


PanatrackerGP Inventory User Manual

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General Inventory Set Up: Recommendations & Tips

General Terms

Item	An inventory item set up within your Dynamics GP database. An item can be received, moved, counted, used, and sold.
Item Tracking Option	Items can be set up to be tracked by quantity, serial number or lot number. Within the Panatracker application, the tracking option is often identified within look up lists using: Bulk: An item tracked by quantity only Serial: An item tracked by serial number Lot: An item tracked by lot number
Manufacturer Item Number OR Alternate Item Number	Within Dynamics GP, your items are set up with an Item Number based on how you would identify this item internally. The manufacturer may also have an item number they identify for the same item. Often this may be referred to as a UPC or the 'bar code' number since many times the manufacturer will bar code their item number on their packaging. This item number can be stored within Dynamics GP for cross reference.
Bar Code	Think of a bar code as another language or font. - Panatrack (Century Gothic) - PANATRACK (ALGERIAN) - Panatrack (Times New Roman) -  (Panatrack as a bar code) You can create a bar code for any field (such as site or bin), not just for inventory items.
Site	A Site typically represents a large general location, such as a warehouse building. A site may also be set up to represent a department or be virtual and represent a status for your inventory (In-Transit, for example). Items will be transferred from one site to another site.
Bin	A bin is location within a Site. If you have several warehouses, you would potentially set up each as a Site. Within that site, you would then have several locations. For example, Aisle 1, Section 2, Row 3 could be represented as bin A123.
Container	This is a PanatrackerGP term for a "movable" or "temporary" bin.
Mobile Computer	Also referred to as "handheld" or "scanner". This is the device that the PanatrackerGP application operates on. These devices are small, mobile computers than can easily be carried around and have integrated bar code scanners.

About Sites

We see sites being used in a number of ways to manage inventory. Typically, a site is a physical location; however, a site can be set up as a virtual site representing the status of inventory.

If you are transferring inventory from one site to another, you may want to consider setting up an “In Transit” site ID. A transfer transaction from one site to another can be better tracked by transferring to an “In Transit” site. The receiving site would complete a transfer transaction from the In Transit Site to the physical site. PanatrackerGPs transfer transaction has 2 user-definable fields. One may be used as a Reference ID that would be used to identify both transfer transactions and tie them together. You may add these user-defined fields to your Smart Lists using Smart List Builder.

Sites may also be set up to represent inventory status, such as a hold for quality check clearance. A designated physical area should still be assigned to meet best inventory management practices. Bin locations may also be used within a physical site to represent a “virtual location.” However; if you want to make sure inventory cannot be selected from a specific location, we recommend setting up a site. If using multi-bins, keep in mind that at least one bin location will need to be set up for the “virtual” sites also. For the In-Transit transfer transaction above, for example, In-Transit may be set up as the site ID and each truck or carrier may be set up as the "Bin".

About Multi-Bins

When inventory is held in more than one location within a physical environment (site), Panatracker recommends enabling the GP multi-bin capability. This provides the ability to track and manage inventory more effectively. PanatrackerGP supports both a multi-bin and non-multi-bin environment. When setting up multi-bins, consider setting default bin locations. Default bins can be set up for each site and can also be set up for each item/site. PanatrackerGP supports bin defaults settings for:

- Purchase Receipts
- Sales Order Fulfillment



Bin Set Up Tip: For some transactions (such as order picking), a configuration option setting is to sort the item pick list based on a default bin. We suggest that you set up bins in a numeric or alpha-numeric order based on your physical layout to be able to take advantage of this capability to obtain maximum efficiency.

Setting Starting Inventory Quantities for Bins

When going from a non-multi-bin to a multi-bin set up, your item-site-bin quantities must be set. Here are a few options that may assist in making this transition:

- PanatrackerGP Move Transaction. When you enable multi-bins, a default bin will be assigned with your initial item-site quantity. You may opt to use the Panatracker Move transaction to transfer inventory FROM this default bin location to assign it TO the actual bin location.
- PanatrackerGP Inventory Adjustment-Add transaction. If you have never tracked inventory levels before, you may want to take a physical inventory of your current items by using the

Inventory Adjustment-Add transaction to add your inventory into GP. (Either set up posting to “Post To” the G/L if you do not want these transaction affecting your GP G/L. Otherwise, set up your inventory and inventory offset accounts with the ability to easily identify these initial Inventory Adjustments as loading your starting inventory quantities.) Inventory can be labeled at this time also.

In either option, you will want to consider how you want to get your current inventory labeled. One option is to use Smart Lists and export your items to Excel. Using NiceLabel (the barcode design and printing software sold with PanatrackerGP), you may print item labels directly from NiceLabel.

Be sure you have all bin locations bar coded. We recommend printing bar code for bin locations on a synthetic label stock or have them pre-printed. Keep in mind that bin locations should be accessible for

scanning. Bin locations may need special labels, including reflective back label stock, mounted placards, etc. Consider long-range scanners if bar codes for bins need to be mounted on high racks or outside the reach of a standard scanner. Distance to read a bar code depends on both the scanner AND the size of the bar code itself (and label material).

Directed Put-Away For Moves

Priority bin assignments can be set up by Item/Site in GP. A minimum and maximum quantity for each priority bin can also be set up. On configuration option available on the PanatrackerGP Move transaction is to restrict the "TO" Bin based on this set up. The "To Bin" lookup includes current quantities in each bin. If a minimum and maximum quantity has been set up, the bin will be identified if there is currently space available. Bins are sorted based on a combination of priority setting and vacancy. This configuration setting provides a basic directed move.

Bins for Receiving

Our recommendation is to have a bin location that represents each physical receiving area. For example, if you receive shipments into 3 receiving dock locations, we would recommend you set up a bin for each (Example: Dock 1, Dock 2, Dock 3).

- If you have multiple physical receiving locations per site, we recommend that you do not set up any Site or Item/Site Purchase Receipts defaults. Instead, have a bar code printed and available to scan for each Receiving location.
- If you are setting up a single receiving bin location for each site, then set up a default Purchase Receipts bin for the Site. This will automatically default on the receiving transaction.

Bins for Order Fulfillment

One configuration option is set the item pick list sort based on assigned item/site default bin (assigned as the default Sales Order Fulfillment bin). Even if your inventory for an item is held in multiple bin locations, we recommend that a primary bin for that item be determined and assigned as the default. A query is available on the PanatrackerGP order pick transaction to view all bin locations with current inventory. It is important to set up your bins in a numeric or alpha-numeric order based on the layout of the warehouse.

If you are not using the GP multi-bin functionality, a Bin can still be assigned for the item for each Site. PanatrackerGP does support display of this default bin at order picking.

About Transfers

Transfers are between sites. If you are physically moving inventory from one site to another site with distance between, consider setting up an "In-Transit" site to identify when the inventory is traveling between the sites. You may also want to consider the Panatracker Directed Transfer functionality available as part of the PanatrackerGP Advanced Inventory solution.

Additional audit can be set up by assigning a control number for one of the user-definable reference fields. Two transfer transactions would be completed. The first from the initiating site going "to" the In-Transit site. Upon receipt at the destination site, a second transfer "from" In-Transit" to the destination site would be completed.

Order Fulfillment Set Up

PanatrackerGP supports Orders, Fulfillment Orders, and picking against an Invoice. To use the standard Order Fulfillment transaction, your order type must be set up to use a Separate Fulfillment Process. Line items may be allocated; however, serial and lot numbers should not be pre-selected. Consider the impact of allocations for move transactions prior to selecting this option if using multi-bins. Moves and transfers have restrictions based on available quantity in GP.

There are a number of ways to manage order picking. Here are a few of the most common that can easily be managed through PanatrackerGP's current configuration settings:

- Orders ready for picking are printed from GP. (The order number is modified to a bar code font). The order number is then scanned and the paper document is abandoned for the actual order pick (order is picked from the handheld pick list).
- Orders ready for picking are assigned a specific Batch ID. A configuration option for the order available list can be set based on Batch ID. The Batch ID is updated once the order is picked; therefore will drop from the available list.
- Order ready for picking are allocated. PanatrackerGP can be set up with the configuration option to only display orders with items allocated. Note: You can allocate inventory without having to select your serial and lot numbers. If you are using multi-bins, you cannot move a quantity that exceeds the quantity available (on hand – allocated = available). Please consider if this will be an issue prior to selecting this option.

There are also on-demand filters for orders. These include Site, Customer, Batch, and Ship Method, and Ship Date.

Shipping Box Assignment

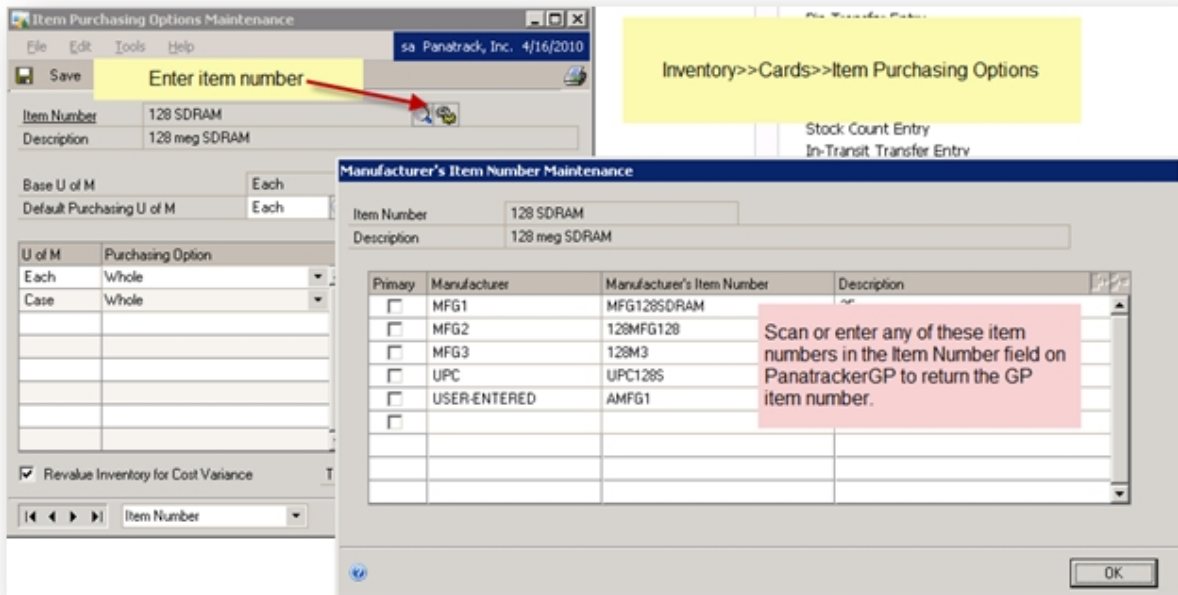
As part of the Order Fulfillment configuration, the option to assign a shipping box ID during the order pick can be set up. Print serialized (carton, pallet, box) labels to affix to each container. Scan items to the container. The tracking number can then be associated to the shipping box ID. This data can be used for shipping applications or for printing packing lists for each box.

Batch Pick

You may group orders together to present a combined pick list. Orders grouped are not available within the standard Order Fulfillment transaction. Panatrack uses a User Field on the Sales Order to identify the group ID. Each order line is presented. Same items are grouped together in the pick list. This will provide the ability to identify quantity for each specific order. Based on the number of orders in the group, each order is assigned a container and the picker is directed to pick to the specific container assigned to each order.

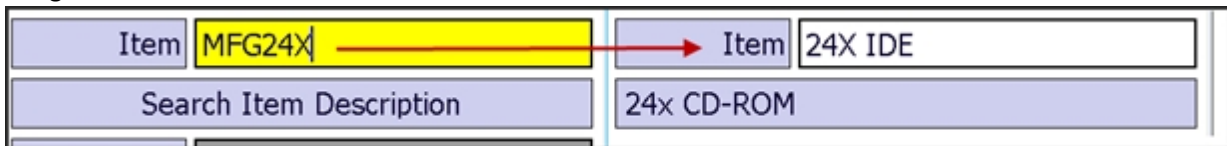
Manufacturer Item Number

Within Dynamics GP, you have the option to set up alternate item number cross reference numbers.



On all transactions, if a set up alternate item number is scanned or entered, the Panatracker application will return the corresponding GP item number (as long as the manufacturer item number is unique).

This is an ideal option to re-labeling received inventory if it arrives with a bar code item number already assigned.



Based on configuration set up, at Receiving, a manufacturer item number can be associated to a Dynamics GP item number. Under Tools, an Associate Manufacturer Item transaction is available to complete creating associations to your existing inventory.

About Posting

Although the transactions are created or updated directly to Dynamics GP, they are assigned to a Batch ID based on configuration set up. Posting is completed within GP directly.

It is possible to add automated posting to Dynamics GP using third party posting solutions available in the market.

- Process Scheduler available from mc2 Software: www.mc2software.com
- Post Master available from Envisage Software Solutions: www.envisagesoftware.com
- SmartPost available from eOne Solutions: <http://www.eonesolutions.com>

These solutions will provide the maximum flexibility for your posting. Select the transactions to post as well as the frequency. If you add new employees, you can assign a Batch ID that is not included in the automated posting to check the transactions submitted by those employees prior to automating their work.

Panatracker Administration

If you do not know the current address of your PanatrackerGP Portal, it can be located on the [System Status](#) Page, in the [Admin Menu](#) of a Handheld Device, or in the test email created during your implementation.

My Portal Address: _____

Default Administrator: administrator

Default Password: admin.1

Administration Settings

System Status

System Status

Version Panatracker Version: **6.1.6.3 M8**

Database Database host: **(local)**
Database name: **PanatrackerGP6**

Security **OK**

Web services **OK**

Environment System Adapter: **DynamicsGP v10** (Panatracker.DynamicsGP.v10)
Server URL root: **http://DGP10A.panatracker.local:82/**
Name of this machine: **DGP10A**
Dns suffix of this machine: **panatracker.local**
Hosted on port: **82**
OS Version: **Microsoft Windows NT 6.0.6002 Service Pack 2**
.Net Version: **4.0.30319.1**

Browser user: **administrator (Authenticated)**
Application path: **/**
IIS process identity: **PANATRACK\DGP10A\$**
Physical path: **C:\Program Files (x86)\Panatrack\PanatrackerGP_V6\Portal**

Printers **Microsoft XPS Document Writer**

License The license is valid.
Organization Code: **9999**
Organization Name: **Panatrack**
Device Licenses: **5**
Licensed DnsSuffix: **panatracker.local**
Licensed Features: **InventoryBasic, InventoryPlus, InventoryAdvanced, FixedAssetsBasic, FieldSalesBasic, FieldSalesPlus**
Feature Key: **010203204041**

[Load a new license](#)

This page is used during the initial install and identifies the key Panatracker setup details including the current Panatracker version release. License details can be found here also. It is rare to ever visit this page once install is complete other than to find the version information or to load a new license key. A new license key file would be provided via email with addition of features or number of device licenses. Upgrades versions will require a more involved interactive process.

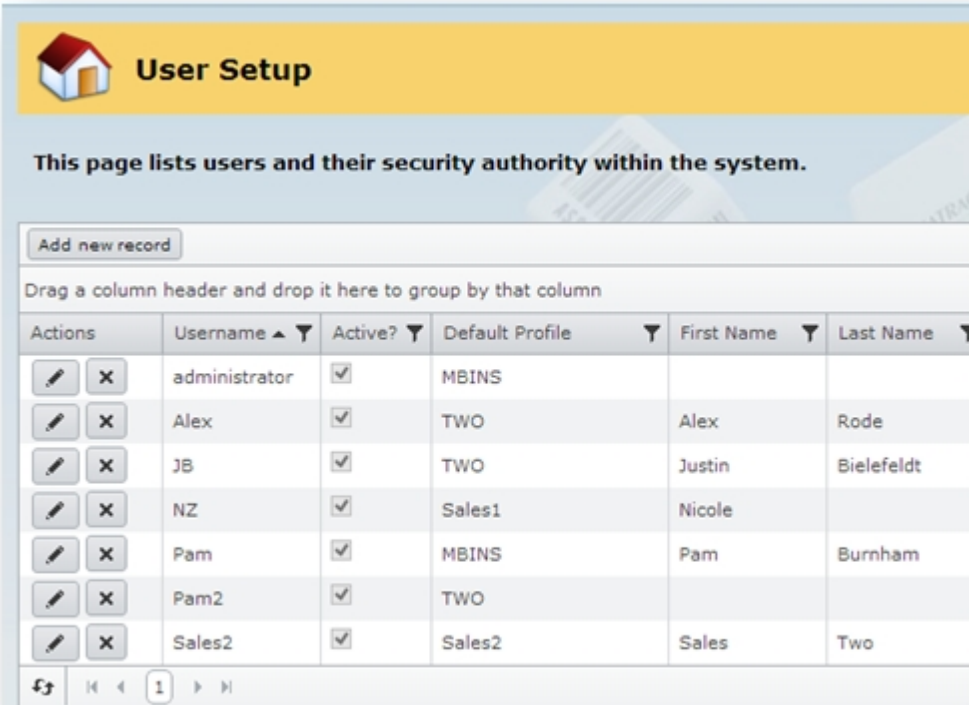
User Set Up

User setup for the Panatracker solution is completely independent to Dynamics GP. Transaction access is managed by profile set up. Users do not need to be set up in your Dynamics database. The device, profile, and user (when using logins) is recorded as part of your transaction logging.

A user set up in Panatracker may be a user to access the Panatracker Transaction Manager portal. Various security options are available. A user may also be set up to login into the device client. Users may be set up for both.

In most cases, the administrator login which is setup initially is shared by any system administrators.

Separate logins can also be created if needed. For setting up user to login to the device, it is recommended to keep the login ID and password simple.



