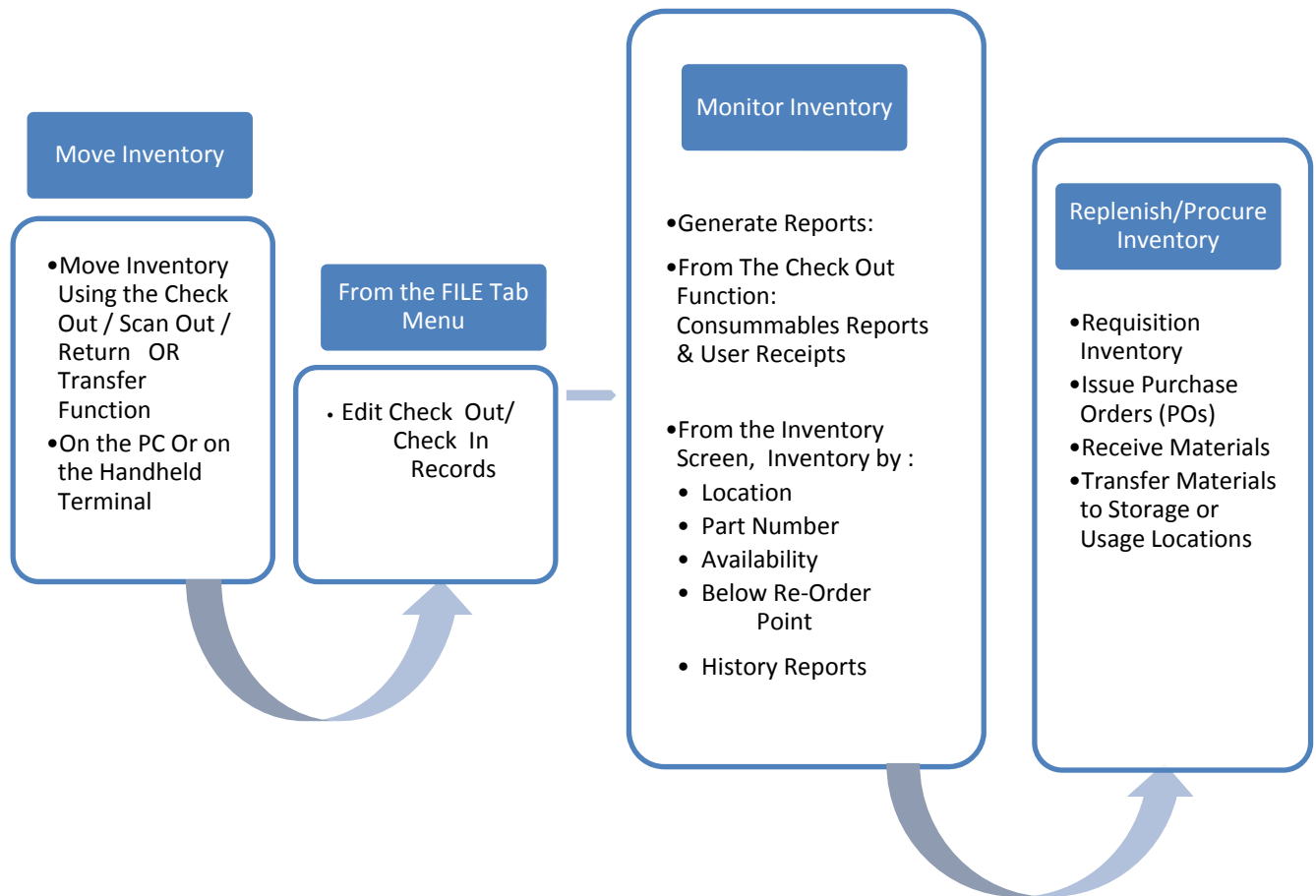




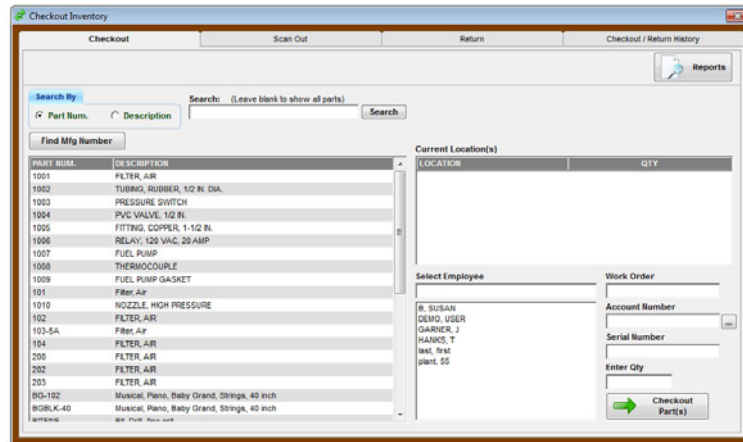
## On the Right Path to getting started with STS:



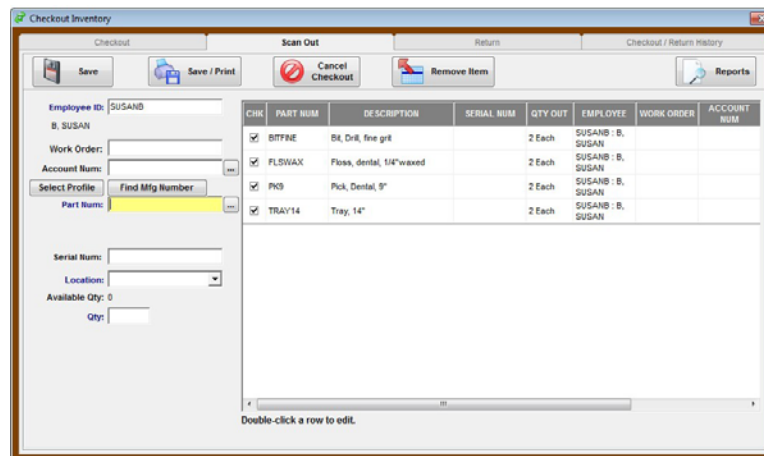
# I. Move Inventory: Check Out, Scan Out, Return, Report

## Move, using the Check Out Functions

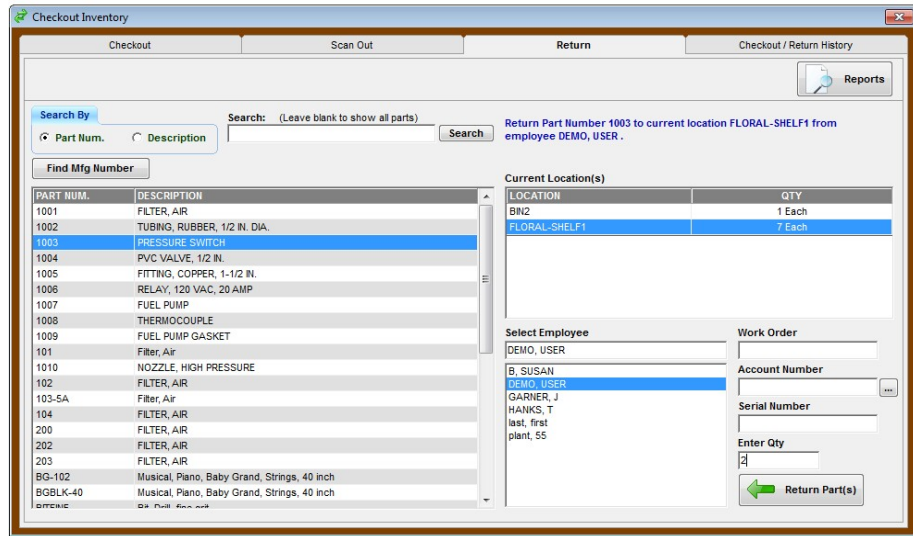
- On the PC
  - **Check out items Singly**, with *optional*: Work Order, Account Number, Serial Number



