

# entree

## Electronic Warehouse Manager System Guide



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# **Chapter 1**

## **Contact NECS**

## 1 Contact NECS



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- Contact our **NECS Sales Department** at [sales@necs.com](mailto:sales@necs.com) for more information.
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## 2 Software Licensing Agreement

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# **Chapter 3**

## **Introducing Electronic Warehouse Manager**

### 3 Introducing Electronic Warehouse Manager

Tablet technology is catching up to the real world needs of business and industry. Recent advances in mobile technology are allowing the NECS software developers to free our **entrée** users from their desktops and go mobile. You can carry around a small, light weight, easy to read, advanced piece of technology which is directly connected to your company **entrée** server via WIFI.

The [Electronic Warehouse Manager](#) (**EWM**) is the mobile application that will automate your warehouse. The **EWM** system, running on Android tablets, allows you to very cost effectively automate your warehouse processes. Data entered into the tablet is immediately saved on your **entrée** server. This means that if the tablet stops working (ex: battery goes dead), no data will ever be lost.



**ELECTRONIC WAREHOUSE MANAGER**  
THE APP THAT CHANGES YOUR WAREHOUSE OPERATIONS FROM RE-ACTIVE TO PRO-ACTIVE

- ✓ So easy to use, requires very little training
- ✓ Streamlines order picking, inventory receiving and physical inventory
- ✓ Barcode scanning which properly reads any vendor's barcode
- ✓ Fully supports catch weights, label printing, substitutions, etc.
- ✓ Supports Bluetooth barcode scanners, scales and printers
- ✓ Makes your warehouse crew's job easier, faster and accurate

The **EWM** is our latest mobile application that will automate your warehouse. The **EWM** system, running on Android tablets, allows you to very cost effectively automate your warehouse processes. Data entered into the tablet is immediately saved on your **entrée** server. This means if the tablet stops working (ex: dead battery), no data will ever be lost.

If you're a Food Distributor that also processes or manufactures products then **Electronic Warehouse Manager** has three features geared toward that side of your business, **Transfer Out**, **Transfer In** help you to manage the inventory used in the production of the new products and the **Production Labels** feature allows you to design labels in-house for those products then print them using **EWM**.

# **Chapter 4**

## Technical Specifications

## 4 Technical Specifications

**entrée Software:** requires [entrée V3/V4](#)

- **entrée** version 3.6.12 or later or **entrée V4 SQL** is required.

**Electronic Warehouse Manager (EWM)** Android Application is required.

### Android Device Requirements:

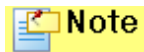
- Android OS version 4.1 (Jellybean) or later.
- A dedicated workstation which communicates with your **entrée** server and the Android tablets.
- 802.11 WIFI network available in your warehouse wherever the tablets will be used. Depending on the layout of your warehouse, additional 802.11 Access Points may be required to boost the wireless signal for all areas of your warehouse, including freezers, coolers, etc.
- **Tablets recommended:** 7" or 10" tablet sizes supported. [Galaxy S2 8" or 9"](#)
- If the tablet is to be used in freezer or wet location, it should be "IP54" rated or higher for durability in wet/hot/freezing environments.

### Bluetooth Barcode Laser Scanners

- [KDC350 Glove Barcode Scanner](#)
- [Socket Mobile CHS 7Pi](#)

### Optional Scales

- **Bluetooth scale:** [Doran Scales](#)
- **Non-Bluetooth Scale & adapter:**
  - Rice Lake Weighing Systems: [CW-90X Over/Under Washdown Checkweigher](#)
  - [IOGEAR Bluetooth Serial Adapter, GBC232A](#)



### Note

Android tablets are made by many different companies and may have controls and menus that are different than the ones presented in this guide. Please consult the product guide for your specific brand of tablet to learn how it works before beginning this installation process on your tablet.

### Apple Device Requirements:

- The Apple iPad 2 or later (16GB, iOS 5.0 or later) can run the **Electronic Warehouse Manager** app, but **without** the Bluetooth scanner/scale/printer abilities.

### Dedicated Workstation Requirements:

Server software is installed on a dedicated workstation which controls the operation of all tablets.

- Windows XP / Windows Vista / Windows 7/ Windows 10.
- Intel i5 or greater.
- 4GB RAM.
- 1360 X 768 minimum monitor resolution.
- 200GB hard drive.

### Accessories:

- Isotoner smarTouch Gloves for Texting.

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# Chapter 5

## EWM Product Features

## 5 EWM Product Features



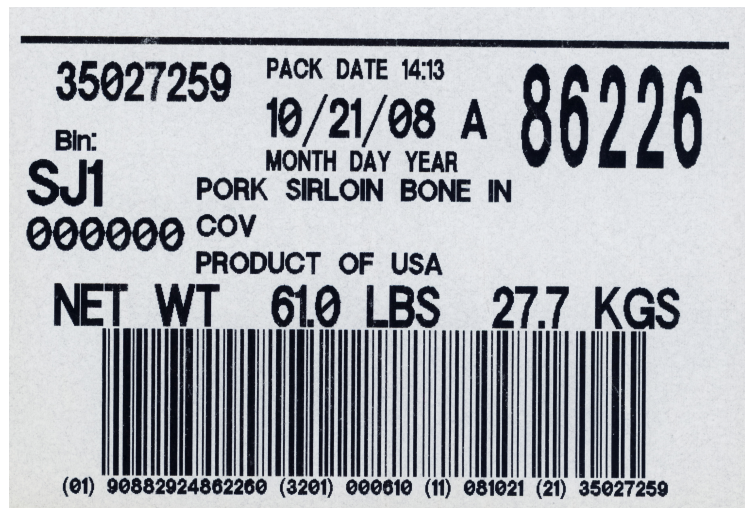
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### EWM Highlights

- Pick Lists
- Loading Sheets
- Purchase Order Receiving
- Pallet Scan
- Barcode Definition Manager
- Barcode Definition Diagnostics
- Progress Dashboard
- Warehouse Manager Dashboard

**To manage inventory used in processing and manufacturing products.**

- Receive Kit Inventory
- Transfer Out
- Transfer In
- Production labels
- Label Printing



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## 5.1 General Features

1. **EWM** tablets connect directly to the your local **entrée** server via WIFI. Tablets are completely portable and at the end of the work day they should be locked in a safe.
  2. Invoices and Purchase Orders are be created as normal from your desktop **entrée** software.
  3. **Pick Lists** are no longer printed because the tablet is the "electronic" version of the document.
  4. **Loading Sheets** will no longer be printed because the tablet acts as an "electronic" version of document, always updated with the latest revisions including customer add-on modules.
  5. The employee in the warehouse will turn on the tablet, log in, select the route, then be able to view a **Pick List** for that route, along with all the **Loading Sheets**.
  6. The **Loading Sheet** on the tablet will have the same layout as the printed Loading Sheet your staff is used to seeing.
  7. Quantities and weights can easily be entered in the warehouse, either by barcode scanning or touch entry via a numeric display on the screen, eliminating the need for office staff to key them in and print labels.
  8. The warehouse operators will be able to sort and view the line items on the order by temperature zone, class, warehouse location, case items, non-case items, catchweights, etc.
  9. They will also be able to view a complete "revision" history of the order, showing each revision and the items that were added / deleted from the order, etc.
  10. **Picking Labels** can immediately print per line item as the quantity and/or weights are entered or printed in total at the end of the picking process.
  11. The labels can print on a portable, WIFI based, high speed thermal label printer or a permanent printer on the loading dock, saving time because the labels can be immediately affixed to products. You will no longer have 75 labels for an order and have to figure out what box has what label.
  12. The warehouse staff will no longer have to wait for the office staff to enter the weights or quantities and print their labels.
  13. The office staff will no longer be required to key in quantity shipped or catchweights, freeing up valuable employee office overhead costs.
  14. Substitution of items, if enabled for a user or via a supervisor override, is allowed.
  15. Even if you don't track your inventory using lots, when scanning item labels, the item's manufacturers lot number is saved in case there is a product recall. The **Product Recall** report will allow you to quickly identify those products and customers and take action to protect the public and comply with the Food Safety Modernization Act (FSMA).
  16. The completed invoice can be printed from the tablet.
  17. Tablets have a Bluetooth interface so they can easily communicate with other devices, such as Bluetooth enabled barcode scanners and scales. If your business does a lot of product weighing for orders, saving the time it takes to input the weights is another area where you can make your processes more cost efficient.
  18. For security reasons no business data is ever stored on the tablet, it is immediately saved on your **entrée** server. So if a tablet is lost or stolen no company information can fall into the wrong hands.
  19. Getting started with **EWM** barcode scanning is not a problem with over 50 of the commonly used bar code symbologies are supported by the application.
  20. The Barcode Definition Manager allows you to define, edit and diagnose problems with manufacturer's bar code labels as you scan them into **EWM**.
  21. The **Production Labels** feature allows you to both design your own label format with **entrée's** barcode label designer and print these labels in your production room.
  22. **Transfer Out / Transfer In** features will manage inventory for items used in processing and manufacturing products.
  23. **Receive Kit Inventory** used to receive inventory for kit items used in the processing and manufacturing other products.
-

## 5.2 Production Labels & Bluetooth Scales

Before you can **Transfer In** you need to create production labels for your items. You can take advantage of the Production Label feature in the **Electronic Warehouse Manager (EWM)** to get that job done.

Design your own label format with **entrée's** Production Label designer feature in the Report system found in the System ribbon menu.

Create your in-house label design in the Production Label feature in **entrée** then in **EWM** you will print these labels in your production room.

You can mount a tablet running the **Electronic Warehouse Manager** near a Bluetooth enabled scale and a thermal barcode printer and generate labels on demand as inventory is processed.

- The system, if set up correctly, can automatically assign Lot Numbers and other key information to meet your labeling requirements.

### ✓ Hot Tip!

Use the lot number that is part of the barcode label that comes on the product.

Production Label - 10499

Directions: Enter quantity. Then touch Printer \\tony2\HP LaserJet 59

Quantity [0] 7 8 9 SET TARE

Weight [ ] 4 5 6 SET KILL DATE

Tare Offset [ ] 1 2 3 PRINT

Kill Date [ ] 0 . CLR

Item #	UOM	Pack	Description	Qty/Wgt	Status
10499	CASE	30#	WHIPPED TOPPING	1	Printed

### 5.3 Product Recall Report

The Bio-terrorism Act of 2002 and the Food Safety Modernization Act (FSMA), signed into law in 2011, is having and will continue to have an impact on the global food supply chain. Distributors must be prepared to meet the new regulations or face large fines and possibly closure. These laws give the Food and Drug Administration unprecedented new powers of enforcement, inspection, and forced recall. Because of this, it was especially important that we include lot tracking features that will keep our customers in adherence to this new law and the freedom of mind that they are fully prepared in case of a product recall.

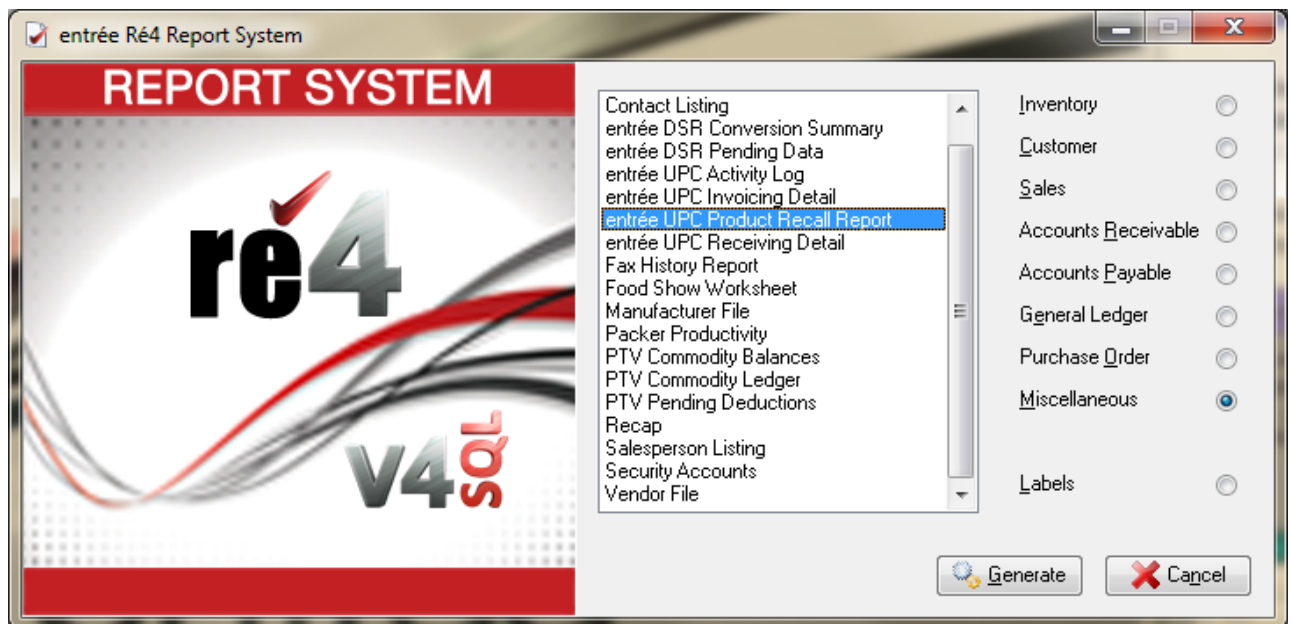
Warehouse staff cannot assign lots using **Electronic Warehouse Manager**. There are three ways to get the Lot numbers assigned to items into the **entrée** Inventory File.

1. When inventory is received warehouse staff use EWM to scan the barcode labels of the products. The lot number is then recorded along with all other key information from that barcode label.
2. Office staff can perform Lot Number assignment during Invoicing, which add times to order processing.
3. Or you can enable **entrée** System Option #106 "Auto Assign Lots During Invoicing", so the **entrée** system will do the lot assignment work.

The best method is #1, scan and use the Lot Number (or Production Date) encoded in the manufacturer's barcode label during receiving.

Then when the product is sold, the lot number in the scanned barcode label is recorded, including all details including the customer that purchased the item.

Whenever a product recall is issued by the FDA, you can then quickly determine what customers were provided inventory from the recalled lot's using the **Product Recall Report**.



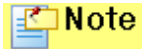
# Chapter 6

## EWM Installation Overview

## 6 EWM Installation Overview

There are various network requirements and installation processes that must be performed before you can use the **EWM** application successfully on your Android tablet in your warehouse location. The requirements are listed below with a brief explanation and a link to the related chapter. These installation steps must be performed in the order they are listed below.

1. Set up a wireless network at the location where **EWM** will be used.
2. Server / Workstation Install:
  - You will need a dedicated server or workstation to communicate between **entrée** and your tablet devices.
  - Create a new administrator account that will be used to login to the server for **EWM**.
  - Install **entrée** on the server (if it is not already installed).
  - Various **entrée** mods will need to be installed and install programs need to be run to align the communications between systems so they will work correctly.



**Note** For step 2 you must contact **NECS Technical Support** and schedule an **EWM installation appointment**.

3. Once you have the **EWM** application installed on your server you will proceed to the [entrée Settings & Dashboard](#) chapter. Here information about the updates needed in the main **entrée** system are detailed.
    - **There are four required installation tasks:**
      - a. Update the main **entrée** system to version 3.6.12 or later.
      - b. [Assign Usernames & Passwords](#) to access EWM.
      - c. [Update User Account Settings](#) Miscellaneous password options to access EWM.
      - d. [Configure entrée System Options for EWM](#).
    - **One optional task to be completed in the main entrée system.**
      - e. [Add Substitute Items in entrée](#) (optional task).
  4. If you will be using a Bluetooth barcode scanning device you will need to first perform the [Barcode Scanning Device Setup](#) process to configure your device before you can use it with **EWM**.
  5. Then after the **entrée** system tasks have been completed proceed to perform the required tablet device tasks.
    - a. [Connect to WiFi](#)
    - b. [Allow Unknown Sources](#)
    - c. [EWM Tablet Installation](#)
    - d. [Sign-In](#)
    - e. [Bluetooth Setup - Adding Scanners, Printers & Scales](#)
  6. Now you can proceed with building your barcodes in the system using the [Barcode Definition Manager](#) section of this guide.
-

# Chapter 7

entrée Settings & Dashboard

## 7 entrée Settings & Dashboard

### entrée Versions

With the release of **entrée version 4 SQL** in 2014 and the major differences between the menus and screens in both **entrée** versions 3 and 4 we have included instructions for using both versions of **entrée** in this guide.

To differentiate topics for each major version of **entrée** you will see color coded **entrée V3** or **entrée V4 SQL** headers in the impacted topics to direct you to the correct information for your system.

### NECS entrée KnowledgeBase Links

- [entrée V4 SQL KnowledgeBase](#)
- [entrée V3 KnowledgeBase](#)

### Set Up Tasks

Before you can begin to use the **EWM** application there are a four required tasks and one optional task to be completed in **entrée version 3** or **entrée V4 SQL** whichever system you are currently running. Followed by five setup tasks that must be completed on your tablet device.

#### **The entrée system tasks that need to be performed are:**

1. Update the **entrée** system to version 3.6.12 or later or the latest version of **entrée V4 SQL**.
  2. [Assign Usernames & Passwords](#) to Access EWM.
  3. [Update User Account Settings](#) to Access EWM.
  4. [Configure entrée System Options for EWM](#).
  5. [Add Substitute Items in entrée](#) (optional task).
- The **entrée** [Warehouse Manager Dashboard](#) and [Reports](#) chapters should be reviewed to get familiar with features and reports used with **EWM**.
  - The [Warehouse Manager Dashboard](#) is used to view the current activity of your warehouse employees using either **entrée.UPC** or **EWM** including Purchase Order receiving.
  - The **Product Recall Report** is used to quickly identify recalled products and take the proper actions to protect the public.
  - After the **entrée** system tasks above have been completed go to [Barcode Scanning Device Setup](#) and [Tablet Setup](#) sections of this guide to continue with the installation process.

### entrée System Tasks

#### **First, Update the Software for your version of entrée**

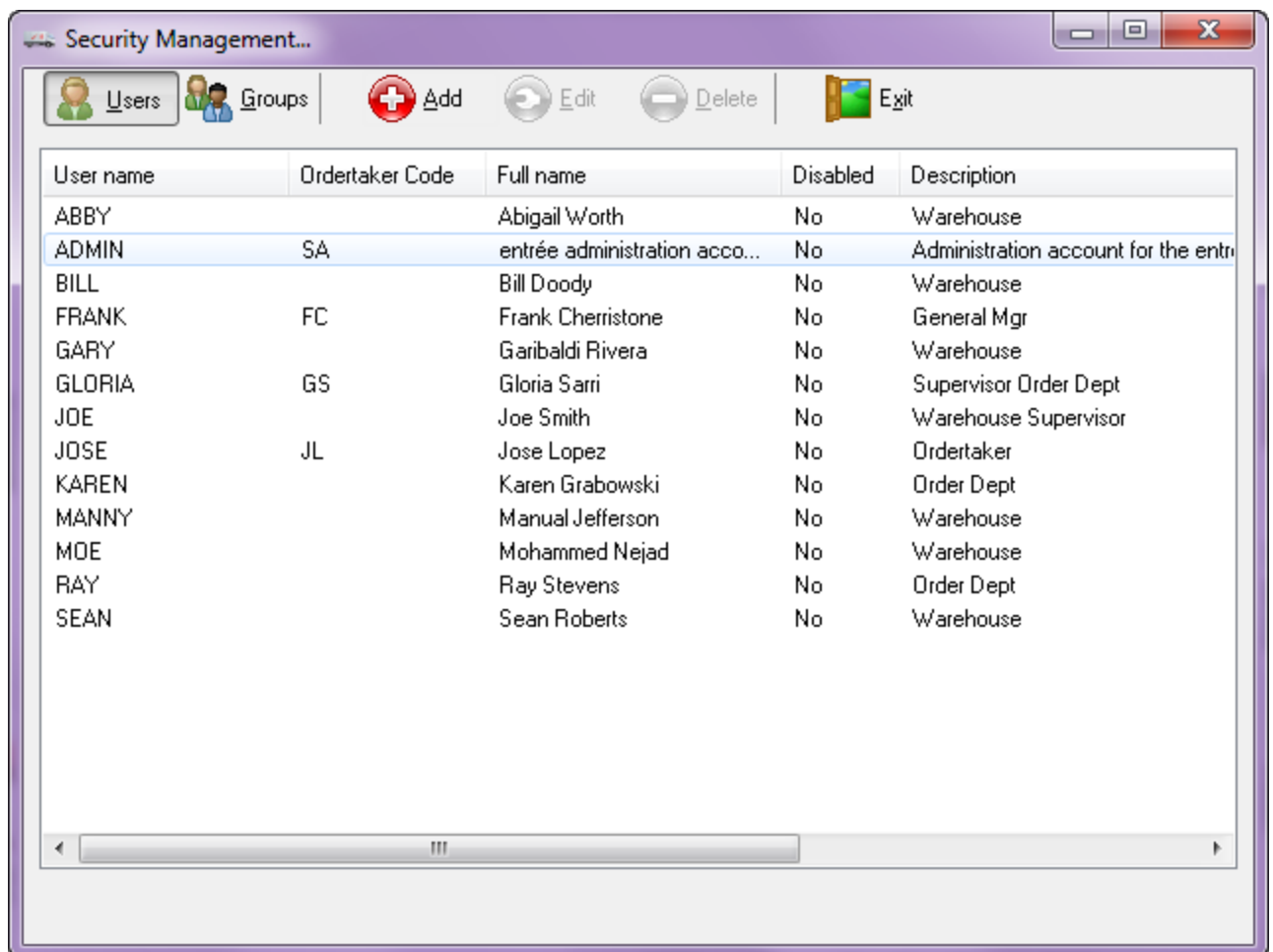
The main **entrée** system must be at version 3.6.12 or later or the **entrée V4 SQL** latest release. If not, please go to <http://www.necs.com/support/> login and download the latest release of **entrée** and update your system before proceeding.

---

## 7.1 Assign Usernames & Passwords

Second, you need to assign a unique Username and Password to each employee using **EWM** in the main **entrée** system. This task will be performed in the **Security Manager**. The process is the to add users is the same in both **entrée version 3** and **entrée V4 SQL**.

- 1a. **entrée V3** Use menu path: **System > Security Management**.
  - 1b. **entrée V4 SQL** Go to the **System** ribbon menu and click the **Security Management** option.
2. Click the **Users** button on the toolbar of the Security Manager utility.



3. Click the **Add** button to open the **Create User** dialog.

4. Enter a unique name for the user in the **User name** field.

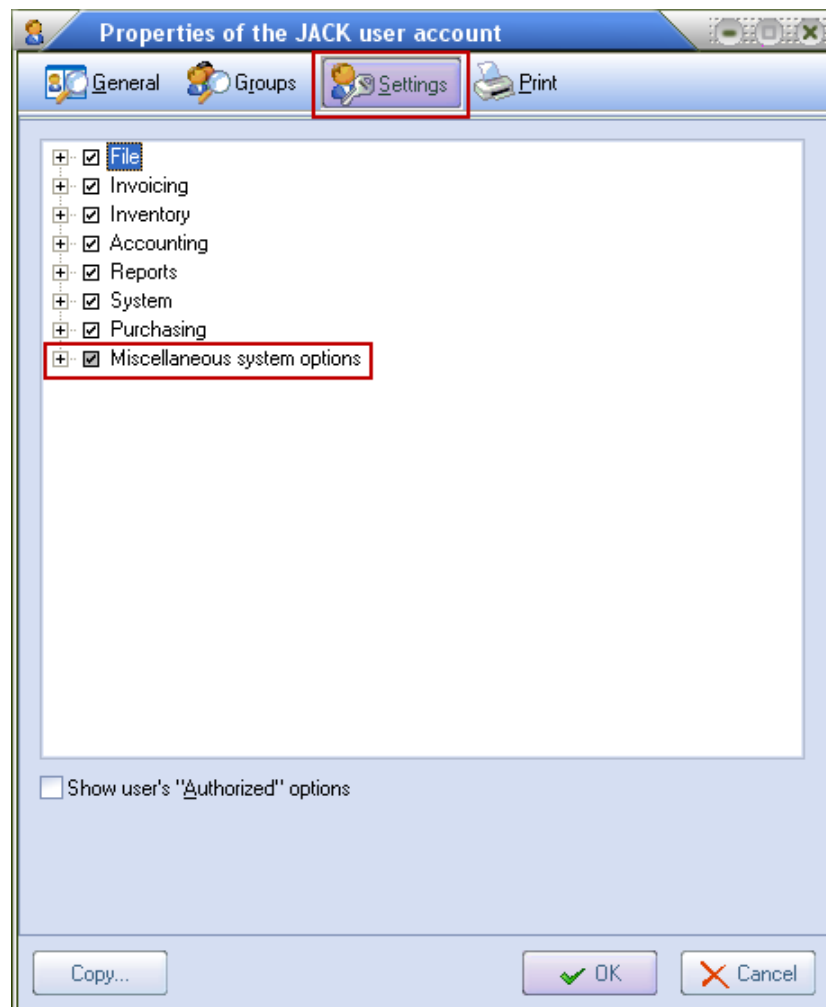
5. Optionally enter a description of the user account in the **Description** field.
6. Enter the full name of the employee that will be using this account in the **Full name** field.
7. Optionally enter the initials of the employee (or other 2-character identifying code) for
  - **Order taker code**
  - **Picker code**
8. Optionally check the **Credit Manager** or **Credit Supervisor** if the employee will process approvals in the credit hold queue.
9. In the **Password** field enter a unique password that the employee will use to access **EWM** and the **entrée** system.
10. Enter the password from step 8 in the **Confirm Password** field. This duplicate entry is required to ensure the password has been keyed in correctly.
11. Click the **OK** button to save the user account and close the **Create User** dialog. The new user will now be listed on the **Users** tab in **Security Management**.

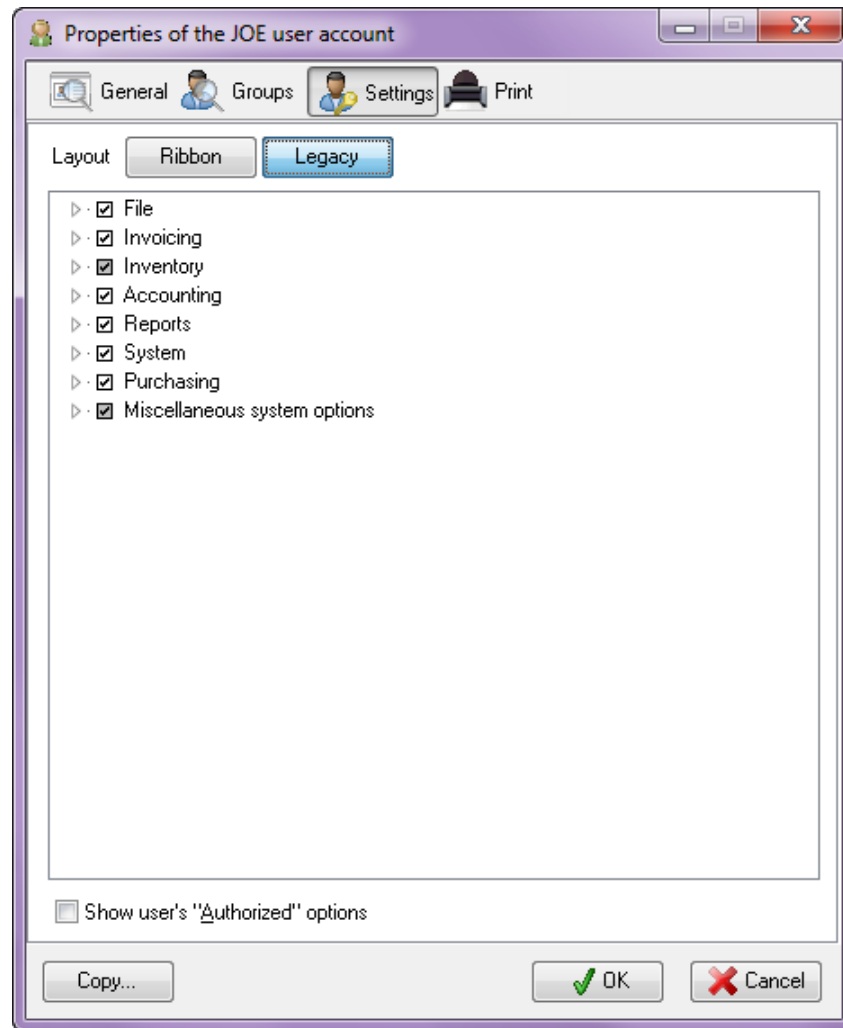
## 7.2 Update User Account Settings

Third, once user accounts have been created with passwords in the main **entrée** system you must proceed with updating the password settings for each of these user accounts.

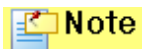
- 1a. **entrée V3** Use menu path: **System > Security Management**.
- 1b. **entrée V4 SQL** Go to the **System** ribbon menu and click the **Security Management** option.
2. Click the **Users** button, located on the toolbar of the Security Manager utility.
3. Select the user account that you want to edit in the account listing area.
4. Click the **Edit** button. This will open the **Properties** of the <NAME> user account, where <NAME> would be replaced with the user name of the selected user account.
5. Click the **Settings** button.

### **entrée V3**



**entrée V4 SQL**

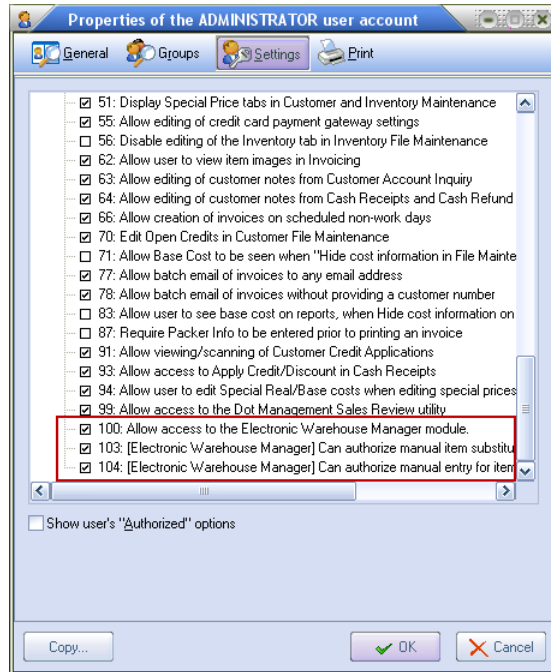
6. Click on the + next to **Miscellaneous system options** to expand the list.