User Setup

This page lists users and their security authority within the system.

Add new record

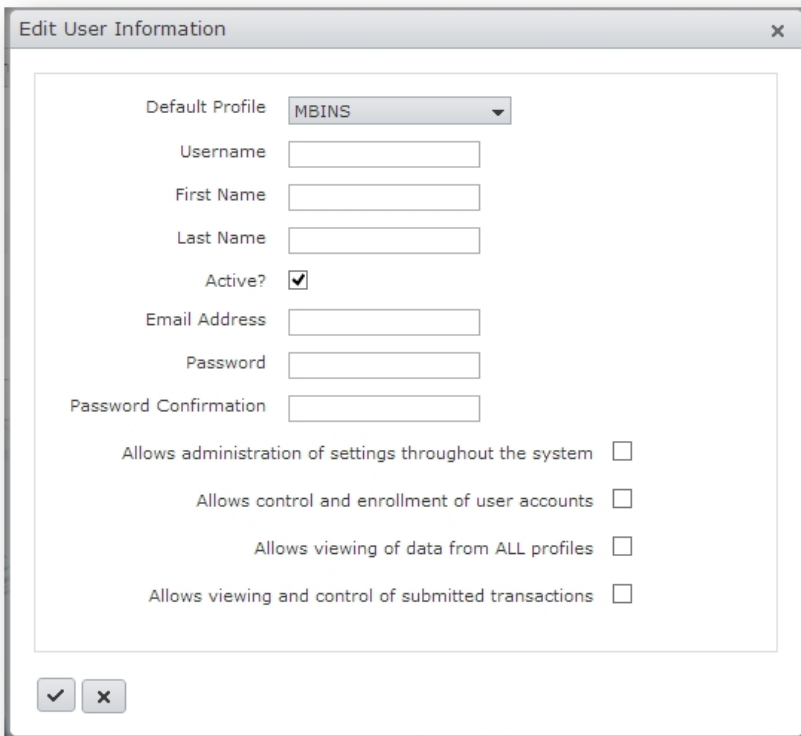
Drag a column header and drop it here to group by that column

Actions	Username ▲ ▼	Active? ▼	Default Profile ▼	First Name ▼	Last Name ▼
	administrator	<input checked="" type="checkbox"/>	MBINS		
	Alex	<input checked="" type="checkbox"/>	TWO	Alex	Rode
	JB	<input checked="" type="checkbox"/>	TWO	Justin	Bielefeldt
	NZ	<input checked="" type="checkbox"/>	Sales1	Nicole	
	Pam	<input checked="" type="checkbox"/>	MBINS	Pam	Burnham
	Pam2	<input checked="" type="checkbox"/>	TWO		
	Sales2	<input checked="" type="checkbox"/>	Sales2	Sales	Two

Navigation: Home, Back, 1, Forward, Refresh

To add a new user, simply click New. Complete the form including profile assignment. You may also Edit an existing user by clicking on Edit.

Username, Profile assignment, and Password are required fields. The four checkbox options support access to the Panatracker Transaction Manager. If none are checked, the user is used for the handheld application only.



Dialog box: Edit User Information

Default Profile: MBINS

Username:

First Name:

Last Name:

Active?:

Email Address:

Password:

Password Confirmation:

Allows administration of settings throughout the system:

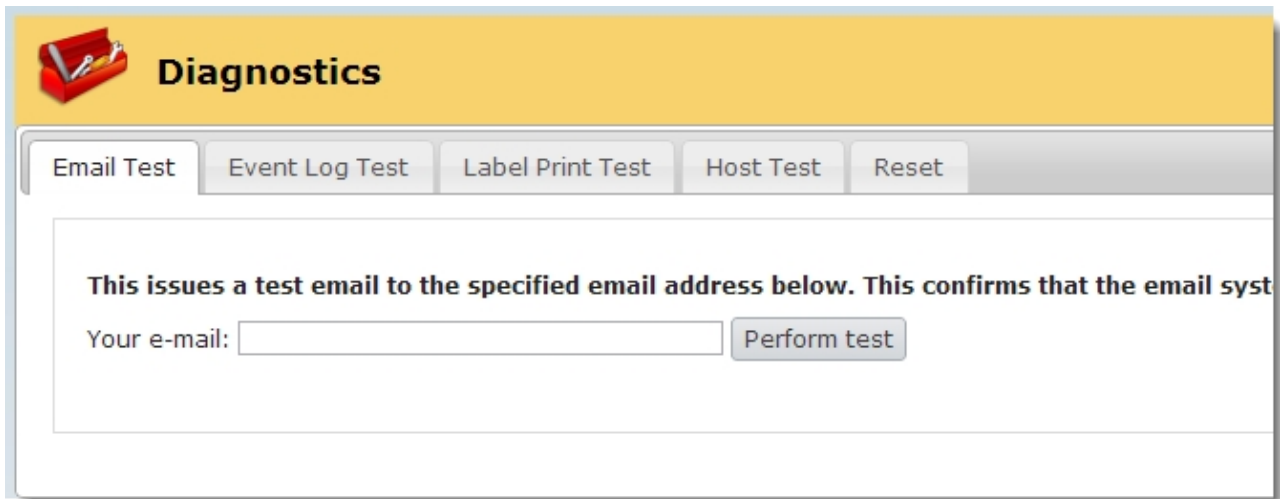
Allows control and enrollment of user accounts:

Allows viewing of data from ALL profiles:

Allows viewing and control of submitted transactions:

Buttons:

Diagnostics



Diagnostics

Email Test Event Log Test Label Print Test Host Test Reset

This issues a test email to the specified email address below. This confirms that the email system is working.

Your e-mail:

This page includes diagnostic tools for Email, host connection, and label printing. Typically a representative from Panatrack will be working with you on any additional diagnostic requirements.

Configure

Companies

On the initial install, any Dynamics GP company databases in the installed domain would be set up here. A company will be defined for each profile set up. A profile is assigned to either a device or user. If adding a new company database, a new profile may need to be set up or an existing profile modified.

Profile Set Up

A profile is assigned various configuration settings including field defaults and what transactions are enabled. The profile identifies the Dynamics GP company database that the profile is set up to complete transactions against. When Panatracker is originally implemented, a profile is set up for each of your organizations company databases. In most cases, this is your live production company database and often a test company database. These profiles are identified by the company database.

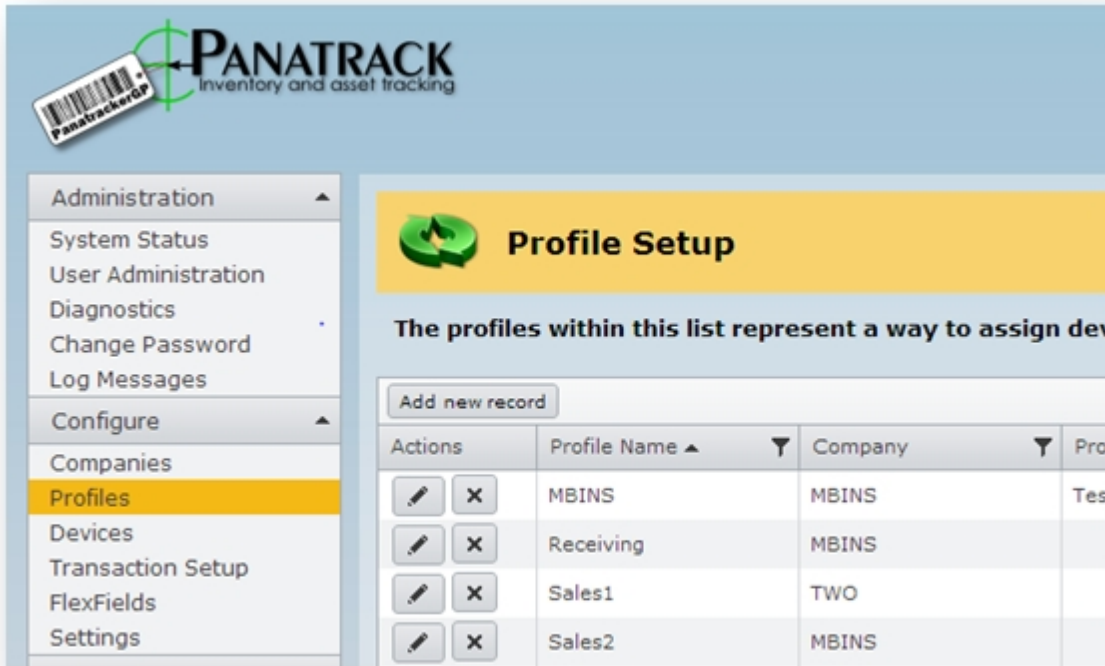
However, you may set up profiles based on other criteria. This may include:

- User or a group of users that will share the same configuration setup based on location.
- User or group of users that will share the same configuration setup based on job.
- User or group of users based on available transactions to access.

More than one user can share a profile. It is recommended to keep the profile setup simple to start with until all of the various profile configurations have been reviewed. As you go through the configuration settings, identify if different users or group of users would be set up different than others. This will assist in defining your profile set up.

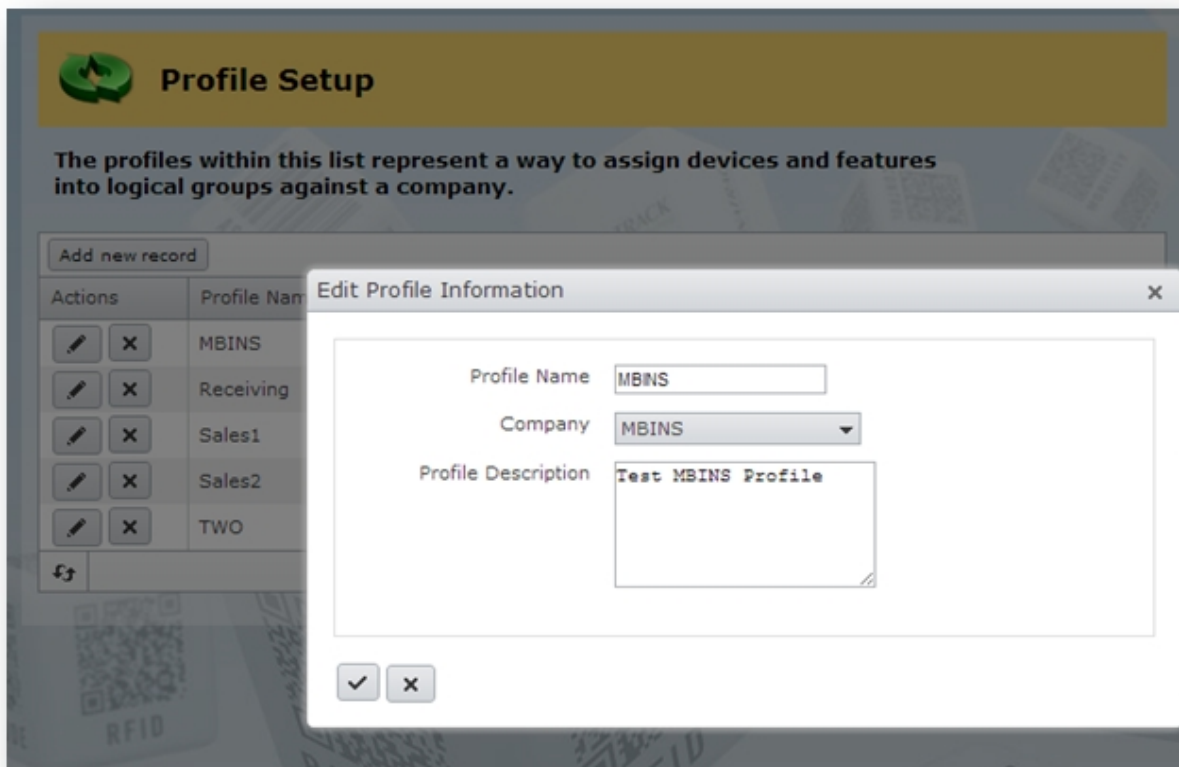
If you are **NOT** using the client device login, profile set up will be based on that assigned to the device. In most cases, your profiles will be dictated based on company database and location

You may set up unlimited profiles.



Typically at install, at least two (2) profiles are set up based on a company. One for the production company and one for the test company. To set up a new profile, simply click Add new record.

Enter the Profile Name and Description. Keep in mind how you will be using profiles to come up with a naming convention that makes sense based on if the profile will be associated with a user, company, site, or any other type of set up.

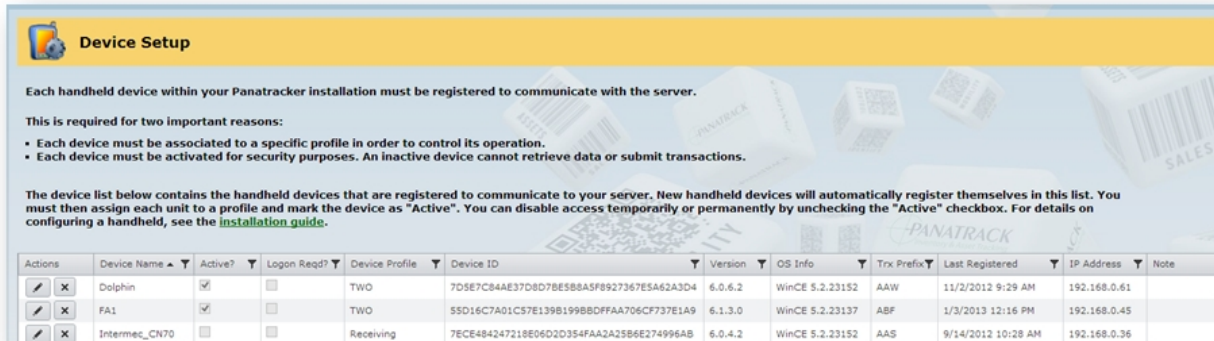


Device Set Up

Panatracker is licensed by server and by client. A client licenses is required for each active device.

When the client software is installed, the device is automatically registered in the Panatracker Transaction Manager under Devices. A default profile must be assigned to the device and the device must be checked as active. Return here to change profile assignment for the device.

Devices can also be flagged to use a login. In this case, the login user profile settings will override the device assigned profile.



Transaction Setup

Transactions are automatically created or updated to Dynamics GP upon transaction [Submit] from the mobile application. To hold a transaction at a "Pending" status in the Panatracker logging database (i.e. does not get submitted automatically to GP), unflag the corresponding "Auto Submit" for the transaction. Submit to GP will be required through the Panatracker transaction log page.

Panatracker will generate transaction numbers in GP separate from the native GP transaction numbering. This is done to differentiate transactions entered from the Panatracker interface from those entered directly in GP. Each transaction type has a prefix assignment. This prefix can be changed under the Transaction Setup tab. The next sequence number can also be adjusted as needed.

Flex Fields

Flex Fields are user definable field. Most transactions have anywhere from 1 – 5 Flex Fields available to set up. Each transaction is listed with the corresponding Flex Fields available. Click the edit icon to change the Field Name and Behavior.

These fields may be set up as Required, Optional, or Disabled. Entry for these fields is bar code scanning or key entry.

More advanced set up is available that would allow set up of a customized look up list. A corresponding Stored Procedure and Validation Stored Procedure would be required to set this up.

Settings

All configuration settings are listed here. These settings are typically set once upon installation and are rarely adjusted.

Settings are listed alphabetical by Setting Name, but can be listed by any column by clicking on it. A description is provided. See the Configuration Setting documentation for additional information on these settings.


Groups are Inventory, LabelPrinting, OrderFulfillment, SystemControl, MobileSales, FixedAssets, ReportPrting, DataIdentifier, & ConnectedSales. These represent the types of transactions or features of Panatracker the settings configure.


All companies or profiles will share the Default Value listed unless the Overridden column indicates 'Yes' for an override. Most settings are Profile related, as identified by the Target Column, indicating which aspect of Panatracker they configure.



As you go through these configuration settings, your profile set up will become more obvious. Identify during your set up if you need a different setting for a user, group of users, or locations.

Settings			
This page controls various settings that affect how transactions are processed. Many settings can be overridden at a profile or company level, allowing you to tailor the system for different users or companies. These settings are typically set once upon installation, and are rarely adjusted. Contact your implementation engineer for assistance.			
Drag a column header and drop it here to group by that column			
Actions	Setting Name ▲	Description	Default Value ▼
Edit	AdjustmentReasonsRequired	Are reasons for performing adjustment transactions required?	False
Edit	Allocate	Manage order picking and submission using allocated quantities?	False
Edit	AllowAdjustmentOverride	Allow adjustments when there is insufficient inventory?	True
Edit	AllowChangeReplenishmentReason	Allow user to select different reason for replenishment transactions?	False
Edit	AllowChangeSite	Can handheld users change their site location? Must have a DefaultSite set up.	True
Edit	AllowChangeToAssetCustodian	Allow change to custodian when updating an asset.	True
Edit	AllowChangeToAssetLocation	Allow change to location when updating an asset.	True
Edit	AllowChangeToAssetPhysicalLocation	Allow change to physical location when updating an asset.	True
Edit	AllowChangeToAssetStructure	Allow change to structure when updating an asset.	True
Edit	AllowChangeToAssetUserFieldGroupA	Allow change to UserField Group A (1-10) when updating an asset.	True

For any setting column, you can apply a filter to find a specific setting more quickly. A filter can be applied on all of the columns except description. To bring up this menu click the  icon in the respective column. Each column allows you to filter two ways depending on the options available.

To edit any of the settings, select the  button and make changes in the new screen.

Allocate

Manage order picking and submission using allocated quantities?