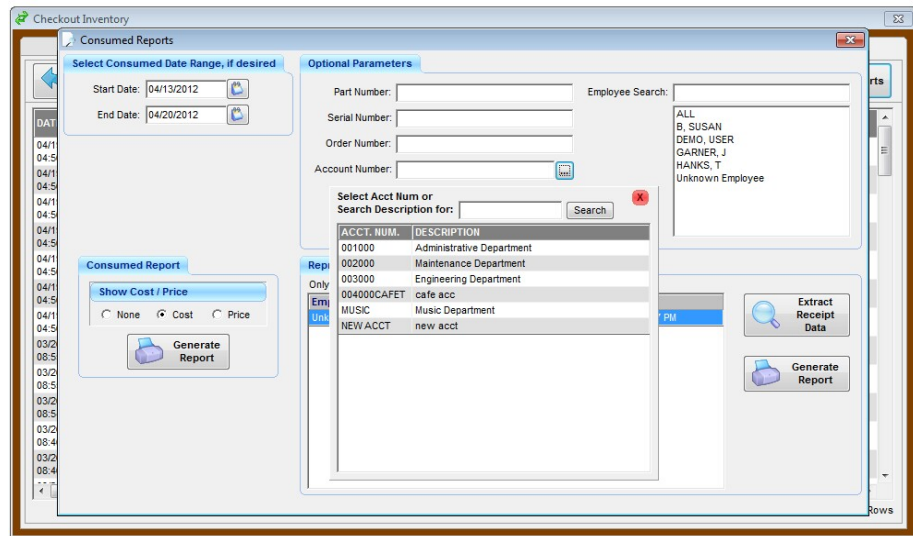
- **Scan out items singly, or as a group**, with *optional*: Work Order, Account Number, Serial Number



- Return Items to Inventory



- Generate Consumables Reports and User Receipts

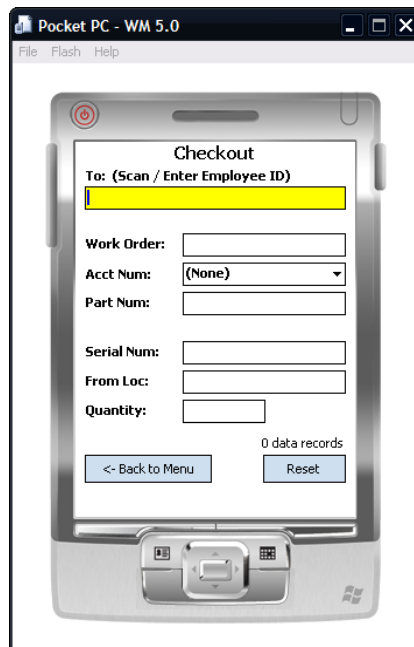


- **Edit Check Out/History** from *FILE Tab Menu | Edit Check Out Records*

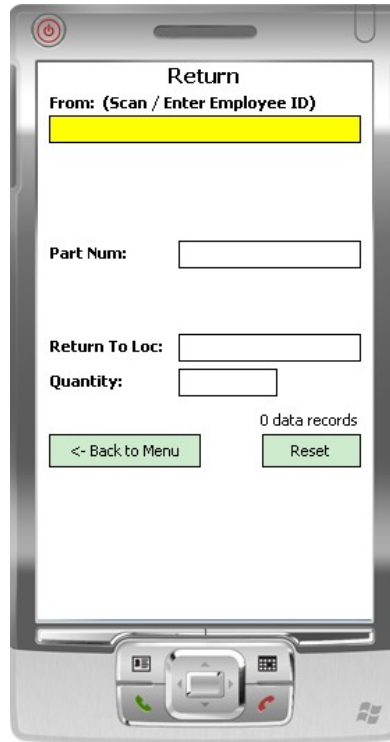
DATE	EMPLOYEE	PART NUM.	DESCRIPTION	INVENTORY LOCATION	SERIAL NUM.	QTY	WORK ORDER
04/19/2012 04:56 PM	Unknown Employee	1003	PRESSURE SWITCH	BIN2		1	
04/19/2012 04:56 PM	Unknown Employee	1002	TUBING, RUBBER, 1/2 IN. DIA.	SHELFB		1	
04/19/2012 04:56 PM	B, SUSAN	TRAY14	Tray, 14"	BIN3		2	
04/19/2012 04:56 PM	B, SUSAN	PK9	Pick, Dental, 9"	BIN2		2	
04/19/2012 04:56 PM	B, SUSAN	FLSWAX	Floss, dental, 1/4"waxed	SHELFA		2	
04/19/2012 04:56 PM	B, SUSAN	BITFINE	Bit, Drill, fine grit	SHELFC		2	
04/19/2012 04:56 PM	Unknown Employee	1008	THERMOCOUPLE	BIN1		1	
03/26/2012 08:55 AM	HANKS, T	101	Filter, Air	SHELFA		3	
03/26/2012 08:55 AM	HANKS, T	1005	FITTING, COPPER, 1-1/2 IN.	BIN1		1	
03/26/2012 08:54 AM	HANKS, T	1002	TUBING, RUBBER, 1/2 IN. DIA.	BIN3		1	
03/26/2012 08:46 AM	B, SUSAN	1008	THERMOCOUPLE	BIN1		5	
03/26/2012 08:46 AM	B, SUSAN	1005	FITTING, COPPER, 1-1/2 IN.	BIN1		4	
03/26/2012 08:46 AM	B, SUSAN	1004	PVC VALVE, 1/2 IN.	BIN3		3	
03/16/2012	HANKS, T	SDF120	shot, flea medication, single dose	SHELFA		880	