**Note**

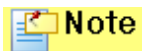
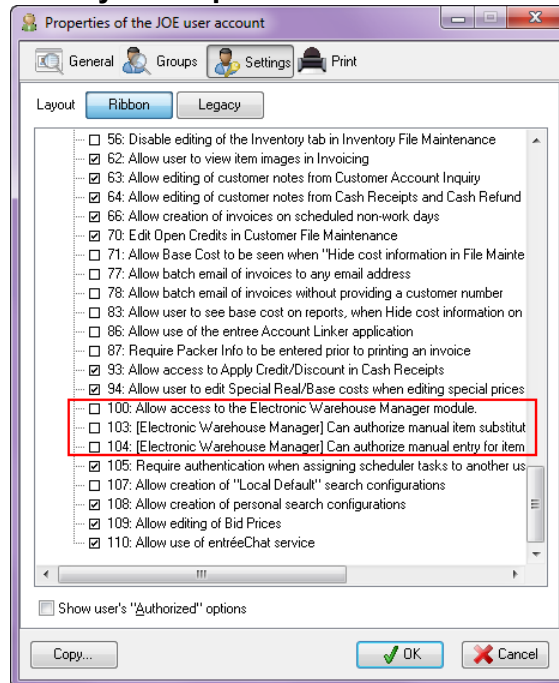
The **Miscellaneous System Options** section of the option tree contains password options with permanent ID number values for each option. Many of these password option settings are associated with specific custom modifications for the **entrée** system. Some numbers will not be seen unless you have the related custom modification for your system. This is where you will control access to **EWM**.

7. Scroll down the list to option **#100** Allow access to the Electronic Warehouse manager. Add a check mark here if you want the particular employee to have access to **EWM**.
8. For option **#103** Can authorize manual item substitutions. Check the box only if you want the particular employee to be able to perform manual item substitutions in **EWM**.
9. For option **#104** Can authorize manual entry for items set as "Required item to be scanned". Check the box only if you want the particular employee to be able to manually enter items in **EWM** and bypass scanning.

**entrée V3 Miscellaneous System Options**



**entrée V4 SQL Miscellaneous System Options**



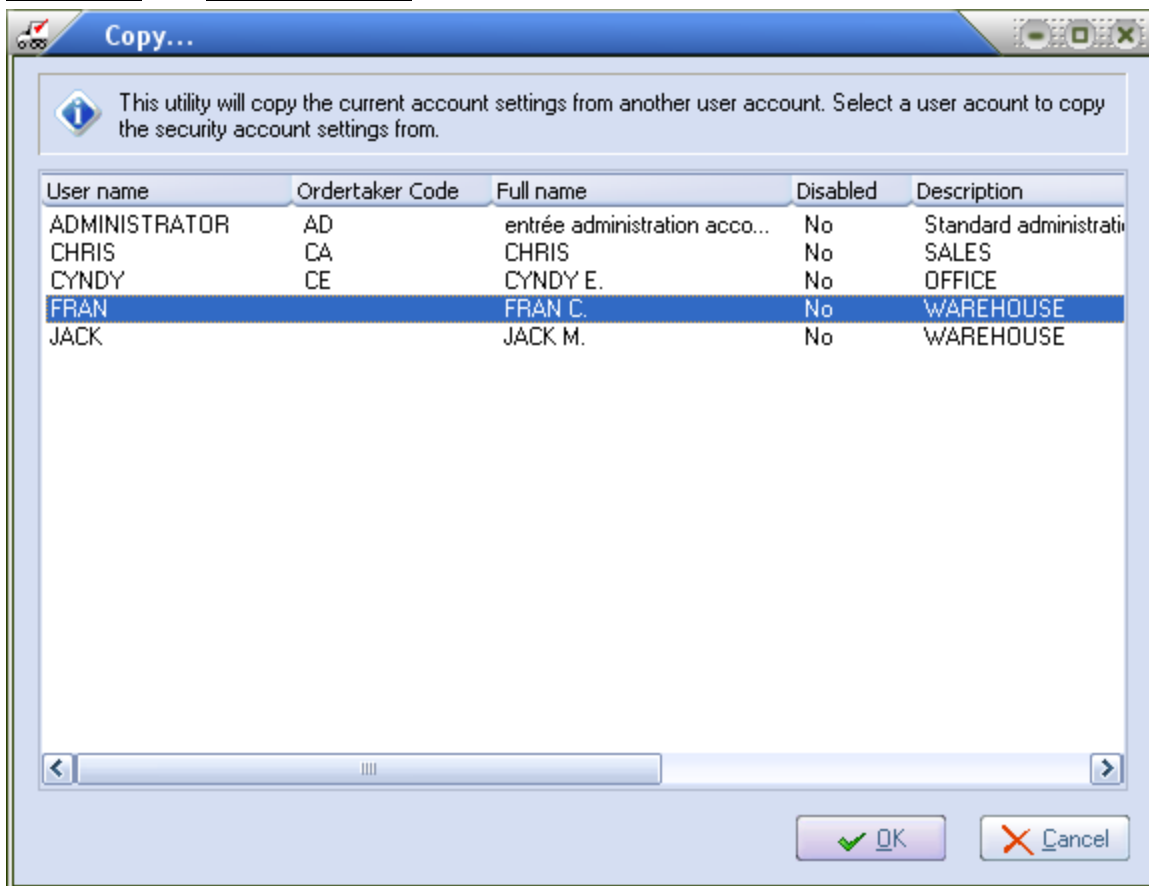
The option settings for the current user may be copied from an existing user by clicking the **Copy...** button, located in the bottom left corner.



**Caution** When using the Copy feature make sure you really want all the security settings copied to the new user. This utility will copy the entire settings list.

**To Copy User Account settings follow these steps:**

- a. Click the **Copy** button.
- b. Select another **User name** from the main list.
  - Users can be sorted by clicking on any of the column headings.
  - Clicking a column heading a second time will reverse the sort order of that column.
- c. Click the **Copy** button. The **Copy** dialog box will display. (See **Caution** message above before using this feature.)
- d. Select the User name with the desired settings from the list. It will copy **all** of the selected user's settings into the current **User name**.
- e. Repeat this process of all users needing identical security settings.

**entrée V3** and **entrée V4 SQL**

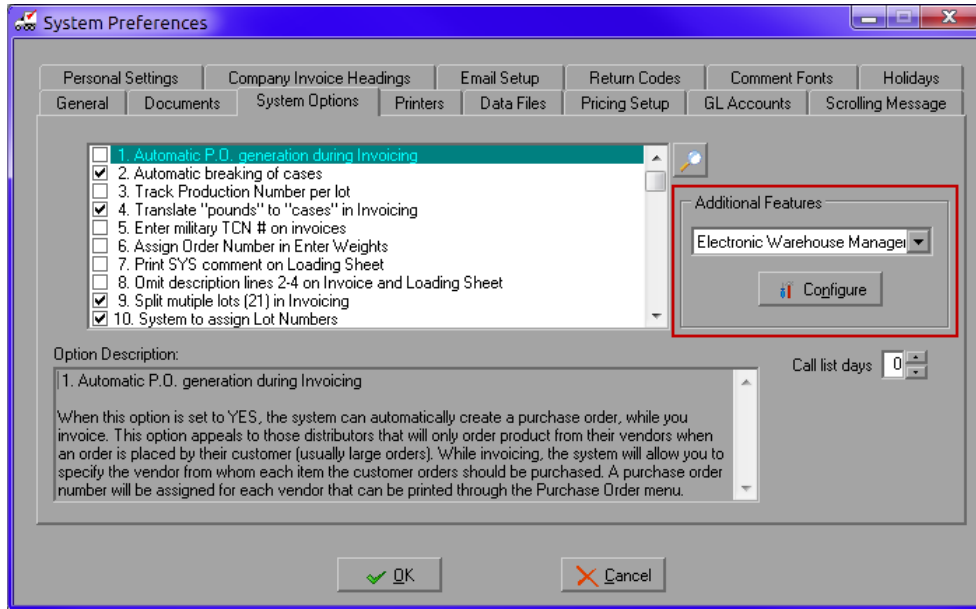
8. Click **OK** to save the User Account.

### 7.3 Configure entrée System Options

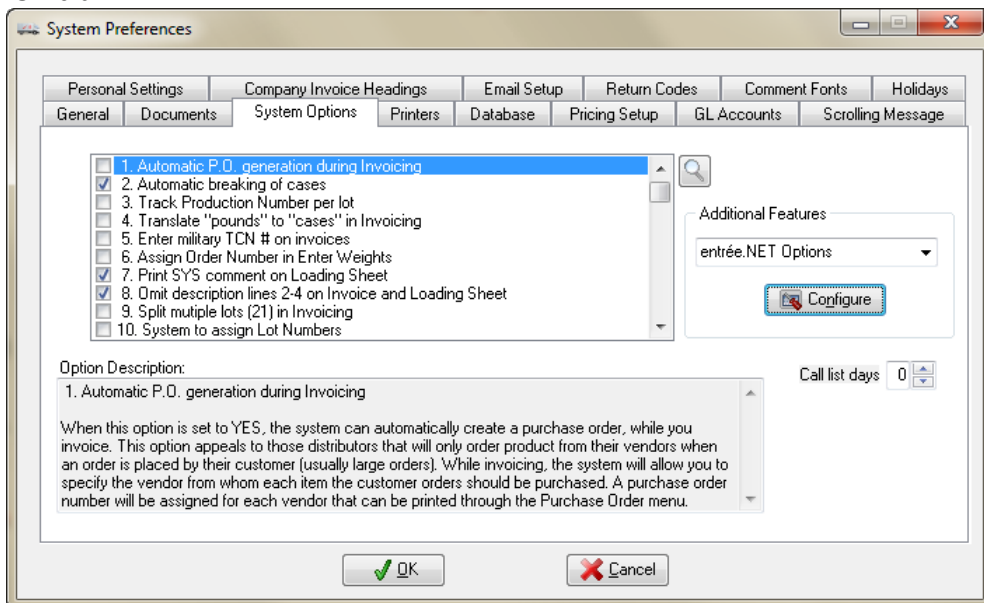
For the fourth **entrée** task you must configure the **Electronic Warehouse Manager** in the main **entrée** system in **System Preferences** to set your options.

The **entrée** System Administrator will follow this process to set your options in the main **entrée** system:

- 1a. **entrée V3** Use menu path: **System > Preferences > System Options Tab.**



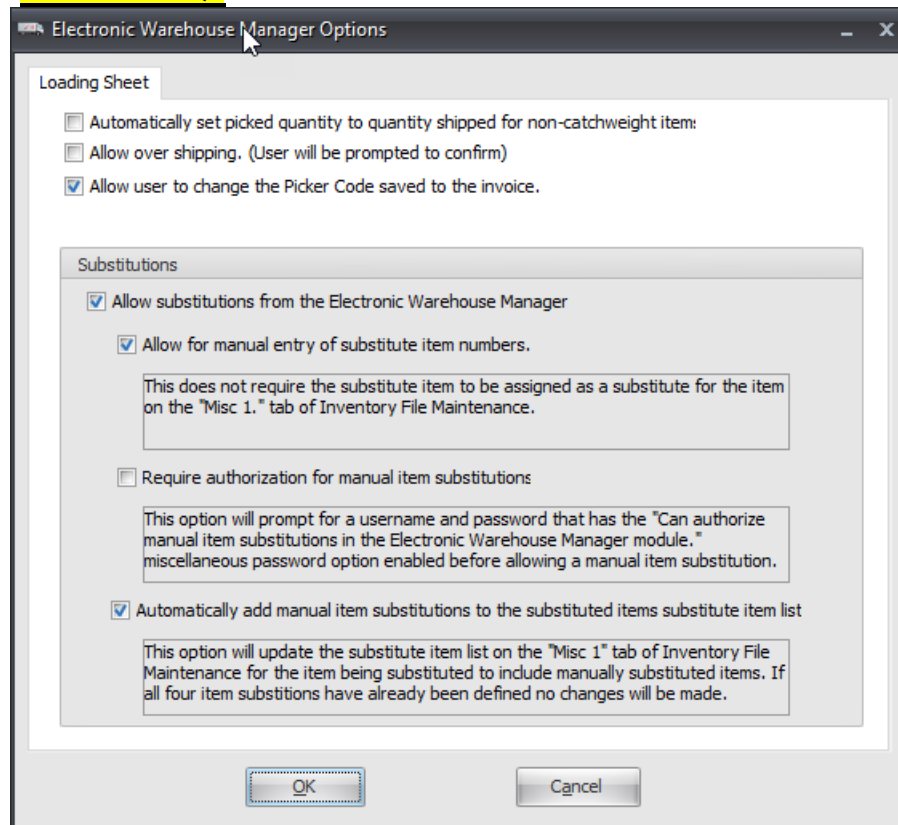
- 1b. **entrée V4 SQL** Go to the **System** ribbon menu > click **System Preferences > System Options Tab.**



2. Click the **Additional Features** drop down menu arrow.
3. Select **Electronic Warehouse Manager**

4. Click the **Configure** button to open the **Electronic Warehouse Manager Options** dialog.
5. Click **Loading Sheet** tab to select from these options:
  - a. **Automatically set picked quantity to quantity shipped for non-catchweight items.**
  - b. **Allow over shipping (User will be prompted to confirm).** This option controls whether or not the EWM operator is allowed to pick more product than what is required by the item's "Quantity Shipped" value on the Invoice. Enabling this option will cause the operator to be prompted to confirm the addition of the extra quantity.
  - c. **Allow user to change the Picker Code saved to the invoice.** This option controls whether or not the EWM operator is allowed to change the Picker Code on the invoice.

**entrée V3** and **entrée V4 SQL**



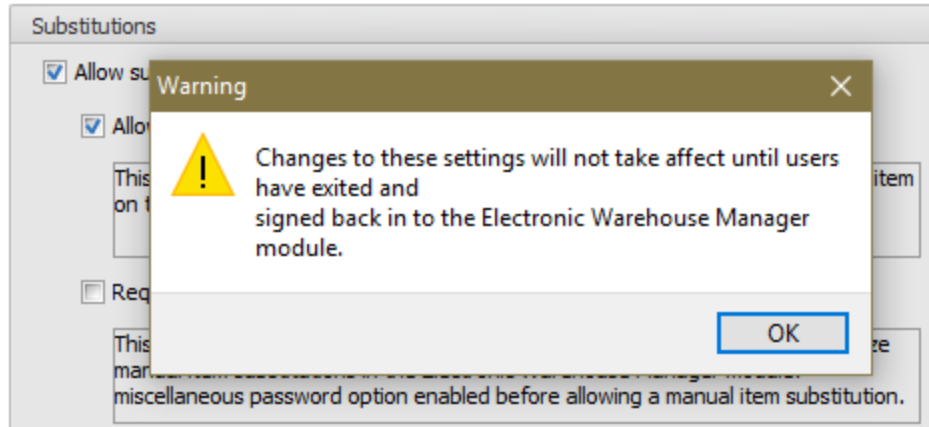
6. Click the desired **Substitutions** options:
  - d. **Allow substitutions from the Electronic Warehouse Manager.**
  - e. **Allow for manual entry of substitute item numbers.** This option does not require that a substitute item be assigned to an item on the Misc1 Tab of Inventory File Maintenance because the user will be allowed to enter an item number.
 

*\*See information about how to assign substitute items in the **Misc1 Tab** at the end of this section.*
  - f. **Require authorization for manual item substitutions.** This option will prompt for a username and password that has the "Can authorize manual item substitutions in the **EWM** module" Miscellaneous system option enabled in the Security Manager.

g. **Automatically add manual items substitutions to the substituted items list.**

When this auto save option is enabled it will automatically save and then display substitute items entered in the [Item Substitution](#) process in **EWM**.

7. Click **OK** to save your selections and this message will display. Click **OK**.

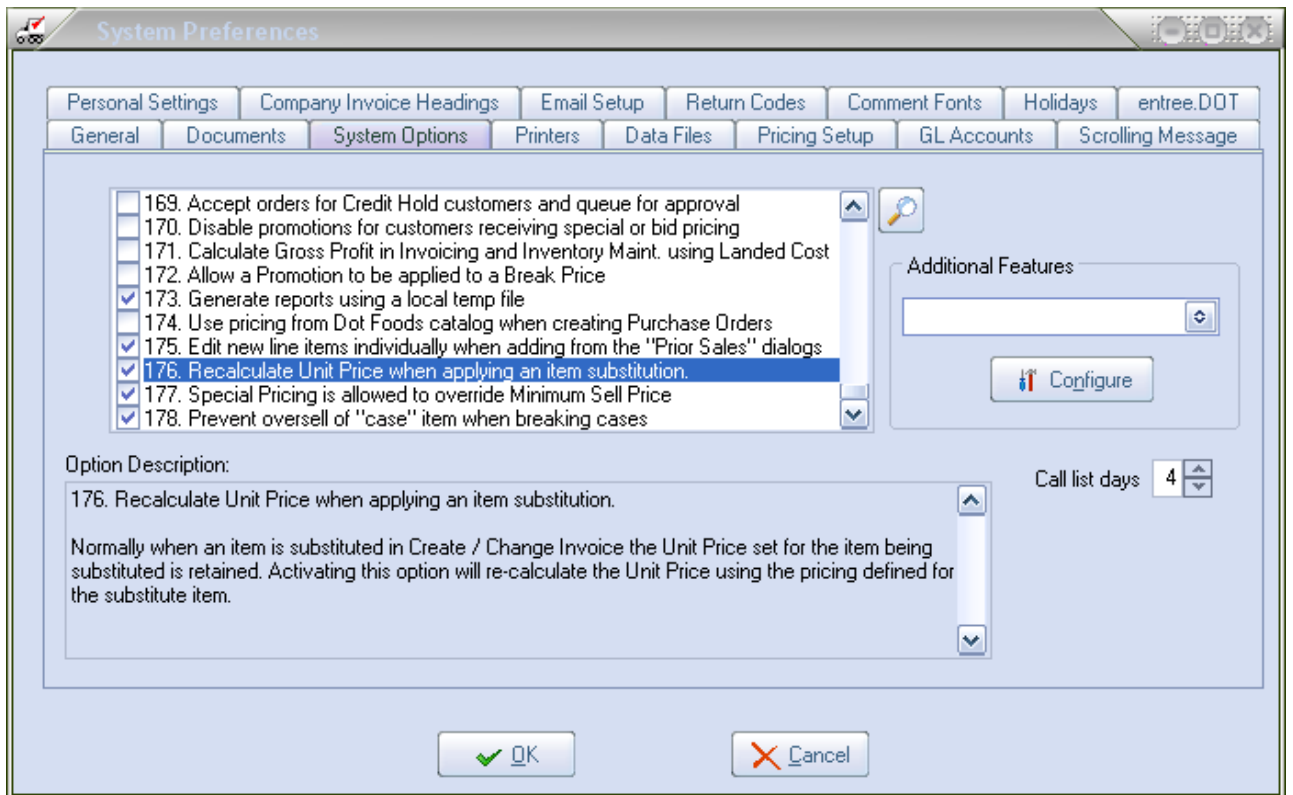


### **System Option for Unit Price During Item Substitutions**

Normally when an item is substituted in Create / Change Invoice or **EWM** the Unit Price set for the item being substituted is retained, this is the default for the **entrée** system.

If you choose not to stay with the default activating **System Option #176** will change the behavior so the **entrée** system will re-calculate the Unit Price using the pricing defined for the substituted item.

**entrée V3** and **entrée V4 SQL**



## 7.4 Adding Substitute Items in entrée

entrée has a substitute items feature in **Invoicing** and in **EWM** that allows a user to select a different product if stock is low or out for a particular line item.

In **EWM** users can tap the **Sub** button on the number touch keypad to open the Item Substitution dialog. Then select from the items that have been added to the Substitute Items section of the **Inventory File Misc1** tab as seen below in both versions of **entrée**.

### How To Add Substitute Items in the IFM Misc1 Tab

#### entrée V3

1. Use menu path: **File** > **Inventory Maintenance** > find the item. The current data for the item will now be loaded into the Inventory File Maintenance window.
2. Click on the **Misc1** tab. The **Substitute Items** section is at the bottom of the screen.
3. Click on the first empty row in the Substitute Items grid and hit the **Enter** key.
4. In the **Item** column enter the item number of the item that will be used as a substitute and hit the **Enter** key.

If the item number is not known, click the **Search** button  to open the Inventory Search screen and find the item.

5. Once all the substitute items have been entered click **Apply** then **OK** to save the changes.

Inventory File Maintenance

Item Number: 0310 Description: RUSSETTE SUPERDRY SHOESTRING FF Brand Name: LAMB WESTON

Unit of Measure: CASE Pack Size: 6/6# Warehouse Loc.: F103 Class: FRENCH FRIES

Inventory Cost/Price Vendor History Lots Promotions Kits Special Pricing Sale Pricing Future Pricing

Break Pricing Status Misc 1 Misc 2 .NET

Description 2: Deposit: 0.00 Broker: Storage Cost: 0.000

Description 3: Cost Plus: 0.00 DEX UPC/EAN Item #: Shrinkage %: 0

Description 4: Category: Piece => Case Break Point: 0 Retail Units: 0 Secondary Location: Corrosive Hazard Comment: Tare Weight Multiplier: 0.000

Min/Max Breakdown... Item Notes Picking Labels


Item	Description	Brand	Pack Size
10339	FRIES SHOESTRING MCCAIN	MC CAIN	6/4.5#

103 records

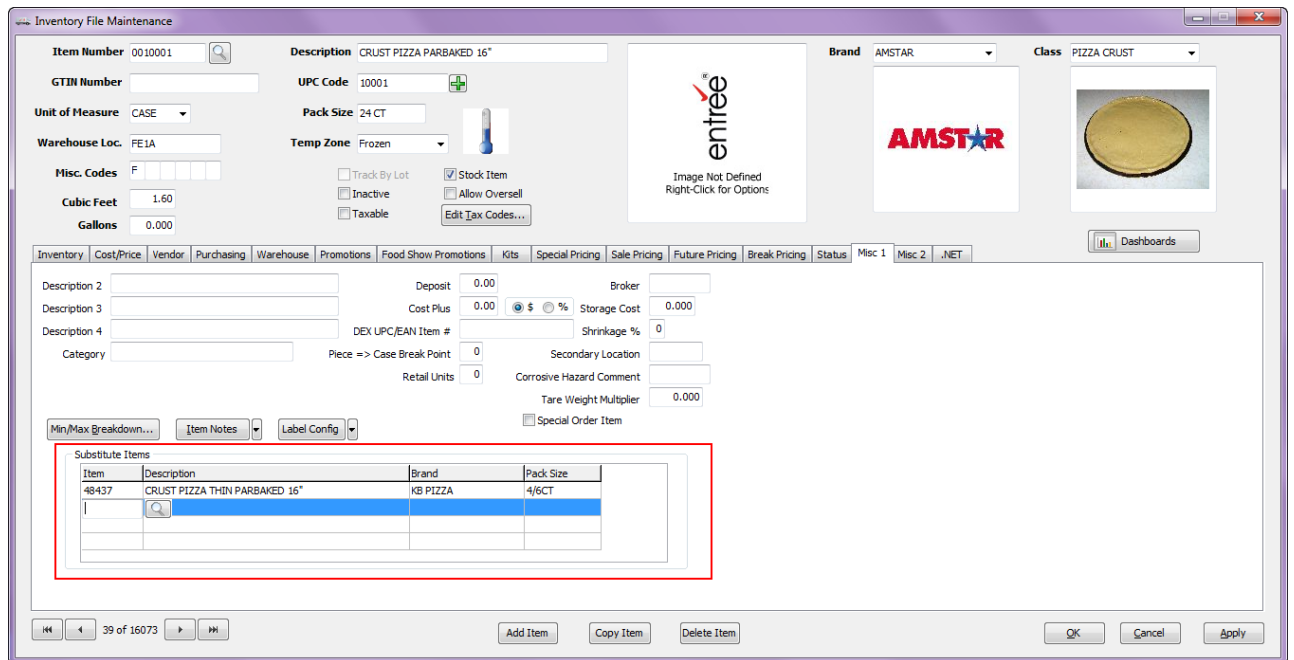
Add Item Copy Item Delete Item OK Cancel Apply

**entrée V4 SQL**

1. Go to the **Inventory** ribbon menu click the **Inventory** option > find the item.
2. Click the **Misc 1 Tab**. The **Substitute Items** section is at the bottom of the screen.
3. In the **Item Number** field enter the item number for the item that you would like to add the substitute items then hit the Tab key.

If the item number is not known, double-click the item field and the **Search** button  displays. Click the **Search** button to open the Inventory Search screen and find the substitute item.

4. Once all the substitute items have been entered click **Apply** then **OK** to save the changes.



## 7.5 Warehouse Manager Dashboard

The **Warehouse Manager Dashboard** in the main **entrée** system is used to view the current activity of your warehouse employees using either **entrée.UPC** or the **Electronic Warehouse Manager**. Both of these software products track the detail of each users productivity, including every catch weight entered or scanned, every item picked, purchase order received, etc., this dashboard is a way for you to monitor, report and help you analyze and track their work. You will always know who picked an invoice down to the detail of individual line items, substitutions and catch weights.

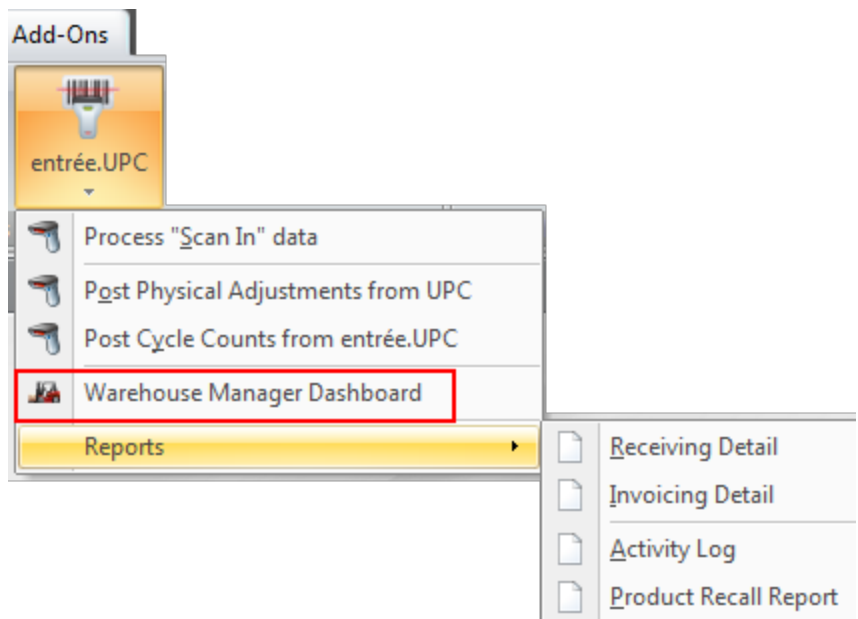
### entrée V3

The **Warehouse Manager Dashboard** is located in the **System** menu in the main **entrée** system.



### entrée V4 SQL

In **entrée V4 SQL** go to the **Add-Ons** ribbon menu and click the **entrée.UPC** option drop down menu to access the **Warehouse Manager Dashboard**.



**entrée V3 and entrée V4 SQL**

Once in the Warehouse Manager Dashboard you have these features available in both versions of the entrée system.

- The “**Drag a column header here to group by that column**” feature at the top of the dashboard screen allows you to control how the information is grouped in the dashboard by dragging a column header to the new area.

App	Login Date	Login Time	User	Activity Start Time	Activity	Document Type	Document ID	Document Description	Units	Wgt	Elapsed Time
EWM	5/9/2012	09:13:09	J.C. Denton	5/9 09:38:42	Editing	Invoice	700528	100016 / ALIANTE HOTEL AND ...	0	0	23:29:15
EWM	5/9/2012	09:13:48	Arthur Dent	5/9 09:13:48	Logged in						23:54:09
EWM	5/9/2012	09:14:26	Gordon Freeman	5/9 09:16:07	Editing	Invoice	700523	100820 / HARD ROCK HOTEL	0	0	23:51:50
EWM	8/20/2012	09:28:52	Thomas P. Sylvester	8/20 16:13:57	Idle						16:54:00
EWM	8/20/2012	16:11:34	entrée administration...	8/21 09:03:27	Editing	Invoice	700529	100001 / ACME MEAT THIS I...	12	4028.96	00:04:30

- Click the Column Selection Tool to the left of the column headers to open a dialog to customize the columns displayed in the dashboard.

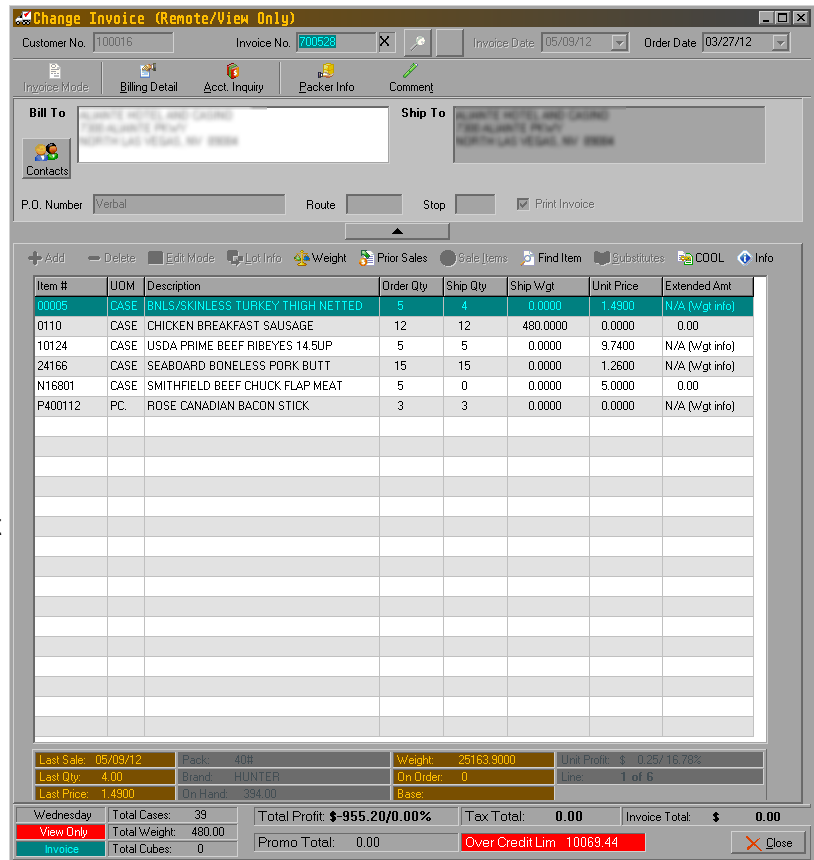
- Check the fields you would like displayed in the dashboard.

