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#### The home screen displays an overview of your warehouse.

Lightspeed LEVEL Home Transaction	ions - Reporting D	Data Management <del>-</del>			Current Branch: Chicago	Hello ckeane! Log off
Atla Advanced inventory management	anta: \$937,404.50 Bostor	n: \$354,193.90 Chicago: \$2,017.08 D	Current Invent	cory Values 26 Franklin: \$49,643.23 Gaffney: \$958.83 Houston: \$2,290.33 Irving: \$	5,434.53 Jasper: \$1,731.16	
Purchase Orders Due	Refresh	16 Transfers To Commit	Refresh	Transfer Summaries	87 Warnings	Refresh
From 2017-06-20 To No Purchase Orders Due Today	2017-07-20	Transfer DateTransfer FromTo: Chicago WH2/3/17Atlanta WH2/7/17Atlanta WH3/6/17Atlanta WH3/8/17Atlanta WH4/5/17Atlanta WH	m Total Units 4 4 40 37 10	Lightspeed Summary2017-07-20ZonesCategoriesItemsNo Lightspeed Activity TodayTransfer Summary2017-07-20TypeCategoriesItemsNo Transfers TodayReceipt Summary2017-07-20CategoriesItemsNo Receipts Today	ItemChicago WH.90 B Frozen5 Hour Berry5 Hour ES Berry7up 12ozAdvil 2Tab 2pk	QOH     QTP     QOO       -120     320     100       0     4     0       0     2     0       0     62     48       0     2     0
12 Receipts To Commit	Refresh	Schedule for Today	Refresh		3 Shortages	Show Zeros Hide Zeros
Receipt # Vendor Re	eceive Date Units 📤	Orders	Receiving		Item	QOH
Chicago WH		Jones	VSA		Chicago WH	
4596 Freshley	3/16/2017 5941	Pepsi - PBG			.90 B Frozen	-120
4597 Bellisio Foods	3/16/2017 24	Hiland Dairy Foods			Black Forest Fruit Snack	-187
Sea Turtle Cache					Sea Turtle Cache	
4604 Bare Foods Co	3/17/2017 1				.90 B Frozen	-2000
A	•					

### Dashboard



# **Purchase Orders Due**

Purchase orders that are due to be received by the warehouse based on schedule dates.

From 20	17-06-20	Тс	2017-07-20		
Order #	Vendor	Order Date	Due Date	Units	
Erie					
6835	Sams	7/7/2017	7/8/2017	360	
6837	Coke	7/10/2017	7/11/2017	0	
6846	7-Up	7/13/2017	7/14/2017	0	

### **Transfers to Commit** Incoming or outgoing transfers that have

yet to be validated / committed.

6 Transfers To Commit Refresh						
Transfer From	Total Units	*				
Atlanta WH	14,977					
Atlanta WH	1					
Atlanta WH	1					
Boston WH	1					
Boston WH	1	-				
	Commit Transfer From Atlanta WH Atlanta WH Atlanta WH Boston WH Boston WH	CommitRefreshTransfer FromTotal UnitsAtlanta WH14,977Atlanta WH1Atlanta WH1Boston WH1Boston WH1				

# **Transfer Summaries**

Summaries of LightSpeed activity, incoming and outgoing transfers, and received orders.

Transfer Summaries										
Lightspeed Sun	nmary									
2	2017-01-01	Z	ones	Categ	jories	Ite				
Description	Pic	ked	Retu	rned	Upda	ted				
Erie WH										
3 Musketeers		66		7	7:41	PM				
5 Hour Berry		7		0	7:16	PM				
Amp Mt Dew		21		0	8:33	PM				
Aquafina 20oz		177		0	8:40	PM				
Baked Lays SC	C	1		0	6:55	PM				
Berk Wrapped F	orks	2		0	7:29	PM				

# **Receipts to Commit**

Orders that have been received, but no pricing has been committed.

Receipt #	Vendor	Receive Date	Units
Denver WH			
4469	Freshley	1/31/2017	6016
4548	VSA	2/7/2017	1146
4554	Freshley	2/7/2017	5564
4642	7-Up	3/24/2017	24

# **Schedule for Today**

Vendors that are scheduled to be ordered or received today.

Schedule for Today	Refr
Orders	Receiving
Hiland Dairy Foods	Hiland Dairy Foods
Jones	
Jones	

#### Transfer Summary

	2017-01-01	Туре	Categories	Item
Description		Transfer li	n Transf	er Ou
Erie WH				
12oz Pop Fam	ily	6	9	(
20oz Pop Fam	ily	24	0	(
20oz Water Fa	mily	4	1	(
Energy Drinks	Family		5	(

## Dashboard

### **Inventory Warnings**

Inventory items that have approached your defined par levels.

22 Warnings			Refres
Item	QOH	QTP	Q00
Denver WH			
BSB Cinnamon Danish	-9	19	0
Chesters Bcn Chddr Fries LSS	35	565	0
Cinn. Toast Crunch Cereal Bar	0	25	0
CO2 Bottle	0	10	0
Freshley Powdered Mini Donut	-12	16	0

### **Inventory Shortages**

Inventory items that are showing in negative quantities in your warehouse.

7 Shortages	Show Zeros Hide Zeros
Item	QOH
Denver WH	
Aspen 1 gal Unsweetened Iced Tea	-200
BSB Cinnamon Danish	-9
Freshley Powdered Mini Donut	-12
Freshley SC Donuts	-55
Kars Sweet & Salty 3.5oz	-8

# Add A User

- 1. From Data Management select 'Admin'
- 2. Select 'Create'
- 3. Complete the fields (as shown) and select 'Register'
- 4. \*Page refreshes for new user\*

# **Assign Roles**

- 1. Locate user and select the appropriate check boxes from the choices on the right.
  - Admin See all financial information, create/edit users/assign branches, create 'transfer to' locations, update items, and link storage areas to zones.
  - 2. Can Edit –
  - 3. Export Financials Accounting package export.
  - 4. View Financials Can view inventory values.
  - 5. Allow Inventory Allows user to create a Full Inventory. Not needed to join to an existing inventory.

