearch** to define a search that will limit your items to the items you want added to the print list. You can use the filters **Bin, Category, Item, Item Desc., Quantity, Serial number,** and **Warehouse** as filters.
Note: This list displays the items meeting your filter criteria for the current on hand quantities.
 - c. Once you have defined your search, click **[Go]** to display the items matching your defined search criteria.
 - d. Click **[OK]** to close the **Advanced inventory barcode search** window and add your list of items to the **Items to print** region.
6. To remove items from the **Items to print** region, select the item and click **[Remove]**.
Note: You can remove multiple items simultaneously by using the windows keyboard shortcut **Ctrl + click** to select varied items in the list or **Shift + click** to select a range of items from the list.
 7. You can sort the labels to print by any of the column headers in ascending or descending order. You simply need to click on the column header by which you want the barcode labels to print. Clicking the column header repeatedly toggles between ascending and descending order. For example, if you want the barcode labels to print by item number in descending order, you click on the **Item** column header once for ascending order or click on the **Item** column twice for descending order. An arrow pointing up sorts the item numbers in ascending order. An arrow pointing down sorts the item numbers in descending order.
 8. To print your list of item barcode labels, click **[Print...]** to display the **Print barcode labels** window.
 9. In the **Layout** field, use the lookup to select the barcode layout option matching your printer configuration.
 10. In the **Code** field, use the dropdown menu to select the barcode symbol structure for your barcode label. Digital Gateway recommends Code 128. This is newer and more common barcode structure for barcoding.
 11. You use the **Offset** field to identify the starting position of the label in which you want to begin your print on a partially printed page of labels. This feature allows you to not waste partial printed barcode label pages. Set partially printed pages aside and on subsequent barcode printings, count starting at **zero** the number of barcode label positions from left to right, row by row to identify the label number in which you want to start printing barcode labels. Enter this number in the **Offset** field.
Note: The **Offset** field is only available on Avery label choices.
 12. Verify the **Item barcode layout** tab is forward, if not click on it to bring it forward.
 13. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location.
Note: The number of optional fields displayed depends on which layout you have chosen.
 14. Click the **Serialized item layout** tab to bring it forward.
 15. In **Optional** fields, use the down arrow to select the value you want printed on the barcode label in the identified location for items on your list that may be serialized.
Note: The number of optional fields displayed depends on which layout you have chosen.
Optional fields note: Based on the layout option selected, Digital Barcode determines how many additional fields can be printed on barcode labels based on label size and spacing. For barcode labels that cannot accommodate the additional fields, Digital Barcode simply does not



display an optional field choice. This instruction set includes instructions for all available fields.
Avery layout note: If you have selected an Avery layout, Digital Barcode displays the **Offset** field.

16. Click [**Print**] to send the barcode labels to the barcode printer.

Note: If the alignment of your barcodes is in correct, confirm that you have installed the correct driver. For example, the Z4MPlus 300 dpi is not the same driver as the Z4MPlus 203 dpi, and using the wrong one may have unpredictable results.

Printing Labels for Warehouses/Bins

You use this tool to identify items by warehouse and bin for which you want to print barcode labels. You may select one bin or a range of bins to identify items for which you want to print barcode labels.

When printing barcode labels you have the ability to sort the order in which you want barcode labels to print. You can sort by any of the following in ascending or descending or by clicking the corresponding column name in the **Items to print** region of the **Bins – [Print barcode labels for warehouses and bins]** window.

- Line number
- Bin
- Warehouse
- Pick order

To identify items for which you want to print barcode labels by item warehouse and bin, do the following:

1. From the **Inventory** menu, select **Barcode labels > Warehouse/Bin...** to open the **Bin – [Print barcode labels for warehouses and bins]** window.
2. In the **Warehouse** field, use the lookup to select a warehouse.
3. You use the **Start bin** and **End bin** fields to identify a range of bins for which you want to print barcode labels.
4. Click [**QuickAdd**] to add the warehouses and bins to the **Bins to print** region.
5. You can sort the labels to print by any of the column headers in ascending or descending order. You simply need to click on the column header by which you want the barcode labels to print. Clicking the column header repeatedly toggles between ascending and descending order. For example, if you want the barcode labels to print by item number in descending order, you click on the **Item** column header once for ascending order or click on the **Item** column twice for descending order. An arrow pointing up sorts the item numbers in ascending order. An arrow pointing down sorts the item numbers in descending order.
6. To print your list of warehouse and bin barcode labels, click [**Print...**] to display the **Print barcode labels** window.
7. In the **Layout** field, use the lookup to select the barcode layout option matching your printer configuration.



8. In the **Code** field, use the dropdown menu to select the barcode symbol structure for your barcode label. Digital Gateway recommends Code 128. This is newer and more common barcode structure for barcoding.
9. You use the **Offset** field to identify the starting position of the label in which you want to begin your print on a partially printed page of labels. This feature allows you to not waste partial printed barcode label pages. Set partially printed pages aside and on subsequent barcode printings, count starting at zero the number of barcode label positions from left to right, row by row to identify the label number in which you want to start printing barcode labels. Enter this number in the **Offset** field.
Note: The Offset field is only available on Avery label choices.
10. If you want to print only bin labels and not the warehouse labels, check the **Print bin label only** checkbox.
Note: The checkbox only displays for certain layouts.
11. Click [**Print**] to send the barcode labels to the barcode printer.
Note: If the alignment of your barcodes is in correct, confirm that you've installed the correct driver. For example, the Z4MPlus 300 dpi is not the same driver as the Z4MPlus 203 dpi, and using the wrong one may have unpredictable results.

e-admin Security Rights for Digital Barcode

Before using Digital Barcode you must first create an e-automate user, in e-admin that has appropriate rights to use Digital Barcode functionality. The following is a list of rights required by Digital Barcode and e-automate to perform the specified functions. For more information, see help in e-admin to create users.

Physical Inventory

Overview

You use e-automate in conjunction with Digital Barcode to perform physical inventory. Before you begin scanning your inventory with your PDA barcode scanner you must first create physical inventory count sheets in e-automate for your PDA devices. With your count sheets created in e-automate you then connect your PDA device to your computer and synchronize with e-automate. During this synchronization the PDA downloads count sheets that are open and not in progress to the PDA device. With the count sheets downloaded to your PDA scanner you can then begin scanning your inventory based on the selected PDA count sheet. You do not need a WI-FI connection in order to do your physical inventory. However, to get the physical inventory data on the PDA you are required to connect your PDA. With your inventory completely scanned you then re-cradle and synchronize again with e-automate and your PDA will upload the scanned counts to e-automate. With the scanned counts in e-automate, your personnel can then review the variances and post them to the general ledger.

When creating your count sheet in e-automate you determine the number of warehouses contained in the count sheet. If you have a count sheet with more than one warehouse, you will be required



to scan the warehouse barcode each time you switch to a new bin. If your count sheet only has one warehouse your PDA scanner will recognize there is only one warehouse on the count sheet and only expect you to scan the barcode for the bin and not the warehouse. If your count sheet has more than one warehouse, it is necessary to scan only the warehouse once and then proceed to scanning all bins within that warehouse.

Creating the Count Sheet

1. Login to e-automate with your User ID.
Note: Your user ID must have inventory rights to access physical inventory. See **e-admin Security Rights for Digital Barcode**.
2. From the **Inventory** menu, select **Physical inventory** to open the **Physical inventory lists** window.
3. Click [**New**] to open the **New physical inventory list** window.
4. Complete the following fields as appropriate.
Batch number: Number for this physical inventory list that you will reference on the **Record physical inventory counts** window.
Note: This number is automatically generated by combining the date and the number of sheets created that day. For example, a physical inventory list with a batch number of 20091113-2 was created on 11/13/11 and was the second one created that day.
Status: Displays open, completed, open (in progress) or cancelled.
Items per count sheet: Number of inventory items you wish to be displayed per count sheet.
Note: e-automate can display up to 20 items per sheet based on the size of the item number and the item description field. If you have completely filled both the item number and the item description field you can only fit 20 items per count sheet. If you have shorter item numbers and descriptions you can fit more per sheet.
Adjustment code: Inventory adjustment code used for this physical inventory lists.
Note: This code tells e-automate how to handle the general journal entries that will be generated based on the changes in inventory value.
Branch: Branch to associate the costs with this physical inventory.
Note: Only displayed when branching is enabled.
Description: Optional description for this inventory list.
5. When creating count sheets for use with Digital Barcode, Digital Gateway recommends that you limit your count sheets to one warehouse and specific bin range per count sheet. Create count sheets with a manageable number of items within a bin range. If you have multiple employees performing physical inventory, create a count sheet for each employee with a unique bin range. Use the **QuickSearch** to create multiple count sheets.
 - a. In the first **QuickSearch** field, use the dropdown menu to select a field to use to narrow your count sheet items.
Note: Using warehouse as the filter field would allow you to permit only one warehouse per count sheet.
 - b. In the second **QuickSearch** field, commonly called the operator field, use the dropdown menu to select an operator for performing the search. Depending on the field, e-automate lists appropriate operators, for example: contains, is the same as, begins with, ends with et cetera.



- c. In the third **QuickSearch** field, enter the search term or criteria.
 - d. To further refine the search, use the **Dropdown** at the end of the first line of search criteria to add either an **OR** or an **AND** and repeat steps a through d.
Note: You can enter up to 12 rows of QuickSearch criteria.
 - e. Click [**Go**] to display a list of in stock inventory items that meet the search criteria.
Note: e-automate displays items in stock in the physical inventory window and out of stock items that have bin defaults for the identified warehouse.
6. Uncheck **Print physical count sheets** when doing physical inventory with Digital Barcode.
Note: You can print or re-print the count sheets from the report console by batch number. Printing the count sheets from the report console allows you to specify whether or not the current e-automate on hand inventory quantities are displayed or not.
 7. Click [**OK**] to create the count sheet.
 8. Repeat steps 3 – 7 to create multiple count sheets.
Note: Be sure you do not overlap bins when creating count sheets for use with Digital Barcode.

Synchronizing Your PDA

Before you can use your PDA scanner to scan your inventory, you must download the count sheet from e-automate to your PDA. You use the synchronize process to download and upload data between your PDA and e-automate.