App	Login Date	Login Time	User	Activity Start Time
<input type="checkbox"/> Session		13:09	J.C. Denton	5/9 09:38:42
<input type="checkbox"/> Sec.ID		13:48	Arthur Dent	5/9 09:13:48
<input checked="" type="checkbox"/> App		14:26	Gordon Freeman	5/9 09:16:07
<input checked="" type="checkbox"/> Login Date		28:52	Thomas P. Sylvester	8/20 16:13:57
<input checked="" type="checkbox"/> Login Time		11:34	entrée administration...	8/21 14:22:50
<input checked="" type="checkbox"/> User				
<input checked="" type="checkbox"/> Activity Start Time				
<input checked="" type="checkbox"/> Activity				
<input checked="" type="checkbox"/> Document Type				
<input checked="" type="checkbox"/> Document ID				
<input checked="" type="checkbox"/> Document Description				
<input checked="" type="checkbox"/> Units				
<input checked="" type="checkbox"/> Wgt				
<input checked="" type="checkbox"/> Elapsed Time				

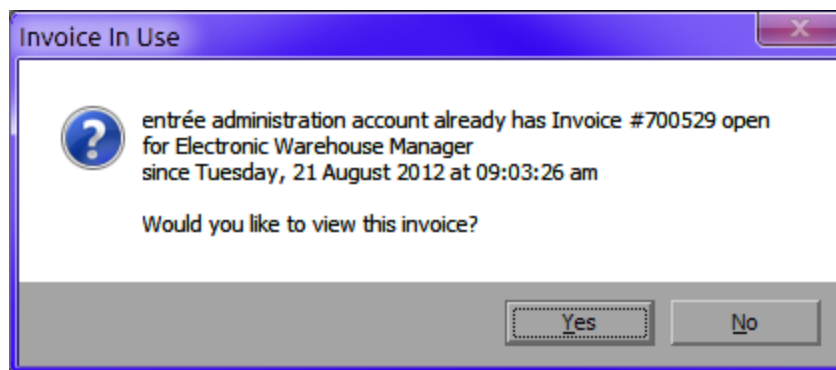
The information displayed in the Warehouse Manager Dashboard includes:

- **App** - The software application being used which includes: **EWM** and **UPC (entrée.UPC Bar Code scanning software)**.
- **Login Date & Login Time** - The date and time the user logged into the App.
- **User** - The username of the person who logged into the App.
- **Activity Start Time** - The time the current activity was started.
- **Activity** - The user’s current activity, such as Editing or Picking an Invoice, Receiving a Purchase Order, etc.
- **Document Type** -The type of document being worked on: Cycle Count, Purchase Order Receiving or Invoice.

- **Document ID** - The ID associated with the document, such as the Invoice Number, Purchase Order Number, etc.
- If you click on the **Document ID**, such as an Invoice Number, the system will pop-up a read only view of the Invoice (above), so that you can see all the details of the document being worked on.



- If an invoice that you selected to view is being used by another person you will see this **Invoice In Use** message. If you would like to view a read-only version of the invoice click **Yes**.




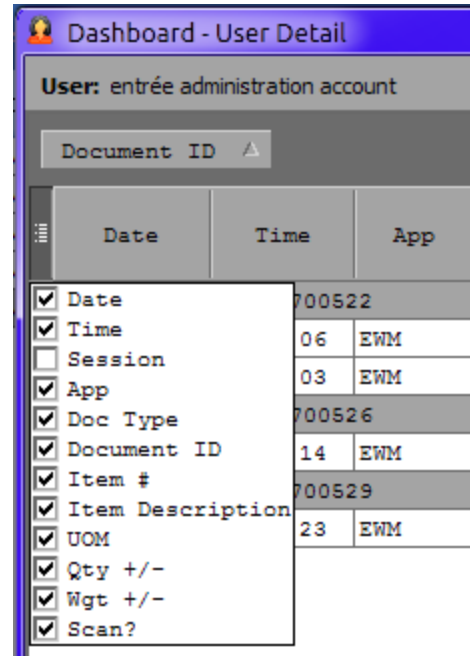
- **Document Description** - This column will display more information about the document being worked on.
- For example, if the user is picking an invoice, this column will display the customer number and name. the user is receiving a Purchase Order, the vendor number and name will be displayed. the user is doing a Cycle Count, the item number and description will be displayed.
- **Units** - The total number of pieces associated with the document. For example, if an invoice is being picked, the total number of pieces for that invoice will be shown. will provide you with the size of the task the user is working on.

- **Wgt** - The total weight associated with the document. Similar to the way "Units" works as described above.
- **Elapsed Time** - How long the current activity has been going on.

When you click the **User** link it opens the **Dashboard - User Detail** window which provides information about the specific user's recent activities in the warehouse.

Date	Time	App	Doc Type	Document ID	Item #	Item Description	UOM	Qty +/-	Wgt +/-	Scan?
Document ID : 700522										
8/21/...	09:19:06	EWM	Invoice	700522	P4283	IBP C/C BONELESS PORK LOIN STRAP ON	PC.	1.00	4.000	N
8/21/...	09:19:03	EWM	Invoice	700522	P4283	IBP C/C BONELESS PORK LOIN STRAP ON	PC.	1.00	9.000	N
Document ID : 700526										
8/21/...	09:21:14	EWM	Invoice	700526	P0465	MOLINARI SOPRESATTA MILD	PC.	1.00	98.000	N
Document ID : 700529										
8/21/...	09:18:23	EWM	Invoice	700529	6939105	BEEF LOIN TENDERLN TLS	CASE	1.00	5.000	N

-  Click the Column Selection Tool to the left of the column headers to open a dialog to customize the columns displayed in the User Detail screen.
- Check the fields you would like displayed.



The information displayed in the Warehouse Manager Dashboard User Details screen includes:

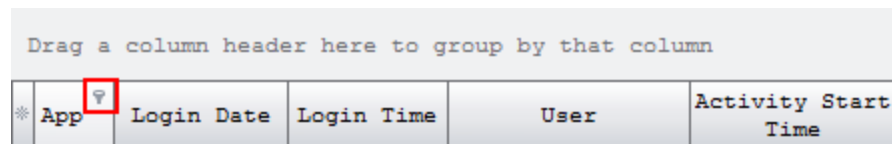
- **Date** - The date the user logged into the App.
- **Time** - The time the user logged into the App.
- **App** - The software application being used which includes: **EWM** and **UPC (entrée.UPC Bar Code scanning software)**.
- **Doc Type** -The type of document being worked on by the user. Values: Cycle Count, Purchase Order receiving or Invoice.

- **Document ID** - The ID associated with the document the user worked on. Values: Invoice Number, Purchase Order Number, etc.
- **Item #** - The **entrée** system item number for the item being processed.
- **Item Description** - The **entrée** system description for the item.
- **UOM** - The unit of measure used on the item.
- **Qty +/-** - The change in quantity the user entered for the item.
- **Wgt +/-** - The change in weight the user entered for the item.
- **Scan** - Is a scan of the document available? Values: "Y" for Yes and "N" for No.

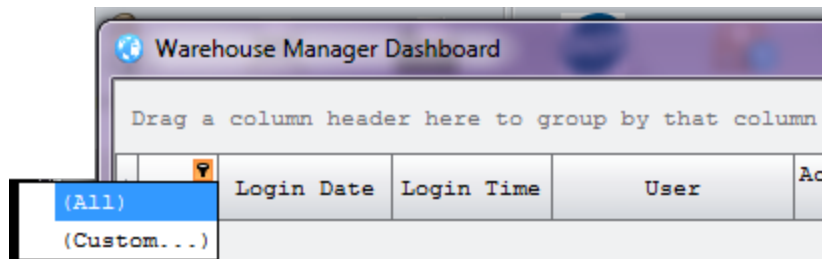
**entrée V4 SQL**

In **entrée V4 SQL** there are additional custom filtering options available for each column of data.

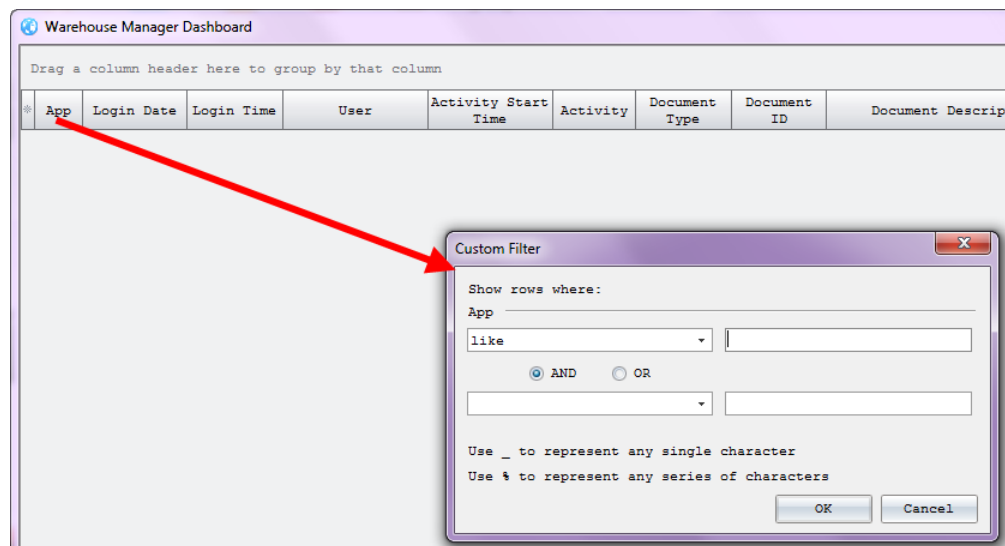
- Mouse over the column header and the **Custom icon** will appear.



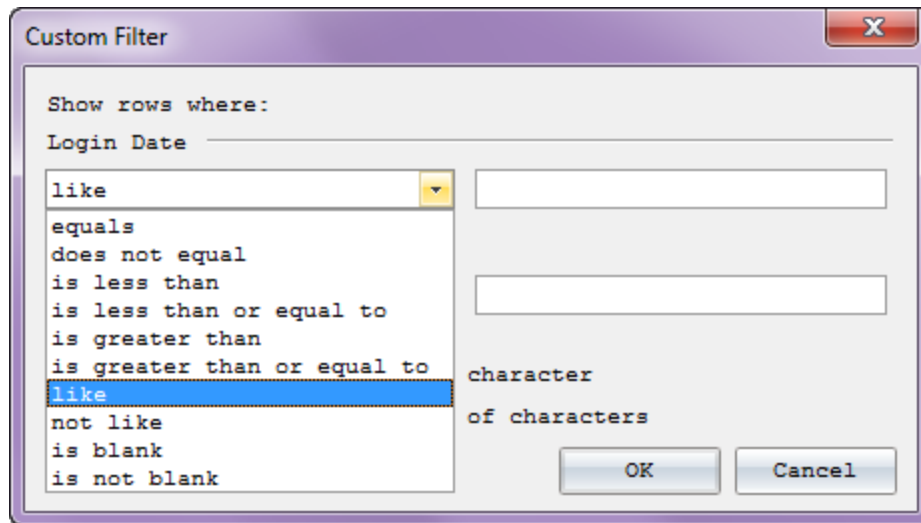
- Click the icon and select from **All** or **Custom** in the menu.



- When you select **Custom** the **Custom Filter** dialog for that column will open.



- Use the **Custom Filter** tools to control the display of information in the dashboard. Click the drop down menu and select the operation to be performed on the text you will enter in the text box on the right for the selected column.



**Example** So if you only wanted to see **Electronic Warehouse Manager** data and not UPC data in the dashboard you would follow these steps.

Select the **App** column custom filter, as we showed you above, select "equals" for the operation on the left and enter "EWM" in the text box on the right. Then click **OK**. Now only EWM data will be seen in the dashboard.

## 7.6 Reports

### Product Recall Report

The Public Health Security and Bioterrorism Preparedness and Response Act of 2002 (Bioterrorism Act) and the Food Safety Modernization Act (FSMA), signed into law in 2011, are having and will continue to have an impact on the global food supply chain. Distributors must be prepared to meet the new regulations or face large fines and possibly closure. These laws give the Food and Drug Administration unprecedented new powers of enforcement, inspection, and forced recall. Because of this, it was especially important that we include lot tracking features that will keep our customers in adherence to this new law and the freedom of mind that they are prepared in case of a product recall.

The Electronic Warehouse Manager will help you with becoming compliant by using the Lot Number (or Production Date) encoded in the manufacturer's barcode label, without the need for you to enable "Lot Tracking" in your **entrée** software.

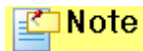
To put it simply, when inventory is received, the scanned lot number in the label is recorded (along with all other key information). When the product is sold, the lot number in the scanned label is recorded, including all details including the customer that purchased the item.

#### entrée Lot Number Assignment

Warehouse staff cannot assign lots in EWM. You have 3 possible methods for getting Lot numbers assigned in the **entrée** system.

1. Your office staff can manually assign lot numbers in **entrée** during invoicing.
2. You can turn on **entrée** system option **#106** to auto-assign lots during invoicing.
3. You can scan the lot number embedded in the barcode label that comes on the product during receiving.

Once one of the 3 options lot number assignments options above are implemented **entrée** can automatically assign the Lot Numbers and other key information in **EWM** to meet your labeling requirements.



**Note** Saving the lot number scanned from the barcode label in receiving allows you to easily search for that lot number using the **entrée Product Recall Report** and quickly respond to recalls.

To bring this ability together, whenever a product recall is issued by the FDA, you can quickly determine what customers were provided inventory from the recalled lot's via the Product Recall Report.

In the event of a product recall this report will allow you to quickly identify those products and take action to protect the public as required by the Food Safety Modernization Act (FSMA).

Go to <http://www.fda.gov/Food/GuidanceRegulation/FSMA> for more information about FSMA.

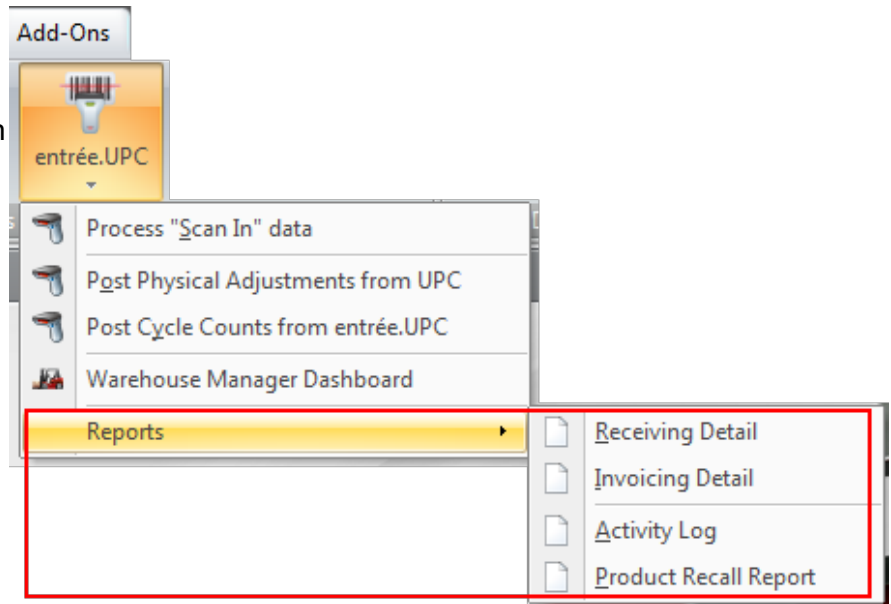
Go to <http://www.fda.gov/regulatoryinformation/legislation/ucm148797.htm> for information about the Bioterrorism Act.

**entrée V3**

To access the Product Recall Report use menu path: **Reports > Miscellaneous > entrée UPC > Product Recall Report.**

**entrée V4 SQL**

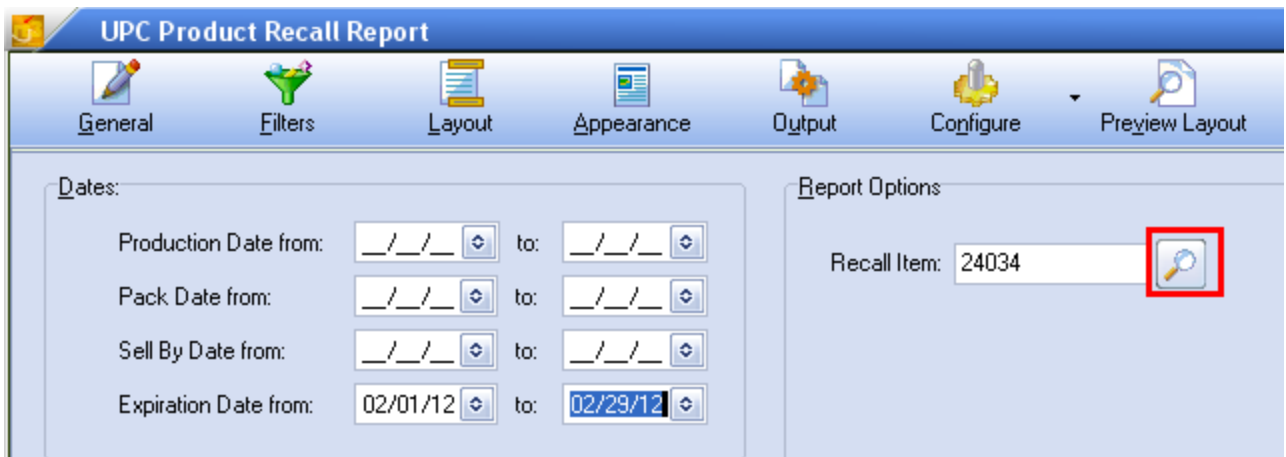
Go to the **Add-Ons** ribbon menu and click the **entrée.UPC** option drop down menu to access the **Reports** menu and select **Product Recall Report.**



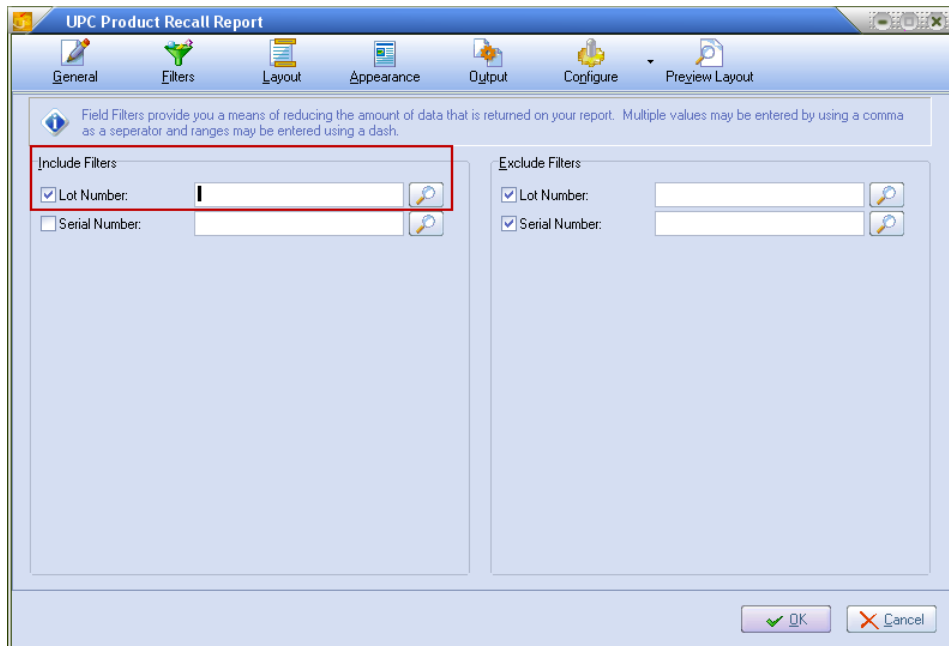
**How to Run the Product Recall Report**

**entrée V3** and **entrée V4 SQL** The options for this report are the same in both versions of the **entrée system.**

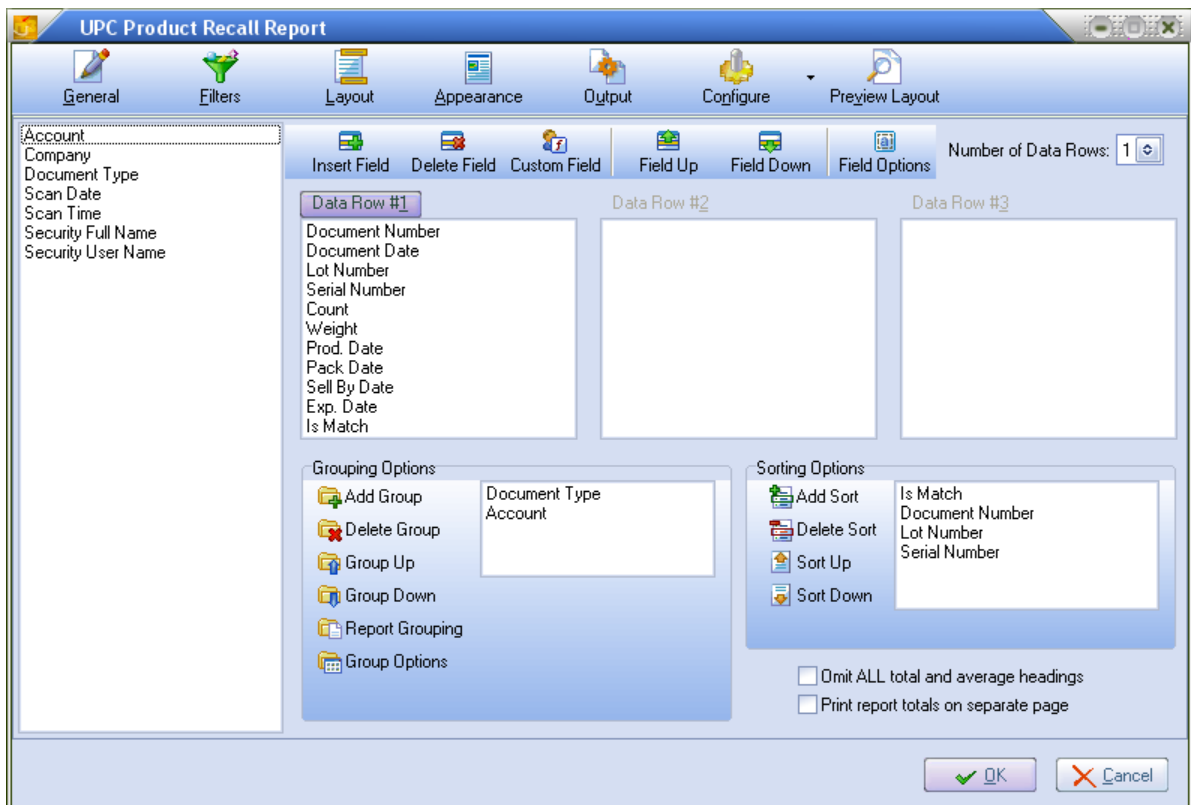
1. Select the desired **Dates** option (see **Options** below) and enter the "Data from;" and "to:" date values.



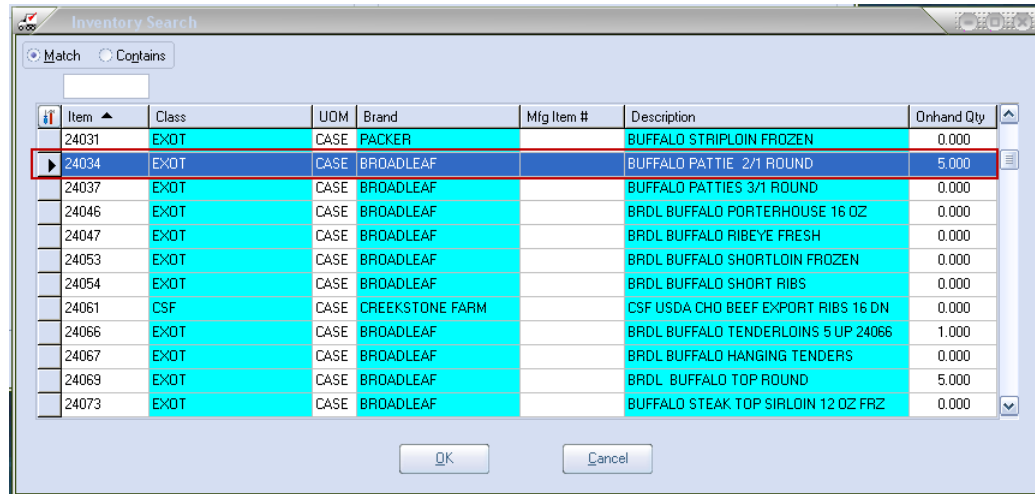
- Click the **Filters** icon to access the **Lot Number** and **Serial Number** search filter options. Enter the appropriate number for the item being recalled here. Click **OK**.



- Click the **Layout** icon. Here you will select the fields you want to see in your report. The default fields are in **Data Row #1** when the screen opens. Use the Insert and Delete Field buttons to create the layout of your report.



4. For **Report Options** enter the **entr e** system **item #** in the **Recall Item** text box or use the magnifying glass to open the Inventory Search dialog to find the item (see image below).



**Options:**

- **Dates** section provides four date values to be used to target the specific items being recalled. Dates include:
  - a. **Production Date**
  - b. **Pack Date**
  - c. **Sell By Date**
  - d. **Expiration Date**
- **Report Options** section lets you enter an item number, lot number and serial number, or search for and select the item from your inventory file.

**UPC Product Recall Report Example**

Date: 12/12/11  
Time: 1:47 PM

Madison Distributors, Inc.

Page: 1

**UPC Product Recall Report**

Item: U80412 - UTILITY BEEF STRIPLOIN 100% PL

Document Number	Document Date	Lot Number	Serial Number	Count	Weight	Prod. Date	Pack Date	Sell By Date	Exp. Date	Is Match
-----------------	---------------	------------	---------------	-------	--------	------------	-----------	--------------	-----------	----------

Document Type: RECEIPTS

Account: PACKP - PACKERLAND-PLAINWELL (AKA MURCO)

103964	04/03/08	080326	020860241812	1	57.80	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860242572	1	56.40	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860243082	1	64.10	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860243172	1	66.20	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860243842	1	65.90	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860244412	1	64.20	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080326	020860244472	1	58.60	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870136131	1	61.40	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870136611	1	63.70	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870138321	1	67.30	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870230392	1	72.90	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870230722	1	66.20	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080327	020870241022	1	54.80	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880134001	1	63.00	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880134331	1	65.00	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880134461	1	66.30	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880134541	1	69.10	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880134631	1	72.80	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880135041	1	58.90	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880229892	1	61.80	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880229922	1	59.40	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880230232	1	63.60	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880231022	1	60.50	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880231042	1	65.40	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880231532	1	75.80	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880231822	1	70.90	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880232112	1	63.60	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880232152	1	58.10	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080328	020880232682	1	59.30	/ /	/ /	/ /	/ /	Y
103964	04/03/08	080329	020890142981	1	66.70	/ /	/ /	/ /	/ /	Y

PACKP - PACKERLAND-PLAINWELL (AKA MURCO) Sub-Totals:

				30	1,919.70					
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RECEIPTS Sub-Totals:

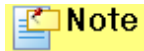
				30	1,919.70					
--	--	--	--	----	----------	--	--	--	--	--

# Chapter 8

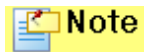
## Barcode Scanning Device Setup

## 8 Barcode Scanning Device Setup

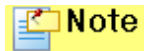
Before you can begin using your Bluetooth barcode scanner it must be configured. Follow the process below to get your scanning devices ready to use. Our instructions are written for a Socket Bluetooth Cordless Hand Scanner Series 7 model **7P**, **7Pi** which is supported by the **EWM** application and the Android OS.

**Note**

In version 1.1.0 support for the Socket Series 7 model **7Xi** scanner was implemented. Users with this model scanner should select the "socketchs7Xi" driver when adding the scanner through the Device Manager.

**Note**

Please read the manufacturer's documentation for your specific device since each manufacturer will have their own Command Barcodes or Programming Codes used to perform the scanner configuration process.

**Note**

Bluetooth Scales: Please consult the product manual for information about any setup or configuration that may be required.

### **Why do you configure the scanner?**

This scanner by default is shipped in HID (Human Interface Device) mode which emulates a keyboard. HID mode can not be used to scan barcodes in your warehouse. So part of the configuration process is to change the scanner's mode to SPP (Serial Port Profile) mode to gain a broader character set, multiple configuration options and be able to roam between tablet devices.

The other important task done during the configuration process is to enable barcode symbologies. This is done so the scanner will recognize the barcode symbologies commonly used in the food distribution business.

### **Before you begin configuring your scanner...**

1. Fully charge your scanner.
2. Make sure the scanner is not connected to a computer or other device before you begin scanning command barcodes.
3. Print the Socket Mobile Programming Codes sheet on the next page. Be sure the printed programming codes are very crisp and clear. You will need these codes on paper so you can scan them during the scanner configuration process.
4. If the scanner is already on, it's best to reboot it (turn it off and then on again). Cycling the power ensures the scanner will program properly.

**\*\*\* Print this page for use in the scanner set up process. \*\*\***



Due to variations in manufacturing, actual sounds may differ. We have found that 99% of the time the tones will sound as described below. You may encounter slightly different variations of scanner beeps.

# SOCKET MOBILE PROGRAMMING CODES

These codes will configure the *Socket 7* series barcode scanner for proper use with the *Electronic Warehouse Manager*.



**1**



***Factory Reset***

On success, you will hear **3 rising tones**, and **5 descending tones**.

**2**



***Switch to Serial Mode***

On success, you will hear **3 rising tones**.

**3**



***Report 'Symbol' Symbology Codes***

On success, you will hear **nothing**, but the laser will **immediately shut off**.

\* Actual sounds heard may differ due to manufacturer variations.

---

### **Configuring the Socket Series 7P Barcode Scanner**

1. Ensure that the barcode scanner is charged and turned on.
  2. You will scan each of the SOCKET programming codes on the supplied sheet starting at the top.
  3. First, scan the **Factory Reset** programming code to perform a complete factory reset clearing the device.
    - On success, you will hear 3 rising tones and then 5 descending tones.
    - On failure... rescan the programming code.
  4. After the **Factory Reset** code is scanned, the scanner will automatically turn off. You will need to turn the scanner on again.
  5. Second, scan the **Switch to Serial Mode** programming code to switch the device into SPP (Serial Port Profile) mode.
    - On success, you will hear 3 rising tones.
    - On failure... rescan the programming code.
  6. Third, scan the **Report 'Symbol' Symbology Codes** to enables all the supported barcode symbologies in the device.
    - On success, nothing is heard but the scanner will immediately shut off.
    - On failure... rescan the programming code.
-

# Chapter 9

## Tablet Setup for EWM

## 9 Tablet Setup for EWM

This chapter will provide you with an example of how to setup and install **EWM** on a Motorola XYBoard tablet with the Android OS. It is important to note that tablets made by different manufacturers will use different theme colors and menus in their devices. Also the screens in different versions of the Android OS will look different. Even with these minor differences the installation process for **EWM** will generally be the same process on various Android tablets.