Setting for **ALL COMPANIES** (unless overridden below):

Special setting for **MBINS** company:

Special setting for **TWO** company:

The “default” setting will apply to all profiles or companies unless otherwise specified; therefore set the default to what will be shared by most, if not all. In most cases, options are presented in a drop down list, including true/false. Select fields will require entry such as Batch ID assignment and default Site. In cases such as Default Site, be sure to enter a corresponding valid GP entry.

The [Save] Button will save your changes and bring you back to the settings page.

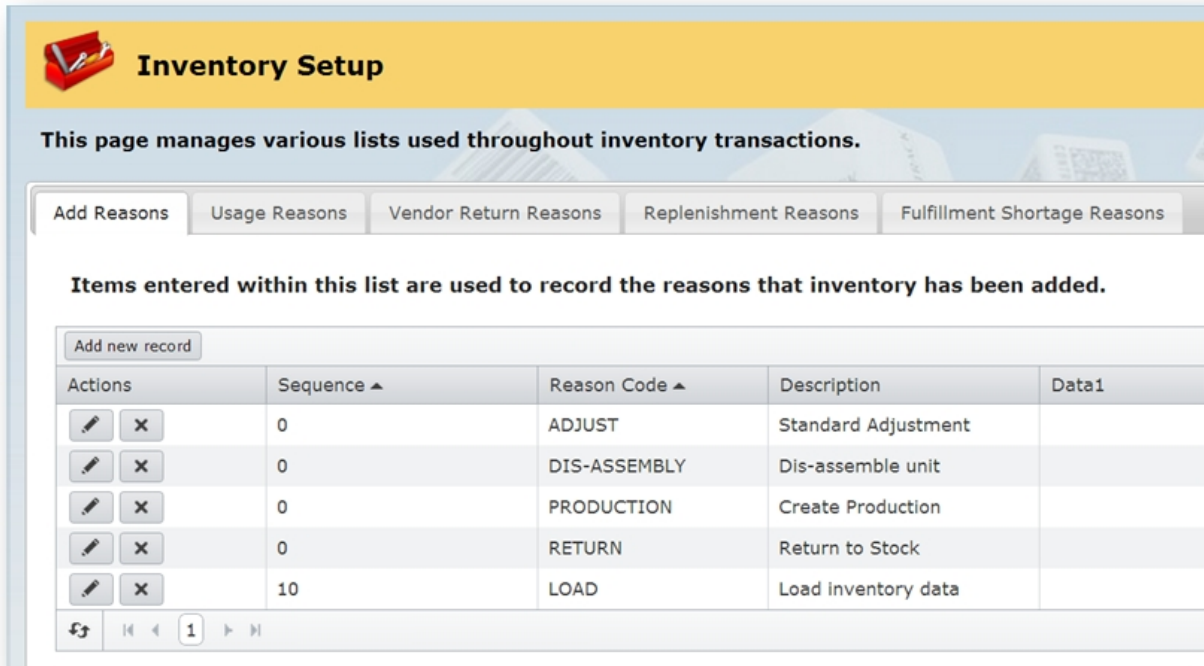
The [Cancel] Button will bring you back to the settings page, but will ignore any changes made.

Inventory Setup

Reason Code set up is located here. You can create a list of Reason Codes for Add Adjustment, Remove (Usage) Adjustment, Vendor Returns, Replenishment, and Fulfillment Shortage. Navigate through the tabs to select the appropriate transaction.

To a new reason code select the add new record and fill in the appropriate information.

The   icons allow you to edit and delete a Reason code. The  icon allows the user to save any changes made to a reason code, while the  is used to cancel any changes.













Inventory Setup

This page manages various lists used throughout inventory transactions.

Add Reasons Usage Reasons Vendor Return Reasons Replenishment Reasons Fulfillment Shortage Reasons

Items entered within this list are used to record the reasons that inventory has been added.

Add new record

Actions	Sequence ▲	Reason Code ▲	Description	Data1
 	0	ADJUST	Standard Adjustment	
 	0	DIS-ASSEMBLY	Dis-assemble unit	
 	0	PRODUCTION	Create Production	
 	0	RETURN	Return to Stock	
 	10	LOAD	Load inventory data	

1

Transaction Logging


Every transaction initiated on the handheld is logged in detail in the Panatracker Transaction Manager. This is a SQL database and additional reporting can easily be set up from the transaction logs directly.

Each transaction has its own page. The transaction log will include the date and time for the transaction and also logs:

- Transaction Code (the corresponding GP transaction number created in GP)
- Status


In Progress	As soon as the transaction data capture begins, the transaction log is initiated. In Progress status remains until the transaction is submitted to GP or discarded (if abandoned)
Succeeded	Successfully created or updated in Dynamics GP. Corresponding Transaction code is assigned.
Discarded	For transactions that have been abandoned, the ability to set as "discarded is provided.
Failed	Failed to be created or updated in GP. Email notifications automatically triggered to set up administrators. Failed transactions can be re-submitted from the web portal.
Pending	If configured not to auto-submit, adds Submit link to manually submit the transaction to Dynamics .


- Profile assignment when transaction was processed.
- Device Name
- User Name (if User Login is being used)
- Header details (PO, Reference fields, etc.)

The  expands to view the transaction line details.

Edit and Discard is available for "in progress" transactions.

Edit, Discard, and Submit is available for "failed" and "pending" transactions.

A filter can be applied on most of the columns. To bring up this menu click the  icon in the respective column. Each column allows you to filter two ways depending on the options available. Click on the Clear Filter Button to remove any filter in that column.



Receiving Transactions

Drag a column header and drop it here to group by that column

Actions	Created ▼	Transaction Code ▼	Status ▼	Profile ▼
▶	12/11/2012 11:08 AM		Discarded	TWO
▶	12/11/2012 10:52 AM		Succeeded	TWO
▶	12/11/2012 10:21 AM		Succeeded	TWO
▶	12/11/2012 8:44 AM		Succeeded	TWO
▶	12/11/2012 8:43 AM		Succeeded	TWO
▶	12/6/2012 10:15 AM		Succeeded	TWO
▶	12/6/2012 8:45 AM		Succeeded	TWO
▶	12/4/2012 12:27 PM		Succeeded	TWO
▶	12/4/2012 11:01 AM		Discarded	TWO

Clear Filter

Show rows with value that

Is equal to ▼

And

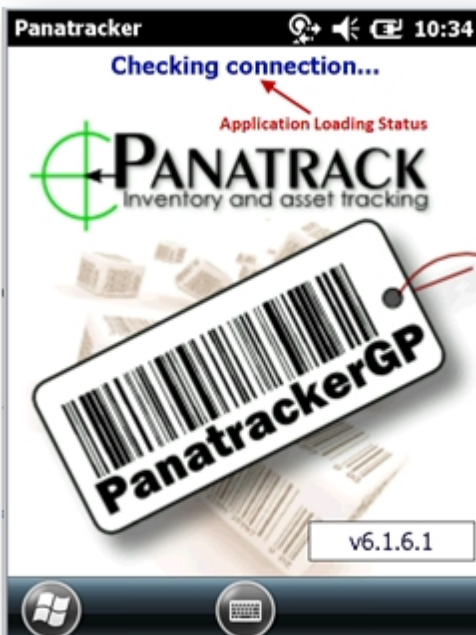
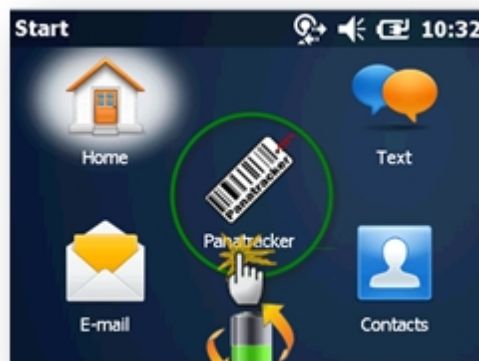
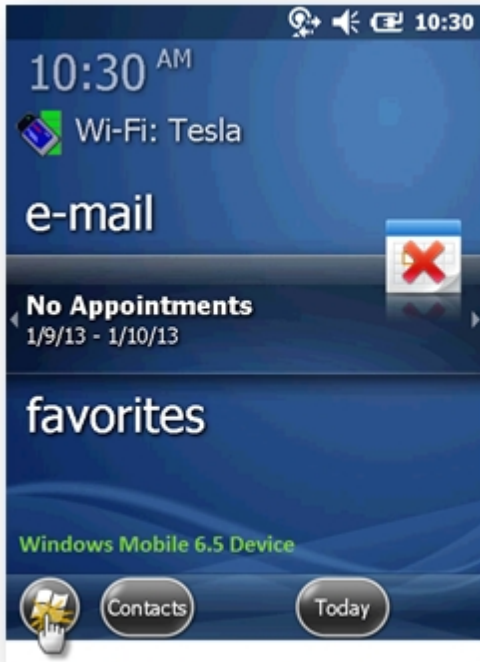
Is equal to ▼

Filter

Navigation

Launch PanatrackerGP

To launch PanatrackerGP Select the application from your Windows Mobile Start Menu.



The Application Splash Screen will appear as PanatrackerGP loads. Here you are presented with the Application Loading Status as well as the current Version Number.

User Login

If User Login is enabled for the handheld, a login screen will be displayed. Enter User Name and Password by either the hardware keypad or popup keypad. These fields also accept a bar code scan.





The assigned profile settings for the user will be accessed and loaded to the handheld.

 *A network connection is required.*

The Main Menu will display. Use the Touch Screen to access the associated transaction menus.

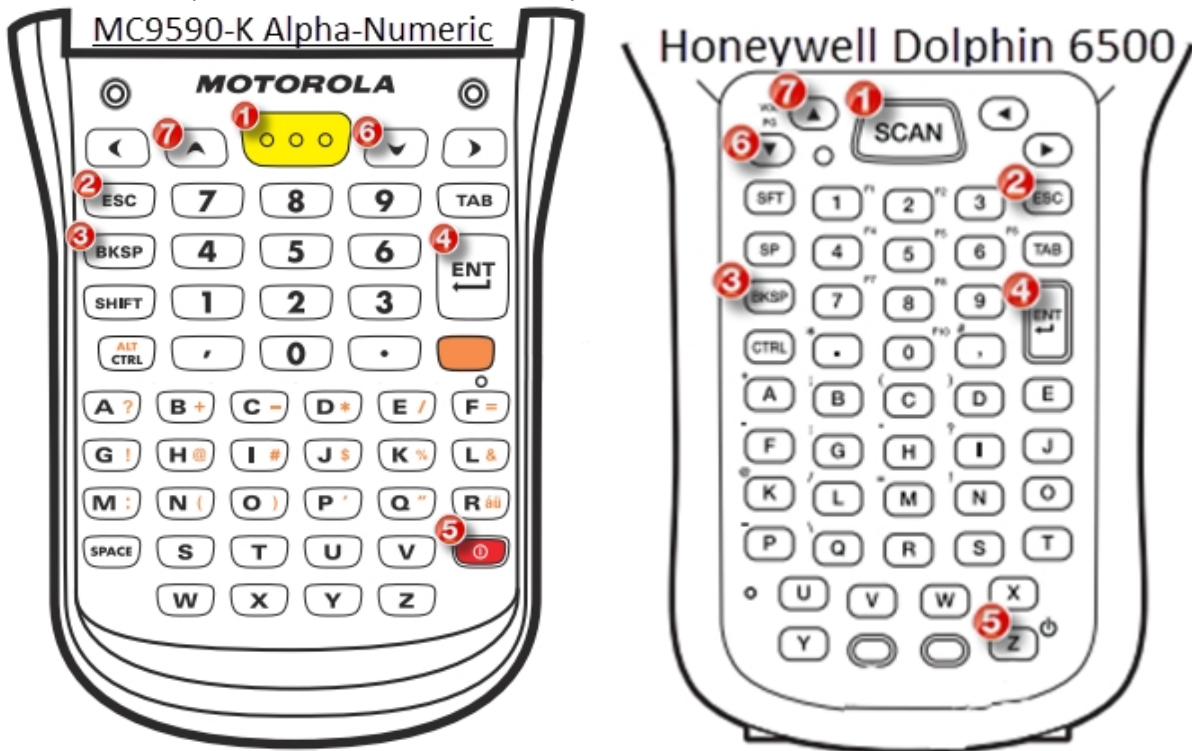
[Exit] to return to the login screen or exit the application (if not using users)

 *It isn't necessary to log out of the Panatracker application completely unless there has been a change to configuration setting or a new version release has been provided.*

 *When not using the handheld, keep it in the charging station. This will ensure that the units stay charged.*

Hardware Buttons

The following keypad configurations are based on the most popular units, please reference documentation provided with the Mobile Computer for details



1. Scanner Button
2. Esc (used to clear a field and move back a field) [Does not appear on Motorola MC55 & MC65 or Honeywell Scanphone 6000 Mobile Computers]
3. Backspace (used to clear a field and move back a field)
4. Enter (to accept key entry or selection from look up or move to next field)
5. Power Button
6. Down Button (to open a look up list)
7. Navigation (to navigate through lists)

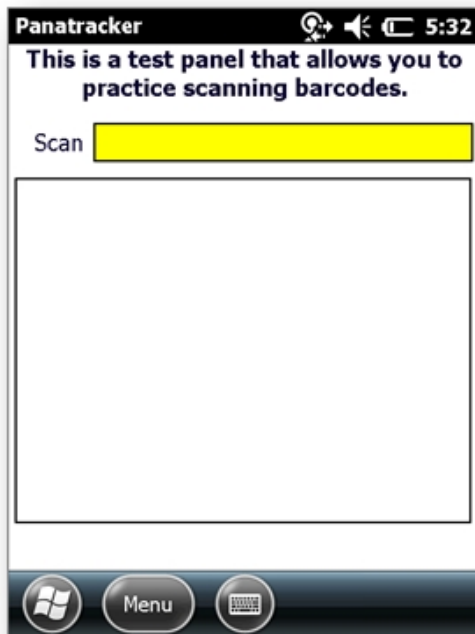
Administration Menu

From the Main Menu, tap Admin.



Then tap on the Test Scan Icon.

This tool will provide new users not familiar with using a barcode scanner, the ability to become familiar with barcode scanning. They can easily master the scanning technique. No data is captured here. Only the information contained within the barcode will be displayed.



To scan simply aim the device and press the yellow button in the center of the keypad; Scanning buttons can often be found on the side of mobile computers as well.

If printing your own barcode labels, this tool can also provide the ability to confirm the barcodes are set up correctly and are scannable.

You may set up bar code labels to test scanning using a bar code label design and printing software package. If you haven't purchased the label printing functionality, you can download a demo version of the software from www.nicelabel.com.

You will only be restricted on the number of labels you can print at a time.

You can create a label scanning test sheet for practicing. You may also use this software to create bar codes to scan for sites, bins, or any other data you may need to enter.

Status



The Admin Menu also allows you to check the status of your PanatrackerGP Application, including Version, Network, device and profile status. This data may be helpful should you ever contact Panatracker Support (Support@panatrack.com)

Transaction Navigation

The Main PanatrackerGP Menu is set up to access transactions based on functionality



The topmost bar of the screen is the Windows Mobile Status Bar. This displays the current application running, wireless connectivity, volume indicator, battery strength and time. Consult your owners manual for additional information regarding the status bar.

At the top of the application is text that identifies which menu screen or transaction you are currently on.

Tap the yellow buttons to access menus or transactions.

Screen menu navigation. If [Exit] is displayed on the lower menu bar, navigation between other screen menus will be available on the screen. When both the menu and screen display Exit, exit will be out of the Panatracker application.

The current Profile and User is displayed on the bottom of the menu screens.

Lower Menu Bar

- The windows button will return you the device start screen.
- [Exit] exits the Panatracker application. [Back] will return to previous menu.
- Center icon accesses popup keyboard. In some cases, it may also indicate CTRL keys are enabled.
- [Synch] is only used for Mobile Inventory, Mobile Sales and Fixed Assets.

Once in a transaction screen, the recommended method of navigation is to use the barcode scanning. No additional key entry is required when scanning is used. The field is populated and validated and focus is automatically set to the next field.

Some fields may have defaults assigned. The default assignment is highlighted so you may simply scan or enter a different option without the need to clear the field.

To accept the default, simply use the [Enter] key on the handheld keypad.



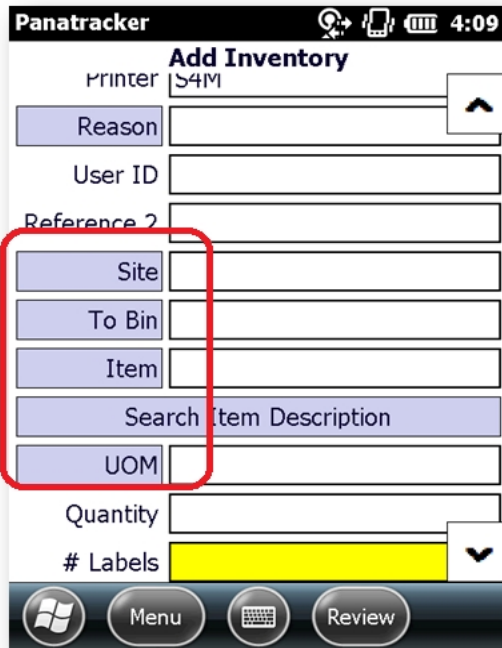
To select an alternate look up option, be sure to use the [Esc] or Bksp] to clear the field first. If the look up list is open, use the [Clear] on the look up window.

By using the [Enter] key to move through the fields, each field will properly be validated.

If skipping a field, USE THE ENTER KEY. This is the recommended option versus tapping into a field further down in the transaction. By using the ENTER KEY, each field will be validated in the appropriate order. There are very few (if any) fields that will be optional for any specific transaction.

The keypad (unit and screen pop-up) can be used to key enter information in any field. Most often this will be limited to a Quantity field.