1. Follow your manufacturer's recommendations for physically connecting your PDA to your computer. If your PDA can connect via WIFI you can use the WIFI connection.
2. Cradle your PDA or connect your Pocket PC wirelessly to your computer.
3. With the PDA authenticated and connected, from the PDA **Start** menu, select **Programs**.
4. Start Digital Barcode on the PDA device.
5. Login to Digital Barcode by doing the following:
 - a. In the **User** field enter your e-automate username.
Note: The Digital Barcode user must have access to inventory rights in e-automate to use Digital Barcode.
 - b. In the **Password** field enter your e-automate password.
 - c. In the **Company** field enter the company to which you want to synchronize.
 - d. In the **Server** field, enter your server for Digital Barcode.
`http://IP address or server name/RAP/`
Note: The virtual directory is set up when you set up the Remote Application Portal (RAP). The default is **RAP**.
6. Click [**Login**] to login to Digital Barcode.
7. Click [**Sync**] to download any open count sheets to the PDA. Once synchronized click [**OK**] to acknowledge the successful transfer.
Note: If you have recorded counts on your scanner, synchronizing will also upload the recorded counts to e-automate.

Scanning Warehouse, Bins, and Items

Before using your PDA to scan your inventory, be sure you have completed the steps outlined in Installing Digital Barcode and on activating your scanner, whether it is a Symbol, Dolphin or other. If you have not activated your scanner to work with Digital Barcode it will not scan properly. Make



sure your PDA is cradled or connected to the network to log in and get your physical inventory data. Once logged in and your data is obtained you can then uncradle or disconnect from the network to do your counts. After your counts are done you must then re-cradle or connect back to the network to sync back up with e-automate.

1. Logon to Digital Barcode and launch the Digital Barcode application on the PDA.
2. If you have not synchronized with e-automate, follow the section, **Synchronizing your PDA**.
3. On your PDA device click [**Physical Inventory**] to display count sheets.
4. On your PDA device, select the inventory count sheet that was previously prepared in e-automate and downloaded to the PDA then click [**Select**].

Note: If your count sheet is not present or there is not a count sheet synchronized to your PDA you cannot count inventory. Complete Synchronizing your PDA before attempting to scan your inventory.

5. If your count sheet has more than one warehouse you are required to scan the warehouse barcode to identify which warehouse associated with the count sheet you are scanning. If your count sheet only has one warehouse, Digital Barcode assumes the warehouse and populates the **Warehouse** field.

Note: If the barcode is worn or un-scannable, you can type the warehouse code in the **Warehouse** field. You can also uncheck the **Scan** checkbox and Digital Barcode provides a dropdown menu on the **Warehouse** and **Bin** fields for convenience. If you have multiple warehouses and you do not want to print a warehouse barcode for each bin, Digital Gateway recommends placing all warehouse barcodes on a "cheat sheet" to carry with you while you do your physical inventory. Then you can scan the warehouse barcode from the "cheat sheet" and proceed to scanning the barcodes on the bins within the warehouse.

6. Scan barcode for the bin you are counting. Once the bin has been scanned, Digital Barcode immediately displays the item field so you can begin scanning items.

Note: If the barcode is worn or un-scannable, you can type the bin code in the **Bin** field. You can also uncheck the **Scan** checkbox and Digital Barcode provides a dropdown menu on the **Warehouse** and **Bin** fields for convenience.

7. Do one or more of the following until you have scanned all items in the bin:

- Scan all of the items in the bin. If the item is serialized, Digital Barcode displays the Serial # field, scan the serial number. After each scan, Digital Barcode displays the item and the scanned quantity total for the bin.

Note: When scanning using Digital Barcode and the Physical Inventory module, Digital Barcode only scans inventory item numbers as defined on the count sheet.

- If you are unable to scan the barcode because it is damaged or for any other reason, you can look up the item by clicking the [...] button located next to the **Item** field and doing the following.
 - a. After the clicking [...] you are taken to the **Cross reference item** screen. In the **Item** field of this screen, enter the full item number and click [**Search**]. The item displays in the list below the **Item** field.
 - b. Select the **Item** and click [**OK**] to count the item.
- To enter a multiple quantity, first click in the **Qty** field on the PDA and enter a quantity and then click in the **Item** field and scan the item.



Note: Digital Barcode defaults each scan to a quantity of one unless you change the **Qty** field.

- To correct a multiple quantity entry or reduce the quantity, in the **Qty** field, enter a negative quantity then click in the **Item** field and scan the item. Digital Barcode removes the quantity and notes the total amount of that item in the bin you are scanning.
- Use [**Undo**] to undo the last scanned item.

Note: You can only undo one scan back.

- Click [**Clear**] to reset the **Qty** and the **Item** field for the current scan.
 - If you scan an item that is not in the count sheet, Digital Barcode displays the message, **Item not in count. Is this item serialized?**. Do the following:
 - a. In the **Item not in count** window, answer the question posed by Digital Barcode. If the scanned item is serialized, click [**Yes**]. If the item is not serialized, click [**No**]. If you unintentionally entered this window, click [**Cancel**].
 - b. If the item is serialized, Digital Barcode requests the serial number, scan or input the serial number and hit ENTER on your keyboard. If the serial number is not in the count, a window displays asking if you want to include the item anyway. Click [**Yes**] to include the item in the count or [**No**] to not include the item in the count.
 - c. If the item is not serialized, Digital Barcode adds the scanned item to the count sheet.
 - Click [**Exit**] to return to the Digital Barcode menu.
8. Click [**Next bin**] and scan the next bin barcode to begin scanning items.
- Note:** You only have to scan the warehouse once and then proceed to scan each bin within that warehouse.
- Note:** If the barcode is worn or un-scannable, you can type the bin code in the **Bin** field. You can also uncheck the **Scan information** checkbox and Digital Barcode provides a dropdown menu on the **Warehouse** and **Bin** fields for convenience.
9. Complete one of the following, as appropriate:
- If your count sheet only has one warehouse, repeat steps 6 – 8 until you have scanned all items and bins within the warehouse on the count sheet.
 - If your count sheet has multiple warehouses, repeat steps 5 – 8 until you have scanned all items in all warehouses and bins associated with your count sheet.
10. Click [**Exit**] to leave the **Physical Inventory** area when you are finished scanning.

Uploading your Scanned Counts to e-automate

1. Cradle your PDA or make sure you have a WI-FI connection.
2. Click [**Sync**] to upload any open count sheets to the PDA.
3. Once synchronized click [**OK**] to acknowledge the successful transfer.

Recording and Posting Physical Counts

1. From the **Inventory** menu in e-automate, on the e-automate toolbar, select **Physical inventory** to open the **Physical inventory lists** window.
2. From the **Physical inventory** list, select the count sheet that has been scanned.
3. Click [**Counts**] to open the **Record physical inventory counts** window for the selected physical inventory.



4. In the **Physical inventory number** field, verify the number is correct. Use the **Lookup** icon to change as necessary.
5. In the **Sheet number** field, verify the sheet is correct, use the **Lookup** icon to change as necessary.
6. In the **Inventoried by** field (at the top of the window) enter your name to record who performed the inventory count.
Note: Counts uploaded from the PDA device indicated they were counted by the user logged into Digital Barcode on the PDA.
7. Review the **On Hand, Count** and **Difference** columns looking for discrepancies between e-automate on-hand and the actual counted (scanned) items. Determine whether to investigate or accept the displayed counts.
Note: If you scanned an item in a bin that is not on your count sheet, Digital Barcode simply adds the item and the count to the count sheet.
8. If a row does not have a count do the following:
 - a. Select the inventory item on the list.
 - b. In the **Inventoried by** field (at the bottom of the window) enter your name to record who added the count.
 - c. In the **Count** field, enter the physical count quantity. If you did not scan the item, the count is zero.
Note: You can also verify this count by visiting the bin associated with this item.
 - d. Click [**Update**]. e-automate enters the correct quantity of the item in the warehouse into the **Count** field, the difference between the original on-hand count and the actual count in the **Difference** field, and your name in the **Inv by** column.
Note: The [**Update**] button is configured so that you can use the **ENTER** key to move down the count sheet items. You can use the ten key portion of your keyboard to record physical inventory counts. You cannot record negative counts for inventory items and you cannot have more than a quantity of one for each row representing a serialized item.
 - e. Repeat steps a – d for all items not scanned.
9. Determine the period to which you want to post the physical inventory variance. In the **Post date** field, use the dropdown calendar to select the appropriate posting date.
Note: The period to which you post physical inventory must be open in order to post the period.
10. Once you have the counts recorded for the sheet or all sheets, do one of the following:
 - To post the inventory counts for all items on all sheets, do the following:
 - a. In the **Sheet number** field, use the dropdown menu to select **Show all**.
 - b. Click [**Refresh list**] to display the counts for all sheets on the count sheet.
 - c. Click [**Post**]. e-automate posts the variances to the general ledger and records a **Y** in the **Posted** column
Note: After the items are posted, you cannot adjust the record count. To adjust, create a new count sheet for that specific item or use the increase or decrease inventory activity.
 - To post the inventory adjustments for all counts that have been recorded, do the following:
 - a. In the **Sheet number** field, use the dropdown menu to select **Show all**.
 - b. Click [**Refresh List**] to display the counts for all sheets on the count sheet.



- c. Click [**Post & Close**]. e-automate posts the adjustments and closes the **Record physical inventory counts** window.

Note: If you have recorded and posted counts for all items on all sheets, e-automate marks the physical inventory list as complete. If you have not recorded the counts for all items on the sheets, e-automate leaves the physical count sheet's status as **Open (In Progress)**. To complete the physical inventory, you will have to record the counts on the remaining items or mark the physical inventory complete.

- To close the report without posting the counts, click [**Close**].

PO Receipts

Overview

You can use Digital Barcode to scan inventory items and serial numbers to receive them on purchase orders into e-automate. Prior to being able to scan items for receipt on purchase orders you must first have the purchase order created in e-automate. The first section of this topic deals with the creation of a purchase order. For more information on purchase orders in e-automate see, *Creating a Purchase Order*.

Typically dealers manually check items received on purchase order receipts and then print appropriate barcode labels for items received. This is usually because the items received from vendors do not already have a barcode on the item or the barcode number that is affixed and used by the vendor is not in the dealer's e-automate database.

If your e-automate database has the necessary cross-reference numbers in the database you can scan items directly off the dock for receiving. This implies that when there is a barcode present on an inventory item arriving and the barcode information is in e-automate, you can scan a variety of numbers that will cross reference (help find) the item you scanned. The PO module is capable of cross referencing the following fields in e-automate with the scanned number:

- Inventory item number (Item field on an inventory item)
- UPC entered in the UPC field on an item record. This number may be the vendors tracking number for the warehouse.
- All historical number associated with vendors.