At the end of this section an overview of Android OS status and menu bars basics is presented to get you up to speed with the tablet.

Before you can run the [EWM Application Installation](#) process you need to complete these tasks on the tablet.

- First, the [Connect to WiFi](#) section will explain how you must connect your tablet to your local wireless network to be able to download EWM and communicate with your server.
- Second, you will proceed to the [Allow Unknown Sources](#) section of this chapter to change a tablet setting to allow software from "Unknown Sources" to be installed. Since the Android OS has a security process which stops installation of software that does not come from the Android Market.
- Third, proceed with [EWM Application Installation](#). Once the **EWM Tablet Installation** process has been completed these last two steps must be performed before you can finally be ready to use **EWM** in your warehouse.
- Fourth, you will sign-in to the **EWM** system with your assigned username and password in the [Sign-In](#) chapter.
- Fifth, you will add and connect your Bluetooth devices (barcode scanners, scales, printers) to the tablet in the [Bluetooth Setup - Adding Scanners, Printers & Scales](#) chapter.

To recap to get your tablet ready for EWM you will perform these steps:

1. [Connect to WiFi](#)
2. [Allow Unknown Sources](#)
3. [EWM Tablet Installation](#)
4. [Sign-In](#)
5. [Bluetooth Setup - Adding Scanners, Printers & Scales](#)

## Tablet Status & Menu Bars



- At the top of the tablet screen for the Android KitKat OS you will find the Android Status bar.
  - Swipe down from this bar on the right side to access the Settings Shortcuts.
  - Swipe down from this bar on the left to view the Notification Tray.



**Debugger icon** - If displayed the debugger is running.



**Bluetooth Connection Status**



The **Network Strength** icon with the name of the network the tablet is connected to.



The **Battery Status** icon with the % value.

- **Accessing the Android Notifications and Settings Panels.**

### Android Notifications Panel

To access the Notifications Panel swipe down with your finger from the **left** side of the Android Status bar at the top of the screen to reveal the panel.

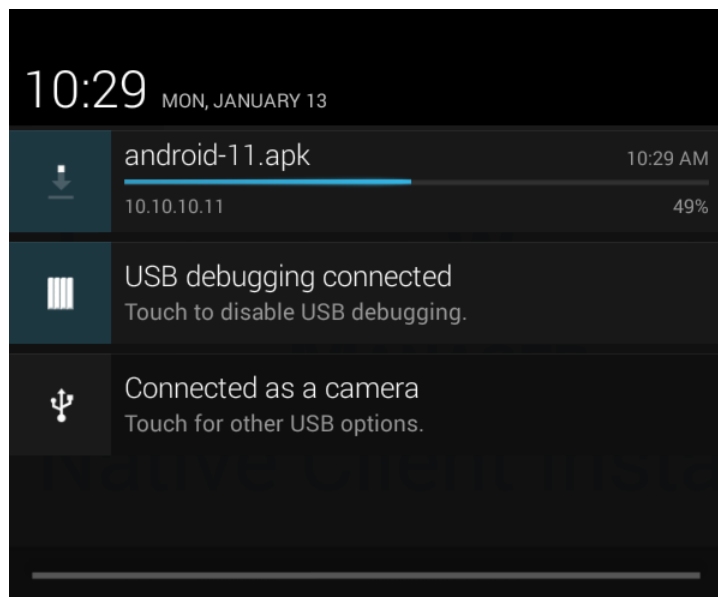
The time, day of the week and date are shown at the top.



**Downloads** icon with the **EWM Package Installer** file, **android-11.apk**.



**Debugger icon** showing that it is connected and running.

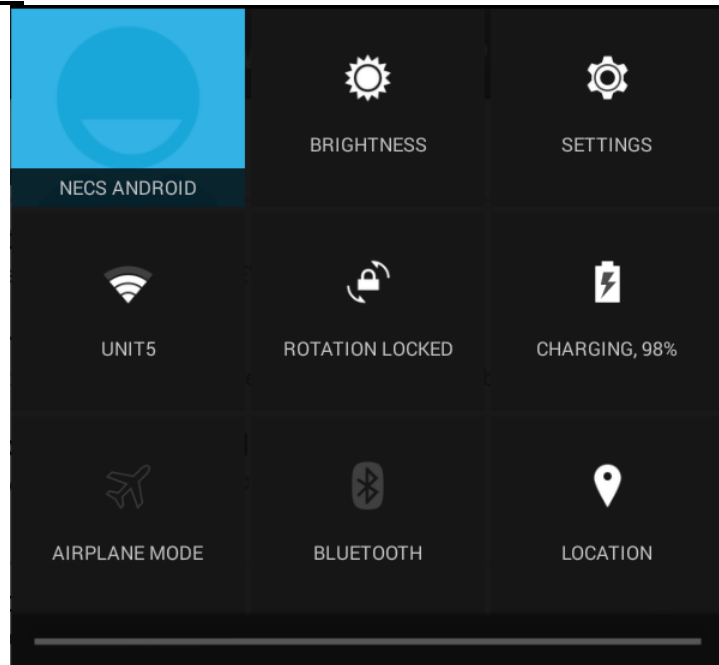


### Android Settings Shortcuts Panel

To access the Settings Shortcuts Panel swipe down with your finger on the **right** side of the Android Status bar at the top of the screen to reveal the shortcuts panel.



Then use the Settings icon to access the all the Settings screen options for the installation process.



The **Network Strength** icon area shows the name of the network the tablet is connected to.

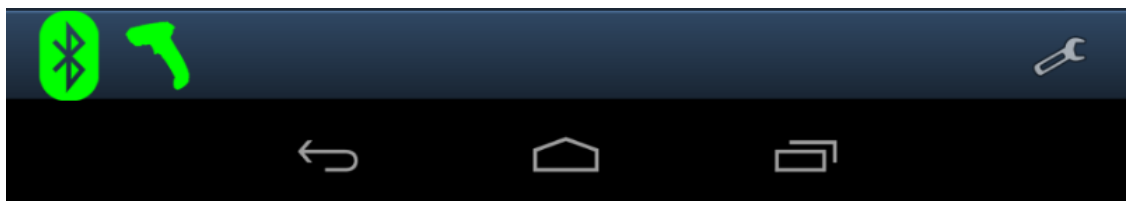


The **Battery Status** icon displays the status and % value.

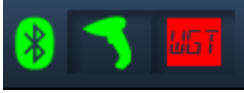
- Tap any of the icons in the panel to access the settings for the options:
  - **Brightness**
  - **Rotation**
  - **Airplane Mode**
  - **Bluetooth**
  - **Location**

### EWM Status Bar Icons

- At the bottom of the tablet screen you will first see the EWM Status Bar in tablets running the Android KitKat OS.



- This bar contains icons for the various **EWM** app related functions as they are active.



The top status bar will display information from **EWM** about the Bluetooth connection and Bluetooth devices paired with your tablet. The status of each is represented using a specific icon and color.



#### EWM Bluetooth Connection icon:

- When the color is red it means the tablet tried to connect to your Bluetooth network but failed.
- When the color is green the tablet is connected to your Bluetooth network.



#### EWM Bluetooth Scanner icon:

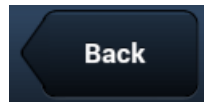
- When the color is red it means the tablet tried to connect with Bluetooth scanner but failed.
- When the color is green the Bluetooth device is connected to the tablet.



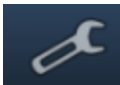
#### EWM Bluetooth Scale icon:

- When the color is red it means the tablet tried to connect with Bluetooth scale but failed.
- When the color is green the Bluetooth scale device is connected to the tablet.

#### EWM Control Panel icons:

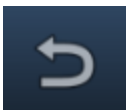


**EWM Back** button returns you to the previous screen.



Opens the **EWM Control Panel** so you can easily access the Network, Bluetooth and Android settings.

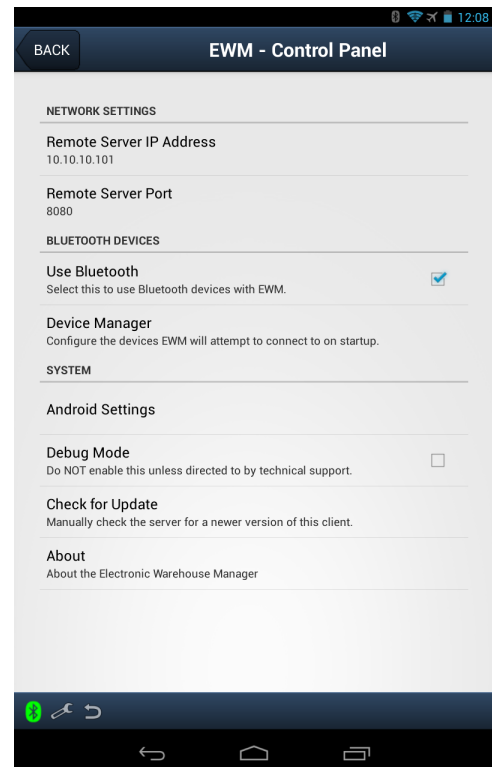
The information **EWM** requires to connect to your **Remote Server**, the **IP Address** and **Port**, are stored here.



**Server Refresh** button will refresh the information received by the server.



**EWM Bluetooth** connection status indicator as described above.



### Android Navigation Bar Icons

- At the very bottom of the tablet screen are navigation icons which change depending on the version of the Android OS you are running.

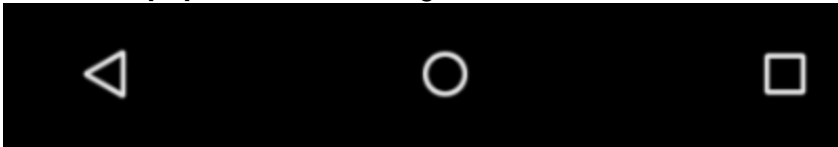
From left to right they are:

- **Back** - Go back one screen.
- **Home** - Go to the Android Home screen.
- **Recent Apps** - Shows all the open Apps.

- The **KitKat** Android OS navigation icons.



- The **Lollipop** Android OS navigation icons.



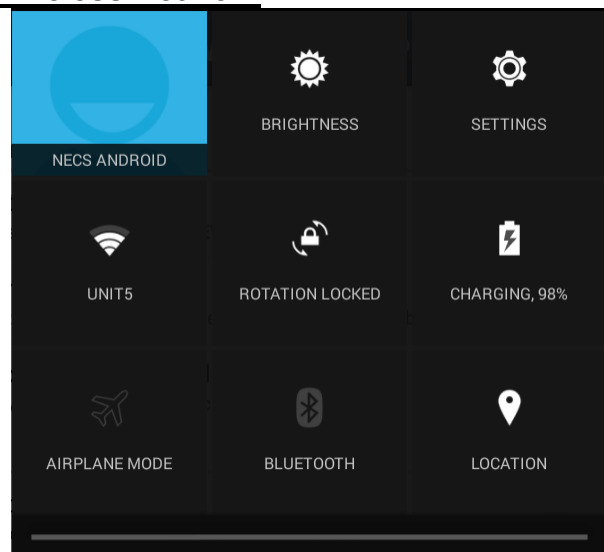
## 9.1 Connect to WiFi

When you first powered up your Android tablet you were required to connect to a local network. If this is the same network that **EWM** will be using you can proceed to [Allow Unknown Sources](#). If not you must continue with this process and connect to the network that will be used by **EWM**.

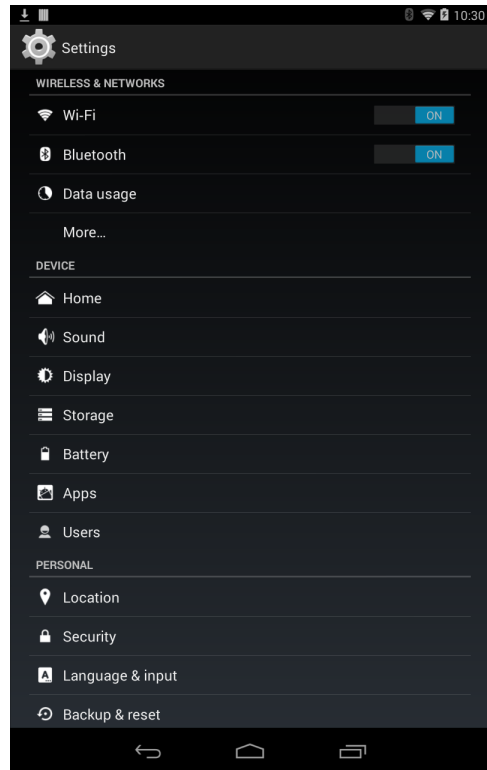
### Connecting the Tablet to your Local Wireless Network

1. To reveal the **Settings** Shortcut panel from the tablet desktop swipe down with your finger on the **right** side of the Android Status bar at the top of the screen.

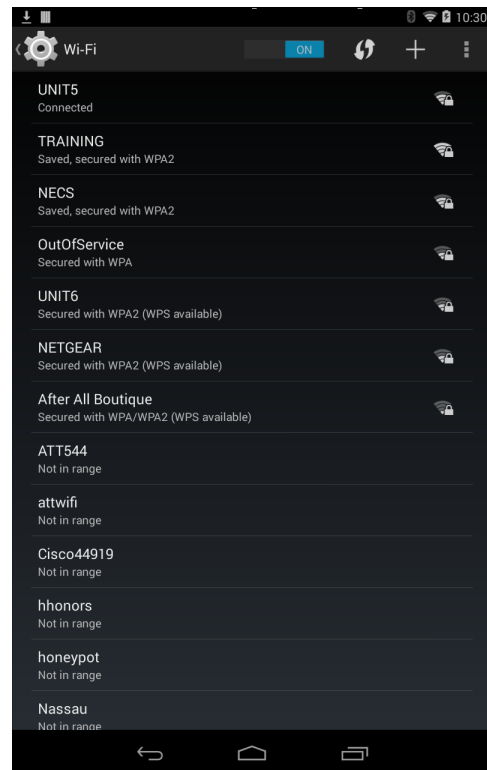
2. Now tap the **Settings** icon



3. The Android Settings panel will open and default to the **Wireless & Networks** options.

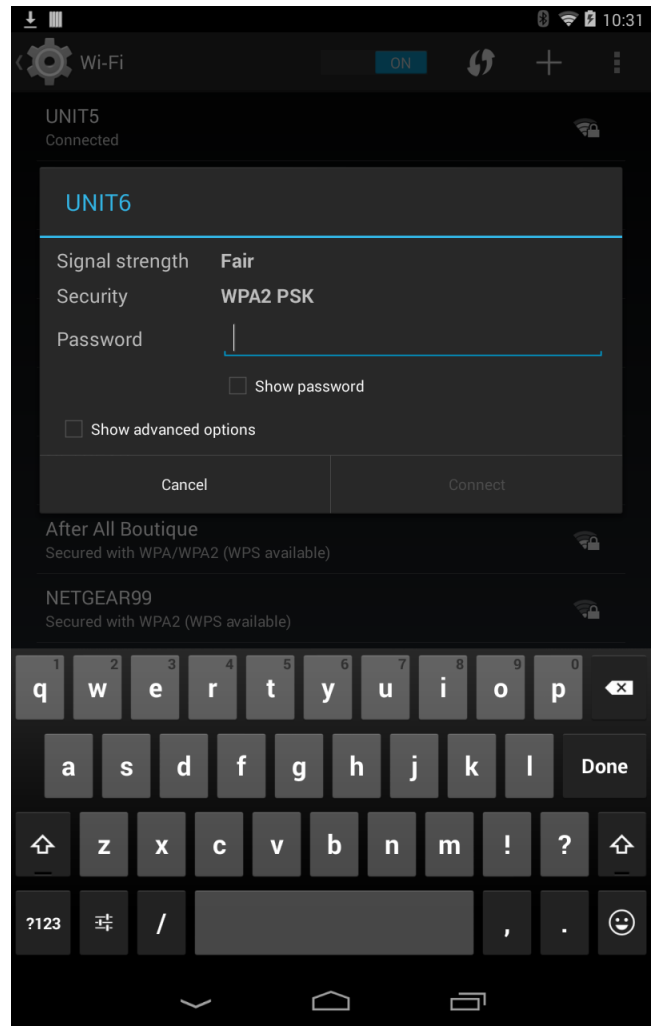


4. Tap **Wi-Fi** to open this settings panel.



5. Now find the local network or wireless network that will be used for **EWM** in the list and tap it.


6. Now tap the check box for **Show advanced options**.




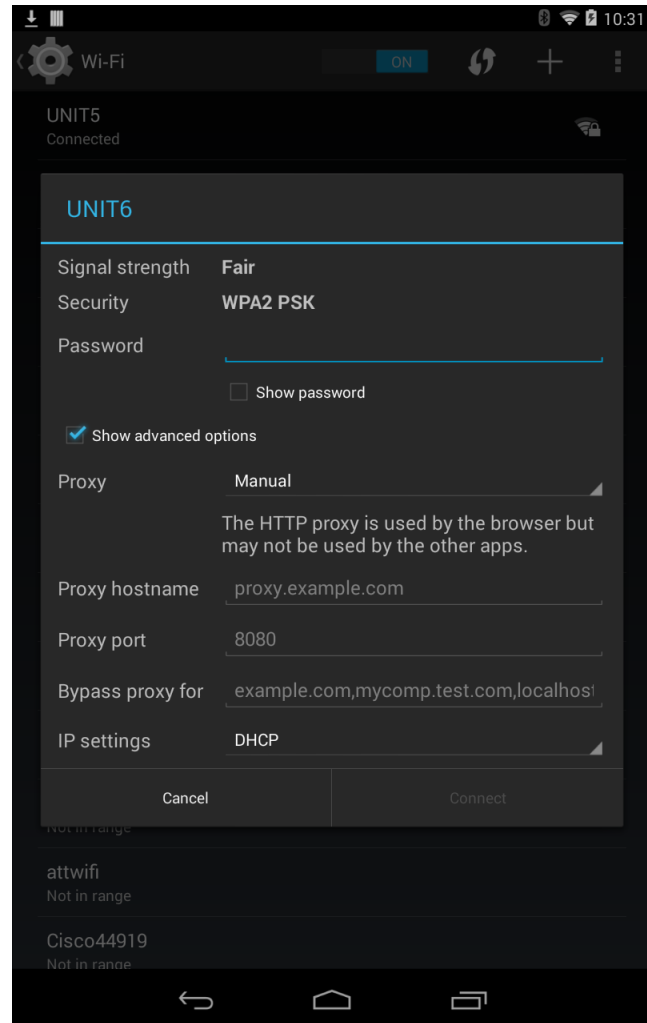
7. The advanced settings for your network will be displayed.

Enter your network's password and tap **Connect**.

If your wireless network is not password protected it will connect automatically when selected.

 **Note** You may need to get the wireless network password and any other required setting from your Network Administrator or IT Department before continuing.

 **Note** If you change the **IP Settings** from "DHCP" to "**Other**", the advanced wireless settings seen here will display. This is needed if an internal company IP address must be entered for the tablet.




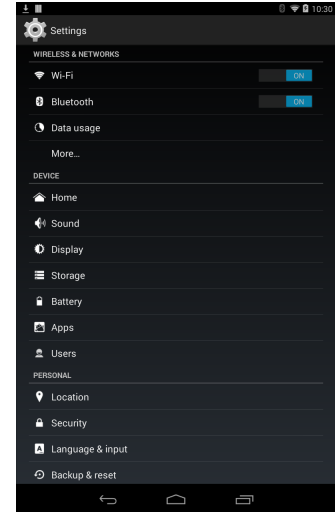
8. Proceed to [Allow Unknown Sources](#) the next section in this chapter to perform the next step.

## 9.2 Allow Unknown Sources

You should already be in the **Settings** screen after performing the [Connect to WiFi](#) steps in the prior section of this chapter. Now you will update the Android OS security option to allow the installation of software from unknown sources, which is the **EWM** application.

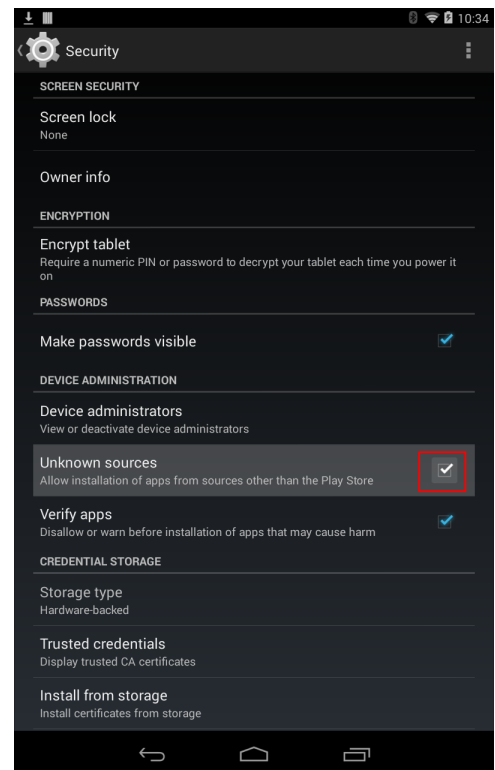
1. From the Wi-Fi screen use your

tablet **Back** button  at the bottom to return to the main **Settings** screen.

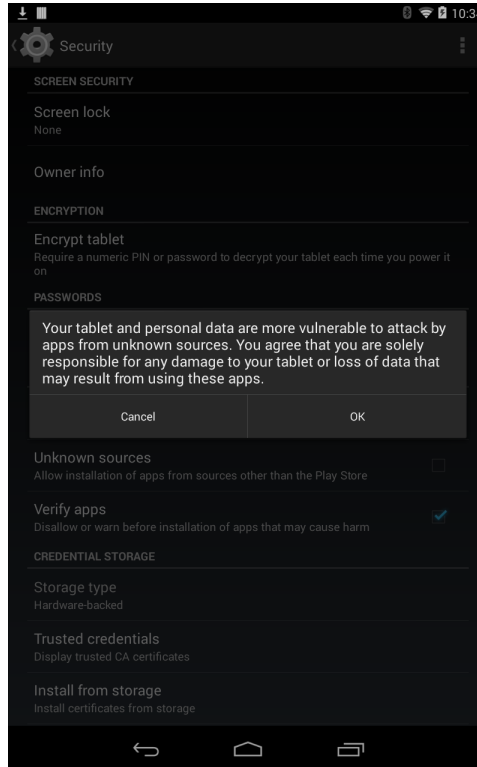


2. Tap the **Security** option in the lower section of the menu.

3. In the **Security** options screen tap the check box for **Unknown sources**. This will enable the installation of non-Market Android applications.



4. A warning message will display. Tap **OK** to proceed.



5. The **Unknown sources** box will now have a green check mark. Now you are ready to proceed with the [EWM Application Installation](#) process to configure and install the **EWM** application on your tablet.

# **Chapter 10**

## **EWM Application Installation**

## 10 EWM Application Installation

Once you have completed the setup in the [entrée Settings & Dashboard](#), [Connect to WiFi](#) and [Allow Unknown Sources](#) processes you are ready to proceed with the installation of the **EWM** application.

The software for **EWM** resides on your Host server. The IP address of your Host server is a required piece of information for the **EWM** Tablet to access the software for installation and release updates.

Write the IP address of your server in the area below to record it.

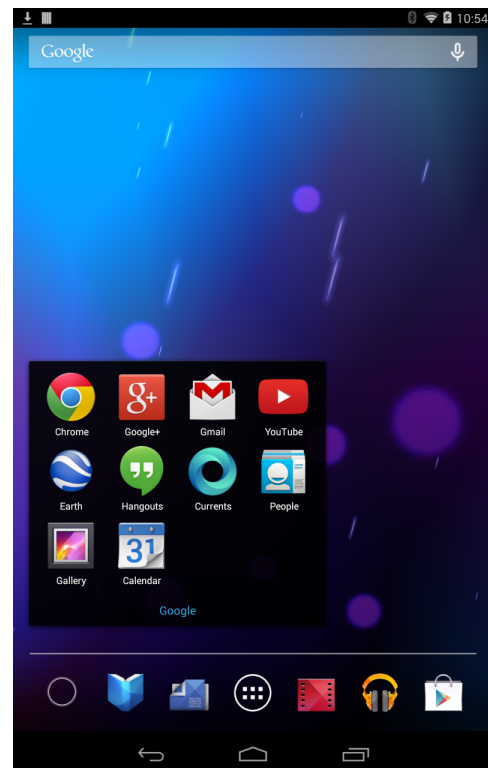
**My Host Server IP Address for EWM is** \_\_\_\_\_

### How to Install the EWM Application on Your Tablet

1. After completing the [Allow Unknown Sources](#) update in **Settings** you will tap the Android OS **Home** icon in the center at the bottom of the screen to get back to the desktop.
- **Follow the steps 2 -14 to download the EWM Android Client Installer from your server and then install the app on your tablet.**



2. Tap the **Chrome** icon which can be found in a folder on the bottom left of the home screen, or under the list of installed applications. to open the browser.



3. In Chrome tap the URL address bar at the top of the browser window.
4. Enter your Host Server IP address in the browser.

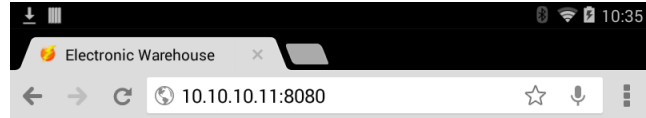


#### Example Host Server IP

**Address:** If your server exists on 192.168.53.199, then you would navigate to <http://192.168.53.199:8080>.



**Note** If you have installed EWM on a port other than 8080, edit your IP address accordingly.



## ELECTRONIC WAREHOUSE MANAGER Native Client Installer

**TAP HERE TO  
DOWNLOAD**

### Troubleshooting

- **Ensure that installation from "Unknown Sources" is enabled in your Android settings.** This can be found either under Security, or Applications depending on your tablet.



5. Now tap the **Enter** key in the keyboard. If the connection was successful, you should see "**ELECTRONIC WAREHOUSE MANAGER NATIVE CLIENT INSTALLER**" on the tablet.



**Note** If you do not see this page or receive an error, double check your IP address settings.



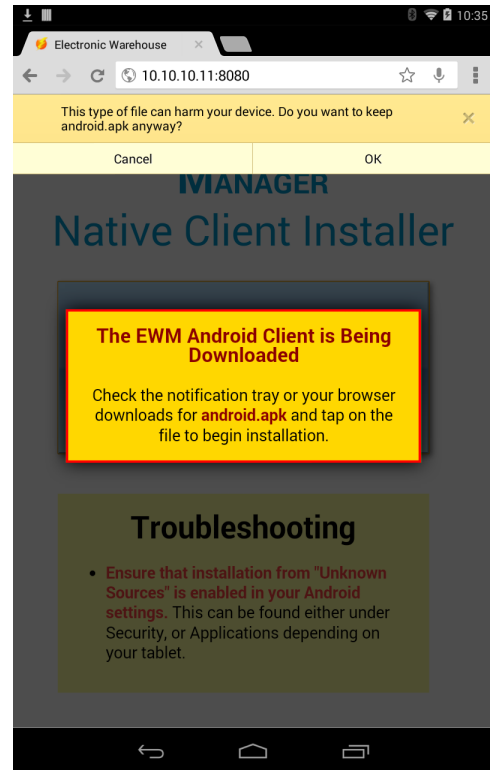
**Hot Tip!** Navigating to this address on a regular desktop PC browser elsewhere on the local network will bring up the EWM login page, if server installation was successful.

6. This is the **EWM** Installer page, tap the "**TAP HERE TO DOWNLOAD**" button to begin.

7. Along the top of the browser a warning message will display:

**“This type of file can harm your device. It will display a message: This type of file can harm your device. Do you want to keep android.apk anyway?”.**

You will tap **OK** to continue.

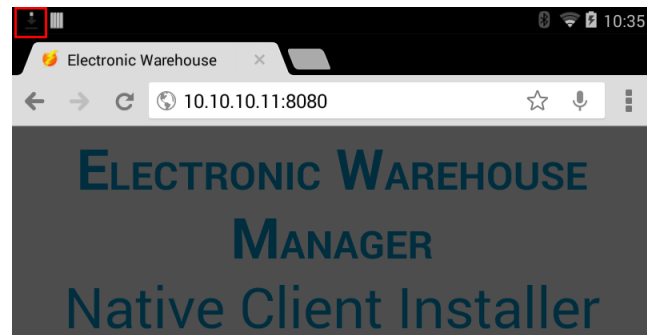


8. In the Android bar at the top of the screen you will see a downward pointing arrow indicating a download is in progress.

Press the **download icon**




and **drag downward** to reveal the notification tray.



9. The **android.apk** file will be listed in the tablet's desktop **Downloads** area and the **Notifications** area when downloading has completed.

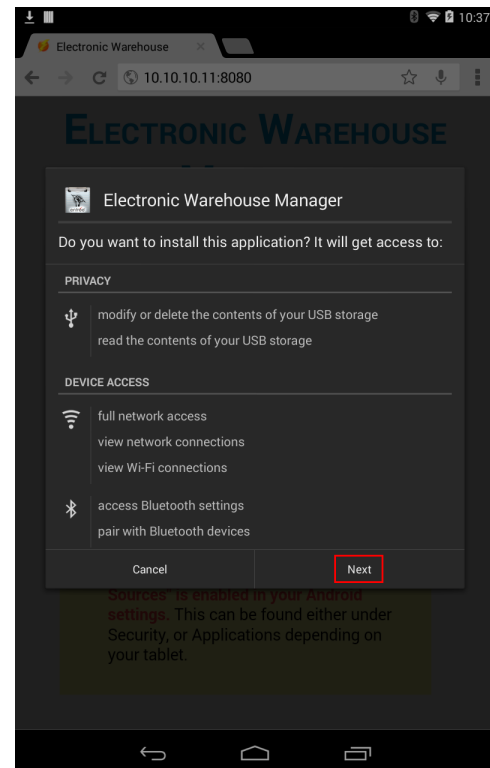
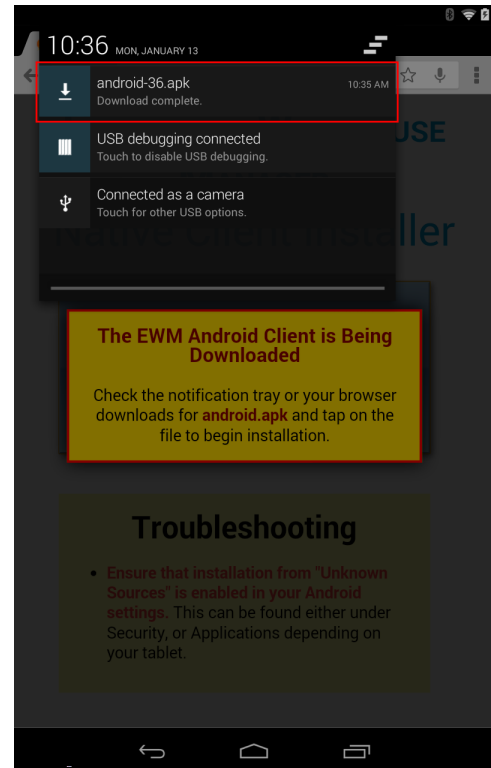
Tap **android.apk** download to begin running the EWM installation process.