# **Assign Branches**

- 2. Select user and click 'Branches'.
- 3. Check the branches you would like this user assigned to.
- 4. Click 'Save'.



User Mana	gement										
Users											
Create Edit									Search:		
User Name	First Name	Last Name	Email	User	Admin	Can Edit	Export Financials	View Financials	Allow Inventory	Branches	
ztestuser	Test	User	ztest@gmail.com	1	<b>V</b>	ø	Ø	V	Ø	Branches	
ztestuser2	Test	User	ztest@gmail.com		V					Branches	
ztestuser3	Test	User	ztest@gmail.com	1		<b>v</b>				Branches	
ztestuser4	Test	User	ztest@gmail.com	•		<b>v</b>				Branches	
ztestuser5	Test	User	ztest@gmail.com	1	•					Branches	
ztestuser6	Test	User	ztest@gmail.com	ø						Branches	Ŧ

### **User Management**







### **Manage Manufacturers**

- From the Data Management dropdown, select 'Manage Manufacturers'.
- The list is broken down between 'Active' or 'Inactive'. You can toggle between either.

You can:

1. Select the desired Manufacturer | 2. Add addresses 📀 | 3. Assign products to the Manufacturer 📀

Manufacturers

Manufacturers	Active Inactive	VSA Addresses	Active Inactive	VSA Products
	_ ···	Addresses	0	Show 10 🔻 entries
Vital Pharmaceuticals Inc.	C ×	Arlington, TX : 4905 New York Ave		Product
Vitners	🖾 🗙			
VSA	<b>x</b>			Alka-Seltzer 2Tab
Wai Lana Production	Ø ×			Apple & Cinnamon Oatmeal
Wal-Mart	<b>()</b> ×			Berry Burn Capp
Weaver Popcorn Co	<b>()</b> ×			Caramel Capp
Welch Foods Inc	<b>()</b> ×			Chap-Ice
Well's	<b>()</b> ×			Clear Eyes
Well's Blue Bunny	Ø ×			Cookie Dough Bites 3.1oz
Wesco Distribution	Ø ×			Cookie Dough Bites 5oz
White Castle Food Products	Ø ×			Dippin Apples & Caramel
Whitlock	Ø ×			Dippin Carrots & Ranch
Wild About Food	Ø ×			Showing 1 to 10 of 74 entries

## Add A Manufacturer

- 1. From the Manufacturers page, select the *plus* button as shown.
- 2. Enter Manufacturer name and code.
- 3. Use the 💿 buttons to add addresses and assign products.

#### Manufacturers



### Manufacturers

			Searc	h: 🗌				
Manufacture	r ID					(	•	
							C	×
							ø	×
							ß	×
							ø	×
							ß	×
							ø	×
							Ø	×
							ø	×
							Ø	×
							ø	×
Previous	1	2	3	4	5		8	Next





## Manage Vendors

- From the Data Management dropdown, select 'Manage Vendors'.
- The list is broken down between 'Active' or 'Inactive'. You • can toggle between either.
- 1. Select the desired Vendor.
- 2. Add addresses by clicking 📀

IFI Addresses						•	Active	Inactiv
dresses								
Address:	Enter Street Line 1							
Address:	Enter Street Line 2							
Address:	Enter Street Line 3							
Enter City				State		Enter Z	ip	
United States	Ŧ	Main Fax			Ordering	Fax		
Main Phone Num	ber	Phone Nu	ımber		Phone Nu	ımber		
Main Email			Ordering E	Email				

3. Add order details and account numbers.



#### 4. Schedule 'Order By' and 'Deliver By' days.

Example 1: If you can order for the vendor UNFI by end of day on Mondays for delivery Wednesday and by end of day Wednesday for delivery on Fridays, your scheduler will be setup as below.

Edit Schedule For Week 1, Monday ×	Edit Schedule For Week 1, Wednesday	Edit Schedule For Week 1, Friday ×
<ul> <li>✓ Order by</li> <li>⑤ Delivered On</li> <li>⑥ 09:30 AM ▼</li> </ul>	<ul> <li>✓ Order by</li> <li>✓ Delivered On</li> <li>○5:00 PM ▼</li> </ul>	Order by       12:30pm ▼         ✓       Delivered On       06:00 PM ▼
Cancel (really?) Save changes	Cancel (really?) Save changes	Cancel (really?) Save changes
Schedule for UNFI		
Number of Weeks: 1 😑 📀 St	art Date: 07/09/2017	
Sun Mon Tue Wed O D	Thu Fri Sat	

**Example 2:** If you can order for the vendor UNFI by end of day on Fridays and their delivery schedule is the following Monday by 12pm, your scheduler will be setup as below.

Edit Schedule For Week 1, Friday ×	Edit Schedule For Week 2, Monday
Order by     5:00pm      Delivered On     10:30 AM	<ul> <li>□ Order by</li> <li>12:30pm ▼</li> <li>☑ Delivered On</li> <li>12:00 PM ▼</li> </ul>
Cancel (really?) Save changes	Cancel (really?) Save

#### Schedule for UNFI



### Vendors









- 5. To associate Items to a specific Vendor
  - a) Select the 🖸 in the upper right corner of the 'Products' section.
  - b) Locate the item by searching the name of the Item, select and click 'Save'.

Create a Vendor - Item Link	
Find an Item	Vendor Code
Starts With Find by Name: Search	Select an Item
	Cancel Save

# **Add A Vendor**

- 1. From the Vendors page, select the *plus* button as shown.
- 2. Enter Vendor name.
- 3. Use the 🖸 button to add addresses.
- 4. Add Vendor Info.
- 5. Set Vendor schedule.
- 6. Assign products.

#### Vendors

Vendors		
Vendor Name		







## **Manage Items**

- From the dropdown, select 'Manage Data Management -Items'.
- The list is broken down between 'Active', 'Inactive' or 'Both'.

#### You can:

- 1. Search the Item by:
  - a) Name
  - b) Product Code
- 2. You can also narrow your search results by selecting a vendor.