If you have these cross reference numbers in your e-automate database, Digital Barcode can find the cross reference numbers and identify the inventory items you scan. The purchase order receipts area of Digital Barcode is the only area that has the ability to search cross reference fields. Because cross referencing is not available in the physical inventory, transfer orders, or sales orders areas of Digital Barcode, you must make sure you affix your own barcode labels to inventory once you have received the inventory items.

After you have received the items and have a receipt number, you can use e-automate to print inventory item barcode labels for items on the purchase order receipt.



Creating Purchase Orders

1. In e-automate, from the **Purchasing** menu, select **Purchase orders** to open the **Purchase orders** window.
2. Click [**New**] to open the **New purchase order** window.
3. To create a purchase order based on a previously created purchase bid request, use the **Lookup** icon in the **Bid request** field to select the bid request. e-automate populates the purchase order from the bid request.
4. Complete the following fields as appropriate.

Vendor: Name of the vendor from whom you are purchasing items.

Description: Brief description detailing this purchase order.

Order type: The type of purchase order you are creating. e-automate defaults this to the last type of order that was created.

Status: e-automate assumes that you are creating a purchase order and that it will be open. You can define your own statuses as necessary.

Purchaser: Person in your company who is making the purchase.

Note: Only employees flagged as purchasers are displayed in the **Purchaser** lookup. This field can be set by your administrator to automatically populate with a main purchaser.

Branch: If branching is enabled, use the **Lookup** icon to select the branch to which you want this PO associated. If branching is not enabled, this field does not display.

Number: Number of the purchase order. Automatically assigned the next sequential number from purchasing options, but you may change this number.

Date: Date this purchase order is being created.

Req. date: Date by which the purchased items are requested.

Warehouse: Receiving warehouse for inventory items to be received on this purchase order.

Bin: Receiving bin for inventory items to be received on this purchase order.

Note: Not required. When left blank e-automate assumes the bin default for the item within the identified warehouse.
5. Do one of the following:
 - To add standard items:
 - a. In the **Item** field, use the **Lookup** icon to select the item to include on the purchase order.
 - b. In the **Quantity** field, enter the quantity for the item to be included on the purchase order.
 - c. Click [**QuickAdd**] to add the item and quantity to the list and to update the **Total** field in the **Summary** region.
 - To add items with unique settings when the purchase order is not based on a purchase bid request:
 - a. Click [**Add...**] to open the **Add purchase order item** window.
 - b. Complete the following fields as appropriate.

Item number: Number of the item being added to the purchase order.

Quantity: Quantity of the item to be ordered on the purchase order.

Cost: Cost of the item at the unit of measure quantity.

Discount: Percentage of cost discount.

Freight/misc.: Freight and/or other charges for the full quantity listed, if known.



Canceled: Quantity of this item to cancel on the purchase order.

Back ordered: Number of items that are on back order with the vendor and have not been received.

Amount: Value of the total number of this purchased item including freight, miscellaneous, discounts, and other charges.

Description: Description of the item being added to the purchase order.

Note: This field is populated from the item's description but you can change it for this one instance.

Vendor item number: Number assigned to this item by the vendor.

Purchase unit of measure: Classification of the purchased quantity of the item such as each, box, or case.

Conversion factor: Number of the item stored within the unit of measure such as case=144 and each=1.

Expense account: Expense account you want assigned to this item.

Branch: If you have branching enabled, use the **Lookup** icon to select the branch with which you want this item associated.

OEM number: Number assigned to this item by the original manufacturer.

Received: Amount of this item that has been received.

Est. ship date: Estimated date that vendor will ship the item. Check the box to activate the ship date entered.

Est. arrival date: Estimated date the replacement item will arrive. Check the box to activate the arrival date entered.

Update the cost for this vendor: When checked, e-automate updates the most recent cost for this vendor on the inventory item's profile. If this vendor is not listed on the item profile, e-automate adds the vendor and stores the most recent cost. If not checked, e-automate does not update or add the vendor.

Note: The next time you generate a purchase order to this vendor and item, it will use the last updated cost.

- c. To edit the warehouse and bin in which inventory items will be received, do the following:
 - i. On the **Warehouse / bin / quantity /** tab, click [**Edit...**] to open the **Edit purchase order item bin** window.
 - ii. In the **Warehouse** field, use the **Lookup** icon to select the destination warehouse.
 - iii. In the **Bin** field, use the **Lookup** icon to select the bin.
 - iv. In the **Quantity** field, enter the quantity to be received into the selected warehouse and bin.
 - v. If you are canceling some or all of this item, enter the canceled amount in the **Canceled** field.
 - vi. Click the **Warehouse availability** button (located in the upper right corner of the window) to view inventory item location information in the **Inventory Availability** window.
 - vii. Click [**OK**] to save the changed warehouse and bin settings.
- d. To add another warehouse and bin, allowing you to receive to more than one warehouse and bin at the same time, do the following:



- i. In the **Add purchase order item** or **Edit purchase order item** window, in the **Warehouse** field, use the **Lookup** icon to select an additional warehouse.
Note: This can be the same warehouse if you want to receive to two or more different bins in the same warehouse.
- ii. In the **Bin** field, use the **Lookup** icon to select the receiving bin.
- iii. In the **Quantity** field, enter the quantity to be received into the specified warehouse and bin.
- iv. Click [**QuickAdd**] to add your warehouse and bin settings.
- v. Repeat the above steps, adding other warehouses and bins until you have designated a destination for the quantity on the purchase order.
Note: If you have not correctly defined a destination for the quantity of items to be received, e-automate will display the warning *The bin distribution does not match the quantity ordered*. If this occurs, verify the quantities for the receiving warehouses and bins and assure that you have a receiving location for all items ordered.
- e. Click [**OK**] to add the item to the list.
- f. Repeat steps a through e for each item you want to add to the purchase order using unique settings.
- To add backordered items from sales orders or service calls or items on inventory requests do the following:
 - a. Click [**Link**] (the chain link button). The **Link** button is located next to the **Delete** button on the item entry row. Clicking the **Link** button opens the **Link transaction** window.
 - b. To filter the items available to be added to the purchase order, choose one or more of the following:
 - If you are only looking for a specific item that has a backordered status on sales orders or service calls or is on an inventory request, check the **Item** filter and select the item. When **All transactions** is selected e-automate searches for your item and only displays your selected item in the **Items** region.
 - When the **Vendor** filter is checked, e-automate displays only items configured to be purchased by the vendor selected on the purchase order. If you want to purchase any backordered item, regardless of the vendor, uncheck the **Vendor** filter.
 - c. Choose one of the following:
 - To add items from any transaction, in the **Transaction type** region, select the **All transactions** radio button.
 - To add items from a sales order, in the **Transaction type** region select the **Sales order** radio button.
 - To add items from a service call, in the **Transaction type** region, select the **Service call** radio button.
 - To add items from an inventory request, in the **Transaction type** region, select the **Requests** radio button.
 - d. If you are not viewing all transactions, in the **Sales order**, **Service call**, or **Requests** field, use the **Lookup** icon to select a transaction.
Note: If the transaction is associated with a customer, e-automate displays the customer.



- e. In the **Warehouse and bin** region, select from the following radio buttons:
 - o **Use transaction warehouse and bin:** Select when you want the receiving warehouse and bin to be the warehouse and bin specified on the originating transaction.
 - o **Use warehouse bin defaults:** Select when you want e-automate to use the workstation default warehouse and the bin defaults associated with it.
 - o **Use the following warehouse and bin:** Select when you want to specify a warehouse and bin for all items on the associated transaction. If you select this choice, you must identify the warehouse and bin in the **Warehouse** and **Bin** fields respectively.
 - f. If the items displayed in the **Link transaction** window have already been added to the list and not linked to a transaction, you can check the **Use unlinked quantities first** checkbox so e-automate will search those out first and link to them before adding new of the same item to the purchase order.
 - g. If you want the purchase order's shipping address updated to match the customer's address on the transaction, check the **Update ship to on purchase order to match transaction** checkbox.

Note: This checkbox applies to service calls and sales order only.
 - h. Use the information provided in the **Items** region to determine which items you want to add to the purchase order. Check the checkbox beside each item you want added to the purchase order.

Note: You can use **[Check all]** or **[Uncheck all]** as appropriate. You can also add only some of the items to a purchase order; you may then add the other items to a different purchase order and a different vendor.
 - i. Click **[OK]** to add the selected items to the purchase order. Acknowledge your decision in the verification window by clicking **[Yes]**. To cancel the addition of the selected items to the purchase order click **[No]**.

Note: You can also use **[Apply]** if you want to leave the **Link transaction** window open to add items from other transactions.

Note: Items that are linked to other transactions are displayed with a chain link icon.
6. Click the **Order/Shipping** tab to bring it forward. e-automate displays the vendor's address in the **order from** field.
 7. Complete the following fields as appropriate:

Use vendor "order from": When checked, the items on this purchase order are purchased from one vendor with multiple order locations. For an "Order From" to display, it must be set up for the vendor.

Ship to: Identify whether you want this purchase order to ship to a warehouse or to the customer. e-automate changes the name of the next field based on your selection.

Warehouse/Customer: Warehouse or customer to which the items on the purchase order are to be shipped.

Note: The address is pre-populated from the customer or warehouse; you can change it.

Terms: Vendor's payment and discount terms.

Note: Terms are pre-populated from the vendor record; you can change them as necessary.

Due: Date the invoice would be due based on the terms if generated today.

Discount rate: Percentage discount available if payment is made by the discount date.



Discount date: Date by which the payment is due in order to get the discount.

Note: When using discount terms, e-automate links the dates and discounts together. Changing any field changes the terms.

Ship method: Method to be used to ship the order to either the warehouse or the customer.

Note: The shipping method is pre-populated from the vendor's record; you can change as necessary.

Remit branch: Branch to which you want payment for this purchase order to be sent.

8. Click the **Miscellaneous** tab to bring it forward.

9. Complete the following fields as appropriate.

Job number: Number of the job to which this purchase order is assigned, if any.

Claim number: Number of the claim that prompted this purchase order, if any.

ABCD number: Tracking number or any number associated with this purchase order.

Note: This field is optional and is only displayed if specified in Purchasing Options.

Vendor confirmation number: Confirmation number sent by vendor once they have received the PO.

Estimated ship date: Date you expect the vendor to ship the items on this purchase order.

Check the box to activate the ship date entered.

Estimated arrival date: Date you expect the items on this purchase order to arrive at the customer or warehouse. Check the box to activate the arrival date entered.

10. Click the **Messages** tab to bring it forward.

11. To add a message that will be displayed when this purchase order is being received, click in the field and enter the message.

Note: If your system administrator configured purchasing messages to popup when receiving, the message you entered pops up and displays in a window during the purchase order receiving transaction. If not configured to popup, the message displays as a flashing message icon in the purchase order receiving window.