 **Note** You may, alternatively, see “android-2.apk”, “android-16.apk”, or other, similar names with different numbers after the dash.

These are all the same and just indicate previous downloads of the client application.

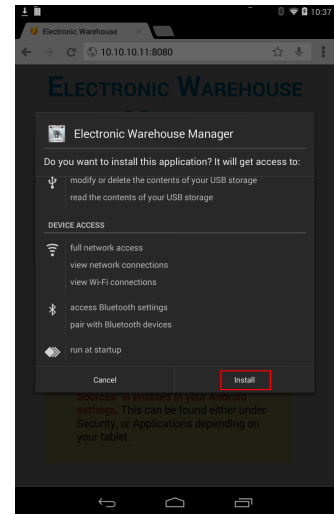
10. The first screen of the **Package Installer** dialog will display.

Tap **Next** to continue.

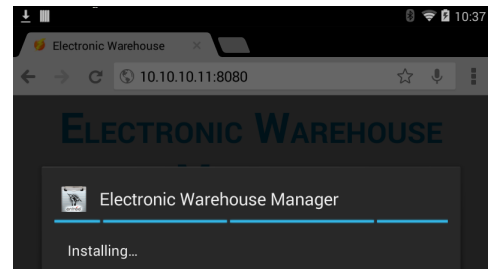


11. The **Package Installer** dialog will continue to a second screen.

Tap **Install** to run the installation setup on your tablet.

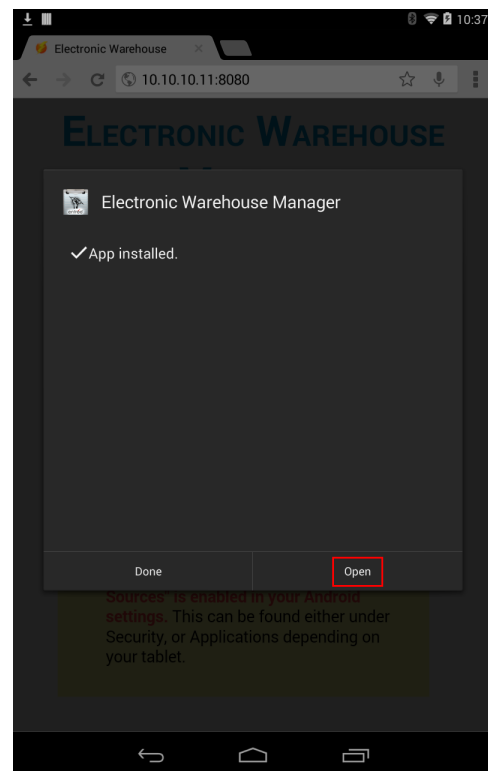


12. The **Installing** message box will display.



13. When installation prep has completed you will see “**App installed.**”.

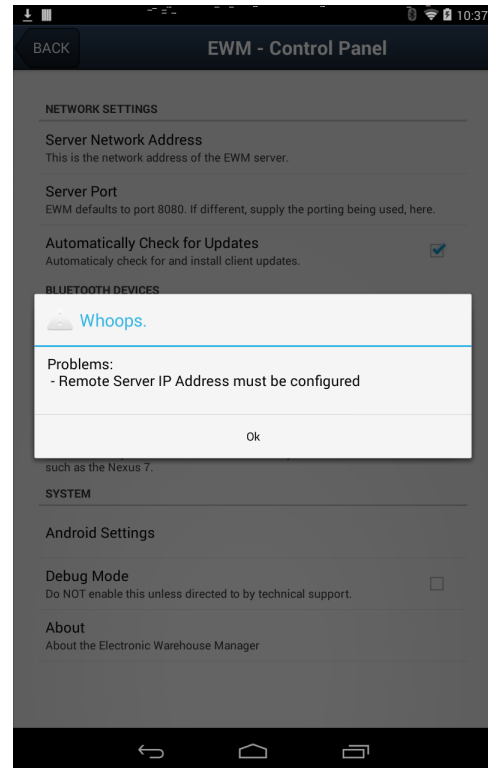
Now tap **Open** to run the installation of the **EWM** application on your tablet.



14. The **Invalid Application** **Setting** message box will display.

This is a normal condition because you still need to tell the **EWM** application what the remote server IP address is for your tablet to run the app.

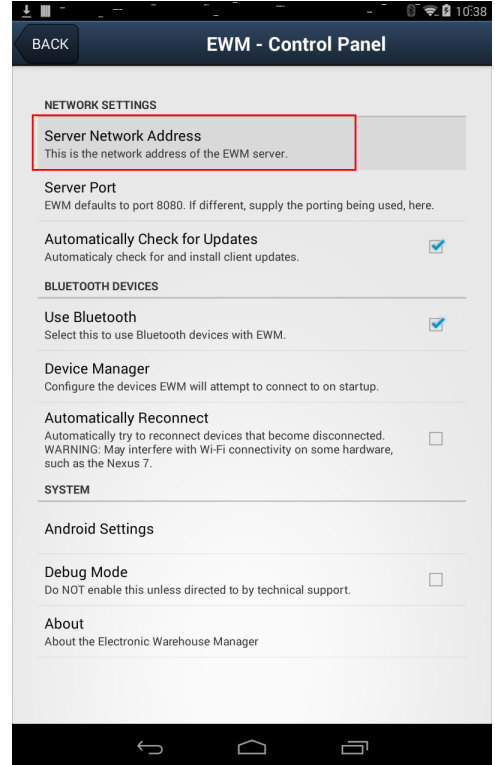
Tap **OK** to continue.



- Next you will Configure the EWM Client and install the application on your tablet device.

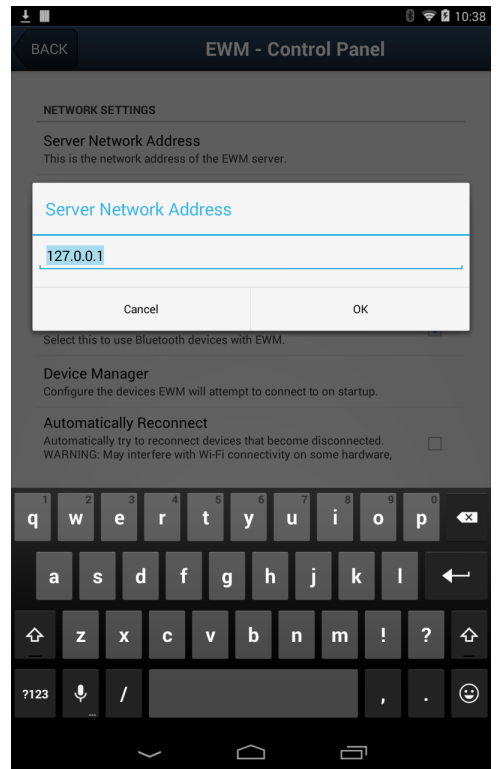
- Following these steps to configure and install the application.

1. The **EWM Control Panel** screen will be displayed. Tap **Server Network Address** to open the dialog so you can enter the IP information for **EWM**.



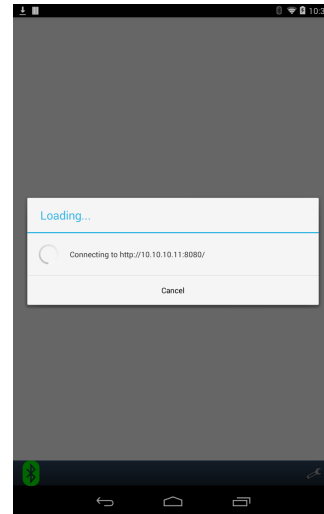
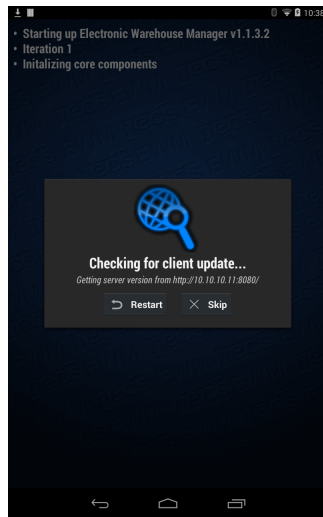
2. Enter the IP address numbers in the **Server Network Address** dialog box.

Tap **OK**.



3. The **Server Network Address** will be used to configure the connection between **EWM** and your server.

- A **Starting up and initialization** message will display (below).
- Next the **Loading** message will display telling you that the server path has been updated and it is restarting the connection (below).

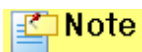


4. Once the **EWM** application is connected to the **Server Network Address** successfully tap the Android OS **Back** button on the left in bottom toolbar. You should now be back on the Android home screen.



**Note** If you're not on the home screen repeatedly tap the Android OS **HOME** button in the center of the bottom toolbar till you get there.

The **EWM** application icon should appear on the home screen a where your apps are located.

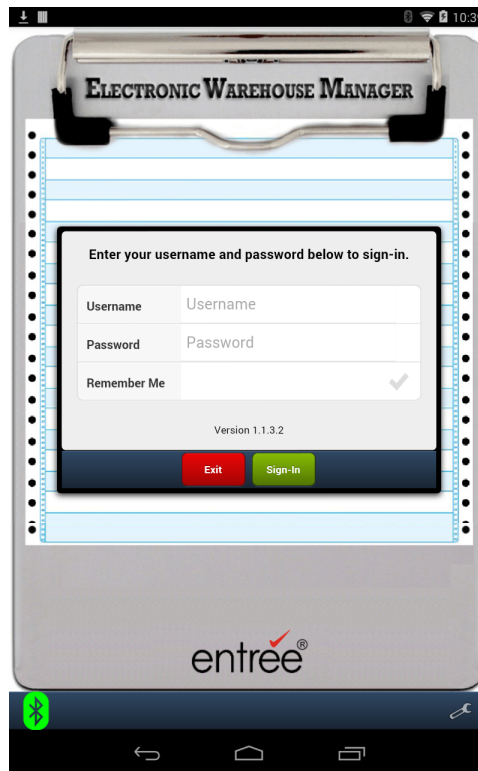


**Note** If you **do not** see the **Electronic Warehouse Manager** icon on the home screen, **tap the application list icon**. (This looks like a circle with six boxes inside it, in the center of the screen, along the bottom.) Tapping this will bring up a list of the apps installed on the device. From there, tap on the **EWM** icon.

**Hot Tip!** To bring the **EWM** icon onto the home screen, for easy access, **tap and hold your finger** on the **EWM icon** while viewing it the application list. The screen should flip back to the home screen, where you can now drop the icon onto it and drag it into position with your finger.

5. Just tap the **EWM** icon to start the **EWM** application.

6. The **EWM Sign-In** screen will display.



7. Proceed to the [Sign-In](#) chapter of this guide and follow those steps to access the **EWM** main menu.
8. Later you will proceed to the [Bluetooth Setup - Adding Scanners & Scales](#) chapter to perform this last steps in the tablet setup process.

### **EWM Application Updates**

Whenever the tablet powers up or when you sign-in to the **EWM** application it will check your Host Server for new versions of **EWM**. You will see a "**Checking for Updates**" message box displayed. If an update is found it will automatically trigger the installation of the new version of the **EWM** application.

# Chapter 11

## EWM Sign-In

## 11 EWM Sign-In

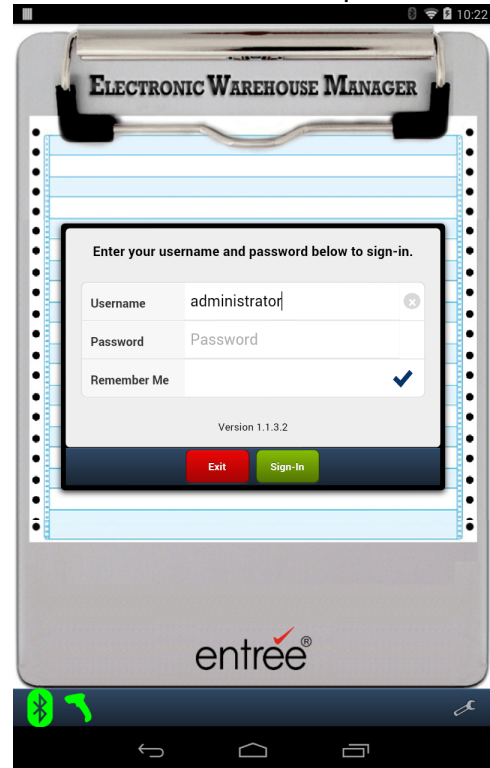
Each operator that uses **EWM** must sign-in using their assigned Username and Password. This allows the **EWM** application to track each user, how long it takes to pick each order, and other information related to productivity.

### The Sign-in process provides these benefits:

- Menu-item-level access controls similar to **entrée** and new Miscellaneous options feature.
- Use of the **entrée Security Management System** - This familiar interface will be used to create and change individual user accounts and assign permissions.
- System Activity Saved to a Central Log File - With individual user accounts in **EWM** the basic activity in the system, including: all scan data, people sign into and out of the system, opening and closing documents for scanning, will now be tagged with the identity of the person who performed the action and saved in a central log file for use in reports.

The [Warehouse Manager Dashboard](#) in the main **entrée** system is where you can view the current activity of your warehouse employees.

See the [Warehouse Manager Dashboard](#) chapter for more information.



- Easily Monitor System Activity - You can generate reports which will combine the data in the activity log with the data in the scan detail files to monitor system activity.

## The Sign-In Process

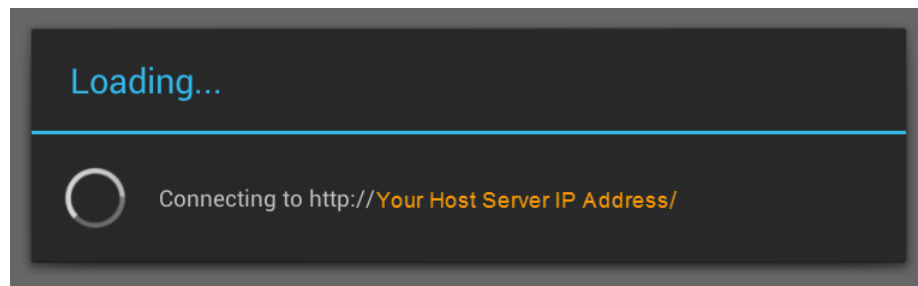
1. Tap the **EWM** icon on the tablet desktop to run the application.

2. You will see these messages displayed:

- First the "Checking for updates..." message is displayed which means **EWM** is checking your Host Server for new versions of the **EWM** app software.



- Next you will see a "**Loading...**" message as the tablet loads **EWM** from your Remote Server. The Remote Server IP address is displayed in the message.



3. The **Sign-In** dialog box will display once the app is fully loaded.

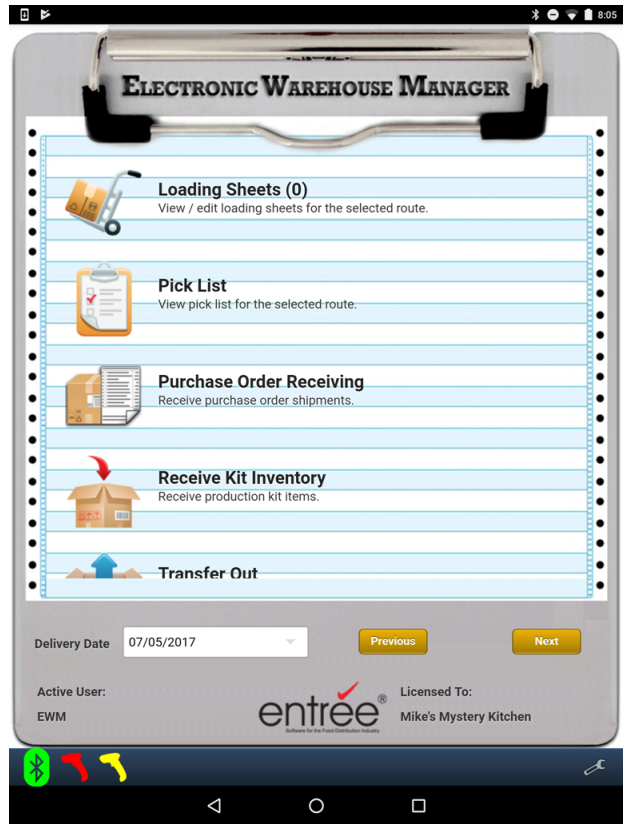
4. Enter your assigned **Username** and **Password**.

5. To save your sign-in information tap the **Remember Me** option to check it.

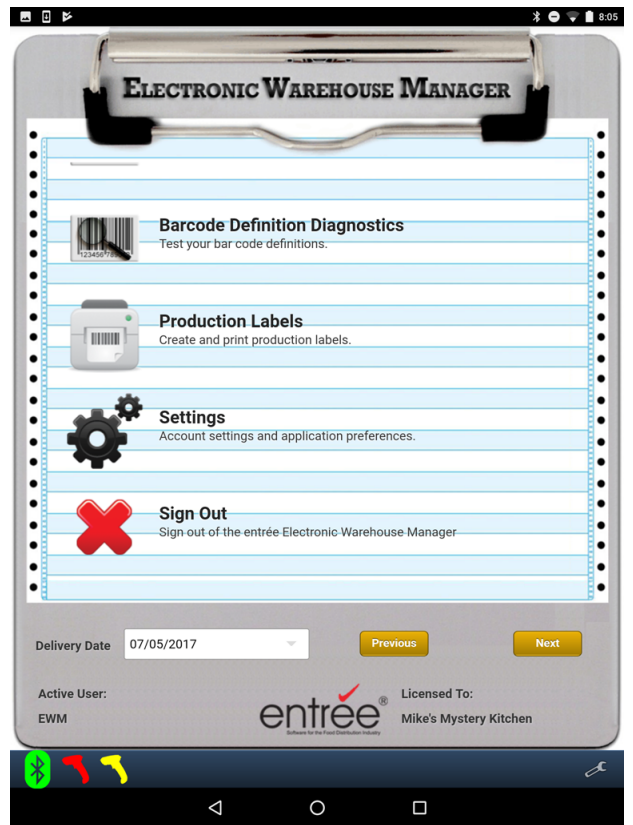
6. Tap the green **Sign-In** button

The image shows a sign-in dialog box with a white background and a dark blue border. At the top, it says "Enter your username and password below to sign-in." Below this are three input fields: "Username" with the placeholder text "Username", "Password" with the placeholder text "Password", and "Remember Me" with a checked checkbox. At the bottom of the dialog, it says "Version 0.9.0a". Below the dialog are two buttons: a green "Sign-In" button and a red "Exit" button.

7. Then the **EWM** main menu will display.



Tap the screen and drag up to scroll to see the rest of the main menu options.





8. At the bottom of the main menu screen enter the **Delivery Date** you are working with.

- The **Delivery Date** will always default to the current date when you first sign-in.
- To change the **Delivery Date** tap the date box area and tap a date in the calendar feature then tap Done.
- The number of loading sheets that have not been picked for each **Delivery Date** are displayed in **(red text)** on dates in the calendar.

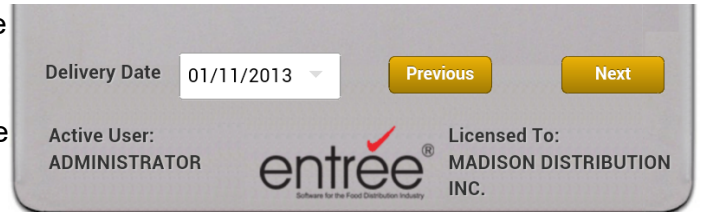


- Or use the **Previous** / **Next** buttons to advance the date in either direction. These buttons will also provide you with a number in a red circle representing how many loading sheets have not been picked on the previous or next day.



**Informational fields at the bottom of the EWM main menu screen include:**

- **Active User:** Displays the username of the person logged into **EWM** on the tablet.
- **Licensed To:** Displays the company name that owns the license for the **EWM** application on the tablet.



**What is next?**

If you will be using the touch screen to enter all your information then you can begin using **EWM** now. Proceed to review the [Common Features](#) chapter will provide you with an overview of key features found in the **EWM** application. The chapter includes: Item Information Panel Setup, screen buttons, Number Keypad Tools and Item Display Controls.

If **EWM** will use barcode scanners and/or Bluetooth enabled scales and printers then proceed to the [Bluetooth Setup - Adding Scanners & Scales](#) chapter. This step must be done so that your Bluetooth devices are defined and paired with the tablet to create the connections for scanning, printing and weighting.

# **Chapter 12**

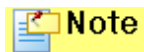
## **Adding Bluetooth Scanners & Scales**

## 12 Adding Bluetooth Scanners & Scales

In simple terms adding a barcode scanner to **EWM** can be broken down into two parts. First you make the Android OS aware of the scanner in this section of the chapter. Then you make the **EWM** application aware of the scanner in the [Bluetooth Device Management in EWM](#) section of this chapter.

### Android OS

The Android OS **Settings** screen on the tablet is where the IP Address is entered so that you can connect your tablet to your Host Server via your local wireless network. There are also settings to configure any Bluetooth devices and load the drivers onto the tablet.




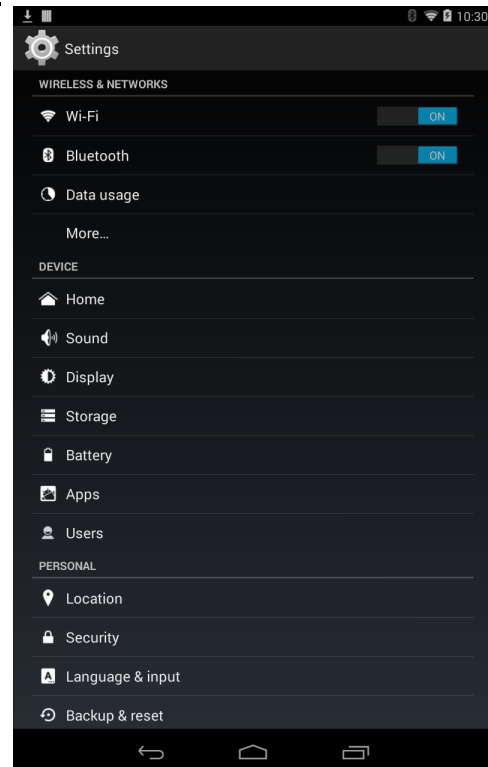
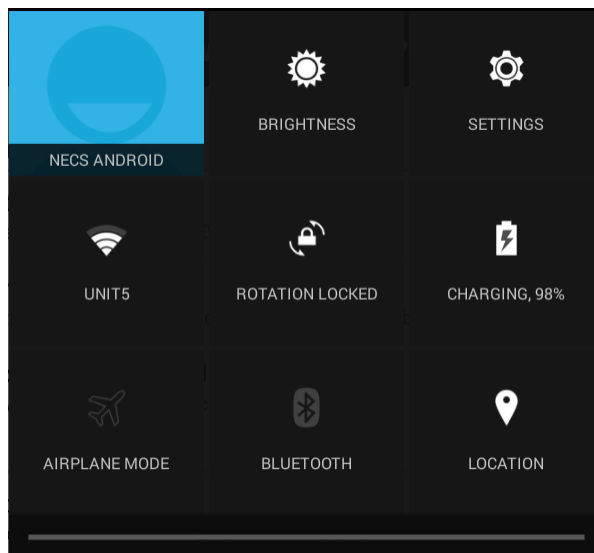
### Note

Some Bluetooth devices may require a password or pin code during this process. Please review the information about your specific Bluetooth device to see if a password or pin code is required for the pairing process.

### First Access the Android OS Settings screen

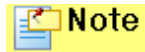
1. From the tablet desktop swipe down with your finger on the **right** side of the Android Status bar at the top of the screen to reveal the **Settings** Shortcut panel.

2. Tap the **Settings** icon  to open the Settings screen (right).



## **Second, Add Bluetooth Devices & Drivers in Android OS Settings**

1. From the **Settings** screen go to the **Wireless & Networks** section.
2. **Bluetooth** should be "**ON**" if you have completed the steps in the [Tablet Setup](#) chapter. If Bluetooth is not "**ON**", tap and drag right to move the setting to "**ON**".
3. The Bluetooth scanning device you would like to pair with the tablet should be turned on at this time.

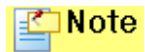


**Note** Tablets must be paired to some Bluetooth devices. This means only the tablet paired with the scanning device will be able to communicate with that specific device, like a hand scanner.

4. Tap **Bluetooth** in the **Settings** screen to open the Bluetooth Settings.

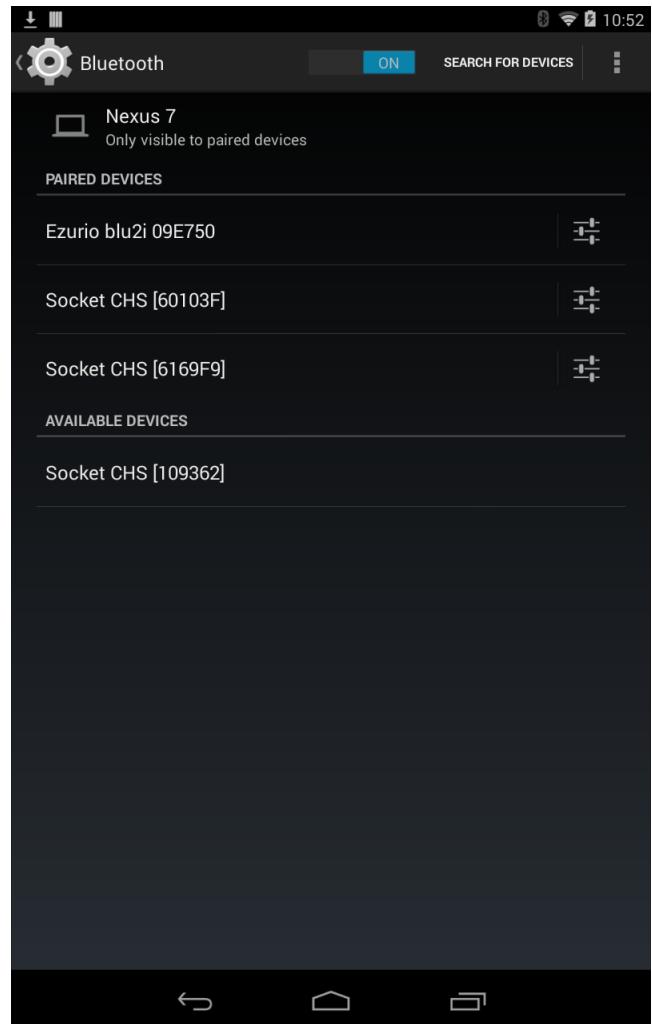
5. Tap **Search for devices**.

The device you turned on should show up in the **Found devices** list.

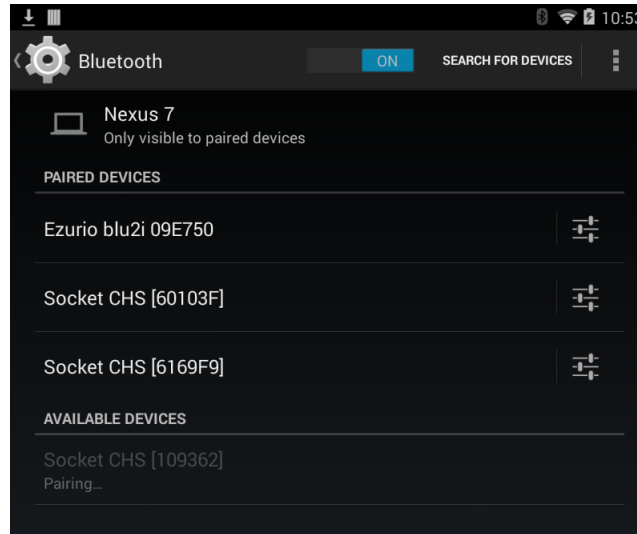


**Some Bluetooth devices may require a password or pin code at this time.**

**Please review the information about your specific device to have the password or pin code required for this pairing process.**

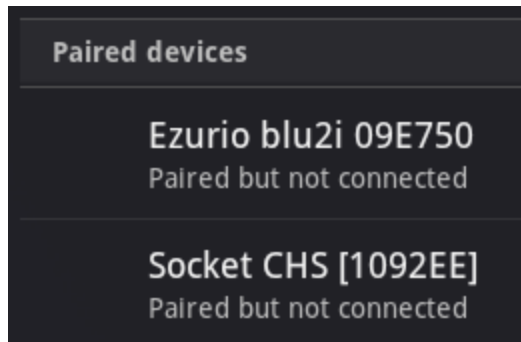


6. Tap the device in the list to pair with the tablet. You will see the the "**Pairing...**" message under Available Devices.



7. When pairing is complete you will see the "**Paired but not connected**" message below the device in the Paired devices section.

This means that the tablet is connected to the device but **EWM** has not been connected to the device yet.