Fields represented with a button label has an associated look up list available.

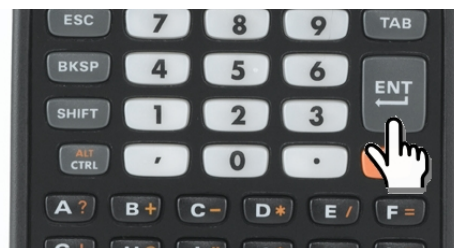
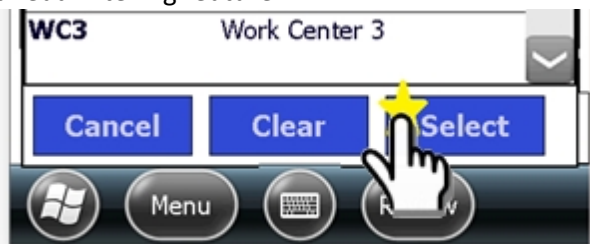


To access the look up list, simply use the DOWN ARROW on the handheld keypad OR tap the button icon (circled in red above).

Look up fields also have type-ahead filtering. Enter the first few characters of the information you are looking for to minimize the look up list. This can be completed either before opening the look up list or after the list is opened or combination of both. When opening the look up list before any entry, you can also use the barcode scanner in the data capture list field.

Once the needed selection is found, either use the Enter key on the handheld to select the highlighted selection or tap the [Select] button on the screen.

[Cancel] returns to the main transaction screen. [Clear] will clear any characters entered for the type-ahead filtering feature.



There is a configuration setting which limits the number of records displayed in the look up list. This can be adjusted if needed. see DataPageSize

Some fields may have defaults assigned. The default assignment is highlighted so you may simply scan or enter a different option without the need to clear the field.

IMPORTANT: To select an alternate option from the look up list, use [Esc] or [Bksp] to clear the default. The [Clear] in the look up list view will also clear the default.

To accept the default, simply use the [Enter] key on the handheld keypad.

By using the [Enter] key to move through the fields, each field will properly be validated.

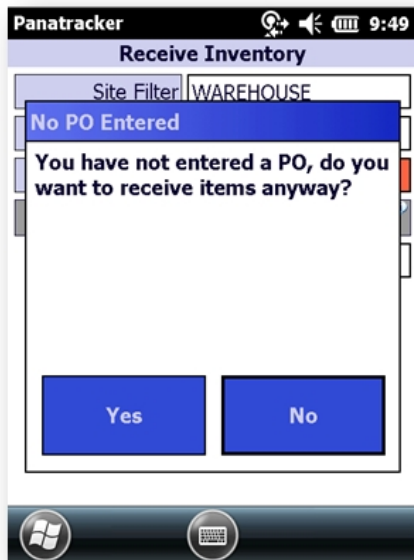


Do Not tap the screen to select the next field

An error will trigger a warning message. This is most often due to a field left blank. These messages will present the user with either a [Yes] / [No] option or a [Continue] button. Any field that has produced an error message will be highlighted in Red until the user selects a field.



If a message requires a [Yes] or [No] selection, the [No] will always be highlighted and therefore selected with the [Enter] key. The user must tap [Yes] to select.

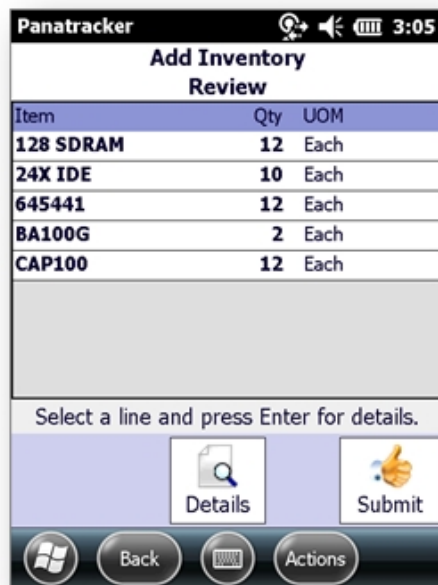
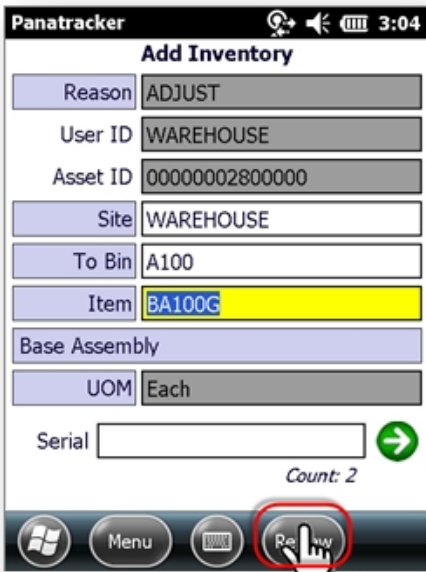


Look ups typically have additional information available. For example, item look ups will display associated quantities (PO Expected to Receive, Item On Hand/Available, etc.)

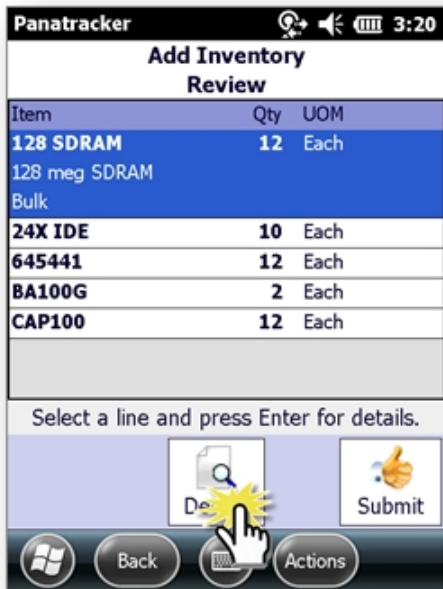


By scanning or selecting the entry and then using the look up (which is now filtered by the selection), you can access the additional information quickly without the need to scroll through a list.

Most transactions have a Review Screen. The user can access the progress of a transaction any time. [Back] to return to the transaction data capture screen.



In some cases the action button allows a user to reduce or expand the screen. The default view is expanded. Selecting this button will hide the row with the [Details] and [Submit] buttons

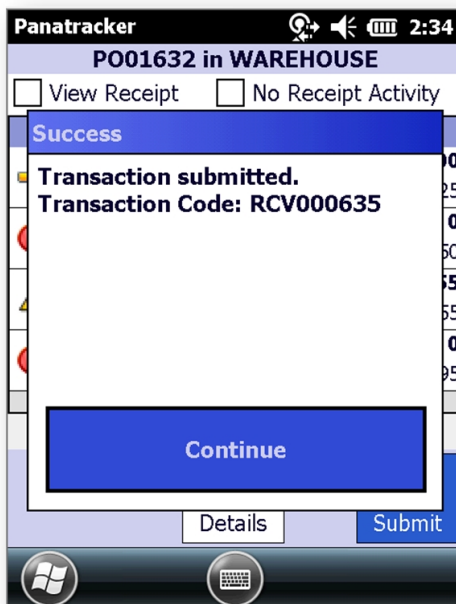


On the Review Screen, tap a line item to expand to show additional information. Tap the [Details] icon to access the data capture details for the selected line item.

For items not tracked by either a lot or serial number, a detail entry is made each time the item was selected and a quantity entered. Serial tracked items will display serial details, and Lot tracked items, lot details.

- [Remove] will remove the selected detail from the transaction completely.
- [Back] to return to the transaction review.

From the Review Screen, the [Submit] button will submit the transaction to Dynamics GP.



A Transaction Succeeded message will display.

Corresponding GP transaction number is displayed as part of the success message

If a Transaction Failed message displays, dismiss the message to start your next transaction.

An email notification will be sent out for any failed transactions. Data captured for the transaction is stored safely in the Panatracker Transaction Log. The transaction can be re-submitted from there.

Item Quantity Tracking

Unit of Measure [UOM] can be configured based on *UseUOMForInventory*, *UseUOMForLots*, *UseUOMForOrderFulfillment*, *UseUOMForReceiving*, & *UseUOMForSotckCount*

Based on these configurations UOM can be set as Read Only or Default.

Data capture is presented based on the item tracking type.


- Bulk = Quantity (An item not tracked by serial or lot number is referred to as "Bulk" for the item tracking option.)
- Serial = Serial Number
- Lot = Lot Number + Lot Quantity with optional Lot Attributes

Item	128 SDRAM
128 meg SDRAM	
Bin	A100
UOM	Each
Quantity	

For Bulk Tracked Items, enter quantity. After submitting by pressing Enter on the keypad the Item Number will reset.

Bulk Item

Item	100XLG
Green Phone	
Bin	A100
UOM	Each
Serial	

Count 3 

For Serial Tracked items, continue to scan serial numbers. Count for serial numbers is displayed below serial number capture field. When complete, tap the green arrow to reset to Item Number.

Serial Tracked Item

Item	CAP100
Capacitor	
Bin	A100
Lot	
Exp Date	
Distributor	
Wire quality	
Receipt date	
UOM	Each
Quantity	

For Lot Tracked Items, enter Lot #, Quantity, and Lot Attributes. After submitting by pressing Enter on the keypad the Item Number will reset. These attributes are Configured by *LotAttributesEnabled*, *LotExpireDateEnabled*, *LotMfgDateEnabled*, *LotQuantityDefault*, *WarnForExpiredLot*, & *WarnForExpiredLotDays*

Lot Tracked Item

Transaction Views

Receive Inventory

(Inventory In)

Submit of the completed transaction will create a Receiving Transaction. When posted, inventory quantities and details will be added to on hand and available in GP, Batch assignment can be set by profile and configured under Settings: BatchCodeForReceiving. If none entered, current date is used. Transaction sequence prefix default is "RCV" and may be changed under Transaction Setup.

Panatracker 4:16

Receive Inventory

Site Filter

Vendor Filter

PO

Vendor Doc#

Menu Next

Panatracker 4:17

012936 in WAREHOUSE

Item

Bin DOCKA

UOM

Quantity

Back Review

Screen 1

Printer

Displayed and required when **LabelPrintingForReceivingEnabled** is set to 'True'

Site Filter

This field is used to filter the PO list and PO items by site. This field may be defaulted based on **DefaultReceivingSite**. If not configured, **DefaultSite** will be used. This field may be read only based on configuration of **AllowChangeSite**. If receiving without a Purchase Order (**AllowReceivingWithoutPO** = "true") Site is required for the transaction.

Vendor Filter

Entry in this field will filter the PO look up list for open POs by Vendor ID selected. This field is optional when receiving against a PO; however, if receiving without a PO, (**AllowReceivingWithoutPO** = "true") then Vendor is required.

PO

Required to receive against open PO. May be left optional is **AllowReceivingWithoutPO** = 'True' When receiving without a purchase order, Site and Vendor will be required. User will be prompted to confirm receiving action without PO.

Vendor Doc#

Setup is FlexField1 under FlexField set up. Entry in this field populates the Vendor Document Number on the Receiving transaction. Behavior is set on FlexField set up. Note: If setting **ReceiptType = ReceiveAndInvoice**, this must be set up as a required field.

Screen 2

Item

Required. Validation is based on PO line status and remaining expected quantity. Warning message returned to user for quantity greater than remaining expected.

Note: **AllowMfgCodeAssignments** = "true" will prompt the user when an item number not set up in GP is entered. Reference Manufacturer Item Number information for more details

Bin

Required when multi-bins are enabled in GP. Default setting is based on **ReceivingBinChoice** setting. Options is Site, Item/Site, or Last Entered.

UOM

Required. Default will be the PO Setup UOM for the item.

Read only unless **UseUOMForReceiving** is set to 'True'. When selecting an alternate UOM, the receive quantity and remaining expected will be updated based on the PO item UOM. For example, if the PO UOM is Each and the user enters a Case which is equivalent to 10 Each, 1 Case will update the quantity received to 10 Each and lower the expected remaining quantity by the same 10 Each.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when **BulkItemAutoSaveAtReceiving** = 'True'

Validation is based on the Remaining Expected Quantity on the purchase order


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots**, **LotMfgDateEnabled**, **LotExpireDateEnabled**, **LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

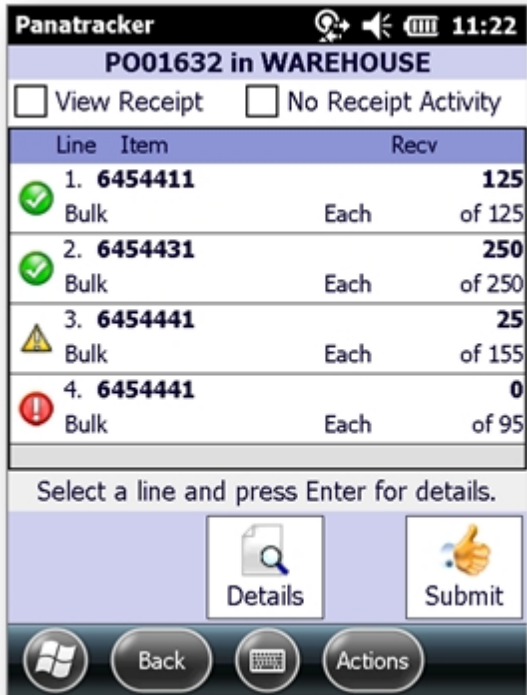
Focus remains on serial field and serials scanned counted until user selects 




Notes

After the first item is entered, focus returns to Item field. Continue to add items as needed for this transaction.

When transaction is complete go to [Review]

Review Screen (3)



	No Pick Activity
	Partial Pick
	Pick Complete

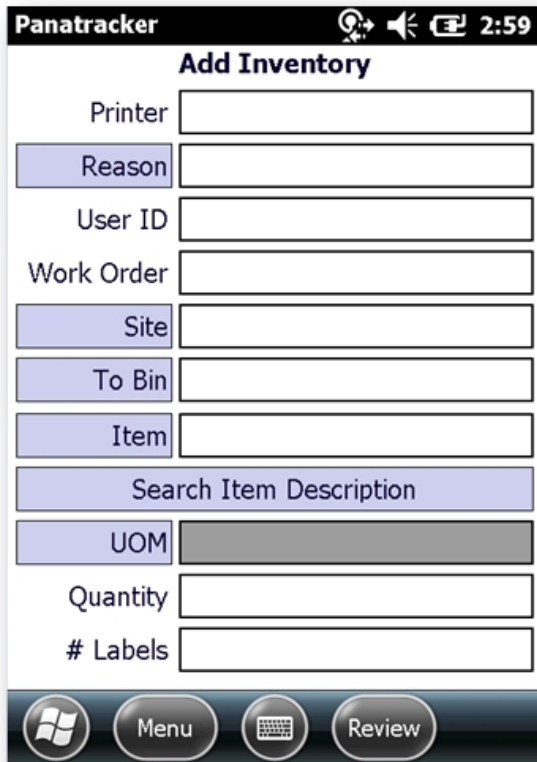
Notes

The check boxes on top allow the user to see only the transaction that have been received [View Receipt] or only the transactions that are not received yet [No Receipt Activity]
 Select the [Submit] button to end the transaction.

Add Inventory

(Inventory In)

Submit of the completed transaction will create an Inventory Transaction. When posted, inventory quantities and details will be added to on hand and available in GP, Batch assignment can be set by profile and configured under Settings: BatchCodeForAdjustments. If none entered, BatchID will be assigned based on the FlexField1 entry. If no Batch ID and FlexField1 is empty, current date is used. Transaction sequence prefix default is "A" and may be changed under Transaction Setup.



Printer

Displayed and required when *LabelPrintingForAddAdjustmentEnabled* is set to 'True'

Item Class

Visible when *UseItemClassCodes* is set to "true" Default setting = "false". Optional filter for the Item look up and validation based on a selected Item Class.

Reason

Set up the list of Reason Codes under *Inventory>>Inventory Setup>>Add Reasons*
May be set as optional or required based on setting *AdjustmentReasonRequired*

FlexField1 & FlexField 2

Displayed based on configuration setup: *Configure>>FlexFields*
Shown in example above as User ID & WorkOrder

Site

Required. This field may be defaulted based on configuration setup: *DefaultSite*
May be set to read-only based on configuration setting *AllowChangeSite*

To Bin

Required when multi-bins is used in GP.

Item

Required. Validation is based on Site selected.

UOM

Required. Default will be Base UOM for the item.

Read only unless configuration setting **UseUOMForInventory** = 'True'

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when **BulkItemAutoSaveAtAdjustment** = 'True'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots, LotMfgDateEnabled, LotExpireDateEnabled, LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Labels

Displayed and required when **LabelPrintingForAddAdjustmentEnabled** = 'True' for bulk and lot tracked items.

Defaults may be presented based on **LabelPrintQuantityDefaultEnabled & LabelPrintQuantityDefault Settings**

Notes

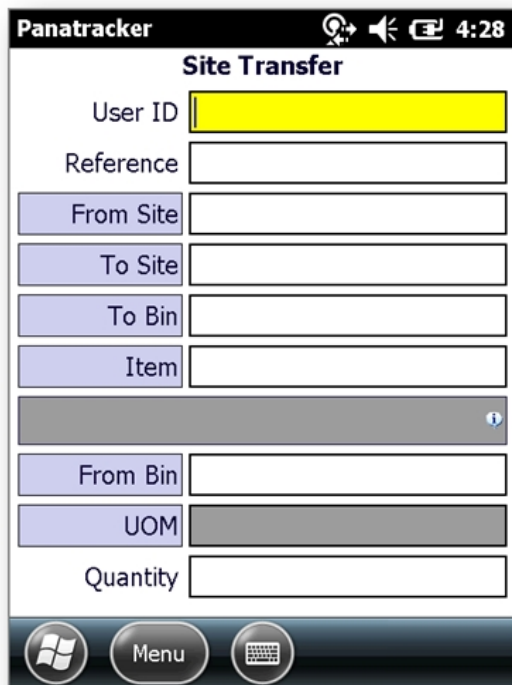
After the first item is entered, focus returns to Item field. Continue to add items as needed for this transaction.

when transaction is complete go to [Review] to complete select [Submit].