12. Click the **Remarks** tab to bring it forward.

13. To include remarks on the purchase order, enter them in the **Remarks** tab field.

Note: Remarks are meant to be external and will print on the purchase order.

14. To send the PO to the print upon creation, check the **Send now** checkbox.

15. If you want to print the bar code labels upon closing the **New purchase order** window check the **Print bar codes** checkbox.

16. Click [**OK**] to save the purchase order information.

Scanning PO Receipts

You must have your PDA cradled or a live WI-FI connection to your PDA in order to scan Purchase Order receipts.

1. From the PDA **Start** menu, select **Programs**.

2. Start Digital Barcode by clicking on the Digital Barcode icon.

3. Login in to Digital Barcode by completing the following:

a. In the **User** field enter your e-automate user.

Note: The Digital Barcode user must have access to inventory rights in e-automate to use Digital Barcode. For more information see **e-admin Security Rights for Digital Barcode**.

b. In the **Password** field, enter your e-automate password.



- c. In the **Company** field, enter the company to which you want to connect.
- d. In the **Server** field, enter your server for Digital Barcode.
http:// IP address or server name/RAP/
Note: Virtual directory is set up when you set up the Remote Application Portal (RAP). The default is **RAP** or what you named it during the setup.
4. Click [**Login**] to login to Digital Barcode.
5. Click [**PO Receiving**] to display a Purchase Order search screen.
6. Do one of the following:
 - To filter POs by Vendor, Item, or both do the following:
Note: The **Vendor** and **Item** fields are filter fields for narrowing your search for open purchase orders. You can use one or both fields, but do not need to use either.
 - a. In the **Vendor** field, enter the vendor name or the vendor number.
Note: This field will allow you to enter a partial number or description to perform the search.
 - b. In the **Item** field enter the item number or description to search for POs with that item number.
Note: This field will allow you to enter a partial number or description to perform the search.
 - c. Click [**Search**] to populate the **PO number** field with POs that meet your search criteria.
Note: Once the search is complete, to view the purchase orders that match your filter criteria, click the down arrow in the **PO number** field.
 - Click [**Search**] to populate the **PO number** field with all open purchase orders.
7. In the **PO number** field use the dropdown menu to select an open purchase order.
8. To view details of the selected open purchase order or to modify scanned details of the open purchase order, do one or more of the following:
 - To view details, click [**Details**] to view details. You can view PO Number, Date, Description, Vendor, Item numbers, quantity of item remaining in e-automate and quantity of item scanned. Click [**Back**] to return to the **PO Selection** window.
 - To clear previously scanned quantities, begin at the **PO Selection** screen and click [**Details**]. Select the item for which you want to modify scanned quantities and click [**Zero Out**] to display the confirmation dialogue. Confirm by clicking [**Yes**] or cancel by clicking [**No**].
 - To view PO item details, begin at the **PO Selection** screen and click [**Details**]. Select the item for which you want to view details and click [**Details**]. To return to the **PO Details** click [**Back**] and [**Back**] again to return to the **PO Selection** screen.
9. To begin scanning the items, from the **PO Selection** screen verify the purchase order is correct and click [**OK**]. The **PO Receipt Scan** screen displays with the **Qty** and **Item** fields prepared for scanning.
10. Do one or more of the following until you have scanned all items on the PO Receipt.
Note: When scanning items using the Purchase Order Receipt component, Digital Barcode scans the barcode and compares it with the e-automate item number, the UPC fields in e-automate Manufacturer number, or history numbers to determine a viable item match in e-automate. If Digital Barcode encounters a duplicate, you are asked to resolve the issue.



- Scan all of the items on the PO receipt. After each scan, Digital Barcode displays the item and the scanned quantity total for the PO Receipt.
 - To enter a multiple quantity, first click in the **Qty** field on the PDA and enter a quantity and then click in the **Item** field and scan the item.
Note: Unless you specify a specific quantity, Digital Barcode defaults a single scan to a quantity of one.
 - You use [**Clear**] to reset the **Qty** and the **Item** field.
 - Click [**Details**] to view PO details of the selected PO such as PO Number, Date, Description, Vendor, Item numbers, Remain (quantity of items remaining to be received), and Scanned (quantity of items that have been scanned). Click [**Back**] to return from the PO details screen.
 - To view individual item details, click [**Details**] to open the **PO Details** screen. On the **PO Details** screen select the item for which you want to see specific details, click [**Details**] to open the **PO Item Details** screen. Digital Barcode displays the details for the selected item. Click [**Back**] to return to the **PO Details**, and [**Back**] to return to the **PO Receipt Scan** screen.
Note: On the **PO Item Details** screen there are two arrows, left and right. You use these arrows to navigate between multiple lines of a single item on a purchase order. For example, if you have the item 168168 on a purchase order three times as three separate line items each with its own quantity, you can use the arrows to navigate between the lines.
 - To zero out your scans and begin scanning from zero for a specific item, click [**Details**] to display the **PO Details**. Select the item you want to set scans at zero and click [**Zero Out**] to display the confirmation window. Click [**Yes**] to clear scans or [**No**] to cancel.
11. Click [**Done**] to return to the **PO Selection** screen where you to choose another PO receipt to scan.
 12. Click [**Exit**] to leave PO Scanning when you are done scanning.
 13. The scanned item quantities and serial numbers are stored in the e-automate database for use during the purchase order receiving process. When you open the **New Order Receipt** window in e-automate, e-automate recognizes scanned quantities and displays them in the window. If Digital Barcode is scanning while the **New Order Receipt** window is open in e-automate, the user can click [**Use scanned quantities**] to refresh quantities currently being scanned by Digital Barcode. For more information on purchase order receipts, see the *Receiving a Purchase Order* topic.

Posting a PO Receipt

Digital Barcode gives you the ability to post purchase order receipts from your PDA or scanning device. To post a PO receipt, do the following:

1. Identify the PO Receipt you want to post by doing one of the following:
 - To filter POs by Vendor, Item, or both do the following:
Note: The **Vendor** and **Item** fields are filter fields for narrowing your search for open purchase orders. You can use one or both fields, but do not need to use either.
 - a. In the **Vendor** field, enter the vendor name or the vendor number.
Note: This field will allow you to enter a partial number or description to perform the search.



- b. In the **Item** field enter the item number or description to search for POs with that item number.
Note: This field will allow you to enter a partial number or description to perform the search.
 - c. Click [**Search**] to populate the **PO number** field with POs that meet your search criteria.
Note: Once the search is complete, to view the purchase orders that match your filter criteria, click the down arrow in the **PO number** field.
- Click [**Search**] to populate the **PO number** field with all open purchase orders.
2. Click [**Post**]. The **Confirm Post** window displays
 3. In the **Confirm Post** window, click [**Yes**] to confirm that you want to post the selected PO receipt.

Printing Labels for Items on PO Receipts

You use this tool to identify a purchase order receipt and print the correct number of barcode labels for the receipt.

1. From the **Inventory** menu, select **Barcode labels** and then select **Receipts...** to open the **Receipt – [Print barcode labels for purchase receipts]** window.
2. In the **Receipt number** field, use the lookup to select a purchase order receipt.
3. Click [**QuickAdd**] located to the right of the **Receipt number** field to add the items associated with the receipt to the **Items to print** region.
4. If you want to add items from additional receipts, repeat steps 2 - 3.
Note: To change the quantity of labels to be printed for an item, select the item from the list, e-automate displays the quantity in the **Quantity** field. Modify the quantity and click [**Update**].
5. To remove items from the **Items to print** region, select the item and click [**Remove**].
Note: You can remove multiple items simultaneously by using the windows keyboard shortcut **Ctrl + click** to select varied items in the list or **Shift + click** to select a range of items from the list.
6. If you want to add additional items to the print list outside of your purchase order receipts, do one of the following:
 - Add each item individually by doing the following:
 - a. In the **Additional items** field, use the lookup to locate the item you want to add.
 - b. If the item is serialized the **Serial number** field is active. Use the lookup to locate the serial number assigned to the item. If the item is non-serialized the **Serial number** field will be inactive.
 - c. Click **QuickAdd** to add the item to the **Items to print** region.
 - Add multiple items using the QuickSearch filter.
 - a. While still in the **Receipts – [Print barcode labels for purchase receipts]** window, click [**Advanced add...**] to open the **Advanced inventory barcode search** window.
 - b. Use the **QuickSearch** to define a search that will limit your items to the items you want added to the print list. You can use the filters **Bin, Category, Item, Item desc., Quantity, Serial number, and Warehouse** as filters.
Note: This list displays the items meeting your filter criteria for the current on hand quantities.



- c. Once you have defined your search, click **[Go]** to display the items matching your defined search criteria.
- d. Click **[OK]** to close the **Advanced inventory barcode search** and add your list of items to the **Items to print** region.
7. To print your list of item barcode labels, click **[Print...]** to display the **Print barcode labels** window.
8. In the **Layout** field, use the lookup to select the barcode layout option matching your printer configuration.
9. In the **Code** field, use the dropdown menu to select the barcode symbol structure for your barcode label. Digital Gateway recommends Code 128. This is newer and more common barcode structure for barcoding.
10. You use the **Offset** field to identify the starting position of the label in which you want to begin your print on a partially printed page of labels. This feature allows you to not waste partial printed barcode label pages. Set partially printed pages aside and on subsequent barcode printings, count starting at 0 the number of barcode label positions from left to right, row by row to identify the label number in which you want to start printing barcode labels. Enter this number in the **Offset** field.
Note: The **Offset** field is only available on Avery label choices.
11. Verify the **Item barcode layout** tab is forward, if not click on it to bring it forward.
12. In the **Optional fields**, use the dropdown menu to select the value you want printed on the barcode label in the identified location.
Note: The number of optional fields displayed depends on which layout you have chosen.
13. Click the **Serialized item layout** tab to bring it forward.
14. In the **Optional fields**, use the dropdown menu to select the value you want printed on the barcode label in the identified location for items on your list that may be serialized.
Note: The number of optional fields displayed depends on which layout you have chosen.
Optional fields note: Based on the layout option selected Digital Barcode determines how many additional fields can be printed on barcode labels based on label size and spacing. For barcode labels that cannot accommodate the additional fields, Digital Barcode simply does not display an optional field choice. This instruction set includes instructions for all available fields.
Avery layout note: If you have selected an Avery layout, Digital Barcode displays the **Offset** field
15. Click **[Print]** to send the barcode labels to the barcode printer.