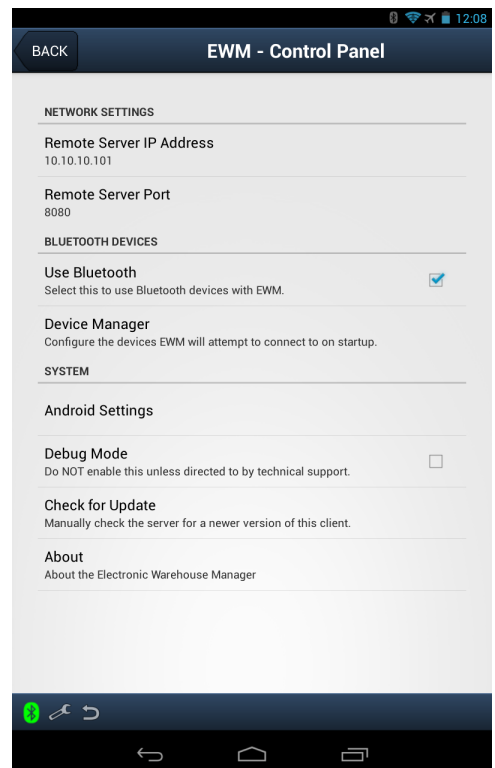
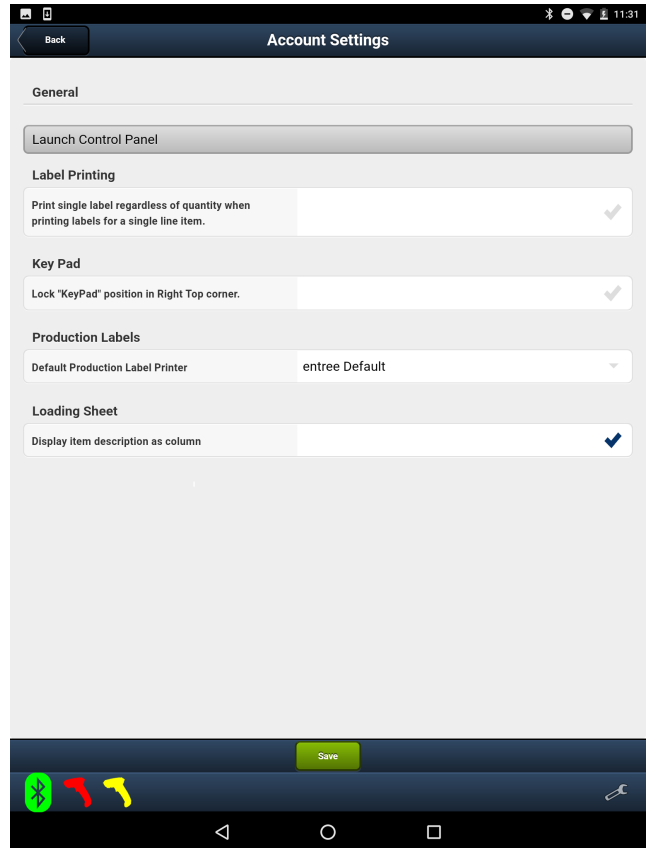
8. Now you have to connect the device to **EWM**. Tap the **Home** icon in the bottom tool bar.

**Next proceed to [Bluetooth Device Management in EWM](#).**

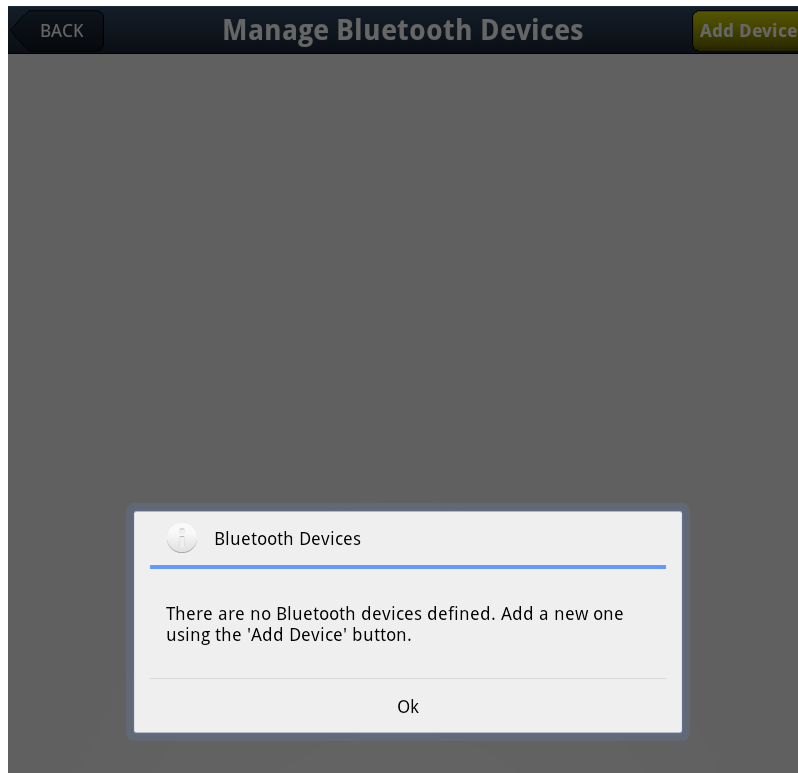
## 12.1 Bluetooth Device Management in EWM

### Managing Bluetooth Devices in EWM

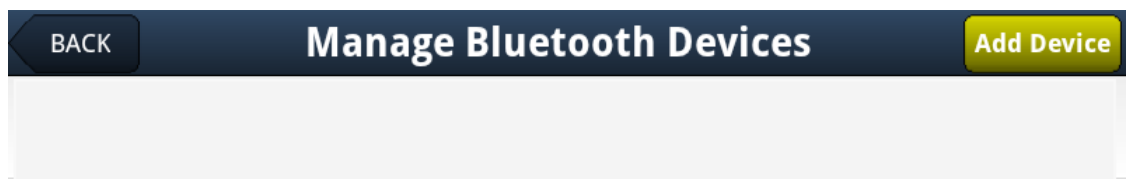
1. The **EWM Sign-In** screen will open. Sign-in to the **EWM** application with your Username and Password.
2. Tap the [Settings](#) option in the **EWM** main menu.
3. Tap the **Launch Control Panel** button.
4. Under **Bluetooth Devices** tap the **Device Manager** option.



5. A message will display saying "**There are no Bluetooth devices defined. Add a new one using the Add Device button**". Tap **OK**.

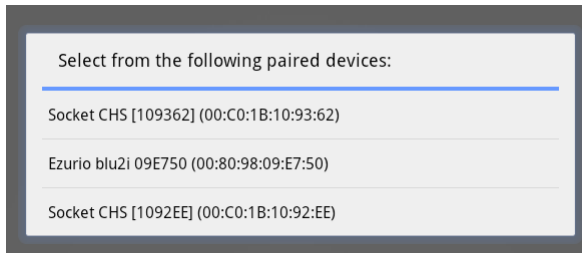


6. The **Manage Bluetooth Devices** screen will display. Tap the **Add Device** button at the top and the **New Bluetooth Device** screen will display.

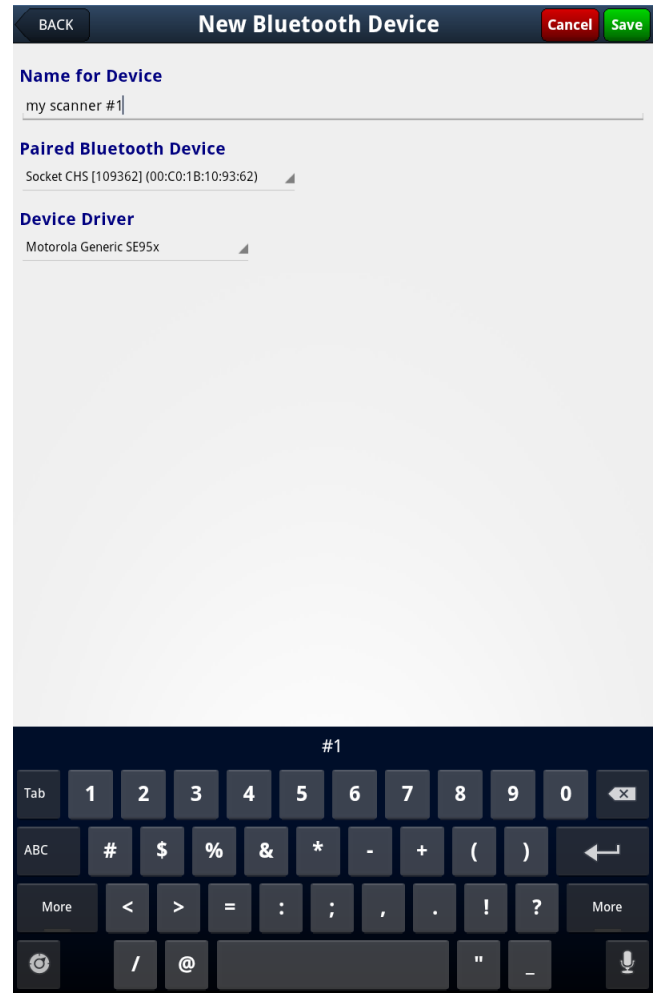


7. In the **New Bluetooth Device** screen fill in the following:

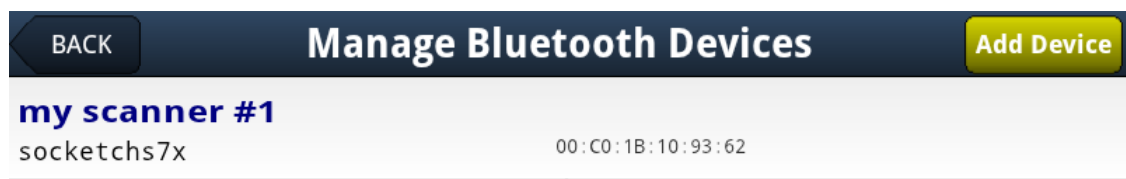
- a. In the **Name for Device** field enter a name for the device.
- b. **Paired Bluetooth Device** tap the arrow to reveal the drop down list and select the device hardware.



- c. **Device Driver** tap the arrow to reveal the drop down list and select the correct driver for your device.
- d. Tap **Save** in the upper right corner when you are done.



8. You will now see the newly added Bluetooth device name in the **Manage Bluetooth Devices** screen. In our example you see "my scanner #1".



9. Tap **Back** to return to the **Control Panel, Manage Bluetooth Devices**.

10. Tap **Back** again and in the [Account Settings](#) screen tap **Save**. You will now be on the **EWM** main menu screen.

# Chapter 13

## EWM Settings

## 13 EWM Settings

### Account Settings

#### • Buttons

- Tap the green **Save** button at the bottom to keep any changes you make in this screen.
- Tap **Back** button at the top to return to the previous screen.
- Tap the **Launch Control Panel** button to access the **EWM - Control Panel**. This is where you access the **Use Bluetooth** options and the **Device Manager**.

#### • Label Printing

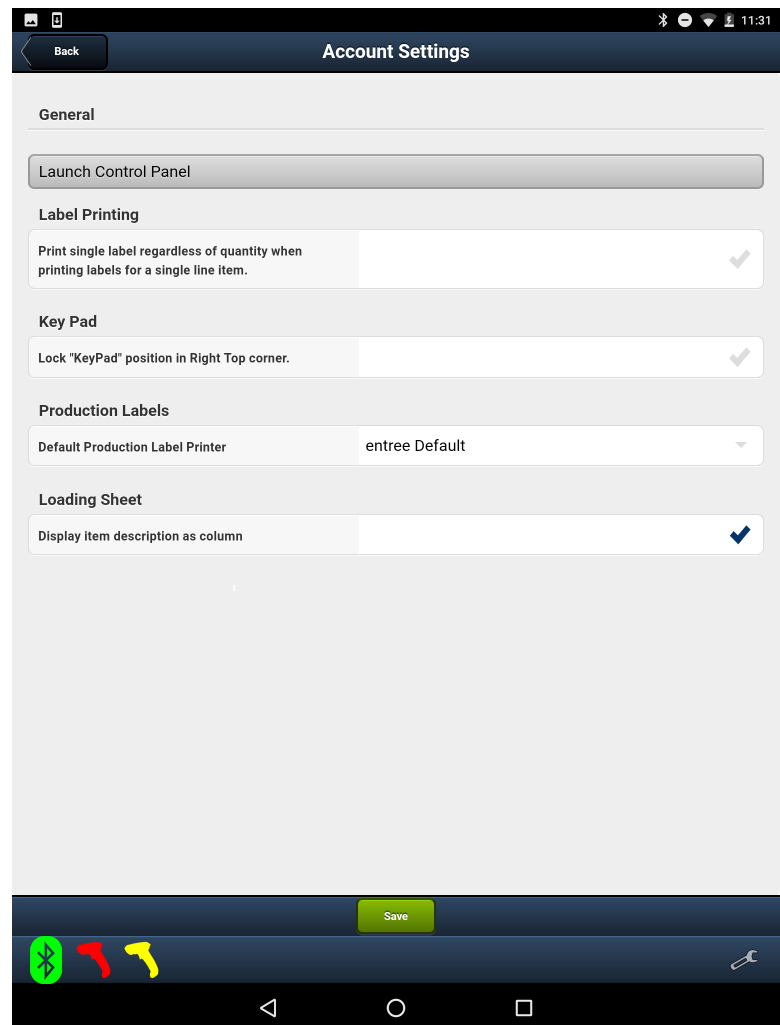
- Tap the **check mark** to enable the option.
- Print single label regardless of quantity when printing labels for a single item.
- Tap **Save** to keep your changes.

#### • Key Pad

- Tap the **check mark** to enable the option and lock the key pad in the top right corner of the screen.

#### • Loading Sheet

- Tap the **check mark** to enable the option so item descriptions will display as a new column on the loading sheet.
- If you do not check this option the item description will be displayed within the item grid row instead.

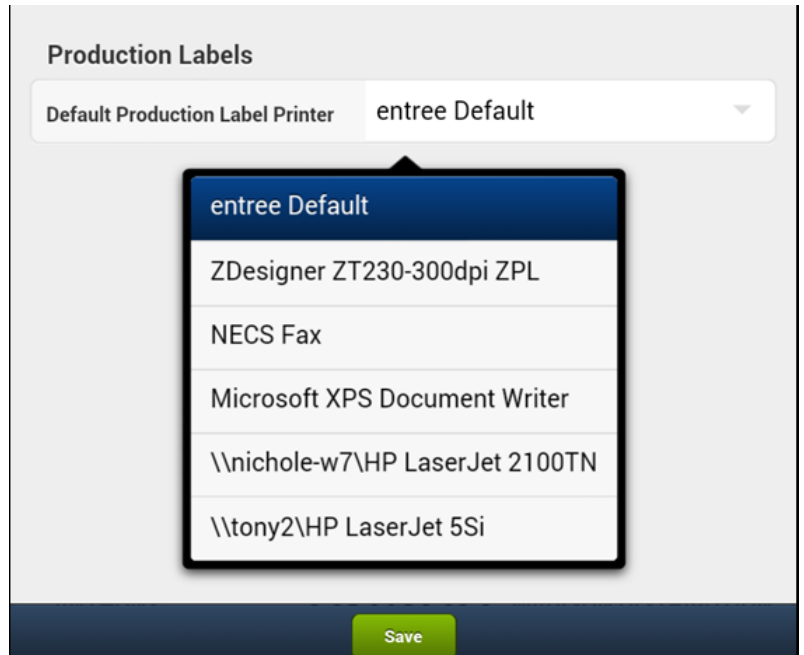


- **Production Labels**

- Tap the drop down menu **arrow** to view the printers available.
- Select a printer from the list to set as the default for printing your production labels.

The **entree Default** option will use the printer you have designated as your label printer in the main **entree** system.

- Tap **Save** to keep your changes.



## Control Panel

### • Network Settings

- **Remote Server IP Address** - Enter your Host Server IP Address here. If your server exists on 192.168.53.199, then you would navigate to <http://192.168.53.199:8080>.
- **Remote Server Port** - Usually the port value is **8080**. If you have installed EWM on another port then edit your IP address accordingly.

### • Bluetooth Devices

- **Use Bluetooth** - Check the option to enable the use of Bluetooth devices with **EWM**.
- **Device Manager** - Use this option to configure and connect with your Bluetooth devices.

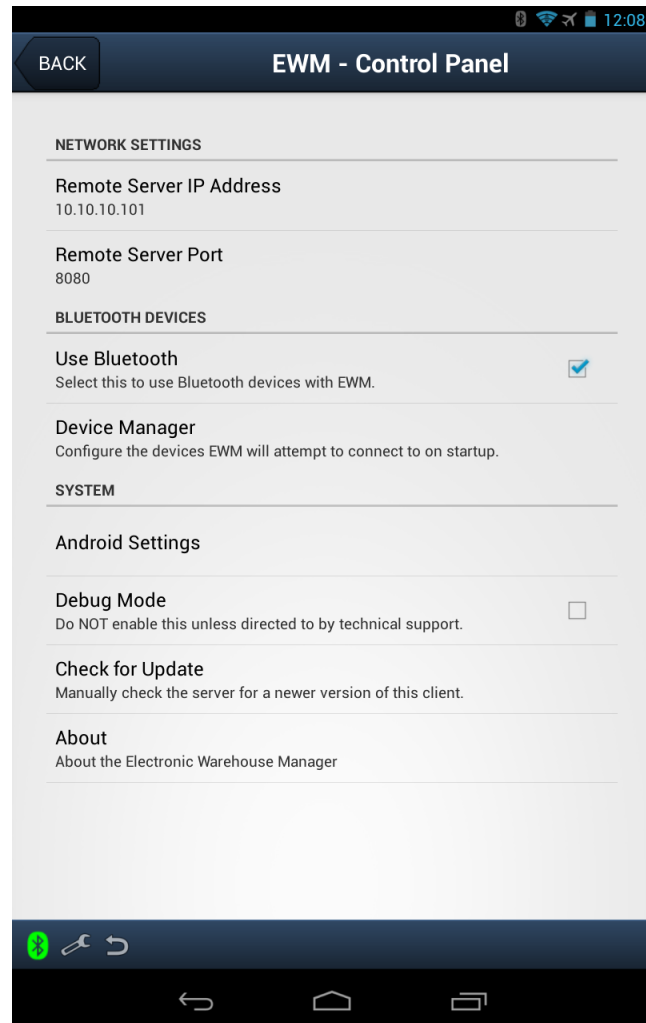
Review these sections of the guide to add a Bluetooth device to the tablet:

- [Bluetooth Setup - Adding Scanners & Scales](#)
- [Bluetooth Device Management in EWM](#).

### • System

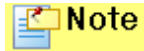
- **Android Settings** - Use to access the Android OS settings.

- **Debug Mode** - Check to activate the debugger tool.



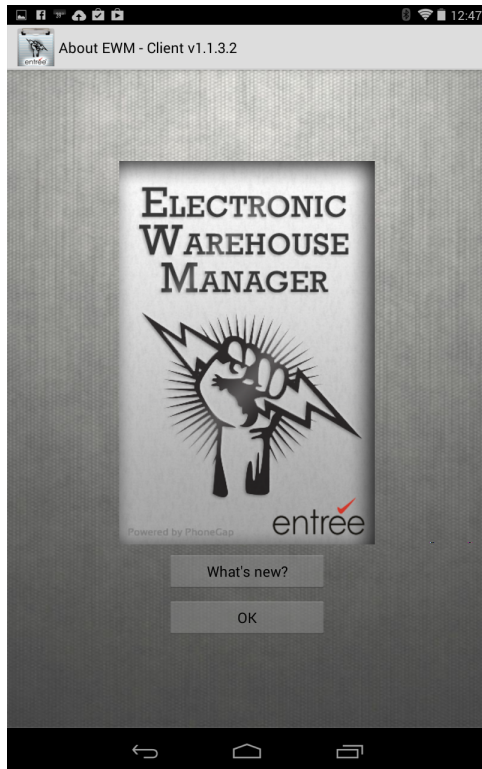
 **Caution** Do not use the Debug Mode option unless Tech Support has asked you to turn it on.

- **Check for Update** - Tap this option to manually check for an update for the **EWM** application on your server.

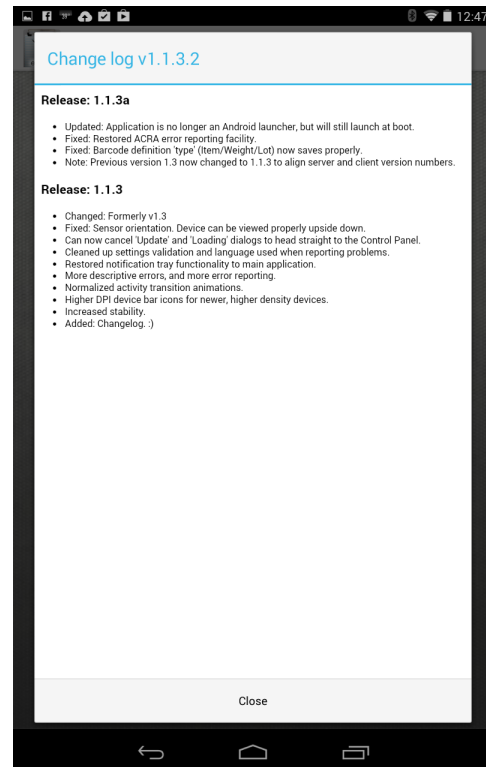


**Note** During the **EWM** sign-in process you will see a "Checking for updates..." message because **EWM** automatically for new versions of software.

- **About** - Provides access to version information and release change logs for the **EWM** application software.
  - Tap **OK** to close this screen.



- **What's new?** - Tap this option on the **About** screen to see the change logs for the **EWM** version release. Find out about the new features and bugs that have been fixed here.



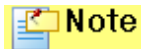
# **Chapter 14**

## **Barcode Definition Manager**

## 14 Barcode Definition Manager

This chapter will explain how to create bar code definitions from labels in the warehouse. If you will be doing any scanning bar code definitions are critical to the proper operation of **EWM**. If your bar code definitions are not set up correctly, you may end up receiving an "**Unable to positively identify bar code**" error message when certain items are scanned. A brief overview of the [GS1 Bar Code Standard](#) is covered next to provide you with a basic understanding of how bar codes are structure and introduce you to the terminology used in conjunction with bar code labels. Then we will show you how to [Create Bar Code Definitions](#).

In V4.0.36 the size of the "Lot Number" and "Serial Number" fields were expanded to 20 characters per the allowable maximum length specifications of the GS1 standard for these values. These fields hold the data extracted from scanned bar codes. We are already seeing labels in the field with "Serial Number" values that are 18 digits long so we decided to get ahead of the coming changes.



**Note** It is important to understand that a Barcode Definition is NOT defined for each product in your inventory. Rather, a Barcode Definition is only defined PER MANUFACTURER (with some rare exceptions). This is because manufacturers will use the same bar code format for all of their items.



**Example** When you set up the Barcode Definition for a "Tyson Foods" label, ALL "Tyson Foods" labels will properly scan with the **EWM** software. This greatly reduces the amount of time needed to get your **EWM** software ready for use!

You can test this by first defining a Barcode Definition for a specific manufacturer. Then go to the "[Barcode Definition Diagnostics](#)" menu option (see the next chapter for more information) and begin randomly scanning bar codes from that manufacturer. They should all work with the corresponding information for that item from your **entrée** Inventory File Maintenance displaying on the tablet with a "Valid Item Located" message.

### Supported Bar Code Symbologies

Normal bar code labels and many other bar code symbologies can be defined and processed by **EWM** and **entrée**. **UPC**. The GS1 Bar Code Standard section is only used as an example in this guide to explain how bar code symbologies work.

#### **EWM currently supports the following bar code symbologies:**

<ul style="list-style-type: none"> <li>▪ Australia Postal</li> <li>▪ Aztec</li> <li>▪ Aztec Mesa</li> <li>▪ BookLand UPC (EAN-8 variant)</li> <li>▪ Canada Postal</li> <li>▪ China Postal</li> <li>▪ CodaBar</li> <li>▪ Codablock</li> <li>▪ Code 11</li> <li>▪ Code 128</li> </ul>	<ul style="list-style-type: none"> <li>▪ Composite AB/C</li> <li>▪ Coupon Code</li> <li>▪ Cue Cat</li> <li>▪ Data Matrix</li> <li>▪ Discrete 2 of 5</li> <li>▪ Dutch Postal</li> <li>▪ EAN-13</li> <li>▪ EAN-8GS1</li> <li>▪ DataBar (formerly RSS-14)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Japan Postal</li> <li>▪ Korea Postal</li> <li>▪ Macro Micro PDF-417</li> <li>▪ Macro PDF-417</li> <li>▪ Magnetic Stripe Reader</li> <li>▪ Matrix 2 of 5</li> <li>▪ MaxiCode</li> <li>▪ Micro PDF-417</li> <li>▪ MSI/Plessey</li> <li>▪ Optical Character Recognition</li> </ul>	<ul style="list-style-type: none"> <li>▪ TCIF Linked Code 39</li> <li>▪ Telepen</li> <li>▪ Tri-Optic Code 39</li> <li>▪ UCC 128</li> <li>▪ UK Postal</li> <li>▪ UPC-A</li> <li>▪ UPC-E0</li> <li>▪ UPC-E1</li> <li>▪ UPC/EAN Supplements</li> </ul>
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<ul style="list-style-type: none"><li>▪ Code 16K</li><li>▪ Code 3 of 9 (Code 39)</li><li>▪ Code 32</li><li>▪ Code 49</li><li>▪ Code 93</li></ul>	<ul style="list-style-type: none"><li>▪ GS1 DataBar Expanded (formerly RSS-14 Expanded)</li><li>▪ GS1 DataBar Limited (formerly RSS-14 Limited)</li><li>▪ Interleaved 2 of 5</li><li>▪ Interleaved 2 of 5, IATA spec</li><li>▪ ISBT 128</li></ul>	<ul style="list-style-type: none"><li>▪ PDF-417</li><li>▪ Plessey</li><li>▪ PosiCode</li><li>▪ QR-Code</li><li>▪ RFID</li></ul>	<ul style="list-style-type: none"><li>▪ USPS Intelligent Mail (aka OneCode)</li><li>▪ USPS Planet</li><li>▪ USPS POSTNET</li><li>▪ WebCode</li></ul>
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### **About Scanning Devices**

You must check the manufacturer's specifications for your scanning device to be sure your bar code symbology is supported by that device. Most scanning devices have a few of the most common bar code symbologies enabled. So you may have to perform some additional setup procedures on your scanning device to enable the bar code symbology you and **EWM** will be using. The bar code symbology you use must be in the list above of those supported by **EWM**.

### **entrée User Accounts**

Before your operators can [Sign-In](#) it is our recommendation that you create *individual* user accounts for each of your **EWM** operators in the main **entrée** system Security Management System (SMS). See the [entrée Settings & Dashboard](#) chapter of this guide for instructions and information about setting up these user accounts before proceeding.

## **14.1 GS1 Bar Code Standard**

This chapter will provide you with an explanation of how bar code symbologies are structured by using the GS1 Bar Code standard as the example. Normal bar code labels and many other bar code symbologies can also be defined and processed in **EWM**. A glossary of terms has also been included at the end of this guide to clarify the terminology used in relation to a GS1 bar code definition. Some of the terminology in the glossary is common to the topic of bar code definitions.


The GS1 Bar Code standard uses a special variation of the "Code 128" bar code symbology which most scanners currently recognize as "UCC-128" or "EAN-128".

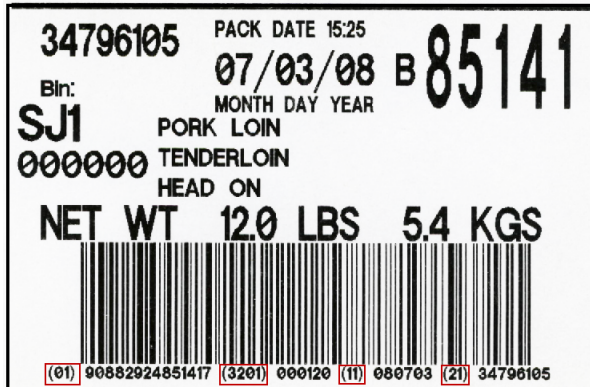
### **Application Identifiers**

The GS1 standard also defines a series of "Application Identifier" values which are used to identify the purpose of different data fields like Item Number or Serial Number. In the man-readable portion of the bar code you will often see these values set off by parentheses. Unfortunately, there is nothing in the bar code data which identifies these values. Even so, they are still useful to us and we have implemented some new features to take advantage of them. See page 55 of this guide for a list of the GS1 Application Identifiers used by **entrée**.

These "Application Identifiers" (outlined in red in the bar code label on the following page) are static data values which will typically appear in the same location in all of that vendor's bar codes. We say "typically" because the standard *does* allow for variable-length data fields. In all the cases of which we are aware of the vendor had the good sense to put the variable-length data at the end of the bar code (usually the Serial Number). Since the identifiers are fixed values they can serve the same purpose as the Manufacturer's ID value in separating two bar code designs which would otherwise be identical. So each of the existing data field definitions now has an auxiliary set of definition values which allow you to associate the "Application Identifier" with the data value. Like the Manufacturer's ID, you define both the location of the value and the content.

- **On the next page you will see examples of both normal and GS1 type bar codes with a related Barcode Definition screen example.**

 **Example** In this GS1 bar code example on the left the **Serial Number Identifier (21)** (outlined in red) is defined in the **Barcode Definition Editor** image at the bottom of the page. On the right is an example of a normal bar code label that does not contain Application Identifiers.



GS1 BAR CODE




NORMAL BAR CODE

Notice the numbers surrounded by parenthesis, (application Identifiers), in a GS1 style barcode.

Notice that there are no numbers surrounded by parenthesis in a normal barcode style.

BACK
**Barcode Definition Editor**
TEST SAVE CANCEL

Label: EX Symb: UCC 128 Len: 44 Desc: Excel GS1 label Type: Item Is Metric?