Site Transfer

(Inventory Track)

Submit of the completed transaction will create a Transfer Transaction in GP. When posted, inventory quantities and details will be updated based on To and From Sites defined., Batch assignment can be set by profile and configured under Settings: BatchCodeForTransfers. If none entered, current date is used. Transaction sequence prefix default is "XFR" and may be changed under Transaction Setup.



The screenshot shows a mobile application interface for 'Panatracker' with a 'Site Transfer' form. The form contains the following fields: User ID (highlighted in yellow), Reference, From Site, To Site, To Bin, Item, From Bin, UOM, and Quantity. The bottom of the screen features a navigation bar with a Windows logo, a 'Menu' button, and a keyboard icon. The status bar at the top shows the time as 4:28.

Printer

Displayed and required when *LabelPrintingForTransferEnabled* is set to 'True'

Item Class

Visible when *UseItemClassCodes* is set to "true" **Default setting** = "false". Optional filter for the Item look up and validation based on a selected Item Class.

FlexFields 1 & 2

Displayed based on configuration setup: **Configure>>FlexFields**

Shown in example above as User ID & Reference.

From Site

Required. This field may be defaulted based on configuration setup: **DefaultSite**

May be set to read-only based on configuration setting **AllowChangeSite** = False.

Restrict the sites available with configuration **TransferToSiteList**. If none defined and **AllowChangeSite** = True, all sites are available to select.

From Type

Defaults to On Hand. Visible when **AllowTypeTransfer** = True. Is not displayed when setting is "false".

Shipping Method

Visible when configuration setting **CaptureTransferShippingMethod** is set to "true". This is an optional field. It will not be displayed if setting is "false"

To Site

Required. Additional field validation may be added with TransferFromSiteList. If none set, then any site in GP can be selected.

To Bin

Required when multi-bins are used in GP. Validation is based on To Site.

Item

Required. Validation for quantity available is based on the From Site defined.

From Bin

Required when multi-bins are used in GP. Validation for available quantity is based on the From Site and Item selected.

UOM

Required. Default will be Base UOM for the item.

Set as read only unless configuration setting **UseUOMForInventory** = 'True'

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'


Allow use to accept a quantity greater than available (bulk inventory only) by setting **AllowTransferOverride** = 'True'

Lot

Displayed when item tracking is "Lot". Validation is based on the Site and Item selected. Quantity validation is based on the lot selected. Transaction quantity cannot exceed the Lot Quantity Available. The available Lot Quantity can be set to default by setting the **LotQuantityDefault** setting to "true". For the look up list, set the Lot Sort Order under setting **LotSortOrder** with options for **Expire Date, LotCode, Location, LeastQuantity**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Validation is based on serial number scanned as available. From Bin prompt will be disabled for serial tracked items.

Item Bin Move

(Inventory Track)

This transaction moves items from one bin to another bin within the same Site. This transaction is a process in GP and requires no additional processing. Each item will be processed and quantities updated immediately. No Batch set up is required. Logging is maintained with the Panatracker logging database. Internal transaction sequence number prefix is "MIV".

The screenshot shows the 'Item Bin Move' form in the Panatracker application. The form has the following fields and controls:

- Printer: Text input field.
- Site: Text input field.
- Type: Text input field with 'OnHand' entered.
- Item: Text input field.
- Search Item Description: Text input field.
- From Bin: Text input field.
- UOM: Text input field.
- Quantity: Text input field.
- To Bin: Text input field.
- Labels to print: Text input field, highlighted in yellow.
- Submit: Button with a thumbs-up icon.

The bottom navigation bar contains a 'Menu' button and a keyboard icon.

Printer

Displayed and required when **LabelPrintingForTransferEnabled** is set to 'True'

Site

Required. This field may be defaulted based on configuration setup: **DefaultSite**
May be set to read-only based on configuration setting **AllowChangeSite**

Type

Required. Default is OnHand. Standard navigation does not prompt for Type.

Item

Required. Validation is based on the Site.

From Bin

Required. Validation is based on the Site and Item

UOM

Required. Default will be base UOM for the item.
This field is set to read only unless **UseUOMForInventory** is set to 'True'

Quantity

Displayed when item tracking is "bulk".
Key entry required when **AllowScanInQuantityField** = 'False'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots**, **LotMfgDateEnabled**, **LotExpireDateEnabled**, **LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

To Bin

Required. Validation is based on the Site. Additional validation may be defined based on Priority Bin set up in GP. When priority bins are assigned for the item and configuration setting **PrioritizePutAwayBins** = 'true' If user selects a bin not set up as a priority bin, a warning message will be displayed; however alternate bins can be selected.

Labels to Print

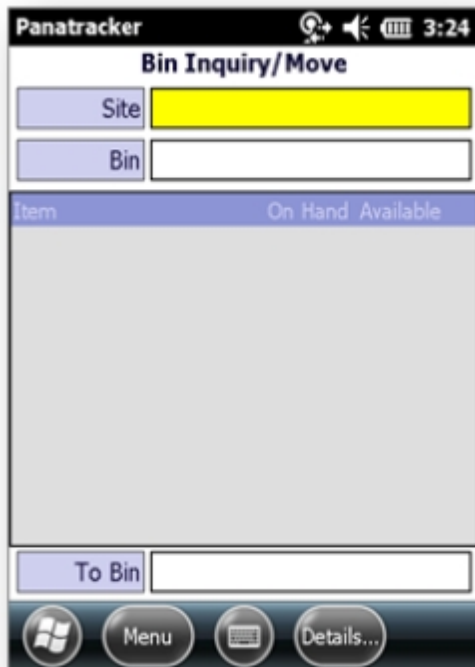
Displayed and required when **LabelPrintingForMoveEnabled** = 'True' for bulk and lot tracked items.

Defaults may be presented based on **LabelPrintQuantityDefaultEnabled** & **LabelPrintQuantityDefault** Settings

Bin Transfer

(Inventory Track)

The Bin Transfer provides the ability to complete an inquiry on all items and quantities within a bin. Option to then “transfer” all items from that bin to another bin under the same site without scanning or selecting each item and item details. ALL items will be moved to the destination bin. On Hand and Available Quantities MUST match for ALL items to complete a transfer transaction.



Site

Required.

Bin

Required. Bin selection retrieves and displays ALL items in that Bin and On Hand and Available quantities.

For Serial or Lot items, tap on the corresponding item line in the view and access the lot or serial details under the [Details] button on the lower menu.

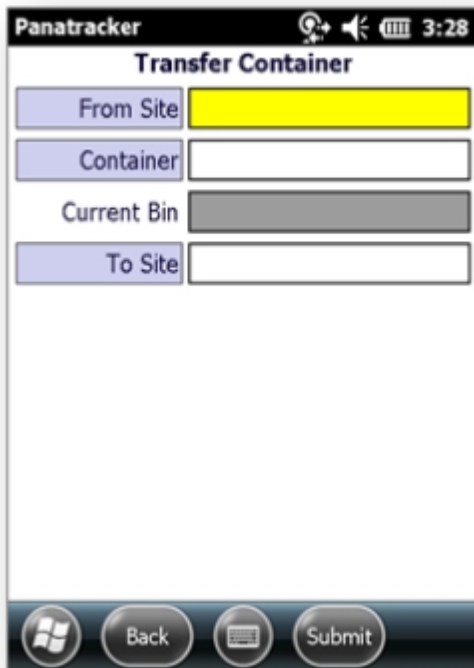
To Bin

To move all items, confirm On Hand and Available quantities match for all items in the selected Bin. Then select the destination bin location. Confirm the move.

Transfer Container

(Inventory Track)

Available within multi-bin environments only. This transaction provides the ability to “group” items under a designated “container” bin. The bins identified to be available for this transaction are set under “**ContainerFilter**” configuration setting. Only bins matching the pattern(s) defined can be used within this transaction. A standard Site Transfer transaction will be created. The transaction sequence prefix is set under TransferContainer with default setting of “TXC”. This transaction shares the same Batch Code Assignment with the standard Site Transfer: **BatchCodeForTransfers**.



The screenshot shows a mobile application interface for 'Panatracker'. The screen is titled 'Transfer Container'. It features four input fields: 'From Site' (highlighted in yellow), 'Container', 'Current Bin' (highlighted in grey), and 'To Site'. At the bottom, there are four buttons: a Windows logo, 'Back', a keyboard icon, and 'Submit'.

Site

Required.

Container

This is the Container Bin. Validated based on the **ContainerFilter** defined.

To Site

The destination Site for the Transfer. The same Container Bin will automatically be created for the destination site if it does not exist.

Note

All items within the Container Bin **MUST** have both On Hand and Available quantities be the same to complete this transaction. Submit will create the Site Transfer in GP for ALL items in the Container Bin.

Count Stock

(Inventory Track)

This transaction uses the Stock Count Schedules set up in GP. This transaction does not have a “submit”. The GP Stock Count Entry is updated in real-time as the counts are captured. Review and processing of variances will be completed in GP.

The screenshot shows the 'Count Stock' screen in the Panatracker application. The interface includes a title bar with the application name and system icons. The main area contains several input fields: 'Stock Count' (highlighted in yellow), 'Site', 'Bin', 'Item', 'UOM', and 'Quantity'. A grey bar with an information icon is located below the 'Item' field. At the bottom, there are 'Menu' and 'Review' buttons.

Stock Count

Required. This field allows the user to select from any stock counts that have been started in GP.

Site

Available Sites depend on the Sites set up on the Stock Count Schedule. Note that the Site look up will indicate the number of items to be counted.

Bin

When using multi-bins in GP, Bins to count are based on the Stock Count Schedule set up. The same as the Site, the number of items in the bin will be identified in the Bin look up.

Item

Items to verify are based on the Stock Count Schedule set up. Once a count has been entered on the item, if it is selected again, the user will be prompted to Add to Count OR be able to Replace the Count. If the item is Lot tracked, all related lots must be verified before the item is marked verified complete. If the item is serial tracked, the user will have the option to enter an item level count first. If it matches to GP, all serials can automatically be validated without individual scans. If the count does not match, all serials must be verified. The user may also select to scan every serial instead of entering a pre-count.

If the item is listed on the Stock Count Schedule, but not found, the user may enter a quantity of 0 to mark the item as verified.

UOM

Required. Default will be Stock Count Schedule UOM for the item.

This field is set to read-only **UseUOMForStockCount**= 'True'. If using an alternate UOM, the count will be

calculated back to the Stock Count UOM. For example, if the Stock Count Schedule is set for Each and the user enters Case, equivalent to 10 Each, 1 Case will be returned as a count of 10 Each.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when BulkItemAutoSaveAtStockCount = 'True'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots**, **LotMfgDateEnabled**, **LotExpireDateEnabled**, **LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Notes

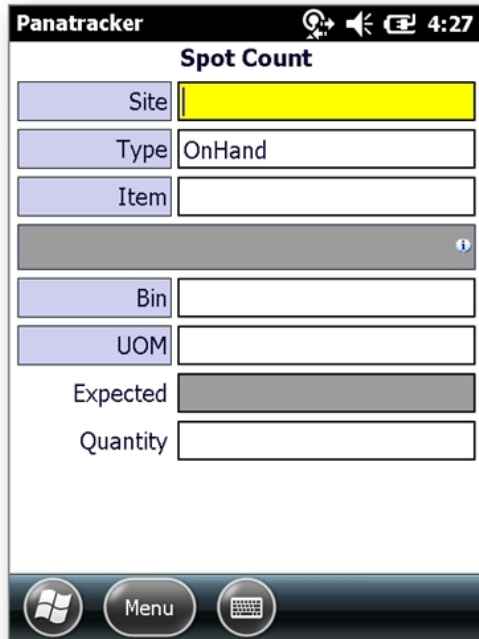
After the first item is entered, focus returns to Item field. Continue to add items as needed for this transaction.

when transaction is complete go to [Review] to complete select [Submit].

Spot Count

(Inventory Track)

This transaction is designed to complete a simple one-step spot count for an item. It was created for multi-bin environments; however, it is not required. The user will be presented with the Expected Quantity retrieved from GP. Entry of the count quantity will then create an Adjustment transaction in GP. BatchCodeForSpotCounts is separate than the standard adjustment transactions. The sequence prefix is also uniquely set up under Transaction Setup. The default is "SPT".



The screenshot shows a mobile application interface for 'Panatracker'. The title bar at the top indicates the time is 4:27. The main form is titled 'Spot Count' and contains several input fields: 'Site' (highlighted in yellow), 'Type' (set to 'OnHand'), 'Item', 'Bin', 'UOM', 'Expected', and 'Quantity'. The 'Expected' field is currently empty and greyed out. At the bottom, there is a navigation bar with a Windows logo, a 'Menu' button, and a keyboard icon.

Site

Required.

Type

Default is set to OnHand

Item

Required. Validation based on the Site selected.

Bin

Required when multi-bins are used in GP. Validated based on site. All bins are available in the event of 0 or negative quantities in GP which require adjustments.

UOM

Required. Default will be base UOM for the item.

Option to select alternate if **UseUOMForInventory** = 'True'

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when **BulkItemAutoSaveAtAdjustment** = 'True'

Notes

Entering a quantity will submit the transaction to GP and return focus to Site.

Remove Inventory

(Inventory Out)

Submit of the completed transaction will create an Inventory Transaction. When posted, inventory quantities and details will be removed from the on hand and available in GP, Batch assignment can be set by profile and configured under Settings: BatchCodeForAdjustments. If none entered, BatchID will be assigned based on the FlexField1 entry. If no Batch ID and FlexField1 is empty, current date is used. Transaction sequence prefix default is R" and may be changed under Transaction Setup.

The screenshot shows the 'Remove Inventory' screen in the Panatracker application. The screen has a black header with the title 'Remove Inventory' and a status bar at the top showing 'Panatracker', signal strength, battery, and time '4:41'. The form contains the following fields: 'Reason' (highlighted in yellow), 'User ID', 'Work Order', 'Site', 'Item', 'Search Item Description' (a button), 'From Bin', 'UOM' (highlighted in grey), and 'Quantity'. A green arrow button is located at the bottom right of the form. The bottom navigation bar has four buttons: 'Windows', 'Menu', 'Keyboard', and 'Review'.

Item Class

Visible when *UseItemClassCodes* is set to "true" Default setting = "false". Optional filter for the Item look up and validation based on a selected Item Class.

Reason

Set up the list of Reason Codes under *Inventory>>Inventory Setup>>Usage Reasons*
May be set as optional or required based on setting *AdjustmentReasonRequired*

FlexFields 1 & 2

Displayed based on configuration setup: *Configure>>FlexFields*
Shown in example above as User ID & WorkOrder

Site

Required. This field may be defaulted based on configuration setup: DefaultSite
May be set to read-only based on configuration setting AllowChangeSite

Item

Required. Validation is based on the Site selected.

From Bin

Required when multi-bins are used in GP Validation is based on the Item and Site selected.

UOM

Required. Default will be Base UOM for the item.

Read only unless configuration setting **UseUOMForInventory** = 'True'

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when **BulkItemAutoSaveAtAdjustment** = 'True'

Lot


Displayed when item tracking is "Lot". Validation is based on the Site and Item selected. Quantity

validation is based on the lot selected. Transaction quantity cannot exceed the Lot Quantity Available.

The available Lot Quantity can be set to default by setting the **LotQuantityDefault** setting to "true". For the look up list, set the Lot Sort Order under setting **LotSortOrder** with options for **Expire Date, LotCode, Location, LeastQuantity**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Validation is based on serial number scanned as available. From Bin prompt will be disabled for serial tracked items.

WennSoft Intergration

JobTrackingAddOn is set to "WennSoftIntegration" additional fields for WennSoft will be available on the Inventory Adjustment Remove transaction. Job or Service details will be populated as part of the adjustment transaction.

Panatracker 2:45

Remove Inventory

Reason [Yellow Box]

FlexField1 []

FlexField2 []

Job/Service Job

Job []

CostCenter []

Site []

Item []

Search Item Description

From Bin []

Menu [] [] [] Review []

Item Transaction Entry

File Edit Tools View Help

Save Delete Post

Document Type: Adjustment [Batch ID](#)

Number: R00000008

Date: 1/15/2013 [Default Site ID](#)

Item Number	U of M	Quantity
Description		
128 SDRAM	Each	(3)
128 meg SDRAM		0.00

Trx Type: Job Cost Service Management [Quantity Available](#)

Job Number: 1005 [General / AIA Billing](#) [Bigs](#)

Batch ID []

If items are assigned to a job or service on a PO line item, the corresponding Receiving transaction will automatically be populated based on the purchase order assignment.