Select Item							
Active Inactive Both							
1# Colombian GR - 2870	):1360 💌						
.90 B Frozen	2870:923	B Frozen Family					
1# Colombian GR	2870:1360	Imp 1# Family					
1# Colombian WB	2870:1359	Imp 1# Family					
1# Decaf GR	2870:3023	Imp 1# Family					
1# Decaf WB	2870:1268	Imp 1# Family					
1# French Vanilla GR	00262	Imp 1# Family					
1# French Vanilla WB	2870:1238	Imp 1# Family					
1# Ground (GR)	2870:213	Imp 1# Family					
1# Hazelnut Decaf GR	2870:219	Imp 1# Family					
1# Hazelnut GR	2870:141	Imp 1# Family					
Page 1 of 362 (3614 iter	Page 1 of 362 (3614 items)						

- Once you have selected your item, the Item Details will populate on the right.
- From here, you can manage:
  - a) If the item is active or not
  - b) Assign a manufacturer
  - Give a default product cost c)
  - Add/adjust the product code d)
  - Shelf Life (days) e)
  - Minimum Remaining Shelf Life f)

Show histo vario time	vs item cos ry average ous lengths	t- s over of			
	Iter	n Sizes			
0	<b>Iter</b> Size	m Sizes # Units	Barcoo	les	•
<b>0</b> ×	Iter Size Each	The second secon	Barcoo	les	• / s
×	Iter Size Each Box	m Sizes # Units 1 12	Barcoo 2 [[]] 1 []]	les I	• / / s e v



Item Options					
Requirement Opt	ions	neck options require	d for this item		
Expire Date 🔲 🛛 S	Sell By Date 🗹	Production Date 🗹	Lot Number 🗹	Manufacturer Code 🗹	
Default Size Op Order Size Cas	tions for Atlanta	Sale Box Size	c of 12 •	Transfer Each o Size	f1 v
Default Vendor S	Sizes for Atlanta				
Size De	efaults	7-Up	VSA	Testvendor	Coke
Each	of 1	•	0	0	•
Box o	of 12	۲	۲	$\odot$	•
Case	of 24	•	•	$\bigcirc$	•
This scree 1. Set d (This is the 2. Set d (This is the LEVEL will d	n allows efault or size you w efault ve size the ve lo the conv	you to g der, sale ant to ord ndor size ndor wan versions fo	ive require and trans ler, sell and es ts you to pu or you)	ements for t fer sizes transfer the it urchase the ite	he item. em in) m in,

s you to set a	Item						
ate ID for		Vendor			ID	•	
iinked Sr	7-Up				10000829	×	
s vou to set	Coke						
dual vendor						^	
D's for that		VSA			45655678	×	
ic item.	٦	Testvendor	r			×	
an also link							
ors and item through this			Ite	em Sizes			
n by the 💽	Size	Units	Ven	dor	ID	0	



# **Update Items**

If you are assigned the 'Admin Role,' you can see the below link.

Update Items

#### Item Management

This will update your items from **LightSpeed**.

When selecting the 'Update Items' button, LEVEL:

- 1. Updates category names
- 2. Pulls in new categories
- 3. Updates items with changed categories
- 4. Updates item names
- 5. Updates item codes
- 6. Pulls in new items
- 7. Pulls in new item sizes
- 8. Updates item size description
- 9. Updates item size units
- 10.Updates if an item size is active or not
- 11. Pulls item images where there was none
- 12. Pulls items size barcodes
- 13.If duplicate barcode, Level deletes the old
- 14.Links barcodes to vendor through item size
- 15.Links price to item through vendor





# **Assign Areas (Warehouses)**

- 1. From the Data Management dropdown, select 'Areas (Warehouses)'.
- 2. The list will display all active Warehouses.
- 3. Select the *icon* beside the warehouse you would like to edit.
- 4. You can edit the name and/or select the branch that particular warehouse belongs to.

Name	Branch	
Atlanta WH	Atlanta	Ø

5. Select the 🗹 icon to save.

## **Set Area (Warehouse) Pars** 1. From the same 'Areas (Warehouses)' page,

- 2. Select the desired Warehouse

\*The left pane will populate with items.

Show 10 🔹 entries 🗹 Active Items Only				Search: coke	
item Name	Vendor	Code	Par	Reorder	On Hand
Cherry Coke 20oz	Coke	7:064	2016	624	288
Cherry Coke 20oz	Love Bottling	7:064	2016	624	288
Cherry Coke Zero 12oz	Coke	6:004	0	0	0
Cherry Coke Zero 20oz	Coke	2870:7499	1008	576	0
Coke 12oz Bottle	Coke	2871:4601	0	0	0
Coke 12oz Can	Coke	6:051	7488	4992	-216
Coke 12oz Can	Love Bottling	6:051	7488	4992	-216
Coke 20oz	Coke	7:017	8064	4032	0
Coke 20oz	Love Bottling	7:017	8064	4032	0
Coke 8.5oz Alum Bottle	Coke	2871:4759	0	0	0
Showing 11 to 20 of 168 entries (filtered from 4,192 total e	entries)	Previo	us 1 2	3 4 5	17 Next

- 4. You can search by item or by vendor.
- out of the field to save your entry. upon refresh.

### **Areas (Warehouses)**

5. Set the desired Par and Reorder points (in UNITS) and press the TAB key or select

**NOTE:** If the same item is assigned to multiple vendors, it will appear multiple times. You only need to set the par and reorder points for ONE. The others will populate



# Inventory

There are 2 types of inventory counts in Level:

- **Partial** This allows you to adjust quantities of only ٠ the items you select
- **Full** Overrides all quantities. Any items not counted ۲ will adjust to '0'

Inventories are typically done through the handheld (Reference Pg.30) but can also be done through the webpage.

# **Create a New Inventory**

- 1. From Transactions select 'Inventory'.
- 2. Select 'Inventory Area (warehouse)
- Select 'Inventory Date' 3.
- 4. Select 'Inventory Time'

If you are an admin, you will have the option to unselect 'Partial' which brings you into a FULL inventory.