Scanning Sales Orders

Overview

You use e-automate in conjunction with Digital Barcode to scan items on Sales Orders to get them ready to ship from the warehouse. From Digital Barcode you can view information about the sales to verify it is the sales order for which you would like to scan items. You can see details such as the Customer, Item number, Quantity of item, the item's current Warehouse and Bin, and the item's serial number. Digital Barcode also lets you view recent scans you have performed on the sales order and zero out or clear those scans if they were made in error.



When using Digital Barcode in conjunction with e-automate and sales codes all items added to sales orders must have a bin assignment (bin distribution). For more information on setting up bin distributions see the **Items Tab** portion of the *Creating a Sales Order* topic in e-automate STEPS (Help).

Once you have scanned all the items on your sales order the sales order cannot be edited until the scanned items have been shipped. For more information on shipping the items see the *Creating a Shipment* topic in e-automate STEPS.

You must have a live WI-FI connection in order to scan sales orders with your PDA device.

In order to use Digital Barcode in to scan items on sales orders you must first have a sales order created and unfulfilled in e-automate. Without a sales order, Digital Barcode cannot identify which inventory items have been purchased by your customers.

Creating Sales Orders in e-automate

Before any scanning can be done you must have a sales order to scan. Sales orders are created in e-automate by doing the following:

1. On the **Sales** menu, select **Sales orders** to open the **Sales orders** window.
2. Click [**New**] to open the **New sales order** window.
3. Complete the following fields as appropriate.

Customer: Name of the customer to whom you are selling the items.

Description: Optional brief description detailing this sales order.

Type: The kind of order you are entering. Choose from **Equipment**, **Supply** or **Other**. You can also create your own order types.

Status: The current status of this order. By default e-automate assumes the status is Open. You can create your own order types and assign them as necessary to meet your operational needs.

Sales rep: Person in your company making the sale. This field is populated from the customer's record and can be changed for just this order, if needed.

PO number: Customer's PO number. This field is populated from the customer's record and can be changed, if needed.

Note: You can require a PO for all sales orders for customers with the **Require PO Number** checkbox checked on the customer record.

Ordered by: Contact associated with the customer responsible for this order.

Branch: Company branch with which this sales order is associated.

Number: Number of the sales order. Automatically assigned the next sequential number in the database, but you may change this number.

Date: Date of the creation of this sales order.

Due by: Date the payment from the customer is due.

Req. date: Date the item(s) are required by the customer.

Quote: Number of the sales quote or price sheet, if any, used to pre-populate the fields of this sales order.



Note: You can make changes to the sales order and not affect the basis sales quote or price sheet.

Warehouse: Populated from your company or branch options **Default warehouse** field. This is the warehouse in which e-automate will allocate the items added to this sales order unless specified otherwise.

Department: The department receiving credit for all items on this sales order. When left blank, department is automatically assigned based on the sales code associated with the item.

Note: This field is usually left blank unless you want to force the department on all line times.

Summary: The **Summary** region keeps a running tally of the value of the sales order.

4. To add supply items based on an equipment item or items included on a contract, do the following:
 - a. Check the **Add equipment and contract** checkbox.
 - b. To view only those supply items associated with a piece of equipment, use the **Lookup** icon in the **Equipment** field to select the equipment number.

Note: To display the supply items for a piece of equipment, the items must be added to the **Related Items** tab in the equipment's item profile.
 - c. When you select an equipment record, e-automate populates the **Contract** field automatically if the equipment is covered on a current contract. If the equipment is on more than one contract, e-automate allows you to choose the appropriate contract.
5. To add an item to the sales order and accept the default settings for the item, do the following:
 - a. In the **Item** field, use the **Lookup** icon to select the item the customer ordered.

Note: If you identified an equipment record and a contract, the item lookup typically is assigned a filter so that it will only display related items associated with the equipment item. The filter is identified by a small triangle under the **Lookup** icon (magnifying glass). You can also hover over the **Lookup** icon and a tooltip displays identifying the filter, if any. You can remove the filter by clicking the dropdown menu and selecting **No Filter**.
 - b. In the **Quantity** field, enter the quantity of the item the customer ordered.
 - c. Click [**QuickAdd**]. e-automate does one of the following:
 - If you have Auto-Availability Checks and Backorder Calculation enabled, e-automate determines if you have sufficient quantities of the item in the specified warehouse to provide the customer. If you do, the item(s) are added to the sales order.
 - If you have the feature disabled, e-automate adds the item to the sales order.
 - If you have Auto-Availability Checks and Backorder Calculation enabled, and you do not have sufficient quantities in the specified warehouse, e-automate displays the **Edit Sales order item bin** window notifying you that you have insufficient quantities in the specified warehouse. Do one of the following:
 - o Select a different warehouse with sufficient stock by doing the following:
 - i. Identify the warehouse and bin with adequate stock by clicking the item availability button. Determine the warehouse and bin with stock and click [**Close**].
 - ii. In the **Warehouse** field, use the **Lookup** icon to select the warehouse with sufficient stock.
 - iii. In the **Bin** field, verify the appropriate bin is displayed. Make changes as necessary.



- iv. Click [**OK**] to add the item with the new warehouse assignment to the sales order.
 - o Accept the backordered quantity by clicking [**OK**].

Note: The Inventory Logistics Console and the e-agent Inventory Management task are designed to pick up backordered items for auto purchase order creation.
 - o Change the stocking code to Drop-ship by doing the following:
 - i. In the **Stocking code** field, use the **Lookup** icon to select *Drop-ship*.
 - ii. e-automate changes the **Bin** field to the drop ship bin identified on the warehouse specified in the **Warehouse** field, if any.
 - iii. Click [**OK**] to save your settings.

Note: Setting the stocking code to Drop-ship for an item allows e-automate to use the Inventory Logistics Console or the Inventory Management task to create purchase orders with the customer's address as the purchase order's shipping address.
6. To change information about a selected item, do the following:
 - a. Double-click on the item in the list to open the **Edit sales order Item** window.
 - b. Complete the following fields as appropriate.

Description: Description of the item being added to the sales order.

Note: This description can be modified if necessary for just this sales order.

Quantity: Quantity of the item on the sales order.

Price: Amount you charge for the item based on the unit of measure quantity. Adjacent to the **Price** field is the **Price** button. You can hover over the **Price** button with your mouse to view a popup displaying information about how the price was set for this item. You can also use the dropdown menu on the **Price** button to view the **Item Prices** window, edit or view the inventory item profile, or view or edit the customer record.

Item discount: Percentage of price discount.

Amount: Total amount of the items, discounts, and other charges.

Quantity to bill now: Quantity of this item on this sales order to be billed now rather than later.

Note: Entering a value in this field is the only impact of a sales order on the general ledger outside of fulfillment. If you bill items on a sales order before fulfillment, e-automate creates the invoice portion of the general journal entry, accounts receivable, and either deferred sales or sales revenue depending on how your system's sales codes are configured. If your sales code has an unearned revenue account, e-automate hits the unearned; if not, e-automate hits the revenue account identified on the sales code or this item.

Canceled: Quantity of this item on this sales order which you want to cancel.

Note: to cancel an item on the sales order, you must enter the canceled quantity at the edit item level and the bin level.

Back ordered: Quantity of this item on back order.

Note: Backordered quantities are only modified at the bin level

Unit of measure: Classification of the possible quantities that can be ordered such as Each, Box, or Case.

Equipment number: If this is a supply order, select the customer's equipment to identify the destination of this supply or part.



Contract number: Number of the current service contract associated with the piece of equipment. Automatically identified if the equipment is under contract(s).

Shipping contact: Customer shipping contact person.

Department: Department responsible for the sale.

Tax as: Tax category in which the items you are adding belong.

Parent line item: Use the dropdown menu to select the item that is defined as the parent item of the identified item on the sales order.

- c. To view item availability information for the item you are editing, click the **View item availability** button (has a picture of a box) in the **Availability** region.
- d. To edit the warehouse and bin from which inventory items will be fulfilled, do the following:
 - i. Select the row on the **Warehouse / bin / quantity** tab which you want to modify and click [**Edit...**] to open the **Edit sales order item bin** window.
 - ii. In the **Warehouse** field, use the **Lookup** icon to select the fulfillment warehouse.
 - iii. In the **Bin** field, use the **Lookup** icon to select the bin.
 - iv. In the **Quantity** field, enter the quantity to be fulfilled from the selected warehouse and bin.
 - v. If you are canceling some or all of this item, enter the canceled value in the **Canceled** field. Enter the same value in the **Canceled** field at the bin level and the detail level.
 - vi. Click the **Warehouse availability** button (button with a picture of box) to view Inventory Item location information.
 - vii. To fulfill this item from your system-defined Drop-ship, Special Order or Stock bin, use the **Lookup** icon in the **Stocking code** field to change as appropriate.

Note: When you change the stocking code, e-automate updates the fulfillment bin for the specified warehouse.
 - viii. Click [**OK**] to save the changed warehouse and bin settings.
- e. To add another warehouse and bin, allowing you to fulfill from more than one warehouse and bin at the same time, do the following:
 - i. In the **New** or **Edit sales order item** window, in the **Warehouse** field, use the **Lookup** icon to select an additional warehouse.

Note: This can be the same warehouse if you want to fulfill from two or more different bins in the same warehouse.
 - ii. In the **Bin** field, use the **Lookup** icon to select the fulfillment bin.
 - iii. In the **Quantity** field, enter the quantity to be fulfilled from the specified warehouse and bin.
 - iv. Click [**QuickAdd**] to add the warehouse and bin settings.
 - v. Repeat the above steps, adding warehouses and bins until you have designated a fulfillment location for the quantity on the sales order.

Note: If you have not correctly defined the fulfillment locations for the quantity of items to be fulfilled, e-automate will display the warning, "The bin distribution does not match the quantity ordered." If this occurs, verify the quantities for the fulfillment warehouses and bins and use [**Update**] to correct as necessary.
- f. To allocate a specific serial number to a sales order, do the one of the following:
 - To allocate serial numbers using [**Update**], do the following:
 - i. Locate the **Warehouse / bin / quantity** tab. On this tab, e-automate displays a warehouse and bin row for each quantity of a serialized item added to a sales order.