- From the Handheld Terminal Screen

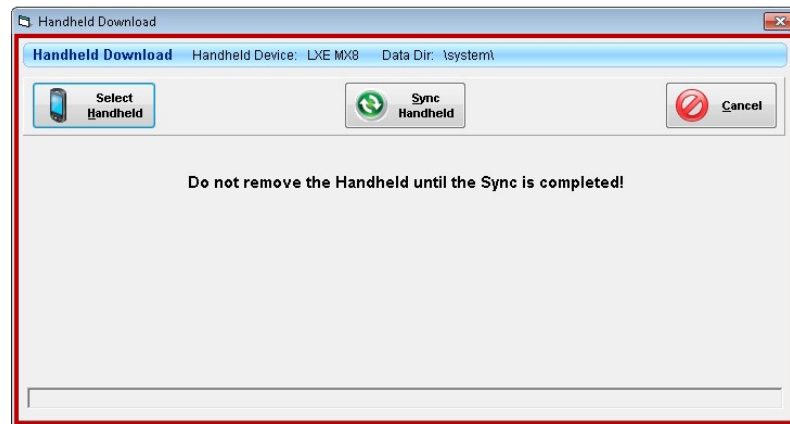
- **Check out items Singly**, with optional: Work Order, Account Number, Serial Number



- Return Items to Inventory



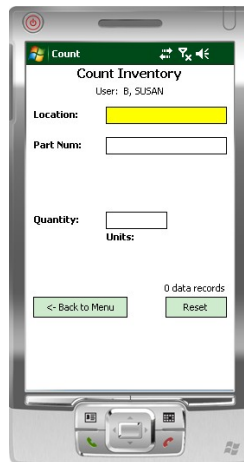
- Synchronize Mobile Terminal Data with STS PC Application



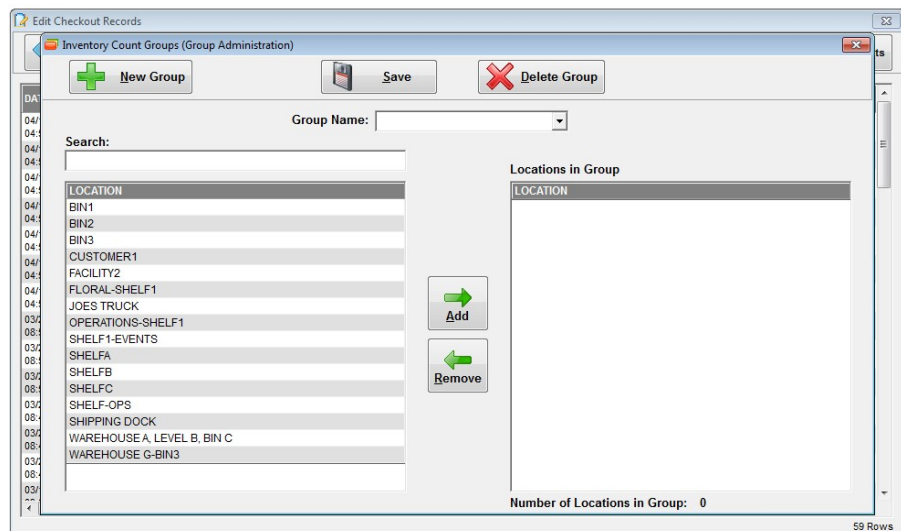
## II. Manage Inventory: Assess, Report, Procure, Receive, Transfer