5. Select 'Start Inventory'

Create a New Inventory	
Select Inventory Area (warehouse)	Erie WH 🔹
Inventory Date	07/14/2017
Inventory Time	01:10 PM Now
Partial Inventory	Partial
Start Inventory	

6.	Select	'New'	to add	Item/Si	ze and	set a	Quantity
----	--------	-------	--------	---------	--------	-------	----------

Add Selected Item/Size		×
Select Item	Vendor	
CF Dt Coke 12oz 6:009		•
✓ All Items	Add All Vendor Items	
Select Item Size	Set Quantity	
Case (24)	20	

- 7. Select 'Add This Item'
- 8. Repeat steps 6-7 until all items and quantities have been added.

\*When doing a Full Inventory, ALL items must be added or they will be adjusted to a '0'.

9. Once you have confirmed your count, select the orange 'Commit Inventory(Done)' button.

#### \*You will no longer be able to edit.

10. To save your work without committing yet, select the green 'Close Inventory' button from the top

#### Inventory



# **Edit An Inventory Count (uncommitted)**

To pull up an inventory saved but not yet committed

- 1. Select the Transactions tab
- Select 'Inventory' 2.
- 3. Find the appropriate inventory and click 📷

Edit An Inventory Count (uncommitted)							
Inventory Date	ld	Last User	Storage Area	Edit	View		
7/1/17 1:05 PM	3294	cpirtle	Erie WH	Ø			
7/14/17 1:10 PM	3296	ckeane	Erie WH	ß			
7/14/17 1:20 PM	3297	ckeane	Erie WH	ß			

Edit

- 4. Continue where you left off until all items and quantities have been added.
- 5. Once you have confirmed your count, select the orange 'Commit Inventory(Done)' button.

# **Completed Inventory Counts**

Here you can view inventories that have already been committed during a selected date range. Committed inventories cannot be edited once they have been closed.

Completed Inve	ntory Counts			
Inventories From:			Inventories To:	_
01/01/2017			07/14/2017	
Date	Id	Storage Area	Units	View
1/12/17	2143	Erie WH	1443	
1/16/17	2147	Erie WH	394	
1/17/17	2148	Erie WH	68	
1/20/17	2158	Erie WH	48522	
1/27/17	2180	Erie WH	270650	•
2/3/17	2202	Erie WH	22603	6

#### Inventory

# **Create a New Purchase Order**

- Transactions select 'Purchase 1. From Orders'.
- 2. Select a Vendor from the dropdown.
- 3. Select your 'Order By' and 'Expected Receipt' dates.
- 4. Select 'Create Order'.

	5.
Select a Vendor to begin	
•	A
Order By Date	
12/06/2016	
Expected Receipt Date	
12/06/2016	
Create Order	

\*This brings up a blank Purchase Order.

\*Order By Date and Expected Receipt Date will populate from the set vendor schedule if one has been entered.



- product, size, and quantity.
- 6. Select 'Add This Item', and the item will be added to the P.O.

- 7.

#### **COLUMN HEADERS:**

- ٠

- •

- (at current branch)
- current branch)

- branch)

### **Purchase Orders**

Repeat these steps until you have added all of the items you would like on your P.O. Click 'Save' from the bottom right. Once you have added all of the items to the P.O., select the 'Complete (Done)' button at the top.

Item: Item description

**Product Code:** Product code of the item

Item Size: Ordered size

Size Units: Units in ordered size

**Quantity:** Quantity of ordered size

**Qty To Par:** Quantity of this size to meet par

Total Units: Ordered amount broken down to units

**Units On Hand:** Total units on hand (at current branch)

Est Days On Hand: Est days on hand based on 30 day trend

**Units On Order:** Quantity of units on ALL open orders (at

Est Days On Order: Est days added to current based on 30 day trend (at current branch)

**Par Units:** The par value in units (set at current branch) **Units To Par:** Number of units to reach par (at current

**Expected Unit Cost:** Exp cost per unit historically **Expected Size Cost:** Exp cost of ordered size historically **Expected Ext Cost:** Exp unit cost multiplied by total units

# **Create a Purchase Order Template**

- 1. Complete steps 1-7 of 'Create an Order'
- 2. Select 'Save as Template' from the options across the top.
- 3. Name and select 'Create New Template'.

Save Order as Template	×
Save as a new Template Template Name:	
Create New Template	

# **Create Order from Template**

- 1. Select desired Template name from list.
- 2. Click 👩

Create Order from Template				
Vendor	Description	Create	View	Delete
Coke	Coke Monday	0		0

# **Edit Orders**

To revisit a P.O. at any time until it has been received, you can select '**Open**' from the **'Edit Orders**' table on the left.

Edit Orders							
Ordered	Expected	Vendor Name	ld	Last User	Edit	View	Vendor
03/21	03/22	International Paper	5752	cpirtle	Ø		
03/21	03/22	Lavazza Premium Coffees Corp	5753	cpirtle	Ø	•	

# **Create from Recent Receipt**

This allows you to duplicate an order from a previous receipt.

- 1. Select your date range.
- 2. Select the desired order and click o

Create Order fr	om Recent Receipt		
Receipts From:			Receip
07/06/2017			07/1
Date	Vendor	Id	Storage Area
7/12/17	7-Up	5748	Erie WH

# **Printing a Purchase Order**

Click the 👝 button.

This will allow you to view, print, and/or export your purchase order in your default order sizes (in **Item Management**).

Click the 📑

button.

This will allow you to view, print, and/or export your purchase order in your default vendor sizes (in Item Management).

# **Emailing a Purchase Order**

If the vendor's email is set up (in Vendor Management > **Addresses**), the option Email To Vendor ≥ will appear at the top left of your Purchase Order screen. Once clicked, you have the option to cc another recipient. Click 'Yes, this order is complete!'

## **Purchase Orders**





# Receiving

Receiving puts items INTO your inventory.

This is a 2 step process within Level:

- 1. Validating items and quantities, and
- 2. Validating pricing.

