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ESSENTIALSPRO® BAR CODING INTERFACE

The EssentialsPro® bar coding interface is designed to work with the American Microsystems LDX10 and TDX20 bar code readers (the TDX20 is the WiFi enabled version of the LDX10 reader)

1. Create new POs or receive parts into inventory from existing purchase orders
2. Post parts out of inventory to jobs
3. Adjust /enter physical counts
4. Transfer inventory parts from one location to another (ie: warehouse to truck)

CREATE PO OR RECEIVE ON EXISTING PO

EssentialsPro® contains an option to generate a new PO, or receive items for an existing PO, using a batch file created on the bar code reader. To generate a new PO, scan a file with the Receive utility using a PO number(s) less than 1000 (ie: 1, 2, 3), and use the Create New PO upload routine. To receive on an existing PO, scan a file using the applicable PO number. As a PO is received, the bar code of the PO number on the PO is scanned. Then a label can be attached to each part as it is scanned into an upload file for that PO. Once imported, the upload file posts the parts to inventory and marks the appropriate PO lines as received. A report is available that provides you with a list of parts and the quantity received for each PO in each upload batch.

POST MATERIAL

In addition to using the regular Material Posting routine, this feature allows you to move inventory to a job using a bar code reader. To facilitate this, the job number is translated to bar code language and prints at the top of your work orders. To post inventory to a job using a bar code reader, scan the job number from the work order, or key in manually. Then scan each part as it is taken from the shelves or loaded on a truck for the job. Scan the next work order and the corresponding parts, etc. When the uploaded file is imported, the system automatically moves the parts out of inventory, costs them to the job and expenses them in your GL.

ADJUST TO PHYSICAL COUNT

The Bar Coding module allows you to update actual inventory quantities on hand by scanning parts on your shelves or on your trucks into a file on the bar code reader, then uploading that count file to the EssentialsPro system. At the time of upload, a report is available that lists the parts and quantities scanned. Once uploaded, the part count is updated and your GL is adjusted.

RELOCATE INVENTORY

Inventory items can also be transferred from one inventory location to another by scanning/entering and uploading location, part and quantity information using the bar code reader. At the time of upload, counts are moved between locations. A report is available that allows you to review the parts and quantities scanned for transfer.

NOTE: Labels printed through CUC include a bar code symbol representing your Part Number. All import utilities recognize Part Numbers. In addition, if the scanned number/bar code is not found when looking at your Part Numbers, the system looks at Manufacturer Part Number and then at Manufacturer UPC/Barcode. If no match is found for a particular record, message displays indicating part number not found. To print bar code labels representing parts on a purchase order, bring the PO up on screen. Select the Print Options button then select Labels for Parts. Labels with bar codes can be printed exclusive of a PO under Inventory Reporting > Basic Inventory Reports > Labels.