0 1 9 0 8 8 2 9 2 4 8 6 2 2 6 0 3 2 0 1 0 0 6 1 0 1 1 0 8 1 0 2 1 2 1 3 5 0 2 7 2 5 9

Start: 35 End: 36 Len: 2 Clear

Item Number
Weight
Serial Number
Manufacturer ID
Lot Number
Dates
Associated

Serial Number

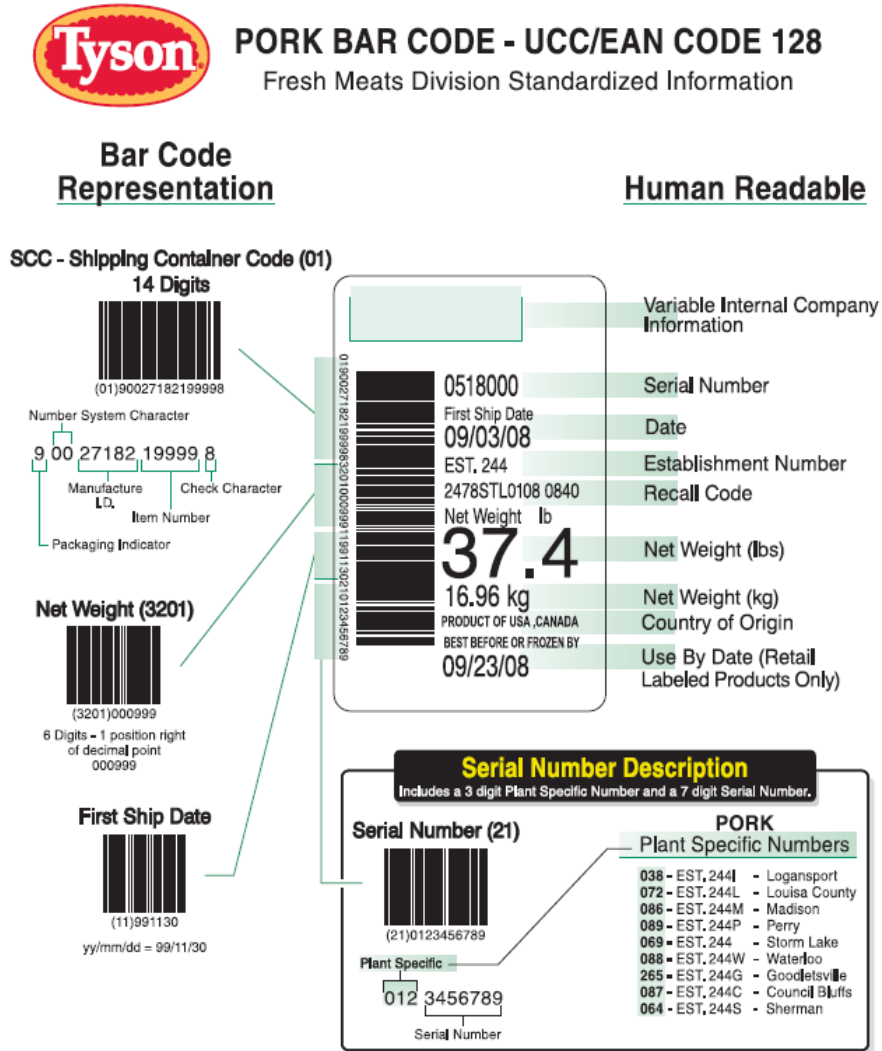
Serial Number Identifier (GS1): 21

### Serial Number Identifier

The Serial Number Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (21) preceding the Serial Number data.

**Defining Normal Bar Codes**

To help you more quickly identify the elements of a bar code label, the manufacturer can usually provide you with a breakdown sheet. The breakdown information for the bar code includes what fields are contained in the bar code and their start and end values. Here is an example of the breakdown you would get for a Tyson Pork bar code.



Tyson Fresh Meats, Inc., Dakota Dunes, SD 57049 U.S.A.

Rev. 05/19/09

**Error Checking**

The second thing we are able to do with the GS1 data is to perform some basic error-checking when you are creating a new bar code definition. Some of the GS1 "Application Identifiers" specify not only what a particular value represents but, in some cases, how it should be interpreted. By having the bar code definition editing process interpret an identifier according to the GS1 specification we can perform some simple checks to make sure that the way you have defined the data field is consistent with what the vendor says is the actual content of the field. We'll get into this feature in more detail shortly.

### Defined Date Values

The GS1 standard defines four different date values which may be associated with an item:

1. Production Date
2. Packaging Date
3. Sell-By Date
4. Expiration Date

You will only see one of these values, maybe two, in a single bar code. The bar code definition system has been expanded to add support for specifying all four of these date values. Also, since one of these dates may serve, either officially or unofficially, as the item's "Lot Number", the field definitions for these date values include a check box which allows you to designate one of them to be recorded as the "Lot Number" value for the scan.

### Automatic Lot Tracking

It is especially important that lot tracking is implemented so our customers are in adherence to the new Food Safety Modernization Act (FSMA). Lot tracking will ensure that your operation is fully prepared in case of a product recall.

**EWM** includes an effective means for automatically tracking lots, even if you do not use the Lot Tracking features of **entrée**.

**Important** The **EWM** barcode definition **must** be set up to identify and use the production date encoded in the barcode label as the lot number for automatic lot tracking to work. This information can be the traceable lot number for the item and used when you need to run the [Product Recall Report](#).

BACK
**Barcode Definition Editor**
REFRESH
SCAN (NEW/EDIT)

Label:  Symb: UCC 128 Len: 44 Desc:  Type:  Is Metric?

Start:  End:  Len: 2

Item Number
Weight
Serial Number
Manufacturer ID
Lot Number
Dates
Associated

- Production Date
- Production Date Identifier (GS1): 11
- Packaging Date
- Packaging Date Identifier (GS1)
- Sell-By Date
- Sell-By Date Identifier (GS1)
- Expiration Date
- Expiration Date Identifier (GS1)

Use Selected Date As Lot

### Date of Production Identifier

The Production Date Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (11) preceding the Production Date data.

***To put it simply, when inventory is received, the scanned lot number (production date) in the label is recorded (along with all other key information). When the product is sold, the lot number (production date) in the scanned label is recorded.***

### **Product Recalls & Lot Numbers in Bar Code Definitions**

A product recall can be issued against any of the data values present in a bar code, so it would be beneficial to define the "Lot Number" field in the bar codes that provide one, along with any of the four date fields. Defining and scanning for this bar code data will enhance your businesses ability to trace all activity on a given product using the [Product Recall Report](#) in the main **entrée** system. This enables you to respond quickly in the event of a product recall and stay in compliance with the Food Safety Modernization Act (FSMA).

### **GS1 Data Values**

Although there is a wide variety of data values which can be identified under the GS1 standard, there are really just a few which affect the system. They are as follows:

<b>Data Value</b>	<b>GS1 Identifier(s)</b>	<b>Data Length</b>
Global Trade Item No. (GTIN)	01	fixed length 13 digits (GTIN-13)
Lot Number	10, 23	up to 20 alphanumeric characters
Serial Number	21	up to 20 alphanumeric characters
Production Date	11	exactly 6 digits (YYMMDD <i>see *</i> )
Packaging Date	13	exactly 6 digits (YYMMDD)
Sell By Date	15	exactly 6 digits (YYMMDD)
Expiration Date	17	exactly 6 digits (YYMMDD)
Net Weight, Kilograms	310x ( <i>see +</i> )	exactly 6 digits
Gross Weight, Kilograms	330x ( <i>see +</i> )	exactly 6 digits
Net Weight, Pounds	320x ( <i>see +</i> )	exactly 6 digits
Gross Weight, Pounds	340x ( <i>see +</i> )	exactly 6 digits

\* The date identifier values are each two digits long then the following six digits represent the date value. The "YYMMDD" notation indicates that the format of the date is a two-digit year ("YY"), a two-digit month ("MM") and a two-digit day ("DD"). So a bar code containing "(11)081016" in the man-readable portion of the label then the value is a "Production Date" ("11") and so then "081016" represents October 16, 2008. No, the "2000" part is not explicitly specified anywhere but the standard specifies that, much like the way **entrée** itself handles two-digit years, years from 00-50 should be interpreted as 2000's and years from 51-99 should be interpreted as 1900's.

+ The weight identifier values are each four digits long and then the following six digits represent the weight value. The "x" in the identifier represents the number of decimal places in the weight. So if you see "(3201)000450" in the man-readable portion of the label then you know that the "000450" value represents the weight of the item. The "320" portion means that it is a Net Weight value which is expressed in pounds. The "1" (in "3201") indicates that the weight is expressed to one decimal place which makes the weight value in this bar code 45.0 pounds. If the label read "(3202)000450" then the weight value is still "000450" but now the final "2" (in "3202") means that there are *two* decimal places in the value making the weight 4.50 pounds.

- For more information about GS1 Bar Code terminology see the [GS1 Bar Code Glossary](#).

 Hot Tip!**GS1 Bar Code Tips**

Application Identifiers help you extract the information correctly from a bar code label.



**Example** If you associate the "3201" identifier with the weight value for this bar code but you have defined the "Weight Decimal Length" value as "2" then a warning will be raised since the specified ID value indicates there is only one decimal place. Or if you had a "3101" identifier but had not checked the "kilograms" option, again, a warning would be raised. In either case, it will be up to you to evaluate the situation and make any necessary corrections since the program has no way of knowing if you just typed "3101" by accident when you meant to type "32" or if the item weight really is in kilos.

- All of the data from the fields you have specified in the bar code definition are recorded in the scan queue files including the four possible date values.
- All scan data is now recorded with the ID value of the user who performed the scan as well as a time stamp for when the scan was recorded.

**GS1 Bar Code Note**

Some manufacturers produce bar codes which generally follow the GS1 Standard guidelines but which are encoded with "Code 128" symbology rather than "UCC-128".

## 14.2 Creating Bar Code Definitions

**EWM** creates barcode definitions by capturing and translating the scanned data from bar code labels in the warehouse. If **EWM** does not find a match in the list of defined barcodes you may need to create the new bar code definition. Before you begin to add a new bar code, you will need the bar code breakdown information from the product vendor or manufacturer. This information about the bar code includes what fields are there and the start and end values for each field.

### About Products with Multiple Bar Code Labels

Before you begin, some vendors use multiple bar code labels on their products, one for the item and another for the weight and still another for the lot number. If the bar code label you are defining has this situation you should define the weight and lot labels first and then the item label. This way you can associate the weight and lot labels with the item label when you define it.

### Using the Barcode Definition Manager

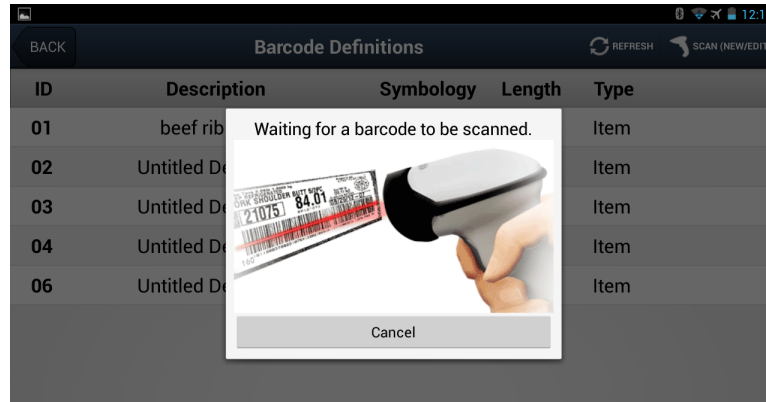
1. Once you [Sign-In](#) tap the **Barcode Definition Manager** option in the main **EWM** menu.
2. The **Barcode Definitions** screen will be displayed listing all the currently defined bar codes in **EWM**.

Each bar code definition in **EWM** will have the following data to display:

- **Code:** A unique editable value assigned by you and used to identify the bar code definition.
- **Description:** The descriptive name for the bar code.
- **Symbology:** Bar code symbology is the mapping system used to translate digits in a bar code into a data value.
- **Length:** The total length of the bar code field.
- **Type:** The label type that the bar code represents, either Item, Weight or Lot.

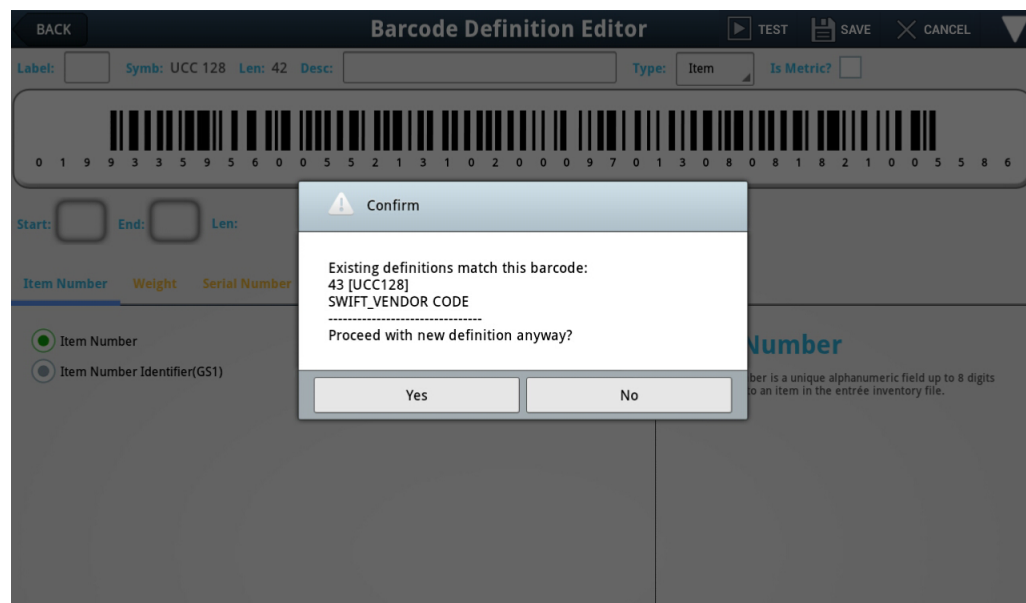
Barcode Definitions				
ID	Description	Symbology	Length	Type
01	beef rib eyes	UCC128	46	Item
02	Untitled Definition	UCC128	42	Item
03	Untitled Definition	CODE128	22	Item
04	Untitled Definition	I205	14	Item
06	Untitled Definition	UCC128	46	Item

3. Tap the **Refresh** button to update the screen data.
4. Tap the **Scan (New/Edit)** button to begin process to capture data from a scanning device to create a new bar code definition.
5. The **"Waiting for a barcode to be scanned."** message will display while waiting for the scanning device to send the data. Tap **Cancel** to abort the scan.



6. Once the scanned data is received it will compare the newly scanned bar code data to existing bar codes in **EWM**. If it finds a match you must respond to the **Confirm** dialog shown below.

Tap **Yes** to confirm and proceed with a new definition. Tap **No** to cancel creation of a new definition.



## Adding a New Bar Code Definition

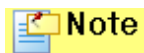
Before you begin to add a new barcode you should have information about the bar code definition from the product vendor or manufacturer if you are defining a normal bar code.

### Barcode Definition Editor Buttons:

- **Back** - Takes you back to the previous screen.
- **Save** - Saves the new barcode definition in **EWM**.
- **Delete** - Used to delete old or incorrect barcode definitions.
- **Cancel** - Will stop the current action and will not save the definition or changes.

### The Barcode Definition Editor needs the following to create a new barcode definition:

1. At the top of the screen you will not need to edit **Symb** or **Len** because they were captured during the scan:
  - **Code**: Enter a unique editable value to be used to identify the barcode definition in **EWM**.
  - **Symb**: Captured when it was scanned, this is the bar code symbology used in the bar code data.
  - **Len**: Captured when it was scanned, this value is the total length of the bar code field.
  - **Desc**: Enter a descriptive name for the bar code definition.
  - **Type**: Select from the menu what type of bar code it is. Options are: **Item**, **Weight** or **Lot**.
  - **Is Metric**: Check this box only if the Metric system is used for the weight values such as KG.



#### Note

The entrée system can automatically convert KG to LB.

Next is a bar code image representing the bar code you just scanned. This image will display where identifiers and values are defined in the bar code definition as you enter their start and end values.

2. Listed across the screen below the bar code image are menu tabs for the various fields that need to be defined in a bar code. These fields are: Item Number, Weight, Serial Number, Manufacturer ID, Lot Number, Dates, and Associated.

One at a time define each field with a start and end value from the bar code definition information you received from the vendor. The definitions for each field name selected will be displayed in the information box in the lower right section of the screen. The screens for each menu tab is displayed on the following pages with an explanation.

## Bar Code Start / End Buttons

- Use the **Clear** button to clear the information you entered and begin defining the start and end field values again.

## Define Item Number

- Tap the **Item Number** button to select it.
- Enter the **Start** and **End** values to locate that data in the bar code.
- Tap the **Item Number Identifier** button to select it.
- Enter the **Start** and **End** values to locate that data in the bar code.

The screenshot shows the 'Barcode Definition Editor' interface. At the top, there are buttons for 'BACK', 'TEST', 'SAVE', and 'CANCEL'. Below these, the current ID is '01', Symbol is 'UCC 128', Length is '46', and Description is 'SWIFT\_VENDOR\_CODE'. The Type is set to 'Item'. A barcode is displayed with a yellow highlight under the digits '9 9 9 9 0 7 6 3 8 9 9 9 9'. Below the barcode, the 'Start' field is set to '11' and the 'End' field is set to '15', with a 'Clear' button next to it. A dropdown menu for 'Item Number Identifier' is open, showing 'Item Number' (selected) and 'Item Number Identifier(GS1)'. To the right, a text box explains: 'The Item Number is a unique alphanumeric field up to 8 digits long assigned to an item in the entrée inventory file.'

- Tap the arrow to the right to view the Item Number Type options in the drop down menu.

Select from these options:

- **Vendor Item Number**
- **Inventory Number**
- **UPC Item Number**

The screenshot shows the 'Barcode Definition Editor' interface. The Label is 'p0', Symbol is 'GS1 DataBar (formerly RSS-14)', Length is '48', and Description is 'TOBYEEE'. The Type is 'Item'. The barcode has a yellow highlight under the digits '9 9 9 9 9 9 9 9 9 9 9 9 9 9 9'. The 'Start' field is '11' and the 'End' field is '17', with a 'Clear' button. The 'Item Number Identifier' dropdown menu is open, showing 'Inventory Number' (selected), 'Vendor Item Number', and 'UPC Item Number'. The text box on the right explains: 'The Item Number is a unique alphanumeric field up to 8 digits long assigned to an item in the entrée inventory file.'

**Important** Defining the "**Type**" that the item number on the bar code represents is key for the software to properly match the scanned bar code with the correct item in your **entrée** inventory file.

If the "**Vendor Item Number**" is selected (the most common), the **EWM** software will scan through your inventory file looking at the "Vendor Item Numbers" defined on the Vendor tab of Inventory File Maintenance. If the item number on the bar code cannot be matched to any of your Vendor Item Numbers, the scanning process **will fail**.

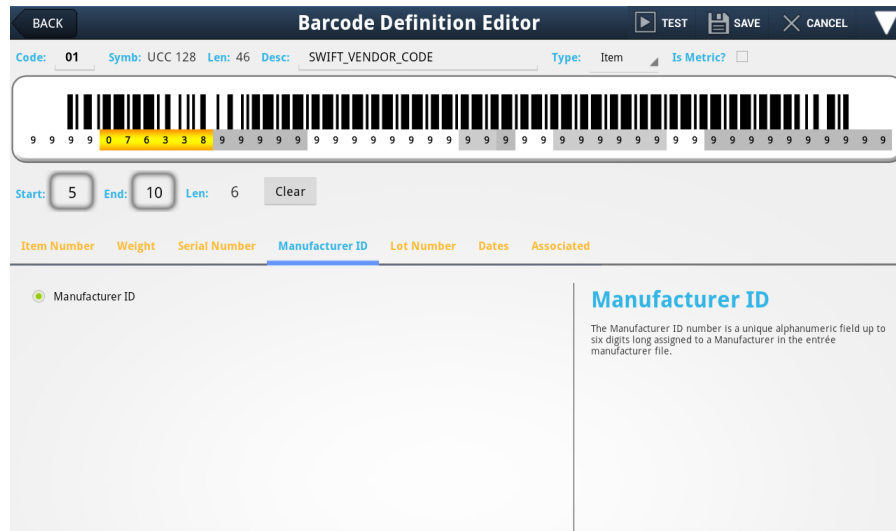
If the "**Inventory Number**" is selected (used commonly when an **entrée** distributor is also the manufacturer of the item, or you have based your Item Numbers on the Vendor Item Number when defining Inventory File Maintenance), the **EWM** software will scan through your inventory file looking





## Define Manufacturer ID

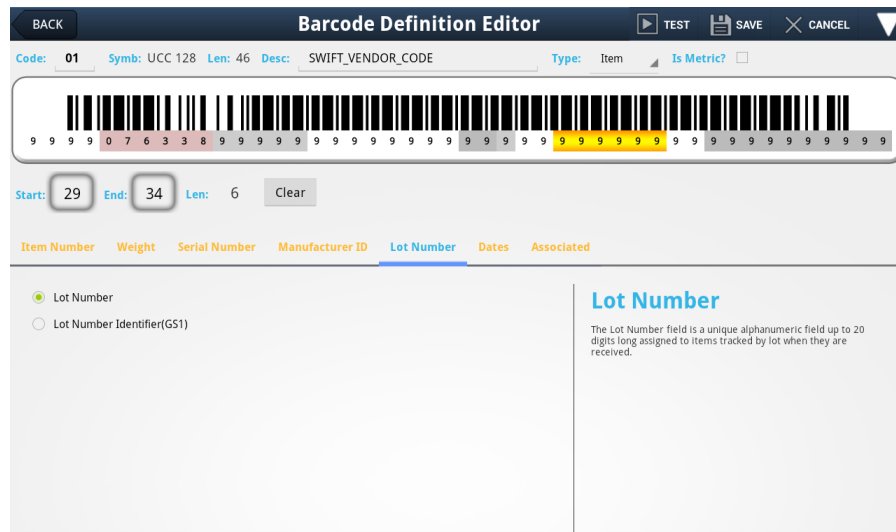
- Tap the **Manufacturer ID** button to select it.
- Enter the **Start** and **End** values to locate that data in the bar code.



The screenshot shows the Barcode Definition Editor interface. At the top, there are navigation buttons: BACK, TEST, SAVE, and CANCEL. Below these, the current configuration is displayed: Code: 01, Symb: UCC 128, Len: 46, Desc: SWIFT\_VENDOR\_CODE, Type: Item, and Is Metric? checkbox. A barcode is shown with a yellow highlight under the digits 076338. Below the barcode, there are input fields for Start: 5, End: 10, and Len: 6, with a Clear button. A tabbed interface below shows 'Manufacturer ID' selected. The main content area has a radio button for 'Manufacturer ID' and a text box with the title 'Manufacturer ID' and the description: 'The Manufacturer ID number is a unique alphanumeric field up to six digits long assigned to a Manufacturer in the entrée manufacturer file.'

## Define Lot Number

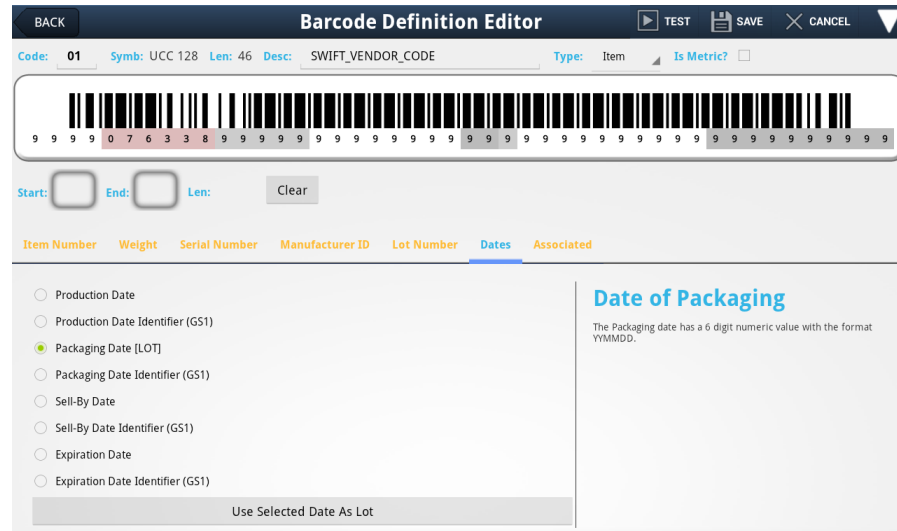
- Tap the **Lot Number** button to select it.
- Enter the **Start** and **End** values to locate that data in the bar code.
- Tap the **Lot Number Identifier** button to select it.
- Enter the **Start** and **End** values to locate that data in the bar code.



The screenshot shows the Barcode Definition Editor interface. At the top, there are navigation buttons: BACK, TEST, SAVE, and CANCEL. Below these, the current configuration is displayed: Code: 01, Symb: UCC 128, Len: 46, Desc: SWIFT\_VENDOR\_CODE, Type: Item, and Is Metric? checkbox. A barcode is shown with a yellow highlight under the digits 999999. Below the barcode, there are input fields for Start: 29, End: 34, and Len: 6, with a Clear button. A tabbed interface below shows 'Lot Number' selected. The main content area has two radio buttons: 'Lot Number' (selected) and 'Lot Number Identifier(GS1)'. A text box with the title 'Lot Number' and the description: 'The Lot Number field is a unique alphanumeric field up to 20 digits long assigned to items tracked by lot when they are received.'

## Define Dates

One at a time define the date and its identifier for the dates present in the specific bar code definition. The dates that can be defined are: Production Date, Packaging Date, Sell-By Date, and Expiration Date.



- **Define the Production Date:**
  - a. Tap the **Production Date** button to select it.
  - b. Enter the **Start** and **End** values to locate that data in the bar code.
  - c. Tap the **Production Date Identifier** button to select it.
  - d. Enter the **Start** and **End** values to locate that data in the bar code.
- **Define the Packaging Date:**
  - a. Tap the **Packaging Date** button to select it.
  - b. Enter the **Start** and **End** values to locate that data in the bar code.
  - c. Tap the **Packaging Date Identifier** button to select it.
  - d. Enter the **Start** and **End** values to locate that data in the bar code.
- **Define the Sell-By Date:**
  - a. Tap the **Sell-By Date** button to select it.
  - b. Enter the **Start** and **End** values to locate that data in the bar code.
  - c. Tap the **Sell-By Date Identifier** button to select it.
  - d. Enter the **Start** and **End** values to locate that data in the bar code.
- **Define the Expiration Date:**
  - a. Tap the **Expiration Date** button to select it.
  - b. Enter the **Start** and **End** values to locate that data in the bar code.
  - c. Tap the **Expiration Date Identifier** button to select it.
  - d. Enter the **Start** and **End** values to locate that data in the bar code.





# Chapter 15

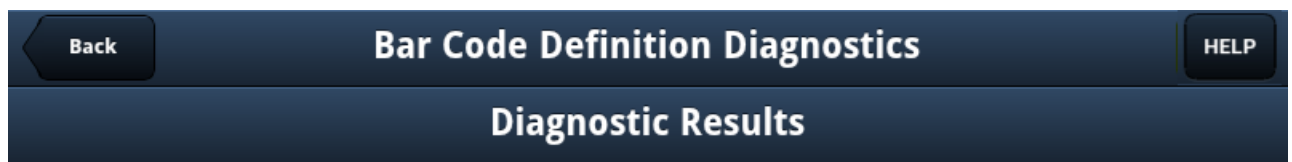
## Barcode Definition Diagnostics

## 15 Barcode Definition Diagnostics

This feature in **EWM** can confirm that you have a bar code setup correctly or diagnose problems with your bar code definitions by capturing and translating the scanned data from bar code labels and providing information about the problems with the bar code.

Follow these steps to diagnose a bar code definition problem or confirm that a bar code definition is correctly defined:

1. Tap the **Barcode Definition Diagnostics** option in the main **EWM** menu.
2. You will then be prompted at the top of the screen with a "**SCAN BARCODE NOW**" message.



3. At this time you will use the Bluetooth scanning device paired with your tablet to scan the suspect barcode.
4. Once the application has found the barcode and completed its evaluation the **Diagnostic Results** will be displayed on the screen.

**Continue to next page for Diagnostic Results screen example.**

- If a barcode is not found a "ITEM NOT FOUND" message will be displayed. Tap **OK**. This message means that you probably need to create a new barcode definition to add it to the **EWM** application.

Back
HELP

## Bar Code Definition Diagnostics

### Diagnostic Results

---

## SUMMARY

Scanned bar code was of type:      UCC 128  
 Length of scanned data:            20  
 Bar Code data:                        00000763381175408313

There were 69 definitions for bar code type "UCC 128".  
 There were **no** matches.

---

46	UCC-128-46	<i>SKIPPED - Incorrect data length. Expected: 46, found: 20</i>
51	UCC-128-50-MPD	<i>SKIPPED - Incorrect data length. Expected: 50, found: 20</i>
13	UCC-128-47-NB	<i>SKIPPED - Incorrect data length. Expected: 47, found: 20</i>
44	UCC-128-44-STR	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
43	UCC-128-42-BL	<i>SKIPPED - Incorrect data length. Expected: 42, found: 20</i>
96	UCC-128-16-Q	<i>SKIPPED - Incorrect data length. Expected: 16, found: 20</i>
45	UCC128-44_NAT	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
41	UCC128-44-SEAB	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
88	UCC128-48-HPM	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
09	UCC128-16-OM	<i>SKIPPED - Incorrect data length. Expected: 16, found: 20</i>
56	UCC128-56-NCS	<i>SKIPPED - Incorrect data length. Expected: 56, found: 20</i>
31	UCC128-30-LR	<i>SKIPPED - Incorrect data length. Expected: 30, found: 20</i>
35	UCC128-34-STR2	<i>SKIPPED - Incorrect data length. Expected: 34, found: 20</i>
49	UCC128-48-JM	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
39	UCC128-40-COOK	<i>SKIPPED - Incorrect data length. Expected: 40, found: 20</i>
77	ucc-128-48-zoll	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
76	UCC128-48-PL	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
78	UCC128-40-GUSTO	<i>SKIPPED - Incorrect data length. Expected: 40, found: 20</i>
19	ucc128-44-seaboard2	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
80	ucc-128-26-str3	<i>SKIPPED - Incorrect data length. Expected: 26, found: 20</i>
90	ROGER_WGT	<i>SKIPPED - "Weight" bar code definition</i>
95	ucc128_35_tasso	<i>SKIPPED - Incorrect data length. Expected: 35, found: 20</i>
01	SWIFT_VENDOR_CODE	<i>SKIPPED - Incorrect data length. Expected: 46, found: 20</i>
02	ucc128_48_miller_vendor	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
05	ucc128_50_nz_kilos	<i>SKIPPED - Incorrect data length. Expected: 50, found: 20</i>
06	ucc128_43_aus_lmb_lbs	<i>SKIPPED - Incorrect data length. Expected: 43, found: 20</i>
03	ucc128_creek_vendor	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
27	CSF_128_44	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
22	sukarne_wgt	<i>SKIPPED - "Weight" bar code definition</i>
25	ucc_128_48_carolina	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
11	ucc128_48_nzl	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
36	ucc128_46_fresno	<i>SKIPPED - Incorrect data length. Expected: 46, found: 20</i>
38	ucc_128_39_danish	<i>SKIPPED - Incorrect data length. Expected: 39, found: 20</i>
26	ucc_128_sf	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
29	ucc_128_sw	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
32	ucc128_48_olyml_kilos	<i>SKIPPED - Incorrect data length. Expected: 48, found: 20</i>
37	ucc128_44_aus_lamb_lbs	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
53	ucc128_45_mpd_new	<i>SKIPPED - Incorrect data length. Expected: 45, found: 20</i>
40	ucc_128_BER	<i>SKIPPED - Incorrect data length. Expected: 42, found: 20</i>
48	UCC_128_NAT	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>
54	UCC_128_EX	<i>SKIPPED - Incorrect data length. Expected: 44, found: 20</i>

**\*\* ITEM NOT FOUND \*\***

OK

←
→
↶

- If the barcode is found and evaluated the number of definition matches found will be displayed followed by the diagnosis results. Drag up to scroll down the screen to see the completed diagnostics list with the match information at the end.