#### **COLUMN HEADERS:**

- **Item:** Item description
- **Product Code:** Product code of the item
- Item Size: Ordered size
- **Size Units:** Units in ordered size
- Quantity Ordered: Quantity of ordered size
- **Expected Size Cost:** Exp cost of ordered size historically
- **Expected Ext Cost:** Exp unit cost multiplied by total units
- Actual Ext Cost: Actual cost from vendor invoice
- **Size Cost Diff:** Difference between actual and expected size cost
- Actual Size Cost: Actual cost from vendor broken down
- **Promo?:** Check this box if you received promo pricing that you do no want to reflect in the item cost history
- Qty Received: Actual quantity received
- Expire Date: Expiration date of the item
- Validated?: Check this box once the quantity has been verified
- Validated By: Populates the user who marked the validated box
- Total Units: Total units on order
- Fill Rate: Percentage rate that this item is filled to order by vendor
- Quantity on Hand: Quantity on hand in units

# **Create a New Receipt**

You can receive items without creating a Purchase Order or Transfer on the webpage.

- 1. From Transactions select 'Receiving'.
- 2. Select 'Target Area (warehouse)'.
- 3. Select 'Vendor'.
- Select 'Receipt Date'.
- Click 'New Receipt'

# **View A Committed Receipt**

Here you can view receipts that have already been committed during a selected date range.

Committed receipts cannot be edited once they have been closed.

Receipts From:		Receipts To:		
07/06/2017		07/13/2017		
Date	Vendor	ld Sto	orage Area	View
7/12/17	7-Up	5748 Eri	ie WH	

## Receiving

# from either the handheld (Reference Pg. 32) or under the Receiving tab

eate a New Receipt	
	Select Target Area (warehouse)
	Erie WH 🔻
	Select Vendor
	Ţ
	Receipt Date
	07/13/2017
	New Receipt

# **Receive from a Purchase Order**

You can receive a purchase order from the handheld (Reference Pg. 32), or through the Level webpage.

Receive From a Purchase Order							
Ordered	Expected	Vendor Name	Id	Last User	Create	View	Vendor
03/21	03/22	International Paper	5752	ckeane	0		

Step 1: For validating items and quantities-

- Transactions select 'Receiving'. 1. From
- Select order from 'Receive From a Purchase Order'. 2.
- 3. Select Create θ
- Enter 'Qty Received' 4.
- Enter 'Expire Date' 5.
- Mark 'Validated' to confirm 6.
- Click 'Save Changes' from the bottom right 7.
- Click 'Close Receipt' from the top to await invoice verification 8.

# **Edit a Receipt**

You can edit a receipt to either make adjustments from Step 1, or move on to Step 2.

Edit A Receipt	(not committed)					
Date	Vendor	Id	Created	Storage Area	Edit	View
03/21/2017	Aspen Beverage Group	4613	cpirtle	Erie WH	ß	-

Step 2: For validating pricing-

- Transactions select 'Receiving'. 1. From
- 2. Select appropriate order from 'Edit a Receipt'.
- 3. Select



- 4. Under the '**Receipt Information**' column on the left
  - 1. Enter 'Invoice' reference (required)
  - Enter 'Discount Amount' (if applicable) 2.
  - Enter '**Comments**' (if applicable) 3.
  - 4. Click 'Save'
- Add 'Actual Size Cost' from vendor invoice 5.
- 6. Select 'Promo' (if applicable)
- 7. Select 'Commit (Done)' to save.

\*Once you've committed, you can no longer edit.

### Receiving



## **Return To Vendor**

- 1. From Transactions - select 'Return To Vendor'.
- 2. Select 'Return From Area (warehouse)'.
- Select 'Vendor'
- 4. Select the 'Return Date'
- 5. Select 'Create New Return'

Create a New Return
Select Return From Area (warehouse)
Select Vendor
Return Date 07/14/2017
Create New Return

- 1. Select 'New' to add Items/Sizes and Quantities
- 2. Select 'Add This Item'
- 3. Repeat steps 6-7 until all items have been added.
- 4. Verify the 'Total Cost' column
- 5. Select the 'Validated' check box to verify you are taking these items OUT of your inventory
- 6. Select 'Save Changes' from the bottom right
- 7. Once you have confirmed all costs and quantities, select 'Commit (Done)' from the top
- 8. Or, you can click 'Save (No Commit)' to return to it later

# Edit o Doturn

Edit A Return (not committed)		
Return Date	Vendor Name	
2/7/17	Jones	

<b>EU</b> You	u can e	<b>nglui ii</b> dit a saved r	eturn by selectir	ng 🕜	from the '	Return to	Vend	l <b>or'</b> pa	age.
Edit	A Return (	not committed)							
Ret	um Date 17	Vendor Name Jones	From A Do	ld 65	Storage Area Erie WH		Edit	View	
<b>UI</b> 1. 2. 3.	<b>Greate Keturn From A Keceipt</b> <ol> <li>From Transactions - select 'Return To Vendor'.</li> <li>Select date range</li> <li>Find appropriate receipt and select</li> </ol>								
Cre	eate Return	From A Receipt							
	ceipts From: 07/07/2017			Receipts To: 07/14/2017	7				
Da 7/1	ite 12/17	Vendor 7-Up		ld 5748	Storage Area Erie WH		Create	View	

- 4. Adjust 'Total Cost' column
- 5. Adjust 'Return Quantity' column
- 6. Select the 'Validated' check box to verify you are taking these items OUT of your inventory
- 7. Select 'Save Changes' from the bottom right
- 8. Once you have confirmed all costs and quantities, select 'Commit (Done)' from the top
- 9. Or, you can click 'Save (No Commit)' to return to it later

### **Vendor Returns**

# **Create a Transfer**

- 1. From Transactions select 'Transfers'.
- 2. Select a FROM 'Source Area (warehouse)'.
- 3. Select a TO

#### 1. 'Target Area (warehouse)'

\*This allows you to move product across warehouses.

#### 1. OR an 'Alternative Target'

(Spoils, damages, donations, etc.)

#### Select 'Return' for product bring backs.

1. Select 'Create Transfer'.



\*This will bring up a blank Transfer.

Print Transfer 🖨 🛛 Cle	ose Transfer 💾	Commit (Done	e) 🗹 Delete 9						
Transfer Id: 382065				Spoil					
								Transi	fer Iter
New Item		Item Size	Size Units Cos	Quantity	Validated	Total Units	Atlanta WH		
		Ŷ					Qty on hand		
			No data to displa	,					
TOTALS:	Line Items:								

#### 5. Select 'New' from the top left.

\*This brings up a window where you can select your product, size, and quantity.