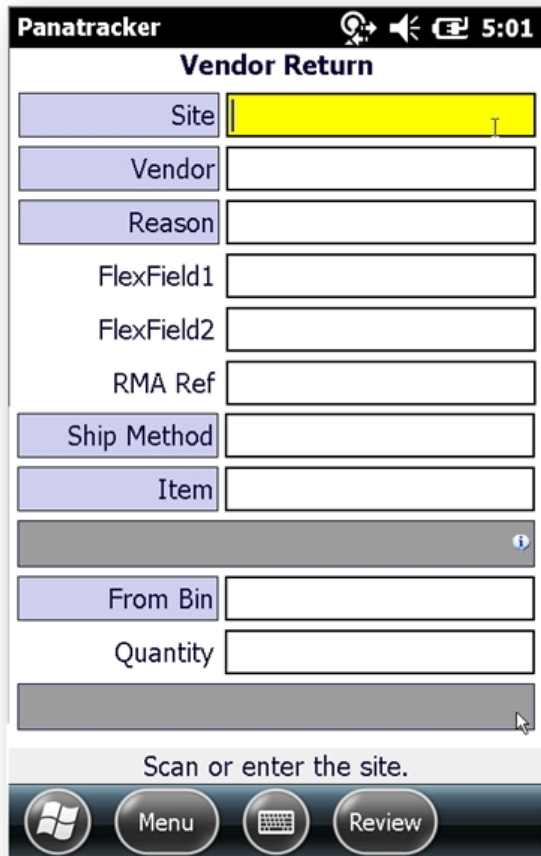
Note: These items are charged directly to the Job or Service and not added to inventory upon posting. It is recommended that these items be labeled accordingly.

Vendor Return

(Inventory Out)

The Vendor Returns transaction will create two separate transactions: Inventory Adjustment Remove and a Payable Return transaction. Both transactions will be assigned the SAME transaction number within GP for audit and clearing. The default transaction sequence prefix is "VRT". Because there are two transactions, an offset account number needs to be defined under Settings

VendorReturnClearingAccount. Both transactions will also be assigned the same Batch ID, defined under setting **BatchCodeForVendorReturns**



The screenshot shows a mobile application interface for a 'Vendor Return' transaction. The title bar at the top reads 'Panatracker' and includes a search icon, a speaker icon, and the time '5:01'. Below the title bar, the form is titled 'Vendor Return'. The form contains several input fields: 'Site' (highlighted in yellow), 'Vendor', 'Reason', 'FlexField1', 'FlexField2', 'RMA Ref', 'Ship Method', 'Item', 'From Bin', and 'Quantity'. A grey bar with a blue information icon is located below the 'Item' field. At the bottom of the screen, there is a navigation bar with four circular icons: a Windows logo, a 'Menu' button, a keyboard icon, and a 'Review' button. Above the navigation bar, the text 'Scan or enter the site.' is displayed.

Site

Required. This field may be defaulted based on configuration setup: **DefaultSiteID**

Vendor

Required. Select from a list of Vendors.

Reason

Set up the list of Reason Codes under **Inventory>>Inventory Setup>>Vendor Return Reasons**

May be set as optional or required based on setting **AdjustmentReasonRequired**. The selected reason code will populate the Description field on the Payables Transaction created.

FlexFields 1 & 2

Displayed based on configuration setup: **Configure>>FlexFields**

RMA Ref

Required. This number must be unique to the transaction and populates the Document Number on the Payable Transaction created.

Ship Method

Required. Populates the Shipping Method field on the Payable Transaction created.

Item

Required. Validated based on Site and Vendor selected.

From Bin

Required when multi-bins are used in GP . Validated based on quantities for the site and item selected.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots**, **LotMfgDateEnabled**, **LotExpireDateEnabled**, **LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Project Transfer

(Inventory Out)

This transaction will create a Project Accounting Transfer transaction in GP. The transaction sequence default is "PJT". Batch Code assignment is shared with the Site Transfer under setting **BatchCodeForTransfers**. This transaction uses a stored procedure to create the transaction in GP set under **TrxProjectTransferStoredProcedure**

Panatracker 4:46

Project Inventory Transfer

FlexField1

FlexField2

Project

Cost Category

Menu Next

Panatracker 4:48

Project: COHOCONST, Ref: :

Item

From Site

From Bin

Quantity

Back Review

Screen 1

FlexField 1&2

Displayed based on configuration setup: **Configure>>FlexFields** FlexField1 will populate the Requested By field on the transaction. FlexField2 will populate the Reference Number field on the transaction.

Project

Required. Validated based on project status

Cost Category

Required. Validated based on Cost Categories set up for the Project related to inventory only.

Screen 2

Item

Required. Validated based on the project set up.

From Site

Required. Validated based on quantities available for the item selected.

From Bin

Required when multi-bins are used in GP. . Validated based on the Item and Site selected.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: ***UseUOMForLots, LotMfgDateEnabled, LotExpireDateEnabled, LotAttributesEnabled***

Serial

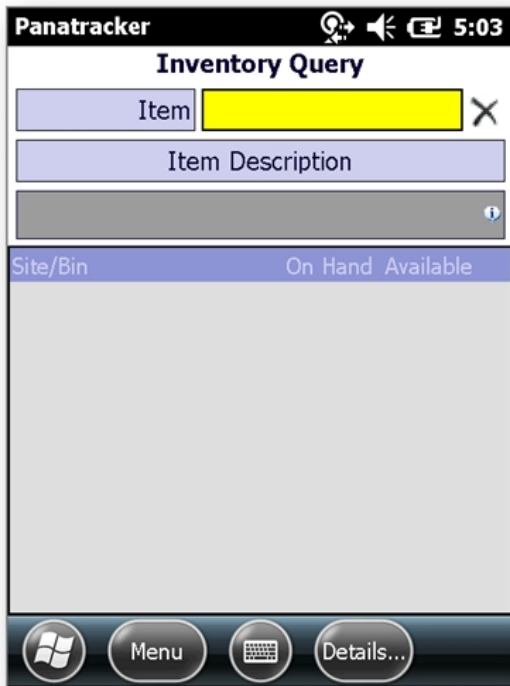
Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Query Inventory

(Tools)

This feature allows the user to check inventory status and location for any item.



Item

Required

Notes

Item information will be displayed below.

The [Details] Button will bring up additional information for item tracked by Serial or Lot

Associate Mfg Item#

(Tools)

This transaction provides a tool to create an association of an alternate item number to a GP Item Number. Reference [Manufacturer Item Number functionality](#) for additional information.

The screenshot shows the Panatracker mobile application interface. At the top, the status bar displays 'Panatracker', signal strength, volume, and the time '5:04'. Below the status bar, the title 'Associate Mfg/GP Item' is centered. The main form area contains three input fields: 'Mfg ItemCode' with a yellow background, 'GP ItemCode' with a white background, and a button labeled 'Search Item Description'. At the bottom of the screen, there is a navigation bar with four icons: a Windows logo, a 'Menu' button, a keyboard icon, and a 'Submit' button.

Assemble

(Mfg.)

This transaction will create the Assembly Transaction in GP using the assigned Batch code under **BatchCodeForAssemblies** setting. The transaction sequence prefix is defaulted as "ASM" and can be modified under the Transaction Setup. This transaction is created using a Stored Procedure identified under the setting "**TrxAssembleStoredProcedure**".

Panatracker 5:05

Assemble Inventory

Printer

FlexField1

To Site

To Bin

Item

Quantity

Next

Panatracker 10:58

Make 1 of FAXX-FG3-0001

Make	Planned:1
<input checked="" type="checkbox"/> FAXX-FG3-0001 Act:1 Desktop Fax System Bulk	
Use	Planned:1
<input checked="" type="checkbox"/> HDWR-FGC-0001 Act:0 Data Card Assembly Serial	
Use	Planned:1
<input checked="" type="checkbox"/> HDWR-PNL-0001 Act:0 Control Panel Bulk	
Use	Planned:8
<input checked="" type="checkbox"/> INST-TWO-0001 Act:0 Installation Bulk	

Pick AutoFill Details

Screen 1

Printer

Displayed and required when **LabelPrintingForAssemblyEnabled** is set to 'True'

FlexField1

Displayed based on configuration setup: **Configure>>FlexFields**

To Site

Required. Define the Site to add the Assembled item quantities, The Assembly item MUST be assigned to the Site.

To Bin

Required when multi-bins are used in GP. Assembly item will be added to this Bin.

Item

Required. Validated based on open BOM Items.

Quantity

Displayed when item tracking is "bulk".


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: **UseUOMForLots, LotMfgDateEnabled, LotExpireDateEnabled, LotAttributesEnabled**

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Screen 2

All component items with the corresponding "use" quantity calculated on the associated BOM set up.

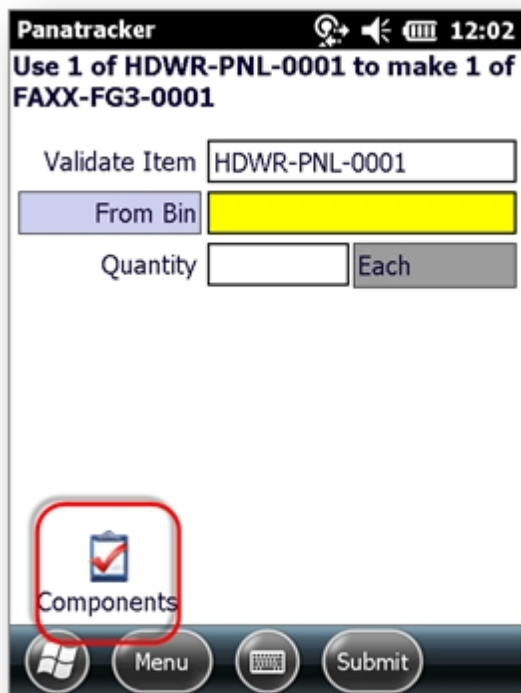
Tap on [AutoFill] to automatically issue all components and calculated quantities based on the "Make" quantity and the BOM set up.

Alternatively, tap on a component line and tap on [Pick] to manually complete the usage recording. If using multi-bins, the default bin set up in GP will be used unless otherwise specified.

If components are serial or lot tracked, use the manual process to issue the selected serial and lot components.

Screen 3

Pick



Validate Item

Here you are validating the component item selected in the previous screen. Scan or tap Enter to populate the field.

From Bin

Required when multi-bins are used in GP. Validation for available quantity is based on the Item selected.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'


Lot

Displayed when item tracking is "Lot".

Other lot tracked settings: ***UseUOMForLots, LotMfgDateEnabled, LotExpireDateEnabled, LotAttributesEnabled***

Serial

Displayed when item tracking is "Serial"

Focus remains on serial field and serials scanned counted until user selects 

Notes

The [Components] button will return the user to the previous screen.

The [Menu] BUtton will prompt the user to exit the transaction without completing.

Fulfill Order

(Orders)

Fulfill Order will update the Quantity Fulfilled on existing sales orders in GP. Order types must be set up to use a separate fulfillment process. Supported types include Order, Fulfillment Order, and Invoice. To pick against an invoice, set AllowPickingFromInvoice to "True"

When the pick is submitted back to GP, the Batch ID is updated based on the pick status. BatchCodeForCompletedOrderFulfill will be used when all items on the order are fulfilled complete. BatchCodeForPartialPicks will be used when there are remaining open line items. To maintain the original Batch ID, be sure to leave this setting blank.

The Panatracker logging will assign a transaction number as well as reference the Order Number as part of the log details. This transaction number is internal for Panatracker logging only. The transaction sequence number default is "ORD".



Screen 1 Order List

Order

Orders or invoices available to pick can be defined based on a Batch Code as an option. Set this under "**BatchCodeListForOrderFulfillment**". Multiple Batch Codes may be set up here. To view only orders with Allocated line items, set the **Allocate setting** to "true". Note: Serial and lot tracked items can still be allocated on the item level without requiring selection of the specific serial and lot details.

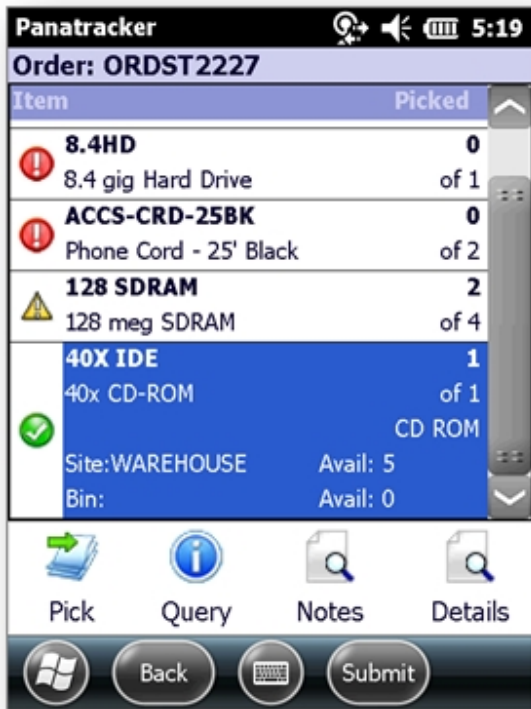
For Advanced Inventory, Directed Transfer orders will be available in this list also.




Filter

On-demand filters are available to apply to the order list. Tap the Filter bar to open the options. The Filter bar will display the applied filters when closed. Tap the X next to the filter to remove it.

Screen 2 Pick List

When the order is selected, the order pick list will be presented. The list will be presented based on the **FulfillmentOrderListSortOrder**. This includes **ItemCode, DefaultBinCode, LineNumber, ItemShortName**. Status icons are displayed representing the current pick status



	No Pick Activity
	Partial Pick
	Pick Complete

As items are picked complete, the list is resorted and those line items are dropped to the bottom of the pick list. If using multi-bins, the [Query] button will access the list of all bins for the selected item in the list and on hand and available quantities.

[Notes] will access any notes set up in the order Comments.

[Details] will access the current pick details including lots and serial details. Only details selected within the current pick transaction can be removed.

[Pick] to access the validation screen for the selected line



Screen 3 Validate Item

Panatracker 11:43

11002.022.001
Energy Enhancer Plus Patch Product

Picked 0 of 1 Each

From Bin ATL-200

Validate Item

UOM Each

Quantity

Pick List Next

Back

From Bin

Required when multi-bins are used in GP. This may be defaulted based on the SOPFulfillmentBin default set. If a default bin is assigned to the item in a non-multi-bin environment, it will also be displayed in read-only format. The Bin lookup includes quantity information for the item.

Validate Item

Required. A scan or key entry is required in this field when RequireScanToPick is set to "true". Best practice is to scan to validate the item pick; however, if the referenced setting is set to "false" the enter key can be used to confirm the item.

UOM

Required. Default will be the Order UOM for the item.

This will be read-only unless UseUOMForOrderFulfillment is set to 'True'. If set to "true" and an alternate UOM is selected, the "pick" quantity will be calculated to the Order UOM. For example, if the order is for 10 Each and the user selects a Case for the UOM which is set up to be equivalent to 10 Each, the pick quantity update will be the 10 Each.

Quantity

Displayed when item tracking is "bulk".

Key entry required when **AllowScanInQuantityField** = 'False'

No prompt and will count item scans when **BulkItemAutoSaveAtOrderFulfillment** = 'True'

Validation for the quantity will be the remaining quantity required. A pick exceeding the order quantity will return an error message unless a **SOPOverPickTolerance** is set. In this case, a warning message will be displayed to the user.

Serial

If the item is serial tracked, available serial numbers must be scanned. Use the [Serial] button to access available serial numbers. The order displayed is based on the **SerialSortOrder** setting with options of **SerialCode, ReceiveDate, Location**

Lot

When the item is lot tracked, the lot number must be scanned or entered. Use the [Lot] button to access All lots available and available quantities. List is displayed based on the setting **LotSortOrder**. Note – this is shared for all lot look ups on all transactions. Options include **ExpireDate, LotCode, Location, LeastQuantity**.

UOM on the lot quantity may be available to select based on setting **UseUOMForLots**. Default will be based on or Order Line Item. Lot quantity may be automatically populated based on setting **LotQuantityDefault**. Enter to accept or enter a new quantity. A warning message may display for expired lots if configured based on **WarnForExpiredLots** and **WarnForExpiredLotDays**

Shipping Box ID

This field will be available when **UseShippingBoxTracking** is set to “true”. Provides the ability to pick items to a specific box that can later to assigned a tracking number. It is recommended to have pre-printed serialized box label printed to use

By tapping the [Next] when the pick is complete for the current item, automatically go to the next item on the pick list.



Next

[Pick List] returns to the pick list screen for review and submit.

Printing

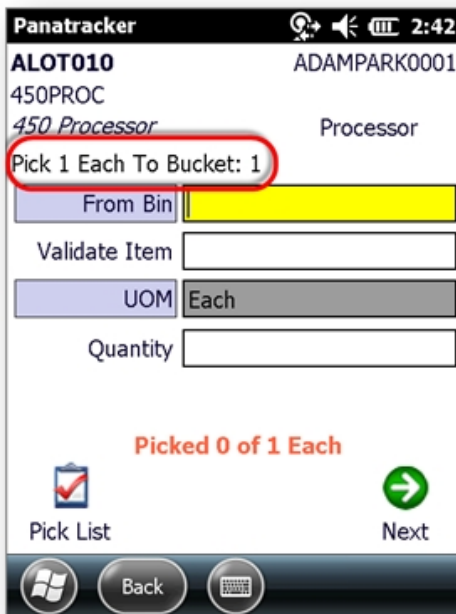
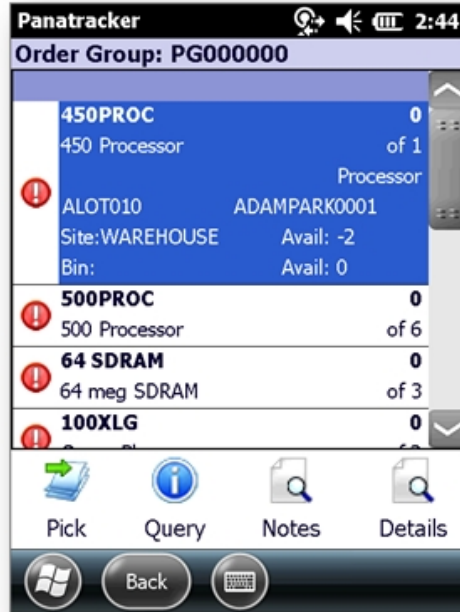
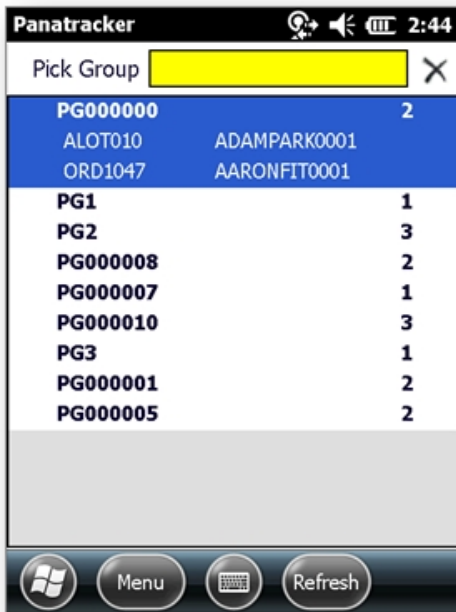
Automated printing of a packing list can be set up. Create a report that can be called outside of GP. Contact Panatrack for assistance with additional set up. Note: This set up is not included under Panatrack's standard install services.