### Assess, using the Inventory Functions

- From the Handheld Terminal Screen
  - **Count Inventory**



- From the PC
  - **Count Inventory**
    - **Setup Inventory Groups**



- Count Inventory

CHK	PART NUMBER	DESCRIPTION	LOCATION	INVENTORY QTY	COUNT QTY	UNITS
<input type="checkbox"/>	1002	TUBING, RUBBER, 1/2 IN. DIA.	BIN3	41	0	Feet
<input type="checkbox"/>	1003	PRESSURE SWITCH	BIN2	2	0	Each
<input type="checkbox"/>	1004	PVC VALVE, 1/2 IN.	BIN3	66	0	Each
<input checked="" type="checkbox"/>	1005	FITTING, COPPER, 1-1/2 IN.	BIN3	50	50	Each
<input checked="" type="checkbox"/>	1006	RELAY, 120 VAC, 20 AMP	BIN2	13	13	Each
<input type="checkbox"/>	1006	RELAY, 120 VAC, 20 AMP	BIN3	3	0	Each
<input type="checkbox"/>	1007	FUEL PUMP	SHELFC	18	0	Each
<input type="checkbox"/>	BITFINE	Bit, Drill, fine grit	SHELFC	8	3	Each
<input checked="" type="checkbox"/>	OPS-FLOREALSTAND	ops	OPERATIONS-SHEL	0	0	Each
<input checked="" type="checkbox"/>	PK9	Pick, Dental, 9"	BIN2	286	285	Each
<input checked="" type="checkbox"/>	RS-CORAL_LONGS	Rose, coral, long stem	OPERATIONS-SHEL	0	0	Each
<input type="checkbox"/>	TRAY14	Tray, 14"	BIN3	21	20	Each

### Generate Inventory Reports

- From the Parts Function – Inventory and History Reports

- Part Inventory (F3)... Select Inventory Reports

Part Number	Description	Location	Qty	Units Of Measure
1001	FILTER, AIR	SHELFA	1,671	Each
1002	TUBING, RUBBER, 1/2 IN. DIA.	SHELFB	6	Each
1003	PRESSURE SWITCH	SHIPPING DOCK	10	Each

**Total Qty: 1687**  
 Qty On Order: 67 Each

Select Report Option | Select Date Range  
Generate Report

Part History (F4)... Select History Reports

Location	Transact Qty	Inventory Qty	Date	Reason	By
SHELF A	4 Each	1671 Each	4/11/2012	Manual Add - can't find	Admin, User
SHELF A	87 Carton	1672 Each	1/30/2012	Received 87 Carton	DEMO, USER
			1/13/2012	Checkout Price changed from 0.00 to 5.00	Admin, User
			1/13/2012	Unit Cost changed from 1.45 to 2.33	Admin, User
SHELF A	50 Carton	634 Each	12/15/2011	Received 50 Carton	GARNER, J
			12/14/2011	Unit Cost changed from 2.50 to 1.45	Admin, User
BIN3	2 Each		10/31/2011	Handheld return	GARNER, J
SHELF A	5 Each		10/13/2011	Manual Add qty 5 to location SHELF A	Admin, User
SHELF B	5 Each	20 Each	10/12/2011	Manual Add - add	Admin, User
SHELF B	-5 Each	15 Each	10/12/2011	Manual Issue - reason	Admin, User

Select Part (or Check All) | Select Date Range  
Generate Report

Part History Reports

Select Part(s)

Check All

1001  
1002  
1003  
1004  
1005  
1006  
1007  
1008  
1009  
101  
1010  
102  
103-5A  
104  
200  
202  
203  
BG-102

Select Received Date Range, if desired

Start Date:

End Date:

Or

Select Over All Dates

**Generate Report**

## Procure

- From the PC Application

- **Requisitions**

- Request Quotes from Suppliers based upon user Requisitions
- Or, simply request Quotes on items needed for inventory
- Then, Generate and Issue POs