- 6. Once you have done this, select 'Add This Item', and the item will be added to the Transfer.
- 7. Repeat these steps until you have added all of the items you would like on your Transfer.
- 8. Select 'Close Transfer' to save.

# **Edit Transfers**

\*You may edit Transfers at any time until it has been received/committed. 1. Select desired Transfer from the 'Edit Outgoing Transfers' and 'Edit Incoming

- **Transfers**' tables on the right.
- 2. Quantities with a **bold** column header may be adjusted.
- 3. When finished, select 'Commit (Done)'.









# **Managing Custom 'Transfer To' Destinations**

This page is only available to users that are granted the 'Admin Role'.

- From the Data Management dropdown, select 'Miscellaneous  $\bullet$ Settings'
- From here, you can view, delete, or add Custom Transfer To **Destinations** 
  - You can switch between 'Active' and 'Inactive' Destinations by selecting the corresponding button

Lightspeed LEVEL	Home	Transactions -	Reporting	Data Management <del>-</del>
Miscellaneou	is Se	ttings		
Custom Transfer To Desl	tinations	• A	ctive 🤍 Inactive	
Custom 1	Transfer	TO Destinatio	ns	
Active	Custom De	estinations	0	
(	Catering & D	ining	×	
	Truck		×	

- to the destination to make it inactive.
- To add a new Destination:  $\bullet$ 
  - 1. Select 🖸 from the upper right
  - 2. Fill in the name of your new Destination, and
  - 3. Select the 'green check mark'

Custom Transfer TO Destinations	
Active Custom Destinations	0
New Transfer To Name	$\bigcirc$

### **Miscellaneous Settings**

To remove a Destination from your list, simply select the 'red x' next



#### **Items Received with Expirations**

A report of the all items with expiration dates for a specific date range in a specific area (warehouse).

#### **Upcoming Expirations after FIFO**

A report of the all items based on First-In-First-Out for transfers with expiration dates for a specific date range in a specific area (warehouse).

#### **Current Total Inventory**

A report of the complete count of all items currently in your inventory at the time of the report generation. Displays quantities, no pricing.

#### **Inventory by Area**

Breaks down all current inventory by specific 'area'. You may select to view an individual area, or all. Breaks down by category. Displays quantities, no pricing.

#### **Inventory by Vendor**

Breaks down all current inventory by vendor. You may select to view an individual area, or all. Breaks down by category. Displays quantities, no pricing. (Note: if an item is sold by two vendors, the same QOH will appear across both vendors if the reports are ran simultaneously.)

#### **Inventory Value by Area**

A report of the complete count of all items currently in your inventory at the time of the report generation, with pricing (values). You may select to view an individual area, or all. Breaks down by category.

#### **Inventory by Date**

All inventory for a given date/time, in a specified area. With pricing.

- **Inventory Compare Dates**
- **Inventory Items Not Counted** All inventory items not inventoried since a given date, in a specified area.
- **Inventory Removed by Date** by a specified type of transfer.

#### **Reorder Report**

A report of the suggested re-orders of all items currently in your inventory at the time of the report generation based on your set pars and reorder points.

#### Items on Order

All items on orders (not yet received) for a specific area (warehouse). Can by filtered by manufacturer, vendor and/or category.

- **Receipt by Vendor, Manufacturer & Date** specified area.
- **Today's Expected Purchase Orders**
- **Expected Purchase Orders by Date**

#### Reporting

Side by side comparison of all inventory on two given dates, in a specified area.

All inventory removed, by date, during a specified date range, in a specified area, and

All inventory received by a specified Vendor, during a specified date range, and in a

A list of Purchase Orders that are expected to be received on the day the report is run.

A list of Purchase Orders that are expected to be received on a specified date.



#### **Transfer Summary by Item**

A report of transfers by item in a specified date range. Can be filtered by zone, transfer location and/or user.

#### **Transfer Summary by Branch**

A report of transfers in a specified date range to a specific transfer location.

#### **Transfer Summary by Zone**

A report of transfers in a specified date range. Can be filtered by zone, transfer location and/or user.

#### **Incoming Transfers Not Received**

A list of incoming Transfers that have not yet been received.

#### **Outgoing Transfers Not Picked**

A list of outgoing Transfers that have not yet been Committed.

#### **Completed Inventories**

This page gives you the ability to search for completed inventories by date range, and then pull up the individual Inventory Detail Reports.

#### **Inventory Reconciliation Report**

This page gives you the ability to search for completed inventories by date range, and then pull up the individual Inventory Reconciliation Reports, where you can see the numbers counted, on hand, whether the items were over/short, and by how much.

- **Receipt Report by ID** View any received orders by Receipt ID.
- **Purchase Order Report by ID** View any committed Purchase Order by Purchase Order ID.
- **Return Report by ID** View any Returned Item Receipt by Receipt ID.
- **Inventory Report by ID** View any committed Inventory by Inventory ID.
- **Item Purchase History** may select to view an individual area, or all.
- **Vendor History** specified area.
- Vendor Fill Rate

This report shows you the fill rate percentage that a vendor has for a specified time period at a specified area (warehouse).

Print Barcodes 

> This page gives you the ability to search for, and print, all barcodes for a specific item or all items from a specified Vendor/Category.

### Reporting

A report of all receipt activity for a specified item, during a specified date range. You

A report of all activity, for a specified vendor, during a specified date range, and in a





## **Void A Transaction**

1. From the Data Management dropdown, select 'Void A

#### Transaction'.

#### Void a transaction

Enter ID Number			
ID Number :			
Type:			
	-Choose Type-		
Vaid Transaction			
	Void Transaction		

- 2. Enter the ID number
- 3. Select
  - 1. Count
  - 2. Receipt
  - 3. Transfer
  - 4. Vendor Return
- 4. Choose 'Void Transaction'.

Confirm Void		×
You are about to Void This Are you sure?	: Receipt 5748	
	NO! (what was I thinking?)	Yes, Void this transaction.