- For example, if you added a quantity of five serialized items to the sales order, e-automate displays five rows on the **Warehouse / bin / quantity** tab.
- ii. Select the row to which you want to allocate a serial number.
 - iii. In the **Serial number** field, use the **Lookup** icon to select the serial number to allocate to this row.
 - iv. Click [**Update**] to allocate the specified serial number to this row.
 - v. Repeat steps i through iv until you have allocated all the desired serial numbers.
 - To allocate serial numbers using Inventory Quick Select, do the following:
 - i. On the **Warehouse / bin / quantity** tab, select the row in which you want to begin serial number allocation.
 - ii. On the right side of the **Warehouse / bin / quantity** tab locate the **Show Inventory Quick Select** icon (identified by two green arrows pointing up).
 - iii. Click the **Inventory Quick Select** icon to open the **Selection** window.
 - iv. Locate the serial number you want to allocate to the selected row and double-click on the serial number to allocate that serial number.

Note: e-automate allocates the double-clicked serial number, removes it from the list and moves the selected row down one row.
 - v. Repeat double-clicking on serial numbers until you have allocated each desired row on the **Warehouse / bin / quantity** tab.
 - vi. Click the **Hide Inventory Quick Select** icon (same icon as in step i) to close the **Selection** window.
 - g. Click [**OK**] to save the edited information.

Note: If you allocated serial numbers and have Equipment History Tracking using the default tracking configuration, e-automate modifies the equipment record for each serial number, setting the status to Allocated and recording this transaction.
7. To rearrange the column order on the sales order list, click on a column heading and drag it to a new location.

Note: After you rearrange columns in the **Sales Order** window, e-automate will remember the order and display the columns in your arranged order the next time you open the new sales order form.
8. Click the **Billing/Shipping** tab to bring it forward, displaying customer address information.
9. In the **Bill to** field, use the **Lookup** icon to select the customer that you want billed for this sales order.
10. In the **Ship to** field, use the **Lookup** icon to select the customer to whose address the order will be shipped.
11. If you want the **Ship to** address to be the same as the bill to address, check the **Same as bill to** checkbox.
12. If you want to select a ship-to address from all customers, rather than just those associated with this customer check the **Show all customers** checkbox.

Note: These terms go into effect when the sales order is fulfilled (invoiced).
13. In the **Terms** field, use the **Lookup** icon to a previously defined payment term.
14. In the **Terms discount** field, enter the percentage discount available if payment is made by discount date.
15. In the **Discount date** field, enter the date by which payment is due in order to get the discount, if applicable.



16. In the **Charge method** field, use the **Lookup** icon to select the method with which the customer intends to pay for charges incurred on this order. If you select *Credit Card/ACH* do the following:
 - a If you want to configure the invoice to be paid with a credit card rather than put on the customer's account, check the **Auth on OK** checkbox.
 - b To indicate you want the credit card used for this sales order only, select **Single use account**.
17. To indicate you want to use a credit card that is currently on file, select **Use existing account** and identify the credit card in the **Charge account** field using the **Lookup** icon.
18. If you want to enter a new credit card that will be kept on file for further use, select **Use existing account** and do the following:
 - a In the **Charge account** field, click the dropdown menu and select **New** to open the **Add charge account** window.
 - b Enter the appropriate information in the following fields:

Name on card: Name on the credit card.
Address: Billing address for the credit card.
City: Billing city for the credit card.
State: Billing state or province for the credit card.
Zip: Billing zip or postal code for the credit card.
Phone: Phone number associated with the credit card.
Remarks: Any comments you feel are necessary.
 - c Do one of the following:
 - If you want to set up a new credit card account, do the following.
 - i. Select the **Credit card** radio button.
 - ii. Click [**Add account to vault...**] to open a third part credit card vault window.
 - iii. In the **Card Number** field, enter the credit card number.
 - iv. In the **Expiration** fields, enter the credit card expiration date.
 - v. Click [**Process Transaction**]. A window displays informing you whether or not the transaction processed successfully.
 - vi. Click [**Close**] to close the third party credit card processing window and return to the **Add charge account** window.
 - vii. In the **Add charge account** window, click [**OK**].
 - If you want to set up a new ACH account, do the following:
 - i. Select the **ACH** radio button.
 - ii. Click [**Add account to vault...**] to open the **Add account** window.
 - iii. In the **Account number** field, enter the account number of the account you want to use for automatic payment.
 - iv. In the **Routing number** field, enter the routing number of the account you want to use for automatic payment.
 - v. Select one of the follow radio button:

Checking: When selected, you are indicating this account is a checking account.
Savings: When selected, you are indicating this account is a savings account.
 - vi. Click [**OK**] to close the **Add account** window and return to the **Add charge account** window.
 - vii. In the **Add charge account** window, click [**OK**] to save the new charge account.



19. In the **Tax code** field, use the dropdown menu to select the tax code under which the sale will be taxed.
20. Use the **Quick tax** dropdown menu to select the tax code that is already assigned to the customer, bill to customer, or ship to customer.
21. If you want e-automate to calculate and assesses taxes on this order check the **Taxable** checkbox.
22. In the **Order discount** field, enter the discount percentage you want applied to the entire order amount, if applicable.
23. In the **Ship method** field, use the **Lookup** icon to select the method by which the customer wants the order shipped to them.
24. In the **Freight** field, enter the dollar amount of the predicted freight charges.
25. Click the **Miscellaneous** tab to bring it forward.
26. In the **Invoice general ledger accounts** region, complete the following fields as appropriate.
 - Accounts receivable:** Account to which the amount of the sale will be applied.
 - Note:** This field should only be changed in rare circumstances requiring a correction.
 - Freight charge:** Account with which the freight charges will be associated.
 - Freight department:** Department with which freight charges will be associated.
 - Order discount:** Account to which the order discount will be applied.
 - Discount department:** Department to which discounts are to be associated.
27. In the **Miscellaneous** region, complete the following fields as appropriate.
 - Approver:** Person in your company, if any, who is responsible for approving the sale to this customer.
 - Job:** Number of the job to which this sales order is assigned, if any.
 - On hold code:** On-hold code for this sales order. **Note:** Placing a sales order on hold does not place the customer record on hold.
 - User field 1 or 2:** If you labeled the user-defined fields in **Options**, they are displayed here. Populate as necessary.
28. In the **Categories** region you can customize the sales order by creating categories that meet your company's specific needs. For example, some companies use categories to specify the source of the sale, such as the Yellow Pages or a referral. To select a category to customize the sales order, do the following:
 - a In the **Categories** field, use the **Lookup** icon to select the category.
 - b Click [**QuickAdd**] to add the category to the list.
29. In the **Alternate sales rep** region you can add another sales rep besides the one listed in the customer profile. To select another sales rep, do the following:
 - a In the **Alternate sales rep** field, use the **Lookup** icon to select the alternate sales rep.
 - b Click [**QuickAdd**] to add the alternate sales rep to the list.
30. Click the **Out Cost** tab to bring it forward.
31. Review the out cost for this order. The out cost displays the sales rep's calculated margin.
32. In the **Notes** field, enter notes as necessary.
33. Click the **Messages** tab to bring it forward.
34. On the **Message** tab, enter internal messages you want displayed to personnel when the order is shipped and fulfilled.
 - Note:** Each shipment associated with this order as well as each fulfillment associated with this



sales order is notified of this message. Messages can pop up on the screen if the administrator enables message popup under Sales Administrative Options.

35. To include remarks, click the **Remarks** tab and enter them. Remarks entered on the sales order print in the **Notes** section on the printed order.
36. To print the sales order when you click **[OK]**, check the **Print sales order** checkbox.
37. To print the Quick pick list, check the **Print quick pick list** checkbox.
38. To print the packing list, check the **Print packing list** checkbox.
39. To ship this order after you click **[OK]**, check the **Ship order** checkbox.
40. To create a work order after you click **[OK]**, check the **Create work order** checkbox.
41. Click **[OK]** to save the sales order.
42. Select the appropriate printing as selected. If you chose to ship this order, e-automate displays the **New shipment** window. For more information on shipping see the online help topic, *Creating Shipments*.

Logging in to Digital Barcode

1. From the PDA **Start** menu, select **Programs**.
2. Start Digital Barcode by clicking on the Digital Barcode icon.
3. Login in to Digital Barcode by completing the following:
 - a. In the **User** field enter your e-automate user.
Note: The Digital Barcode user must have access to inventory rights and Sales rights in e-automate to use Digital Barcode sales functionality. These rights are configured in e-admin.
 - b. In the **Password** field enter your e-automate password.
 - c. In the **Company** field enter the company to which you want to connect.
 - d. In the **Server** field, enter your server for Digital Barcode.
`http:// IP address or server name/RAP/`
Note: Virtual directory is set up when you set up the Remote Application Portal (RAP). The default is **RAP** or what you named it during the setup.
4. Click **[Login]** to login to Digital Barcode.
5. On the displayed, Digital Barcode menu, click **[Sales Orders]** to access sales order functionality.

Basic Info

When you are scanning items on a sales order you must first provide the sales order by either scanning the item number or entering the exact sales or number. If you do not know the sales order's exact number, you may also search for the sales order by customer or by entering a portion of the sales order number. To scan items on a sales order, do the following:

1. Identify the sales order that includes items you want to scan by doing one of the following:
 - If you want to scan the sales order, do the following:
 - a. Verify the **Scan** checkbox is checked. If it is not checked, check it.
 - b. Scan the sales order barcode. The **SO number** field populates with the sales order number.
 - If you know the exact sales order number, do the following:
 - a. Verify the **Scan** checkbox is checked. If it is not checked, check it.