A box label can be printed upon submit of the order fulfillment process. The user would enter the number of labels to print. Note: These labels are not intended to be shipping labels. Configure with **LabelPrintingForOrderFulfillment**

Batch Pick

(Orders)

Multiple orders can be grouped together to present a single pick list under order in the Panatracker portal. A list of orders will be presented. Mark the order to group. The Group ID is assigned to the order under the User Defined Text Field 1. Once an order is grouped, it is no longer available to pick from the Order Fulfillment transaction. Note: The Group assignment can be removed on the order in GP if needed.



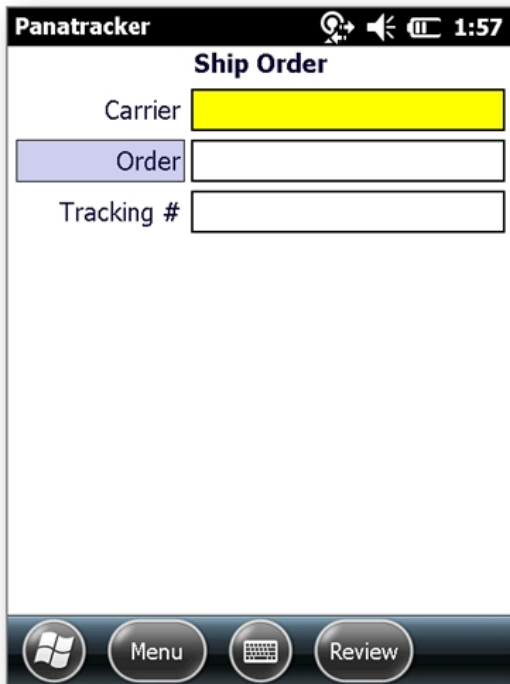
Each order in the group will be identified to pick to a "Bucket" for sorting. Each item for each order will be displayed and validated independently to provide the ability to manage inventory shortage situations. Items will be grouped together in the order pick list. Follow the same process as the standard Order Fulfillment transaction.

Ship Order

(Orders)

This transaction associates tracking numbers to orders and Shipping Box ID. Option for signature capture for pick ups or delivery drivers. The option to update the Order with a new Batch ID is available with submit based on **BatchCodeForShipOrder** configuration setting.

The Panatracker logging will assign a transaction number as well as reference the Order Number as part of the log details. This transaction number is internal for Panatracker logging only. The transaction sequence number default is "SHP".



The screenshot displays the 'Ship Order' interface on a mobile device. At the top, the status bar shows 'Panatracker' and the time '1:57'. Below the title 'Ship Order', there are three input fields: 'Carrier' (highlighted in yellow), 'Order' (highlighted in blue), and 'Tracking #' (empty). The bottom navigation bar contains four buttons: 'Menu', 'Keyboard', and 'Review'.

Carrier

Optional – Enter the Carrier name.

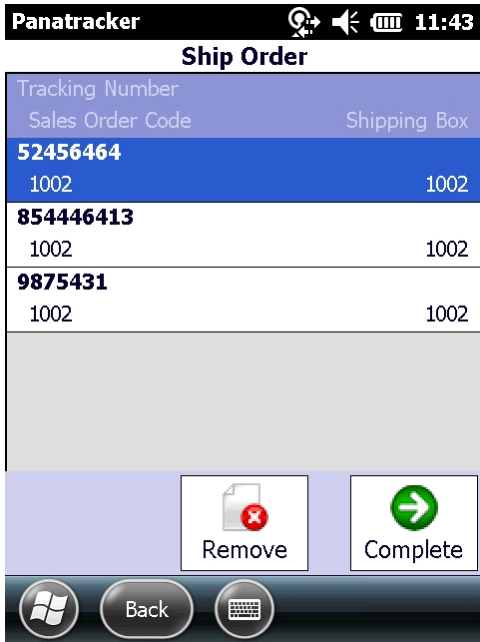
Order | Shipping Box

If the Shipping Box is used, scan or select the Shipping Box to associate the Tracking Number. If Shipping Box feature is not used, select the order.

Tracking

Scan or enter a tracking number. The Tracking Numbers on the GP sales orders under User-Defined Fields will be populated.

Continue adding tracking numbers to this transaction



Tap [Review] to view order/shipping box and tracking assignments for the Carrier

[Complete]

Displays number of boxes calculated by the tracking numbers entered.

Optional signature capture.



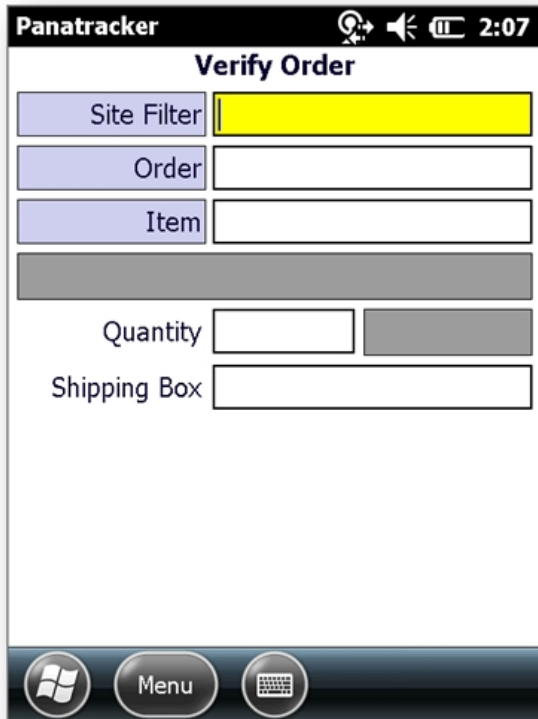
[Submit] will update the Batch ID on the corresponding sales orders and assign the tracking number under the User Defined field à Tracking Numbers on the sales orders.

Verify Order

(Orders)

This transaction provides the ability to verify items on a FULLY fulfilled sales order. Orders to be verified may be defined based on a Batch Code. Set this up under **BatchCodeListForOrderVerify**. The option to verify or “pack” to a shipping box can be set by setting the UseShippingBoxForVerify to “true”.

The Panatracker logging will assign a transaction number as well as reference the Order Number as part of the log details. This transaction number is internal for Panatracker logging only. The transaction sequence number default is “VER”.



The screenshot shows the 'Verify Order' screen in the Panatracker application. The title bar at the top reads 'Panatracker' and 'Verify Order'. Below the title bar, there are several input fields: 'Site Filter' (highlighted in yellow), 'Order', 'Item', 'Quantity', and 'Shipping Box'. The 'Quantity' field is split into two parts. At the bottom of the screen, there is a navigation bar with a 'Menu' button and a keyboard icon.

Site Filter

This is a filter for the Order look up list and not required.

Order

Only fully picked orders can be processed. Additional validation based on the **BatchCodeListForOrderVerify** configuration setting.

Item

Scan or confirm items. Validation is based items on the order.

Quantity

Displayed when item tracking is "bulk" Validation based on order quantity and remaining quantity to confirm.

Serial

If item is serial tracked, validate serial numbers. Validation is based on serial numbers assigned to the order.

Lot

If item is lot tracked, validate lot numbers. Validation is based on lot numbers assigned to the order.

Shipping Box

Configured with UseShippingBoxForVerify. Required when **UseShippingBoxTracking** = 'True'
[Review] to access items that have been verified and to Submit the verification to GP. ALL items must be verified complete to process. Exit an in-progress transaction and tap the [Yes] to save the verified progress and keep the transaction open in the Panatracker logging portal. The balance of the verify can then be resumed later.

Note

To close the open transaction in the portal to start the verify completely over after a save, go the to Verify Order portal page and discard the transaction.

Submit of the completed verify will update the Batch ID assignment on the Order in GP based on the setting **BatchCodeForVerifiedOrders**. *To keep the original Batch Code, be sure this setting is left empty.*

Sales

(Orders)

The sale transactions provides the ability to create a new sales transaction and to edit or add to an existing sales order (designed to support environments that use sales orders as a work order). Customer sale returns can also be created from this transaction interface. These transactions are available using a continuous network connection. Contact Panatrack to discuss the Field Sales functionality for supporting data capture outside of a continuous network connection.

Screen 1

Panatracker 4:27

Site

Customer ID

Search Customer Name

Ship To ID

Bill To ID

Order

If no order is selected, then a new order will be created based on the selection below.

Sale Return

Menu

Site

Required when creating a new sales transaction. Provides a filter for the Order look up for editing an existing transaction. Default may be set: ConnectedSAlesDefaultSiteIDForSale

Customer ID

Required when creating a new sales transaction. Option to search by Customer Name by tapping the Search Customer Name field. Enter the part of the customer name and then use the look up button to access the list.

Ship To ID

Required when creating a new transaction. Field will default based on the Customer Card setup. To select an alternate Ship To, [esc] or [bksp] to clear the default and select an alternate option.

Bill To ID

Required when creating a new transaction. Field will default based on the Customer Card setup. To select an alternate Ship To, [esc] or [bksp] to clear the default and select an alternate option.



Sale

Tap Sale initiate a new sales order or invoice for the customer.



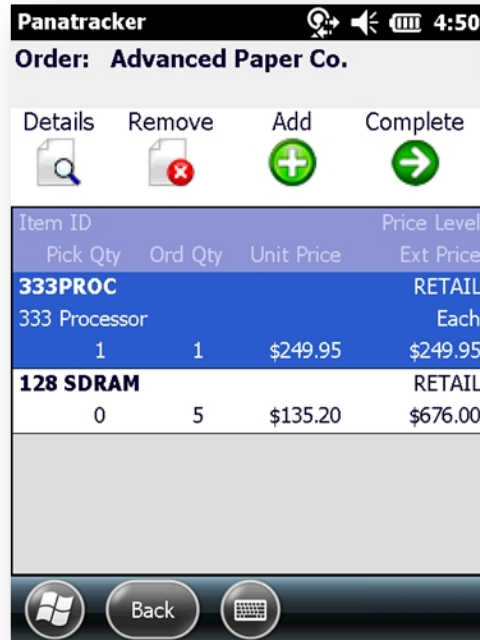
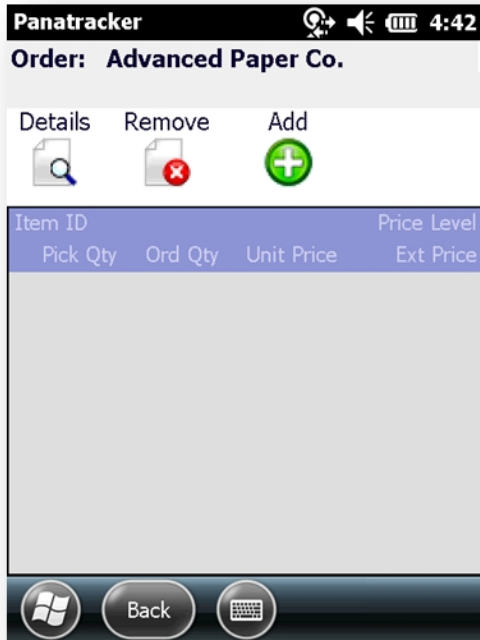
Return

Tap Return to initiate a sales return transaction for the customer.

Order

Scan, enter or select an existing order. Site and Customer fields will provide a filter for the look up list. Orders can be restricted based on ConnectedSalesOrderDocumentIDFilterForOrderEdits
Use the [Enter] key to select the order or if order is scanned, it will open the order details screen.

Screen 2: New Order



Tap Add to begin capturing items for the order. Return to this screen to review the order lines. This transaction may be a direct sale or to create an order that will be fulfilled later. Tap on a line and tap on [Remove] to remove the line from the order.

Screen 3 – Add Items

The screenshot shows the Panatracker mobile application interface. At the top, the status bar displays 'Panatracker' and the time '4:47'. Below the status bar, there is a form with the following fields:

- Item: 128 SDRAM
- 128 meq SDRAM
- Price Level: RETAIL
- UOM: Each
- Unit Price: \$135.20
- Quantity: 5
- From Bin: (highlighted in yellow)
- Fulfilled Qty: (empty)

At the bottom of the form, there is a status bar that reads 'Picked: 0 Remaining: 5'. Below this, there are two buttons: 'Review' (with a document icon) and 'Next' (with a right arrow icon). At the very bottom, there is a Windows-style taskbar with a 'Review' button and a keyboard icon.

Item

Validated based on the Site selected at the start of the transaction. Miscellaneous, Flat Fee, and Service item types may be selected.

Price Level

Defaulted based on configuration set up. This may be set to read only based on configuration setup. ConnectedSalesDefaultPriceLevelAssignment, ConnectedSalesAllowPriceLevelFrom (Customer or System Default), ConnectedSalesAllowPriceLevelChange

UOM

Default based on Price Level selected. If multiple UOM exist for the Price Level, default will be based on item Base UOM setting.

Unit Price

Populated based on the Item, Price Level, and UOM selected. This may be set to read-only.

Quantity

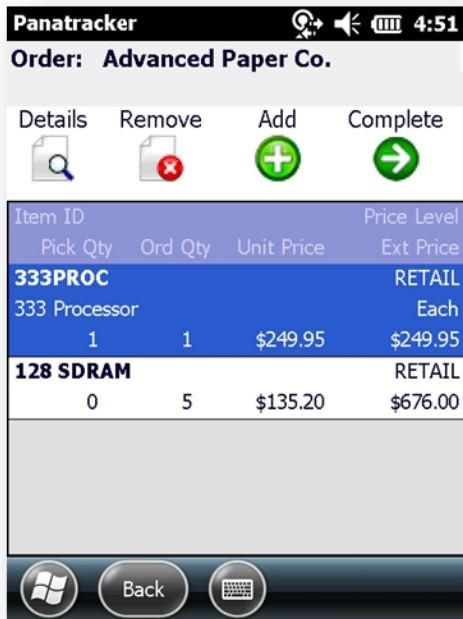
Enter quantity for the order.

From Bin

Required if picking or fulfilling the item for the order at the same time. A "pick" status box will be displayed. If only creating an order, then tap à Next to enter next item.

Fulfilled Qty

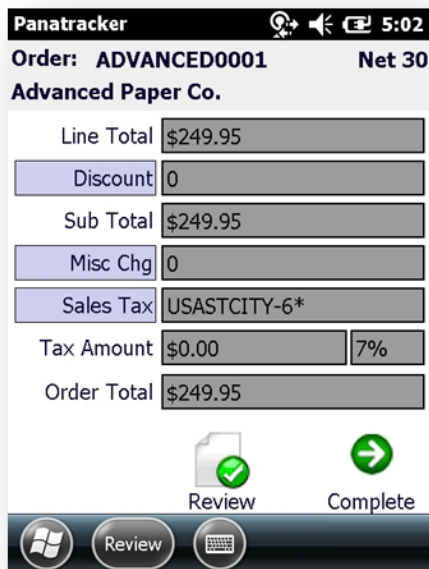
Quantity being picked or fulfilled. May be left empty if no items are being fulfilled at this point. ConnectedSalesDefaultFulfillQuantity when set to 'true' will automatically populate the Fulfilled Qty from Order Quantity.



Details

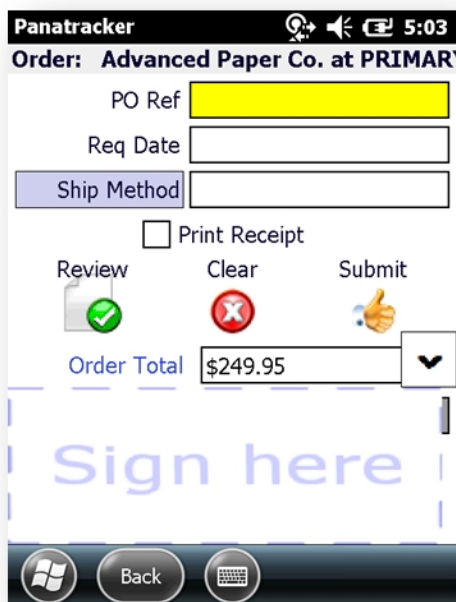
Tap a line in the review screen and then tap details to view the pick details for that line. Tap on the line edit icon to edit price or quantity.

Tap on the fulfillment line detail and tap on the Edit on the lower menu bar to edit line fulfillment details.



Screen 4

Complete Order: Order Summary: Read Only.



Screen 5 Complete & Submit

PO Ref

Optional field.

Enter the customer PO or reference. Populates the PO field on the sales order.

Req Date

Optional Requested Ship Date. Date entry is based on date configuration which as a default is set to accept entry as 010113 which will be 01/01/2013.

Ship Method

Optional. Validated based on ship methods set up in GP.