- 5. Select 'Yes, Void this transaction' to confirm



# 6. Look for the green 'Transaction XXXX had been voided!' comment.





# LightSpeed Settings

1. From the Data Management dropdown, select 'LightSpeed Settings'.

Zone Settings:

- 1. Select the LightSpeed Zone you want to assign.
- 2. Select the Area (Warehouse) you are assigning the selected zone to.

Lightspeed Zones	Level Areas - Source		
Zone Description	Storage Areas		
Bev- SPR	Atlanta WH		

#### **Branch Settings:**

- 1. Select the LightSpeed Branch you want to assign.
- 2. Select the Level Branch you are assigning the selected LightSpeed branch to.

Lightspeed Branches	Level Branches
Lightspeed Branch	Level Branches
Tulsa	Atlanta

# **External Settings**

stored and maintained.

You can manage:

- 1. Storage Path
- 2. Tax Code
- 3. When to send
- 4. Time to send

#### **Branches**

**Branch Details** 

1. From the Data Management -

#	Branch Id	Branch Name	Accounting Reference
<u>Edit</u>	1	Atlanta	5000001100K2870
<u>Edit</u>	2	Boston	5000001100K2871
<u>Edit</u>	3	Chicago	500000110AR2874
<u>Edit</u>	4	Denver	500000110AR2876
<u>Edit</u>	5	Erie	500000110AR2872
<u>Edit</u>	6	Franklin	5000001100K2877
<u>Edit</u>	8	Gaffney	5000001100K2878
<u>Edit</u>	9	Houston	500000110TX2880
<u>Edit</u>	10	Irving	500000110AR2879
<u>Edit</u>	11	Jasper	500000110AR2879

- 1. Select 'Edit' next to the Branch
- Enter your Accounting Reference 2.
- 3. Select 'Update' to save.



#### \*This is where the connection credentials to your Accounting Package is

#### dropdown, select 'Branches'.







# **Customer Support**

**Click here for resolutions to common issues.** 

Client Success is available 8am – 6pm EST M-F (Excluding Holidays). Afterhours requests will be returned the following business day. \*\*If your system is down, please call 678.287.7117 and choose option 1.\*\*

There are two convenient ways to open a support request: #1 Email - support@lightspeedautomation.com #2 Call - 678.287.7117 and choose option 1.

## **Feature Requests**

For Feature Requests, please submit to: <u>www.lightspeedautomation.com/feature-requests</u>

#### Support



# Log In

1. From the handheld's Lock screen, press the 🖸 button from the bottom of the device to unlock.



2. Once you are on the Home screen, select the LEVEL icon from the bottom.



3. Once the LEVEL app opens, enter your supplied Username and Password and select 'Login'.

4. This will bring you to the LEVEL home screen where you can select a task to work in.

# Log in (HH)







# **Select Branch**

- 1. From the LEVEL Home screen, select the name of the 'Current Branch' at the top.
- \_ogout **Jason Leach** Current Branch Atlanta **Select Printer** Actions Receiving Inventory Vendor **Transfers Returns** Refresh Link **Barcodes** Items Add/Edit Scanner Images **Settings**
- 2. From the pop out window, you can select the appropriate Branch and select 'OK'.



# **Select Printer**

1. From the Home screen, click 'Select Printer' at the top.

2. From the pop out window, you can select the appropriate Printer and select 'OK'.

## **Branch (HH)**











# **Refresh Items / Pictures**

 From the LEVEL home screen, make sure you are in the correct branch and select 'Refresh Items'.



- Here, you are able to either 'Refresh All Items', or 'Items Since Last Update'.
- Once this has completed, you can repeat the process to 'Refresh All Images' or 'Images Since Last Update'.
- 4. Press '**Return**' to return to the Home screen.

Return Refresh Local Data			
<b>Refresh</b> N Item Update	Refresh Items and Images Not Started Item Update: 12/14/2016 2:03 PM		
Refre	Refresh All Items		
Items Si	Items Since Last Update		
Image Update	Image Update: 10/27/2016 5:23 PM		
Refre	Refresh All Images		
Images S	Images Since Last Update		
	Cancel		

# Link Barcodes

In order for the Handheld to recognize the items in your inventory when using the scanner, you must first designate Barcodes to all items and sizes.

1. Select 'Link Barcodes' from the Home Screen

- 2. Scan the barcode of the item you wish to enter.
- Select the item and size you wish to link, and press
   'Select'.
- 4. Choose 'Link Barcode To Item'.

## Items (HH)







# Add/Edit Images

- From the LEVEL Home screen, select 'Add/Edit Images'.
- ogout **Jason Leach Current Branch** Atlanta **Select Printer** Actions Receiving Inventory Vendor **Transfers Returns** Link Refresh **Barcodes** Items Add/Edit Scanner **Settings** Images

- Scan the barcode of the item or select 'Item Lookup'.
- Choose the item and press
   'Select'.
- 4. Tap the Image Square in the middle of the screen.



- 2. Take a picture of the item you wish to link
- Select 'Retake' to try again or 'Use Photo' once you are satisfied.
- 4. Click 'Save'.

## **Items (HH)**







# **Perform an Inventory**

 From the LEVEL home screen, make sure you are in the correct branch and select 'Inventory'.



From here, you are able to either 'Start New inventory', or 'Continue Saved Inventory'.

- To begin a New Inventory, verify the date and Branch, and select 'Start'.
- To continue a Saved Inventory, select the Inventory from the list, and select 'Continue'.

iPod ᅙ	2:40 PM	+ 🔜 ا	
Return			
Start Nev	Start New Inventory		
12	/14/2016 2:40	РМ	
Test F	Test Fort Smith Warehouse		
Partial In	Partial Inventory		
	Start		
Continue saved inventory			
Delete		Continue	

- Be sure 'Partial Inventory' is selected. If this is not selected, any items you do not count will be marked as ZERO in that branch.
- Inventories without 'Partial Inventory' selected is only to be used for FULL COUNTS of entire warehouses.
- Pull up items by either scanning the barcodes or searching for the items with 'Search Items' at the bottom.
- On this screen, you can also verify that your scanner is currently connected and turned on
- Look for the screen.
- in the middle of

### **Inventory (HH)**

Partial Inventory





- Once you have scanned an item, your Handheld will bring up all available sizes
- 4. Select the size you wish to enter.
- 5. To enter the number of items, you can either:
  - Add the 'Size Count' Gives the total number of that size counted for that day
  - Or, 'ADD to Count', Adds the number entered to the running total for this Inventory.