- b. In the **SO number** field, enter the exact sales order number.
Note: If the number you enter is only a partial SO number, you will get a message indicating the sales order number is invalid.
 - If you want to search for all open sales orders, do the following:
 - a. Uncheck the **Scan** checkbox.
 - b. Click [**Search**] to populate the **SO number** field with all open sales orders.
 - c. Once the search is complete, use the dropdown menu in the **SO number** field to select the desired sales order from a list of sales orders.
 - If you want to filter the sales orders list by Customer, sales order number or both, do the following. The **Customer** and **SO number** fields are filter fields for narrowing your search for open sales orders. You can use one or both fields, but you are not required to use either.
 - a. Uncheck the **Scan** checkbox.
 - b. In the **Customer** field enter the customer name or the customer number.
Note: You can also enter a portion of the customer number in this field to find matches.
 - c. In the **SO number** field enter the sales order number to search for sales orders with the sales order number.
Note: You can also enter a portion of the SO number to perform the search.
 - d. Click [**Search**] to populate the **SO number** field with sales orders that meet your search criteria.
 - e. Once the search is complete, use the dropdown menu in the **SO number** field to select the desired sales order from a list of sales orders that match your filter criteria.
2. To view details of the selected open sales order click [**Details**]. You can view SO number, date, description, customer, item number, quantity, warehouse, bin, and serial number of items on the sales order. Click [**Back**] to return to the SO selection window.
3. To clear previously scanned quantities, identify the sales order as outlined in step 1 and do the following:
 - a. Click [**Details**] to open the **SO Details** screen.
 - b. Select the item for which you want to clear previous scans performed.
Note: When you select an item from the list of items, Digital Barcode displays the quantity scanned in the lower left corner of the screen.
 - c. Click [**Scans**] to display the scanned information.
Note: If there are no scans, the screen is blank.
 - d. From the list select the scan you want to clear.
 - e. Click [**Zero Out**]. Digital Barcode cancels the previous scans for the item.
 - f. Click [**Back**] to return to the **SO Details** screen and [**Back**] to return to the **SO Selection** screen.
4. To begin scanning the items, from the **SO Selection** screen, identify the sales order as outlined in step 1 and click [**OK**]. Digital Barcode displays the **SO Warehouse/Bin** screen.
5. Scan the warehouse and bin barcode on the sales order.
Note: You may also manually enter the warehouse and bin names in the **Warehouse** and **Bin** fields and press **Enter** on your keypad.
6. Once the Warehouse and Bin have been scanned, Digital Barcode displays the **SO Item Scan** screen. On the **SO Item Scan** screen you can do any of the following:
 - Scan items. Do the following:



- a. Enter the quantity of the item you want to scan in the **Qty** field.
 - b. Use your scanner and scan the barcode on the item. You may also manually enter the item number and press **Enter** on your keypad
Note: When scanning items using the sales order module, Digital Barcode searches only for a match in the item number field in e-automate. If you need to look up a cross reference to the item number, click [...] and scan the number.
 - c. If the item is serialized, scan the serial number. If you cannot scan the serial number, enter the serial number in the **Serial #** field.
 - d. Each time you scan an item, Digital Barcode returns to the **SO Warehouse/Bin** screen. Continue scanning items on the sales order until all items have been scanned.
 - To view details or zero out scans, do the following:
 - a. Click [**Details**] to display sales order details.
 - b. To clear scans, select the item from the list and click [**Scans**].
Note: Scanned quantity is displayed when the item is selected.
 - c. Click [**Zero Out**] to cancel previous scans of the items.
 - d. Click [**Back**] to return to the **SO Details** screen.
 - e. Click [**Back**] to return to the **SO Item Scan** screen.
 - If you have entered information in the **Qty** or the **Item** field and you want to clear the information, click [**Clear**]. The **Item** field returns to **1**.
 - To skip to the next bin suggestion, click [**Next Bin**].
 - To skip to the next sales order, click [**Next SO**]. Digital Barcode returns to the **SO Warehouse/Bin** screen where you can select another sales order.
7. When the sales order is completely scanned, Digital Barcode displays a message notifying you that the sales order has been scanned in full.
 8. When you have scanned all items on the sales order, click [**Exit**] to leave the **Sales Orders** area.

Scanned Items in e-automate

The scanning of items you performed using Digital Barcode are not used until you return to e-automate and use the sales order shipping functionality. When you enter the New Shipment window, e-automate displays a button [**Use scanned**] to import scanned quantities into e-automate.

Transfer Orders

Overview

Digital Barcode provides you the ability to perform transfer orders by simply scanning items you want transferred to get them ready to ship from one warehouse to another or to simply transfer inventory from one warehouse to another. You can either scan items on transfer orders that already exist in e-automate or perform Ad-hoc transfers which allow you to initiate a transfer order without needing to set up a transfer order in e-automate. With Digital Barcode you can pick up the items that are transferring, put the items that are transferring away, and complete (post) the



transfer. In order to use this functionality you must have your PDA scanner connected through a WI-FI connection and logged into Digital Barcode.

Digital Barcode uses specific names for actions you take with regard to transfers. The following are terms used by Digital Barcode in regard to transfer orders.

- **Pick Up:** The process you use to scan items in which you have physically picked up and are preparing for transfer.
- **Put Away:** The process used to tell Digital Barcode that you have the items and are ready to prepare them to put them in their new warehouse and bin.
- **Post Transfer:** Completes the transfer in e-automate.

To scan transfer orders with Digital Barcode you must, first, select whether the transfer you are performing is with an existing transfer order or if it is an Ad-hoc transfer. If the transfer is for an existing transfer order you must, then, identify the transfer order you want to complete. If the transfer order is for an Ad-hoc transfer, once you complete the transfer, a new transfer order is created in e-automate under Inventory > Transfers > Transfer orders. At this point you **Pick Up** the items (from the current warehouse/bin location, and then **Put Away** the items (to the destination warehouse/bin). Once the items are put away, you finalize the transfer by clicking **Post**, which completes the transfer in e-automate. If this is a transfer from an existing transfer order, posting the transfer removes the transfer order from e-automate's list of open transfer orders.

When creating transfer orders in e-automate, you identify the source warehouse (the warehouse from which the items you identify will be pulled) and optionally you can identify a destination warehouse (the warehouse that all items added to the transfer order are destined). If you choose not to identify a destination warehouse, you can choose a different destination warehouse and bin for each item added to the transfer order.

Digital Barcode handles the **Put Away** process for transfer orders with multiple warehouse destinations differently than transfer orders with a single warehouse destination. The **Put Away** process for transfer orders with multiple destination warehouses and/or bins is handled much the same as the **Pick Up** process. You scan the warehouse and bin in which you are about to place an item, then scan the quantity of the items you are placing in the warehouse and bin. You then go to the next bin and scan the warehouse and bin for the *next* **Put Away** item and then scan quantity of items that go in the next warehouse and bin. This process is repeated until you have put away all the items that go in multiple warehouses and bins on the transfer order.

When you have a transfer order with several items, but a single destination warehouse such as a technician warehouse, for example, the **Put Away** process in Digital Barcode is quicker and easier. With the **Put Away** process you have the ability transfer several items to a single destination warehouse. This alleviates you from needing to scan each item as you put the item away to a unique warehouse and bin. Digital Barcode recognizes when there is only a single destination warehouse and bin and displays the bulk **Put Away** button automatically.



For information on creating transfer orders see the **Creating Transfer Orders in e-automate** topic below.

Creating Transfer Orders in e-automate

1. From the **Inventory** menu, select **Transfers > Transfer orders** to open the **Inventory transfer orders** window.
2. Click [**New**] to open the **New transfer order** window.
3. Complete the following fields as appropriate.
 - Requested by:** Employee requesting the inventory.
 - Description:** Brief description of the request.
 - Source warehouse:** Warehouse in which the items identified are to be pulled.
 - Destination warehouse:** Warehouse to which the items identified are being transferred.
 - Branch:** Company branch associated with this transfer order. **Note:** This field displays if branching is enabled.
 - Number:** The system automatically enters the next sequential number for this transfer order, but you can change it if necessary.
 - Date:** Date the order is being made.
 - Due by:** When checked, you can enter the date by which the order must be transferred.
 - Request:** You can base a transfer order on an existing Inventory Request. Use the lookup in the Request field to select a request and e-automate populates the transfer order with the information defined on the Inventory Request.
 - Requires shipping:** When checked, e-automate displays the **Shipping** tab. **Note:** You use the **Shipping** tab to identify the customer or the warehouse to which you want the items to ship.
4. Indicate the item and quantity for the order by doing the following:
 - a. Verify the **Items** tab is forward.
 - b. In the **Item** field, use the **Lookup** icon to select the item.
 - c. In the **Quantity** field, enter the quantity of the item.
 - d. In the **Destination warehouse** field, use the **Lookup** icon to select the destination warehouse of the item.
 - e. In the **Destination Bin** field, use the **Lookup** icon to select the destination bin for the item.
 - f. Click [**QuickAdd**] to add the item, quantity, warehouse, and bin information to the list of items being entered on the order.
 - g. Repeat steps a through f for each item requested.
5. To edit the quantity, destination warehouse, or destination bin do the following:
 - a. Select the row in which you want to edit.
 - Note:** e-automate populates the **Item, Quantity, Destination warehouse, and Destination bin** fields with the selected row.
 - b. Change the necessary values.
 - c. Click [**Update**].
6. To add shipping information, do the following:



- a. Click the **Shipping** tab to bring it forward.
Note: The **Shipping** tab is only displayed when you have checked the **Requires shipping** checkbox.
 - b. In the **Ship to** region select either **Warehouse** or **Customer**.
Note: e-automate changes the field to either **Warehouse** or **Customer**.
 - c. In the **Warehouse/Customer** field select the appropriate shipping location.
 - d. To edit the selected warehouse or customer address, click the **Edit ship to address** (pencil) icon.
7. To add remarks, click the **Remarks** tab and enter your remarks.
 8. Click [**OK**] to save the transfer order.

Logging into Digital Barcode

1. From the PDA **Start** menu, select **Programs**.
2. Start Digital Barcode by clicking on the Digital Barcode icon.
3. Login in to Digital Barcode by completing the following:
 - a. In the **User** field enter your e-automate user.
Note: The Digital Barcode user must have access to inventory rights in e-automate to use Digital Barcode transfer functionality. These rights are configured in e-admin. (See section, **e-admin Security Rights for Digital Barcode**.)
 - b. In the **Password** field enter your e-automate password.
 - c. In the **Company** field enter the company to which you want to connect.
 - d. In the **Server** field, enter your server for Digital Barcode.
`http://IP address or server name/RAP/`
Note: Virtual directory is set up when you set up the Remote Application Portal (RAP). The suggested name is RAP or what you named it during the Remote Application Portal (RAP) setup.
4. Click [**Login**] to login to Digital Barcode.
5. On the Digital Barcode menu, click [**Transfers**] to access transfer order functionality.

Basic Info

1. Select either **Ad-Hoc transfer** or **Use transfer order** to identify the type of transfer you want to do.
2. If you select **Ad-Hoc transfer** click [**OK**] and skip to step 4.
3. If you select **Use transfer order**, identify the transfer order you want to complete by doing one of the following:
 - Scan the transfer order by doing the following:
 - a. Verify the **Scan** checkbox is checked. If it is not checked, check it.
 - b. Scan the transfer order barcode. The **TO number** field populates with the transfer order number.
 - If you know the exact transfer order number, do the following:
 - a. Verify the **Scan** checkbox is checked. If it is not checked, check it.
 - b. In the **TO number** field, enter the exact transfer order number.
Note: If the number you enter is only a partial TO number, you will get a message indicating the transfer order number is invalid.