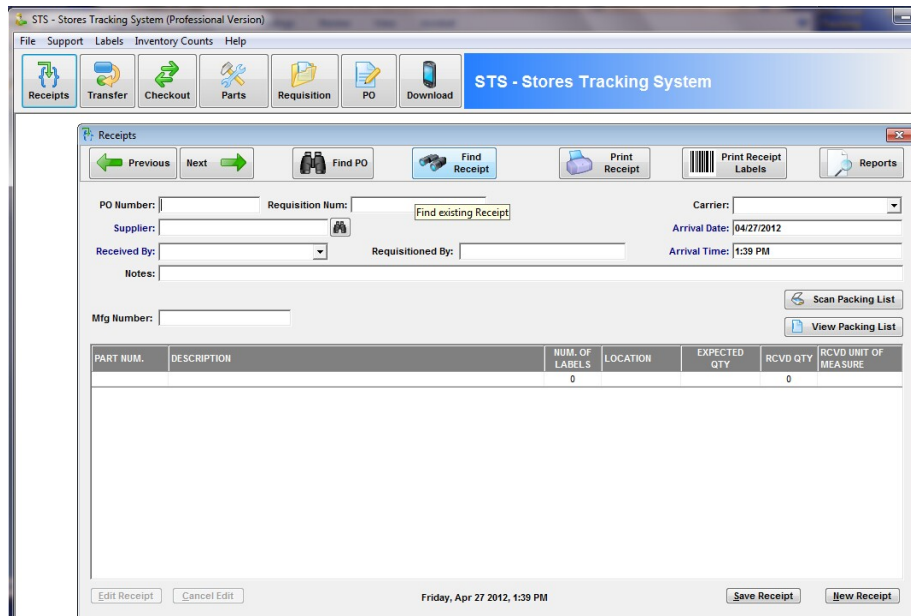
The screenshot shows the 'Requisition' application window. At the top, there are navigation buttons: 'Previous', 'Next', 'Find', 'New', 'Save', and 'Delete'. Below this, there are fields for 'Selected Bidder(s)', 'Select Suppliers For Bid', 'Address', and 'PO Number'. A 'Requisition Number' field is set to '000013'. There are checkboxes for 'Quote Requested' and 'Requisition Ready For Approval'. A 'Requisitioned By' dropdown is set to 'Admin User' and the 'Date' is '04/27/2012'. There is also an 'Approved By' field. Below these fields is a table with columns: ITEM NUM., SELECTED SUPPLIER, QTY, PART NUM., DESCRIPTION, REQUESTED DATE, ACCT. NUM., W.O. NUM., UNIT PRICE, PER, ITEM TOTAL, and TAXABLE. The table contains one row with '1' in the 'ITEM NUM.' column. At the bottom, there is a 'General Remarks' text area, a 'Close Requisition' checkbox, and a 'Create PO' button. On the right side, there are financial summary fields: 'Subtotal \$ 0.00', 'Sales Tax \$ 0.00', 'Special Charges \$ 0.00', and 'Total \$ 0.00'.

- **POs (Purchase Orders)**

- Issue Purchase Orders based upon Requisitions or Quotes
- Or, directly generate POs from the Purchase Order screen,

The screenshot shows the 'Purchase Order' application window. At the top, there are navigation buttons: 'Previous', 'Next', 'Find', 'Items Below Recorder Pt', 'Generate Recorder Items', 'Print P.O.', 'Delete P.O.', and 'Reports'. Below this, there are fields for 'Supplier', 'Requisition Number', 'DATE' (04/27/2012), and 'P.O. NO' (000023). There is a 'Close Purchase Order' checkbox. The main area is divided into sections: 'PURCHASE ORDER', 'BILL TO' (with fields for SUPPLIER, BILL NAME, BILL ADDR 1, BILL ADDR 2, BILL CITY, WI 22222-2222), 'SHIP TO', and 'TERMS'. Below these is a table with columns: CLOSE, ITEM PART NUM, DESCRIPTION, ACCT. NUM, W.O. NUM., QTY, PER, UNIT PRICE, EXTEND. AMT., TAX, DUE DATE, RCVD QTY, and PO. At the bottom, there is a 'Note to Supplier' field, an 'Accounting Note' field, and an 'Inhouse Note' field. On the right side, there are financial summary fields: 'Subtotal \$ 0.00', 'Sales Tax \$ 0.00', 'Special Charges \$ 0.00', and 'Total \$ 0.00'. There are 'Save PO' and 'New PO' buttons at the bottom right.

- **Receipts (Receiving)**
  - Receive materials based upon issued POs
  - Or, receive directly, using only supplier and receiver information



- **Transfer**
  - Transfer materials to appropriate locations for putting into stock, or releasing for outgoing shipments.