Return Test Fort Smith Ware Details				
Dt Co	Dt Coke 12oz Can (6:049)			
Selected Size	e: Unit Units: Size Count 11 - +	1 ADD to Count 4 - + Save		
Choose an Item Size				
Unit	Quantity	Total		
Units 1	11	11		
Case	Quantity	Total		
Units 24	0	0		
Box	Quantity	Total		
Units 12	0	0		
Item Total 11				
	Search Items			

- 4. Once you have completed this step, select 'Save' and scan or enter your next item.
- 5. Repeat these steps until you have completed counting.
- 6. To view all items currently in inventory, you can click'Details' from the top right.
- 7. Click '**Return**' when finished.

### Inventory (HH)

Return Te:	Return Tost Fort Smith Ware Details			
Dt Co	Dt Coke 12oz Can (6:049)			
Selected Size	: Unit Units: Size Count 11 (- +)	1 ADD to Count 4 - +		
11	Connected	Save		
Choose a	n Item Size			
Unit	Quantity	Total		
Units	11			
Case	Quantity	Total		
Units 24	0	0		
Box	Quantity	Total		
Units 12	0	0		
Item T	Item Total 11			
	Search Items			



# Receiving

- 1. From the LEVEL Home screen, select 'Receiving'.
- 2. You can 'Create a New Receipt', 'Create From Purchase Order, or 'Continue a Saved Receipt'.



#### To 'Create a New Receipt'

- 1. Select Date and Time.
- Select Vendor. 2.
- 3. Select 'Create'.



- 3. Scan or search for the items you wish to Receive.
- Select the size. 4.
- Enter the quantity 5.
- Add expire date and 'Save'. 6.
- To validate: tap to mark with a 7. 'green checkbox'.
- 8. Once all returns have been entered and validated, you will see 'Receipt is Complete'. \*Repeat steps 3-8 for 'Saved **Receipts'** as well.

#### To 'Create From Receipt'

- Select desired Receipt. 1.
- Select items. 2.
- Select the size. 3.
- Enter the quantity. 4.
- Add expire date and 'Save'. 5.
- To validate: tap to mark with a 6. 'green checkbox'.
- 7. Once all returns have been entered and validated, you will see, 'Receipt is Complete'.

### **Receiving (HH)**









# **Vendor Returns**

- From the LEVEL Home screen, select 'Vendor Returns'.
- You can 'Create a New Vendor Return', 'Create From Receipt, or 'Continue a Saved Return'.



#### To 'Create a Vendor Return'

- 1. Select Date and Time.
- 2. Select Vendor.
- 3. Select 'Create'.

Return			
	Atlant	a WH	
Create a Vendor Return		ndor Return	
	7/19/2017 9:21 AM		
ľ	Vendors Please select a Vendor		
С	C Pepsi - PBG n		
	7-Up		
	Coke		
	Coca-Cola Enterprises		
I	Freshley		
L	Cancel	ОК	
	M7R-Atlanta WH		
		Continue	

- 3. Scan or search for the items you wish to Return
- 4. Select the size.
- 5. Enter the quantity and 'Save'.
- To validate: Tap to mark with a 'green checkbox'.
- 7. Once you've entered all returns, click 'Done'.
  \*Repeat steps 3-7 for 'Saved Returns' as well.

#### To 'Create From Receipt'

- 1. Select desired Receipt
- 2. Select items.
- 3. Select the size.
- 4. Enter the quantity and 'Save'.
- To validate: tap to mark with a 'green checkbox'.
- 6. Once you've entered all returns, click '**Done**'.

### Vendor Returns (HH)







# **Perform a Transfer**

In LEVEL, you are able to transfer inventory OUT of your warehouse.

- To Transfer items, select
   'Transfers' from the Home
   Screen
- From here, you are able to either 'Create a new Transfer', or complete an 'Existing Transfer'.

#### To 'Create A Transfer',

- 1. Verify the date
- 2. Branch,
- Choose 'Another Area' (branch) or 'Alternate Destination'.
  - Sale
  - Spoil
  - Damage
  - Promo
  - TradeLoss
  - Donation
  - Return \*Use this for bring backs
- 4. Select 'Create'.



🗸 Jason Leach		
Create a	Transfer	
12/14/201	6 2:40 PM	
Test Fort Smi	th Warehouse	
To Another Area	Alternate Destination	
Chocce D	octination	
	Create	
Existing	Transfers	
Outgoing Transfers	Incoming Transfers	
Test Fort Smith Warehouse to Spoil Created 12/13/2016, by wpitts		
	Continue	

- 5. Scan or search for the items you wish to Transfer
- 6. Select the size.
- 7. Enter the quantity and 'Save'
- To validate: tap to mark with a 'green checkbox'.
- Once you've entered all items, click 'Commit'.

To continue an '**Existing Transfer'**, select the Transfer from the Outgoing or Incoming list, and select '**Continue**'.

- 1. Scan or search for the items you wish to Transfer
- 2. Select the size.
- 3. Enter the quantity and 'Save'.
- 4. To validate: tap to mark with a 'green checkbox'.
- Once you've entered all items, click 'Commit'.

### **Transfers (HH)**

Return Atlanta WH to Sp	ooil	
BodyArmor Blacko	ut Brry	
Transfer Quantity <b>1</b> - + #382067 - Atlanta WH to	Save Spoil	
BodyArmor Blackout Brry		
Size: Case (12) Total: 12	Quantity	
Search/Add Item	Commit	

✓ Jason Leach			
Create a Transfer			
12/14/2010	12/14/2016 2:40 PM		
Test Fort Smit	th Warehouse		
To Another Area Alternate Destination			
Choose Do	estination		
	Create		
Existing 1	Transfers		
Outgoing Transfers	Incoming Transfers		
Test Fort Smith Warehouse to Opoil Created 12/13/2016, by wpitts			
1	Continue		



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