Signature Capture

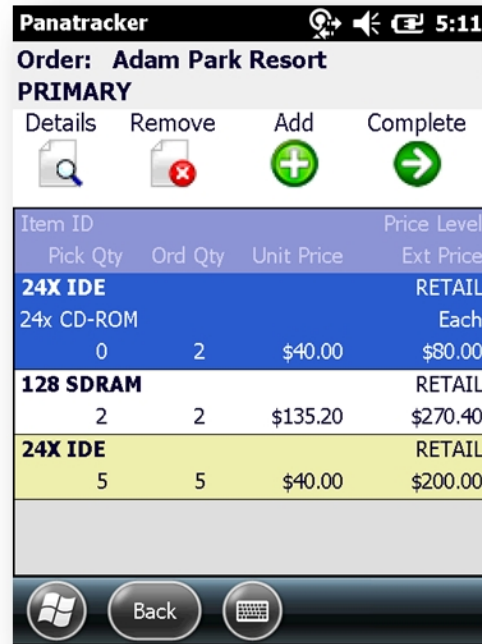
Optional signature capture. This is stored in the Panatracker transaction manager database.

[Review] will return to the item list.

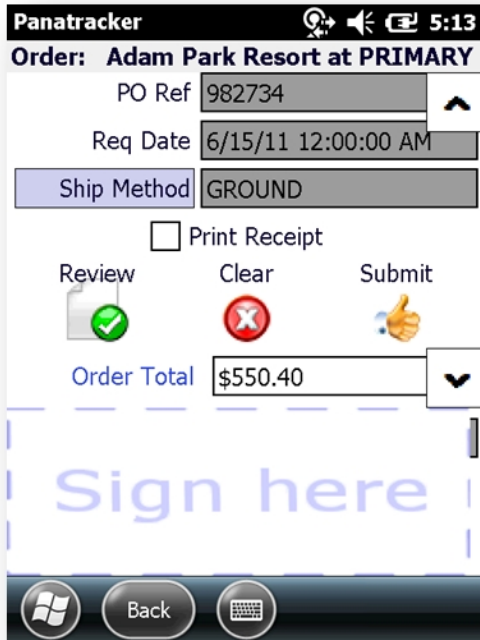
[Clear] will clear the signature capture field.

[Submit] will commit the transaction and create the order in GP.

Edit Existing Order



Previously submitted lines will be displayed in yellow. Depending on configuration setting, edit may not be allowed to previously submitted lines. New line items added will be displayed to the top of the order list. Settings include: ConnectedSalesAllowAddToExistingTransaction; Connected SalesAllowEditToExistingOrderLines; Follow the same instructions for editing details, adding or removing lines as a new order.



Review and submit screen will show PO, Req Date, and Ship Method as read only based on previously entered data for that order. No edits can be made to these fields.

Submit will update the order or invoice.
 Transaction logging is under Orders -- Sales

Directed Transfer

Directed Transfer functionality is available to set up under the Panatracker Advanced Inventory solution. Additional table are added to manage and support these transactions.

Panatrack has created a Directed Transfer infrastructure. This infrastructure supports the ability to create an internal transfer directive. This directive would be submitted to the Panatracker tables:

- PanatrackerGPX_DirectedTransferOrder (order header details)
- PanatrackerGPX_DirectedTransferOrderUnits (item details)

The following provides a guideline to populating these tables

PanatrackerGPX_DirectedTransferOrder		
Field Name	Description	Requirements
TransOrderCode	Represents the internal order number for the transaction. This is the order number that will be displayed on the Order list on the Order Fulfill transaction in the Panatracker mobile client interface	This is a required field and must be a unique number. This is a primary key which will also relate to the corresponding item lines on the DirectedTransferOrderUnits table.
SourceLocCode	This is the Dynamics GP Site that the inventory will be picked "FROM". If using multi-bins, the default Sales Order Fulfillment bin assigned to the item will be the bin default presented. If not default bin is set up, the user will select the bin as part of the transaction data capture.	This is a required field. The Site entered must be a valid Site set up in Dynamics GP. If using multi-bins, the Sales Order Fulfillment bin must be set up.
ViaLocCode	This is the Dynamics GP Site identified as the in-transit site. When using the in-transit functionality, the destination receiving site will use the PO receiving transaction to create the in-transit transfer 'from' the ViaLocSite to the DestinationLocSite. If using multi-bins, the default Purchase Receipt Bin will be assigned.	Via Site is not required. If it is not provided, the Transfer will be created directly for the Destination Site set up. The ViaLocCode is required for a two-step transfer. The Site entered must be a valid Site set up in Dynamics GP. The Purchase Receipt Bin must be set up in GP.
DestinationLocCode	This is the Dynamics GP Site that the inventory is to be transferred 'TO' (i.e. the requesting location). If using multi-bins, the default bin will be the Purchase Receipts default bin set up on the item in Dynamics GP. If using the ViaLocCode, the GP Site set up for the ViaLocCode populates for the 'FROM'	This is a required field. The Site entered must be a valid Site set up in Dynamics GP. If using multi-bin, the Purchase Receipt bin must be set up.
<i>AuditReqd</i>	<i>For future functionality</i>	
DocDate	This is the order date.	Valid date must be entered.
ShipMethodCode	This identifies the shipping method for the transfer. It is logged as part of the Panatracker logging database.	This field is optional.
FulfilledDate	Updated when the order is submitted and the transfer is created from the Panatracker mobile client.	Updated by Panatracker
DueDate	This represents the requested delivery date for the inventory to the destination location. The order list in the Panatracker Order Fulfill	Valid date must be entered.

	interface is sorted based on requested dates	
<i>FlexFields 1-5</i>	<i>For future functionality</i>	
OrderGroupCode	For support to Batch Picking. When orders are placed in a Group Code, those orders would then be grouped together in a single pick list for picking under the Batch Pick transaction. Orders assigned to a group are not available in the standard Order Fulfill screen.	This field is optional.
PanatrackerGPX_DirectedTransferOrder		
TransOrderCode	Represents the internal order number for the transaction. This is the order number that will be displayed on the Order list on the Order Fulfill transaction in the Panatracker mobile client interface	This is a required field and must be a unique number. This is a primary key and must correspond the TransOrderCode on the DirectedTransOrder (header)
LineItemSeq	Item line item sequence.	Required - Corresponds to ItemCode
ItemCode	This is the GP Item Number for the items requested to be transferred.	Required - minimum 1
ItemDescription	This is the Item Description and should correlate the GP Item Card for the item number entered in ItemCode	Corresponds to ItemCode
QtyOrder	This is the requested quantity to transfer.	Required
QtyFulfill	For a new order submit, this should be quantity 0. This is updated with the submit to create the corresponding transfer from the Order Pick screen in the Panatracker interface.	= 0. Updated by Panatracker
UnitOfMeasure	This is the Unit of Measure corresponding the Item to be picked. Alternate UOM may be entered; however, it must be a valid UOM based on the GP Unit of Measure Schedule assigned to the item. The transfer will be created based on the UOM entered	Required

The Panatracker Order Fulfillment transaction is used to “pick” the transfer order. Refer to [Order Fulfillment transaction](#) for details on this transaction.

Once the order is picked and submitted, instead of updating a Sales Order, a Site Transfer transaction is created in GP based on the transaction setup. The Panatracker table will be updated based on quantity picked. Line items where quantity picked = quantity to transfer will no longer be available.

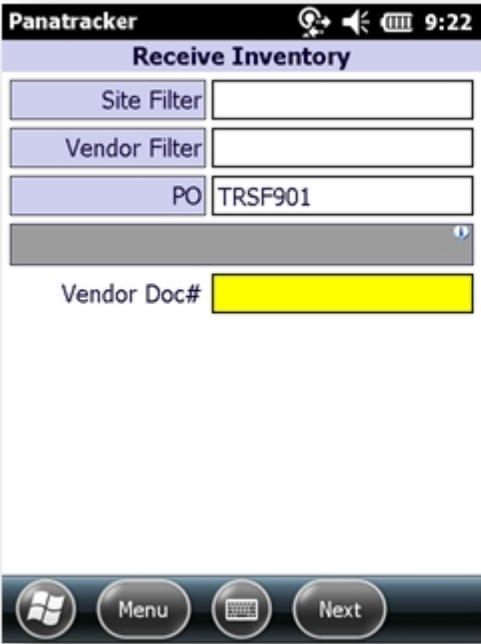
If using a “Via” Site, a pending Inbound Transfer transaction will be created in the corresponding Panatracker tables. If the [Shipping Box](#) is used, the Shipping Box(es) entered for the pick will be recorded as the corresponding transaction number. If a Shipping Box is not used, then the original Transfer Order number will be used.



In the event of multiple picks, the suffix will be added. For example, Transfer Order “12345” would have the first pick transaction number as “12345”. If a second pick is done, then the inbound receiving transaction would be recorded as “12345-1”.

The receiving site location will then use the Receiving transaction which will create the corresponding

Site Transfer “from” the Via Site. The Inbound Transfer table for quantity received will then be updated and the transaction marked as closed.



ASN Receiving

Panatracker has added a table structure to support Inbound Vendor Shipments. This is commonly known as Advanced Ship Notices (ASN). When a PO is selected within the Receiving transaction interface that is identified as a ship notice, the Shipment ID would be used to select each “package” and a receiving transaction will automatically be created in GP based on the file details supplied.

The supporting tables include::

PanatrackerGPX_InboundVendShipment: Represents the header details for the transaction

PanatrackerGPX_InboundVendShipmentUnits: The corresponding line details for the transaction

The following is the overview of the file structure and requirements:

PanatrackerGPX_InboundVendshipment		Transaction Header
Field Name	Description	Requirements
PkgTrackingCode	This represents the Shipment ID. If more than one package is included in the shipment, there may be several Shipment IDs associated with a single PO. If there are multiple packages associated with the purchase order, the user will then be prompted to receive each specific Package by selecting the Package Code.	Required Unique numbers must be assigned if receiving by individual packages
Status	The receipt status for the shipment. When the file is submitted, the Status would be set to 1 for each PkgTrackingCode. Once the transaction has been processed, the Status is updated to '4'	New transaction = 1 Required.
POCode	The corresponding purchase order in Dynamics GP. This must be a valid and open Purchase Order available to receive against in Dynamics GP.	Required
InboundLocCode	This is the Site ID. This must match to a Site set up in Dynamics GP and should match the PO assigned Site. The Site can be used to filter available purchase orders in the Panatracker Receiving interface.	
DocDate	This is the file document date.	
AuditReqd	For future functionality	
ShipMethodCode	This is the shipping method of the transaction.	Optional.
ShipToName	This is the Ship To name.	Optional.
DueDate	This is the expected delivery date for the shipment.	
VendorCode	This must match the Vendor ID assigned to the corresponding purchase order and must be a valid Vendor ID set up in Dynamics GP. Vendor can be used to filter the PO look up list in the Panatracker Receiving transaction.	
VendorName	Corresponding Vendor Name to the VendorCode supplied	
ReferenceCode		Optional
ReferenceCode2		Optional
FlexField1-5	For future functionality	Optional
PanatrackerGPX_InboundVendshipmentUnt		Transaction Line Items

PkgTrackingCode	This represents the Shipment ID. If more than one package is included in the shipment, there may be several Shipment IDs associated with a single PO.	Required Each line must be associated with the corresponding code. This must match the Header.
POLineNumber	The associated PO Line Number on the Dynamics GP Purchase Order. The line number and item MUST match the Dynamics GP Purchase Order.	Required
ItemCode	This is the Dynamics GP Item Number for the associated line sequence number.	Required
ItemDescription	The corresponding item description on the purchase order line	
LotCode	The Lot detail for the line number that will be received. Each lot will be represented in a separate line.	Required if item tracking set in Dynamics = Lot
SerialCode	The Serial Number detail for the line number that will be received.	Required if item tracking set in Dynamics = Serial
ReceiptBin	If using multi-bins, the designated bin for the receiving transaction. If no bin is designated, the defaults set up in Panatracker will be used.	Required if a default PO Receiving Bin is not set for either the Site or the Item in GP.
ReceiptQtyType		
QtyShipped	The quantity shipped for the PO line	
QtyReceived	When the receiving transaction is completed through Panatracker, the QtyReceived will be updated.	
UnitExpDate	For Lot Tracked Inventory. Populates the Expire Date Attribute for the Lot passed in.	
UnitMfgDate	For Lot Tracked Inventory. Populates the Manufacture Date Attribute for the Lot passed in.	
UnitOfMeasure	The Unit of Measure for the Receipt. This must match the Unit of Measure on the corresponding purchase order line in Dynamics GP. If Unit of Measure is not populated, the purchase order Unit of Measure will be defaulted.	

If the ASN transaction is identified by a Package ID, either the PO Number OR Package ID can be selected in the [PO] field. Otherwise, select the PO and then scan or select the corresponding Package ID to receive.

The image shows two side-by-side screenshots of the Panatracker 'Receive Inventory' screen. Both screens have a status bar at the top showing 'Panatracker', signal strength, a speaker icon, a battery icon, and the time '9:32' on the left and '9:33' on the right.

The left screenshot shows the following fields:

- Site Filter: [Empty]
- Vendor Filter: [Empty]
- PO: [ASN-2126-A]
- Package: [Empty]
- Vendor Doc#: [Empty]

The right screenshot shows the following fields:

- Site Filter: [Empty]
- Vendor Filter: [Empty]
- PO: [PO2126]
- Package: [ASN-2126-A]
- Vendor Doc#: [Yellow highlight]



The purchase order or purchase order items associated with the Package ID will automatically be received creating the corresponding Receiving Transaction in Dynamics GP. The receive quantity will be updated on the Pantracker table and the transaction status updated to closed.

Support

It is recommended to contact support via email to support@panatrack.com. A support ticket will be initiated to the support team who will review and assign to the appropriate resource. Your support ticket then captures all communication and activity through resolution.

If you would prefer to communicate by phone dial **(262) 646-3590 Option "3"**

Add: If additional follow up is required, a support ticket will then be opened.

Contacting Support

Panatrack offers phone and email support during regular business hours. Our standard business hours are Monday through Friday, 8:00 AM to 5:00 PM central time zone; excluding United States holidays.

- If requesting support via email, send your request to support@panatrack.com.
- If you would prefer to communicate by phone, call our support line at 262-646-3590 and select option "3". In the rare event that your call isn't answered immediately by a support engineer (or after normal support hours), please leave a message stating your problem and how we can reach you. Your message automatically triggers notifications throughout our team and will be addressed as soon as possible.

Our aim is to address your support request within 4 business hours, but we make a strong effort to respond to your issue immediately. Support requests are typically monitored outside of standard business hours. However, our return response is not guaranteed until the next business day.

Whatever means you choose to contact our support team, please be as detailed as possible to describe the problem so that we can lead you to a solution as efficiently as possible. It is helpful for you to offer the following information:

- Your version of PanatrackerGP, which can be found on your portal's System Status page.
- A detailed description of any error message encountered.
- If possible, please record any steps to recreate the issue.
- What steps you have already attempted to resolve your issue.
- Your contact information.

If you have a specific need to perform a planned upgrade or migration outside of these hours, rest assured that we will do our best to accommodate your needs.

Additional Support Considerations

PanatrackerGP is a data capture solution extending Dynamics GP. As an "add-on" mechanism for capturing transactions, PanatrackerGP provides the mechanism for capturing transactions quickly and accurately via scanning on a mobile device. In most cases, these are the same transactions that can be directly entered in Dynamics GP. This ability to enter transactions directly in Dynamics GP offers an immediate (albeit painfully inefficient) way to continue working in the rare event of a critical problem with PanatrackerGP. If entry of the transaction is urgent, it can be entered directly to GP through the standard GP interface. The PanatrackerGP transaction can then be marked as "discarded" in the portal to eliminate duplication.

All transactions initiated from the PanatrackerGP handheld application are logged in our Panatracker Transaction Manager logging database and immediately applied to Dynamics GP. If for any reason the transaction fails to submit to GP, an email notification (if configured) is sent to the designated administrators. Panatrack maintains a special email account to also receive these notifications, and we encourage our customers to include us in the administrator list. Therefore, the same notifications will be sent to Panatrack with the details of the error. This allows us to learn of any problems so that we can react faster to provide assistance. This information is also used by our team to "design away" causes of a recurring problem.

PanatrackerGP uses Microsoft's eConnect integration mechanism for most transactions. The eConnect mechanism follows the same business rules as if the transaction is entered directly in the GP interface. In most cases, the errors that we report are generally related to the setup of GP data. Once the issue is resolved, the transaction can be resubmitted from the PanatrackerGP portal with the simple press of a button. An example of such an error message returned by eConnect could include something as trivial as "Document being edited by another user" (Order Fulfillment). In this case, once the order-fulfillment document is closed, the transaction is easily resubmitted.

In the event of a failed transaction, the user on the handheld will receive a failed message and upon dismissal of the message, will be able to start another transaction. This eliminates the user from requiring the issue to be resolved prior to continuing work since the handheld user is often not necessarily the administrator.

Disclaimer

Panatrack offers support to customers currently under their software maintenance contract. The first year of maintenance is required; renewal is optional. Customers requesting support but not currently under a maintenance contract will be notified of their support options. A current maintenance contract entitles customers to new versions as they become available. See the PanatrackerGP End-User License Agreement for additional details.

Panatrack's support is limited to the support of our PanatrackerGP software. Panatrack does not provide support for network-related or hardware-related issues, as these are typically supported by a hardware manufacturer or IT provider.

Panatrack does not provide support for Microsoft DynamicsGP or other third party software. Please contact the vendor directly, or contact your Dynamics partner for assistance. Reference the Panatrack End-User License Agreement for additional support details.