- Select from a list of all transfer orders by doing the following:
 - a. Uncheck the **Scan** checkbox.
 - b. Click [**Refresh**] to populate the **TO number** field with all transfer orders.
 - c. Use the dropdown menu in the **TO number** field to select the desired transfer order from a list of transfer orders
- 4. With the transfer order selected, do one of the following:
 - To use Digital Barcode to begin the **Pick Up** and **Put Away** process, click [**OK**]. See the **Pick Up**, **Put Away**, and **Post Transfer Order** topics below for further directions.
 - To view the details of the selected transfer order, click [**Details**]. Digital Barcode displays the **TO Details** screen. This screen provides details associated with the transfer order.
 - To view the items that have been picked, do the following:
 - a. With the transfer order identified, click [**Details**]. Digital Barcode displays the **TO Details** screen.
 - b. Select the desired item from the list of items.
 - c. Click [**Picked**] to display the **TO Item Details** screen. The number of items picked is displayed directly above the items list.
 - d. Click [**Back**] to return to the **TO Details** screen.
 - To clear items that have been picked, do the following:
 - a. With the transfer order identified, click [**Details**]. Digital Barcode displays the **TO Details** screen.
 - b. Select the desired item from the list of items.
 - c. Click [**Picked**] to display the **TO Item Details** screen.
 - d. Select the pick from the list and click [**Zero Out**].
 - e. Click [**Back**] to return to the **TO Details** screen and [**Back**] to return to the **TO Selection** screen.
 - To view items that have been put away, do the following:
 - a. With the transfer order identified, click [**Details**]. Digital Barcode displays the **TO Details** screen.
 - b. Select the desired item from the list of items.
 - c. Click [**Put Away**] to display the **TO Item Details** screen. This screen displays the number of items put away directly above the items list.
 - To clear items that have been put away, do the following:
 - a. With the transfer order identified, click [**Details**]. Digital Barcode displays the **TO Details** screen.
 - b. Select the desired item from the list of items.
 - c. Click [**Put Away**] to display the **TO Item Details** screen.
 - d. Select the picked item in the list and click [**Zero Out**].
 - e. Click [**Back**] to return to the **TO Details** screen and [**Back**] to return to the **TO Selection** screen.
 - To leave the transfer order selection window, click [**Exit**].

Pick Up

Once you have identified the transfer order as outlined in the **Basic Info** section above you may begin the Pick Up process. To Pick Up items on the transfer order selected, do the following:



1. Click [**Pick Up**]. Digital Barcode displays the **TO Warehouse/Bin** screen. Any of the following optional tasks can be performed from the **TO Warehouse/Bin** screen.
 - To view details on the transfer order, click [**Details**]. You can view item number, item quantity, source warehouse, warehouse, and bin. Click [**Back**] to return to the **TO Warehouse/Bin** screen.
 - To view and/or cancel items on this transfer order that have previously been picked, do the following:
 - a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Picked**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the pick scan.
 - d. Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.
 - To view and/or cancel items on this transfer that have been previously put away, do the following:
 - a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Put Away**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the put away scan.
 - d. Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.
2. Scan the warehouse barcode to populate the **Warehouse** field.

Note: If you are unable to scan the barcode, click in the **Warehouse** field and enter the full warehouse name. If you enter the warehouse description Digital Barcode will not recognize the warehouse. For example, if you are using the suggested location given in red, enter the characters in parentheses.
3. Scan the bin barcode to populate the **Bin** field. Digital Barcode displays the **TO Item Scan** screen.

Note: If you are unable to scan your barcodes click in the **Bin** field, enter the full bin name and press **Enter** on your keypad. If you enter the bin description Digital Barcode will not recognize the bin. For example, if you are using the suggested location given in red, enter the characters in parentheses.
4. Any of the following optional tasks can be performed from the **TO Item Scan** screen.

Note: When scanning using the Transfer Order component of Digital Barcode it scans the barcode and only searches for a matching item in the item field. If you need to scan a cross reference number, click [...].

 - To view details on the transfer order, click [**Details**]. You can view item number, item quantity, source warehouse, warehouse, and bin. Click [**Back**] to return to the **TO Warehouse/Bin** screen.
 - To view and/or cancel items on this transfer order that have previously been picked, do the following:
 - a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Picked**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the pick scan.
 - d. Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.



- To view and/or cancel items on this transfer that have been previously put away, do the following:
 - a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Put Away**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the put away scan.
 - d. Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.
 - To move on to the next transfer order, click [**Next TO**].
 - To scan another transfer order before the one you are currently working on is complete, click [**Next Bin**]. For example, you want to complete pickup on multiple transfer orders before you put them all away.
5. Scan the item at the suggested quantity. For example, if the quantity suggested is three, scan three items. You may also manually enter the item number and press **Enter** on your keyboard. If the item is serialized, Digital Barcode displays the **Serial #** field, scan or enter the serial number. Digital Barcode accepts the scan and displays the **TO Warehouse/Bin** screen.

Note: Digital Barcode assumes that every scan is a quantity of one unless you change the **Qty** field prior to a scan. Once you have scanned an item, Digital Barcode returns the **Qty** field to one.
 6. When you scan the item barcode, Digital Barcode only searches for a matching item in the item field. If you need to scan a cross reference number, do the following:
 - a. Click [...] to display the **Cross Reference Item** screen.
 - b. Scan the item to populated the **Item** field or manually enter the item number in the **Item** field and click [**Search**].
 - c. Select the item from the list and click [**OK**].
 7. Once you have scanned the suggested quantity of the item on the transfer order, Digital Barcode returns to the **Source** screen to allow you to scan another warehouse and bin, click [**Back**].
 8. Repeat steps 2 – 6 until you have scanned all items on the transfer order.

Note: Digital Barcode displays the message, *There is nothing left to pick for this transfer order when all items have been scanned.*

Put Away

Once you picked up the items on the identified transfer order you may begin the Put Away process. To Put Away items on the transfer order selected, do the following:

1. Verify the correct transfer order is selected.
2. Verify the items you want to put away have been picked up.
3. From the **TO Menu** screen, click [**Put Away**]. Digital Barcode displays the **TO Warehouse/Bin** screen.
4. Any of the following optional tasks can be performed from the **TO Warehouse/Bin** screen.
 - To view details on the transfer order, click [**Details**]. You can view item number, item quantity, source warehouse, warehouse, and bin. Click [**Back**] to return to the **TO Warehouse/Bin** screen.
 - To view and/or cancel items on this transfer order that have previously been picked, do the following:



- a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Picked**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the pick scan.
 - d. Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.
 - To view and/or cancel items on this transfer that have been previously put away, do the following:
 - a. Click [**Details**] to display the **TO Details** screen.
 - b. Select the item and click [**Put Away**] to display the **TO Item Details** screen.
 - c. Select the scan and click [**Zero Out**] to clear the put away scan.
 - To move on to the next transfer order, click [**Next TO**].
 - To scan another transfer order before the one you are currently working on is complete, click [**Next Bin**]. For example, you want to complete pickup on multiple transfer orders before you put them all away.
 - Click [**Back**] to return to the **TO Details** screen and [**Back**] again to return to the **TO Warehouse/Bin** screen.
5. Do one of the following:
- If you have multiple destination warehouses and bins on the transfer order, do the following:
 - a. Scan the warehouse barcode to populate the **Warehouse** field.
Note: You can also manually enter the warehouse in the **Warehouse** field.
 - b. Scan the destination bin barcode to populate the destination bin.
Note: You can also manually enter the bin in the **Bin** field and press **Enter** on your keyboard.
 - c. Scan the suggested quantity requested. For example, if the quantity suggested is three, scan three items to be put away in the scanned warehouse and bin. If the item is serialized, Digital Barcode displays the **Serial #** field, scan or enter the serial number.
Note: You can also manually enter the item number in the **Item** field and press **Enter** on your keyboard.
 - d. When you scan the item barcode, Digital Barcode only searches for a matching item in the item field. If you need to scan a cross reference number, click [...] to display the **Cross Reference Item** screen. Scan the item to populate the **Item** field or manually enter the item number in the **Item** field and click [**Search**]. Select the item from the list and click [**OK**].
 - e. Repeat steps a – d until you have put away all items on the transfer order.
Note: Digital Barcode displays the message, “There is nothing to put away for this transfer order” when you have scanned all items to be put away.
 - If you have a single destination warehouse and bin on the transfer order, a button displays labeled with that warehouse and bin. Click this button, [**Pull all items in XXWH/XX Bin**], to put all the items in the labeled warehouse and bin.
6. Click [**Back**] to return to the **TO Menu** screen.



Post Transfer

Once you have picked and put away all items on the transfer order, you must post the transfer to complete it in e-automate. To post the transfer do one of the following:

1. From the **TO Menu** screen, click **[Post Transfer]** to open the **Confirm Post** window.
2. Click **[Yes]** to commit the transfer and complete the process. Click **[No]** to cancel the posting of the transfer.

Note: If your transfer order violates e-automate inventory rules, Digital Barcode displays a message explaining why the transfer order cannot be posted. If you get a negative inventory message, you must assure there is sufficient quantity in the bin before posting your transfer.

3. If you clicked **[Yes]** Digital Barcode displays the **Posted** screen.
4. Click **[OK]** in the upper right-hand corner or the posted window. Digital Barcode returns you to the **TO Selection** screen.

Partial Transfer Order

While scanning items for transfer orders, Digital Barcode expects you to have the printed copy of the transfer order as a backup to identify what item comes next if for some reason you discover you do not have the next Digital Barcode suggested item.

1. To scan a partial transfer order, use the instructions identified in this topic.
2. If you discover you are short items, click **[Next Bin]** to identify the next item's warehouse and bin from the printed copy of the transfer order.
3. Scan the warehouse and bin.
4. Scan the next item on the printed transfer order.

Details Screen

When scanning transfer orders Digital Barcode allows you to view details of the transfer order from any screen. The details region is also where you can view items from the selected transfer order that have been recently picked and/or put away. To view more details on your selected transfer order do the following:

1. Click **[Details]** to see more information about the transfer order including:
 - Transfer order number
 - Date the transfer order was scanned
 - Description of the transfer
 - Item number
 - Quantity of each item
 - Source Warehouse
 - Warehouse where items are to be transferred
 - Bin where items are to be transferred
2. Select the item to view how many of the item has already been picked or put away
3. Click either **[Picked]** or **[Put away]** to view the appropriate information.

Clearing Recent Picked and Put Away Items

You zero out or clear a pick or put away transaction when you have performed the transaction in error. To clear a recent pick or put away, do the following:



1. Click [**Details**] to view more information about the transfer order.
2. Select the item for which you would like to clear recent scans.
3. Click either [**Picked**] or [**Put Away**] to view recent picked or put away transactions on the item.
4. Select the item and click [**Zero Out**] to clear the picked or put away quantities.
5. Click [**Back**] to return to your desired screen