The top half of the screen will display the Item Details for the inventory item that the barcode represents in the main entrée system.

This information includes:

- Item Number
  - Item Description
  - Brand Name
  - Class
  - and all Inventory Details
- Tap the **Purchases** button to see PO information for the item.
  - Tap **Clear** to remove the current information from the screen.

Bar Code Definition Diagnostics			
53235 - BRDL WAGYU BEEF FLAT IRONS #3			
Item Number	53235		
Description 1	BRDL WAGYU BEEF FLAT IRONS #3		
Brand Name	BROADLEAF	Class	EXOT
Inventory Detail			
Unit MS	CASE	On Hand Qty	10
Pack Size	3 pc	On Hand Wgt	0
Constant Wgt	0.0000	Cubic Feet	0.00
Average Wgt	25.00	Temp Zone	R
Gross Weight	0.00	UPC	
Warehouse Loc.	13A04	Secondary Loc.	
Track by Lot	N		
<b>Purchases</b>			

In the lower half of the screen the Diagnostic Results Summary report is displayed.

You will have to drag up on the bottom section of the screen to page through the full report.

The Summary section includes:

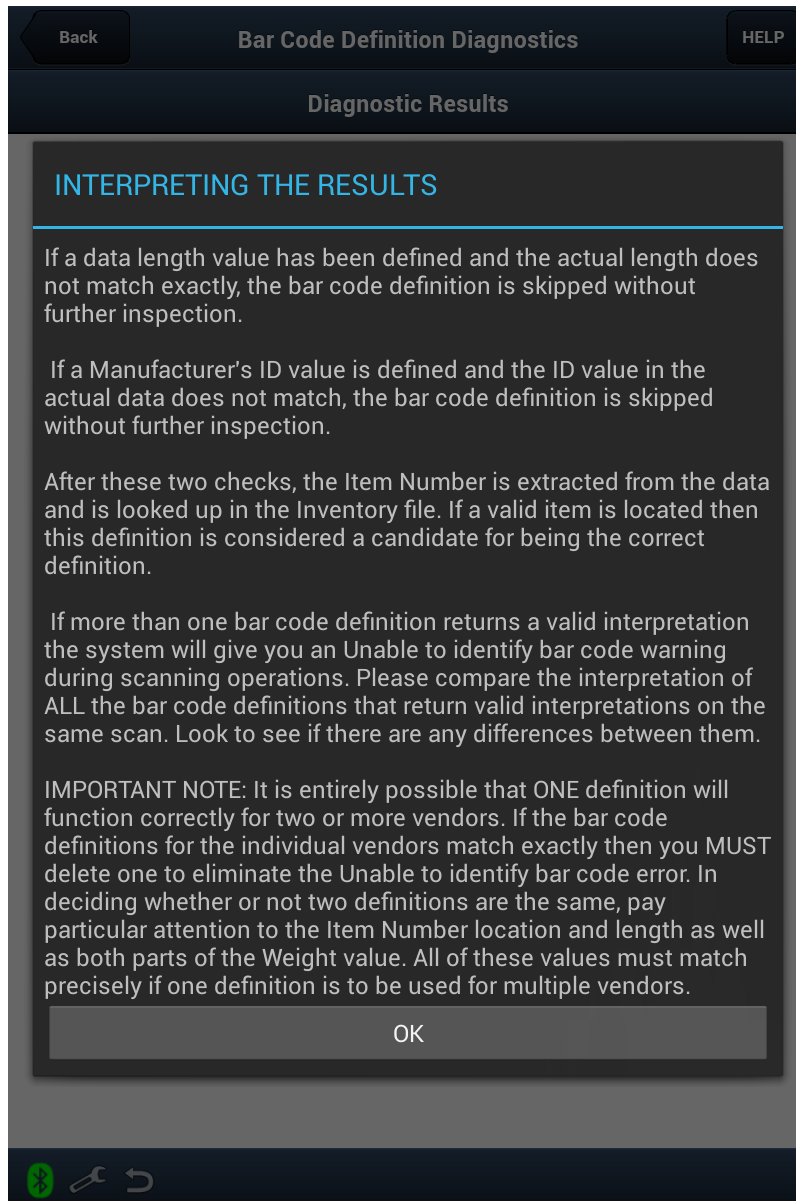
- **Type** - Barcode type
- **Length of scanned data**
- **Bar Code data**
- How many barcode matches were found.

Any problems with the scanned barcode will be listed in this section in **red text**.

- Drag up to scroll down the tablet screen to see the complete diagnostics list with the match information at the end in green text.

Diagnostic Results	
<b>SUMMARY</b>	
Scanned bar code was of type:	UCC 128
Length of scanned data:	42
Bar Code data:	019933595600552131020009701308081821005586
There were 67 definitions for bar code type "UCC 128".	
There was 1 match.	
46	UCC-128-46 <i>SKIPPED - Incorrect data length. Expected: 46, found: 42</i>
51	UCC-128-50-MPD <i>SKIPPED - Incorrect data length. Expected: 50, found: 42</i>
13	UCC-128-47-NB <i>SKIPPED - Incorrect data length. Expected: 47, found: 42</i>
44	UCC-128-44-STR <i>SKIPPED - Incorrect data length. Expected: 44, found: 42</i>
Looking with item # "005521"	
43	UCC-128-42-BL
*** VALID ITEM LOCATED: 53235 - BRDL WAGYU BEEF FLAT IRONS #3	
Manufacturer's ID (data):	
Item Number: 005521 (Vendor's Item Number)	

5. At any time you can tap the **HELP** button and display information about interpreting your diagnosis results. Tap **OK** to return to the previous the screen.



# **Chapter 16**

## Common Features

## 16 Common Features

The **Common Features** chapter will provide you with an overview of some features that are found in many screens in **EWM**.

Topics covered in this chapter are:

- [Item Information Panel Setup](#)
- [Buttons](#)
- [Number Touch Keypad Tools](#)
- [Item Display Control buttons](#)
- [Progress Dashboards](#)


### 16.1 Item Information Panel Setup

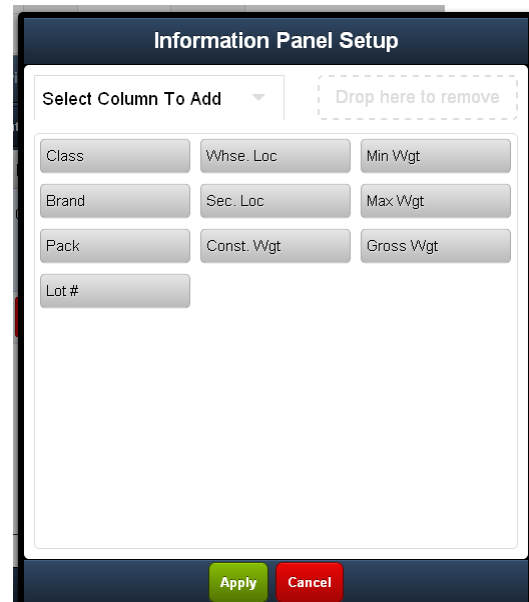
The Item Information Panel at the bottom of the screen displays the selected item's information from the **entrée** system Inventory file which may include an item image, if it is part of the **entrée** item record. You may want to customize what is displayed in this area of the screen in **EWM**.

10590 - EGGS LARGE GRADE A						
	Class	DAIRY	Whse. Loc	CC1121B	Min Wgt	0.00
	Brand	LAND O LAKES	Sec. Loc	N/A	Max Wgt	0.00
	Pack	15 DOZEN	Const. Wgt	0.00	Gross Wgt	0.00
	Lot #	N/A				

- When you tap the **item image** on the left the **Item Details** screen will be displayed.
- With version 1.1.0 the "On Hand" and "On Hand Weight" values displayed are the true inventory information. The value now correctly reflects the amount of product that should be in your warehouse.

#### Customizing the Information Panel

1. Tap the Tool icon  to open the **Information Panel Setup** tool to change the data that is displayed in the bottom section of the screen.

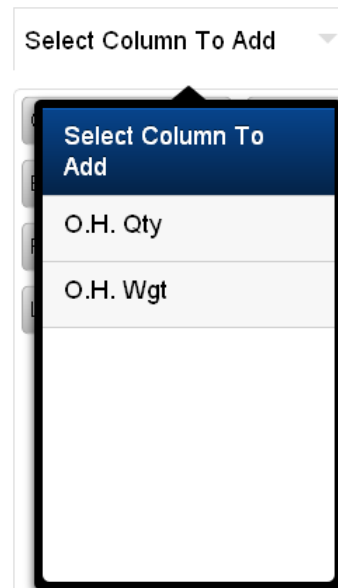


The **Information Panel Setup** screen features a dropdown menu labeled "Select Column To Add" and a dashed box labeled "Drop here to remove". Below these are several buttons arranged in a grid:

Class	Whse. Loc	Min Wgt
Brand	Sec. Loc	Max Wgt
Pack	Const. Wgt	Gross Wgt
Lot #		

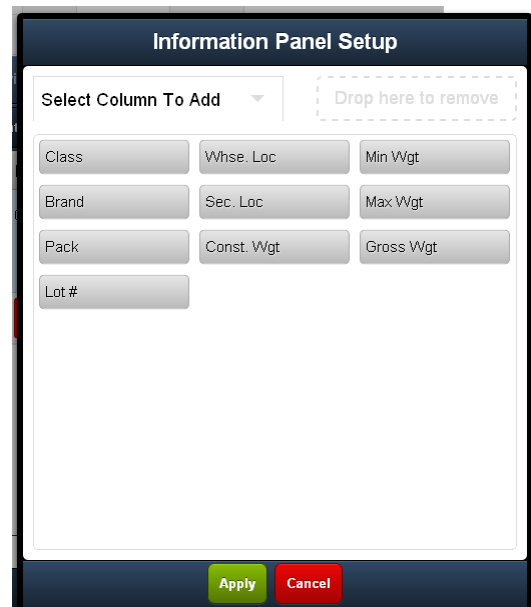
At the bottom of the screen are two buttons: **Apply** (green) and **Cancel** (red).

2. Tap the **Select Column To Add** arrow to view the columns that are not currently displayed in the Information Panel.
3. Then tap the desired column in the list to add it to the panel.
4. Then tap the **Apply** button in the Information Panel Setup dialog to save your changes.



### Delete a Column

1. Tap the column and drag it to the **Drop here to remove** area.
2. Tap **Apply** to save your changes.



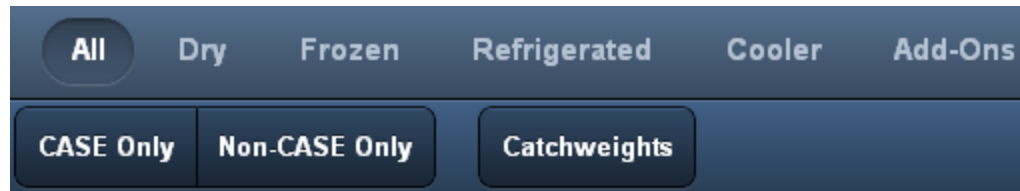
## 16.2 Buttons

### Common Screen Buttons

- **Back** - Takes you back to the previous screen.
- **Save** - Saves the current change.
- **Delete** - Removes old or incorrect barcode definitions.
- **Refresh** - Tap to update the data in the screen.
- **Clear** - Tap to remove the current information from the text box, dialog or screen.
- **Cancel** - Aborts the current activity without saving changes.
- **Hold** - Saves the current screen data for retrieval so you can come back later to complete the work. Then returns you to the main menu.

### Line Item Display Control Buttons

You will find that Item Display Control buttons will be used to control the display of the items on many **EWM** screens. Item information from the **entrée** Inventory File Maintenance, Temperature Zone, Unit of Measure (UOM), and Weight Information, are used to categorize items along with the designation of Add-On.



- **All** - Show all items on the invoice.
- **Dry** - Show only items with a Dry Temperature Zone.
- **Frozen** - Show only items with a Frozen Temperature Zone.
- **Refrigerated** - Show only items with a Refrigerated Temperature Zone.
- **Cooler** - Show only items with a Cooler Temperature Zone.
- **Add-Ons** - Show only items that are invoice Add-Ons.
- **Case Only** - Show only items with a UOM of Case.
- **Non-Case Only** - Show only items with UOMs that are not Case.
- **Catchweights** - Show only items with Catchweights.

## 16.3 Number Touch Keypad Tools

The same tools will be available in the number touch keypad in many **EWM** screens.



- **Enter** - The green left arrow key saves the current value and move the cursor to the next red box or back to the item list.

- **Clear** - Resets the value to zeros.



- **Print Item Label** - Tap to print one label for the currently selected case or item.



- **Print Case Labels** - Tap to print one label for each case on the line item.



- **Scale Weight** - Captures weight for Catchweight / LB. items from a Bluetooth Scale.



- **Scale Disabled** - When no Bluetooth Scale is enabled the button will be .



- **Substitute Item** - Tap to open the [Item Substitution](#) dialog.

This tool is used to replace an item in the order with a defined substitute in the main **entrée** system Inventory File Maintenance or enter an item number to manually provide a substitute item.

- See the [Item Substitution](#) to find out how it works and permissions that are required.
- See [Add Substitute Items in entrée](#) to learn how to add substitute items to a line item in the **entrée** Inventory File.

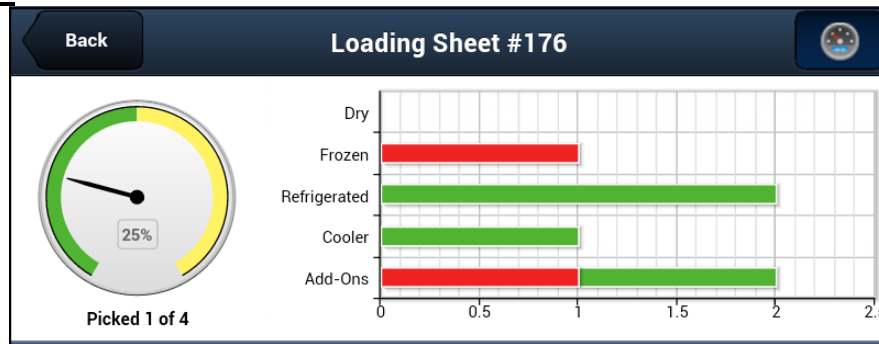
## 16.4 Progress Dashboards



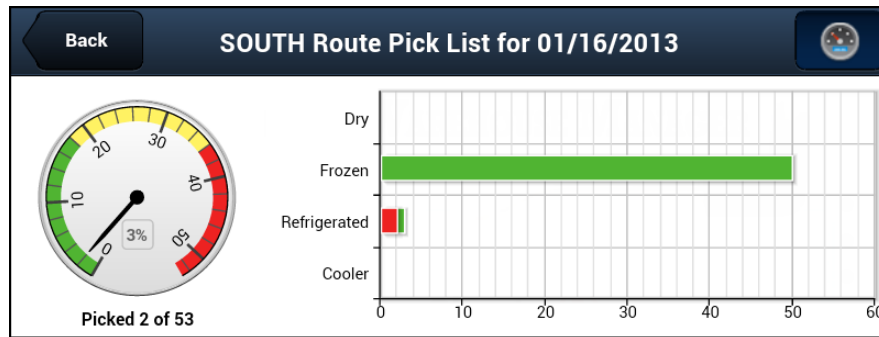
The **Progress Dashboards** feature will quickly get you information about the status of the Loading Sheets, Picking and PO Receiving areas of **EWM** during the day.

- The left side of the dashboard shows a progress gauge that indicates how many items of that process have been completed. The needle on the gauge and the count information written below will provide your status information.
- The right side of the dashboard shows a "stacked bar chart", which indicates the completion progress for each Temperature Zone and Add-On items. The chart starts off as green lines, but as progress continues the lines start to turn red until that zone is completed.

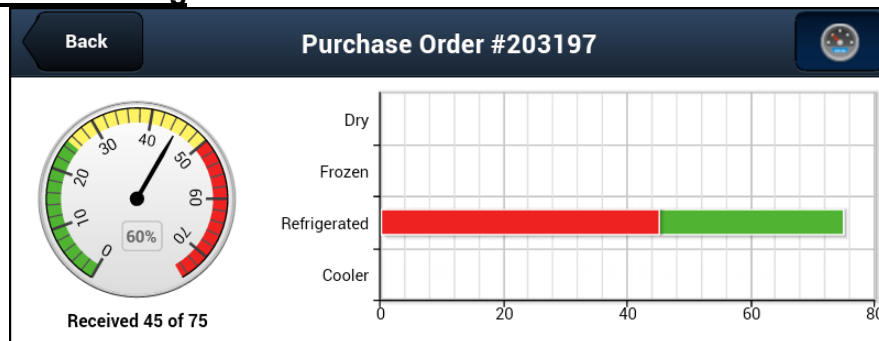
### Loading Sheet



### Pick List



### Purchase Order Receiving

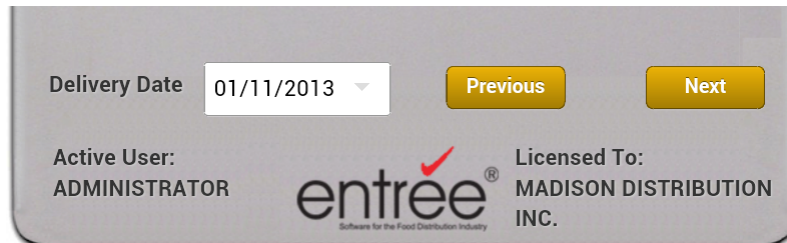


# Chapter 17

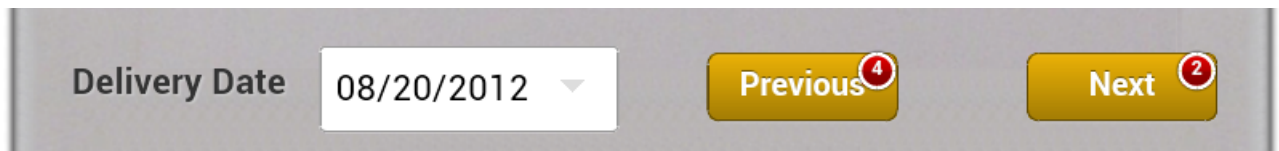
## Loading Sheets

## 17 Loading Sheets

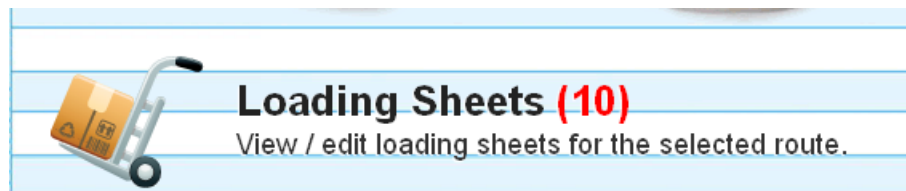
The **Loading Sheets** screen will display all the unassigned loading sheets for the **Delivery Date** from the main menu screen. Use to drop down arrow to open the calendar tool to change the **Delivery Date** if you are not working with the current date which is the default date. Or use the **Previous / Next** buttons to advance the date in either direction.



- The **Previous** and **Next** buttons will also provide you with a number in a **red** circle representing how many loading sheets have not been picked on the previous or next day.



- The main menu screen will display how many loading sheets have not been picked for the selected **Delivery Date** in **(red text)** as shown below.



### Routes & Loading Sheets

Once you tap the **Loading Sheets** option in the main menu the **Route Loading Sheets** screen will display with a list of the loading sheets for each route for that date.

Routes are defined and maintained in the main **entree** system **Assign Routes Utility**. Customers are assigned their route in Customer File Maintenance in the **Routes** tab.

- Each route will have a truck with the number of loading sheets indicated for the Delivery Date and a color representing it. The truck colors will indicate the status and number of printed invoices for each route.

- **Index of Route Truck Colors:**



Blue - The currently selected route.



Green - The number of printed invoices for the route are between zero - 33%.



Yellow - The number of printed invoices for the route are between 34% - 66%.



Orange - The number of printed invoices for the route are between 67% - 99%.

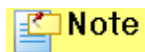


Red - All invoices for the route have been printed - there is nothing to pick.

- Tap a truck to select the route and the truck turns blue.

Back		SOUTH Route Loading Sheets for 07/26/2012			
Refresh	Stop▲	Inv. #	Rev	Company	Picker
Open					
	010	231306		ALL STAR PIZZA LAND	
	055	231310		COUSINS RESTURANT	
	065	231308		BERNARDO'S CAFE	

- Then tap a loading sheet in that route to open it.
- You will then be brought to the [Loading Sheet detail](#) screen to continue processing the loading sheet.



Once you select a loading sheet it will be locked. This means no other person can update the loading sheet until you tap **Hold** or **Finish** to release it. This includes other **EWM** users and users in the office via the main **entrée** system "Change Invoice" option.

In **EWM** you will see this message if the invoice you are trying to load is already opened.

#### Unable To Load Invoice

entrée administration account  
already has Invoice #700529  
open for change since Tuesday,  
14 August 2012 at 02:14:44 pm

OK


## 17.1 Loading Sheet Processing

When a loading sheet is tapped it opens and displays all the items in the invoice. In this screen you can:

- **Enter Shipped Quantities**
- **Enter Weights**
- **View Comments**
- **Substitute Items**
- **Sort Line Items**
- **Remove Pckd** to organize your work and keep track of unpicked versus picked items.
- **Remove Scan Tap** to remove the scanned quantity and weight from an item for a re-scan or to allow for manual data entry.
- **Immediately Print Labels Per Line Item:**
  - One label for the current case.
  - One label for each case of the line item.
- **Print Labels** for the entire loading sheet in one tap or by Temperature Zone or just Add-Ons.
- **Finish**

### Non-Inventory Items

Loading Sheets that contain non-inventory items can be opened so you can manually enter the quantities to be entered for the non-inventory item.

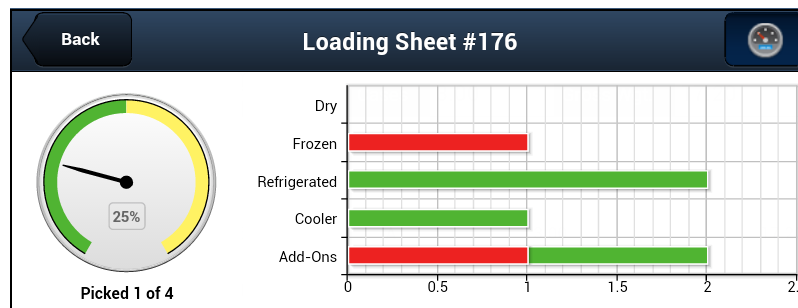
 **Note** Due to the nature of non-inventory items it is not possible to support scanning entry for these items.

### The 3 Sections of the Loading Sheet Screen

- The top section is the **Invoice / Account** information, below that section are the **Item Display Control** buttons.
  - **Back** - This button takes you back to the previous screen.



The **Progress Dashboard** button will quickly get you information about the status of the Loading Sheets in **EWM** during the day. See the [Progress Dashboards](#) topic in [Common Features](#) for more information.



- In the middle of the screen is the **Invoice Items** section which lists all the items ordered on the Invoice. Tap the screen and drag up to scroll down to view the complete list of items.
  - Tap any column heading to sort the line items by that column. Tap the same column a second time to change the sort order from ascending to descending.
  - At the bottom are the **Total Picked** and **Total Weight** values for the loading sheet.

- The bottom section of the loading sheet screen has the **Item Information Panel** which displays the details about the currently selected item.

To get instructions on how to customized it to suit your needs see the [Item Information Panel Setup](#) section of this guide.

- At the very bottom of the screen are the buttons you will use to process the loading sheet, **Print Labels**, **Hold** and **Finish**.

#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Pack	Wh. Loc	Pckd
7	971163	1.00	1.00	0.00	EACH	1/EA	U0031	<input type="checkbox"/>
	PEPPERCORN MEDLEY 15 OZ							
8	971530	1.00	1.00	0.00	CASE	12/CS	U0308	<input type="checkbox"/>
	FLAT LASAGNE							
9	10532	1.00	1.00	0.00	CASE	36/1 #	CB1361B	<input type="checkbox"/>
	BERK RACK OF PORK CH OFF							

Total Picked	0.00	Total Weight	5.0000
--------------	------	--------------	--------

10311 - MILK WHOLE ORGANIC						
Class	DAIRY	Whse. Loc	CE1351B	Min Wgt	0.00	
Brand	STONYFIELD FAR	Sec. Loc	N/A	Max Wgt	0.00	
Pack	4/1 GAL	Const. Wgt	0.00	Gross Wgt	7.20	
Lot #	N/A					

### Invoice / Account Section

The top of the screen shows the account information for the invoice. This information includes: Invoice #, Revision number, Invoice Date, Route, Stop, Comments, Ship To, Contact and Phone number.

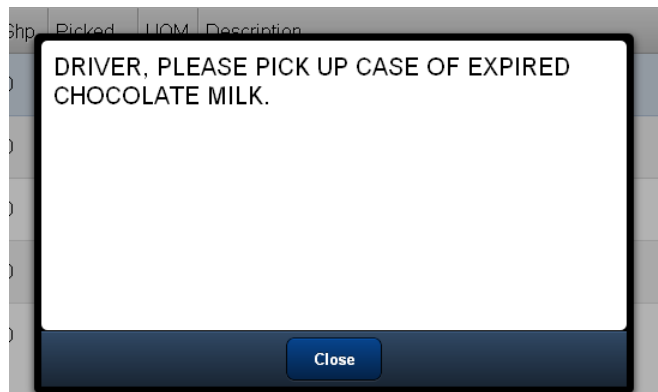
Back		Loading Sheet #231277			
Invoice #	231277	Rev	B	Ship To	JBBBRO JOHNNY'S BAR AND GRILL 8436 BROOKFIELD AVE BROOKFIELD, NY 01513 MIKE (212) 485-4504
Inv. Date	10/11/2012				
Route	MAIN	Stop	060		
Comment	No Comments				

## Viewing Comments

- If there is a comment on the order **View Comment** will be displayed in the **Comment** field.

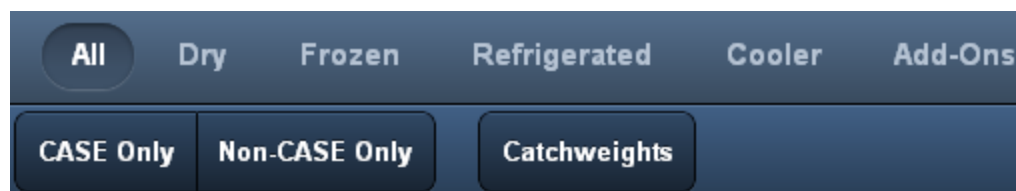
Back				Loading Sheet #231305			
Invoice #	231305	Rev	A	Ship To	<b>JBBBRO</b> JOHNNY'S BAR AND GRILL 8436 BROOKFIELD AVE BROOKFIELD, NY 01513 MIKE (212) 485-4504		
Inv. Date	7/26/2012						
Route	EAST	Stop	010				
Comment	<b>View Comment</b>						

- Tap **View Comment** to open the comment display box seen in the image below. Tap **Close** in the display box to return to the loading sheet.



## Item Display Controls

See the [Buttons](#) section of [Common Features](#), for details about the use of these buttons. These button control what items are displayed on the screen. So if you need to work with Frozen foods just tap it and only those items will display.



## Invoice Items Section

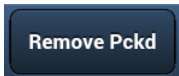
This section of the screen will list all the items on the invoice, in the default order your printed Loading Sheets normally sort by.

The columns in the Invoice Details section: #, Item Number, Quantity Ordered, Quantity Shipped, Picked, UOM, Item Description, Pack, and Warehouse Location.

- Tap any column heading to sort the line items by that column.
- Tap the same column a second time to change the sort order from ascending to descending.
- Here you will enter weights for Catchweight / LB. items, update the value for the **Picked** field.

CASE Only		Non-CASE Only		Catchweights		Remove Pckd		
#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Pack	Wh.Loc	Pckd
13	51532	2.00	2.00	0.00	CASE	24 CT	FB1352A	<input type="checkbox"/>
CHOCOLATE CAKE ICED INDIVIDUAL WRPD (A) SARA LEE #8646								
14	972263	3.00	3.00	0.00	EACH	1/EA	V0304	<input type="checkbox"/>
OIL CANOLA GAL								
2	10396	1.00	1.00	0.00	PAIL	1/30#	CE1341A	<input type="checkbox"/>
SOUR CREAM LIGHT								
Total Picked		25.00		Total Weight		929.2500		

- Check the **Pckd** column box once an item has been picked and it turns green with a green check mark (image on next page).



Use the **Remove Pckd** features to organize your work and keep track of unpicked versus picked items on the loading sheet.

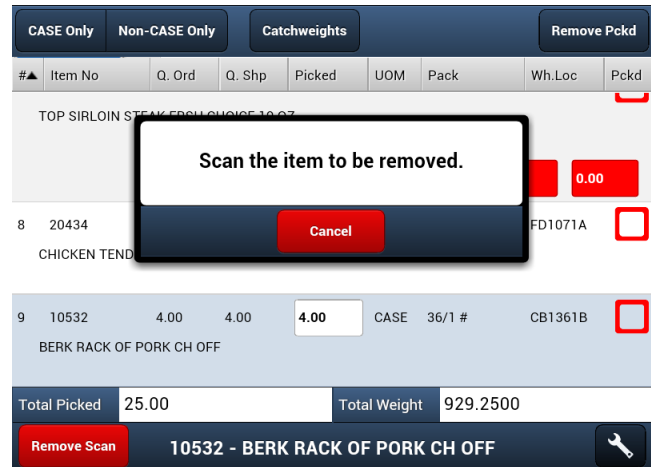
- Tap the **Remove Pckd** button to remove all the picked items with a green check from the loading sheet screen.
- Tap the **Remove Pckd** button again and the picked items will return to the screen.

11	12430	3.00	3.00	2.00	CASE	25#	T0202	<input checked="" type="checkbox"/>
TOMATO ROMA PLUM								
12	20598	2.00	2.00	0.00	CASE	2/5#	FD1121A	<input type="checkbox"/>
SHRIMP 110-160 COOKED PLD TAIL-OFF (A) CONTESSA #4711160205								
Total Picked		25.00		Total Weight		929.2500		



The primary reason for the **Remove Scan** feature is to allow workers to remove the scanned quantity and weight to correct errors during the scanning process. This button can also be used to remove scanned data on the item in the screen to allow for manual data entry.

- Tap the scanned item to select it.
- Tap the **Remove Scan** button.
- The "**Scan the item to be removed.**" dialog box will display waiting for you to scan the item.
- Once the item has been scanned you can re-scan the item or manually enter the item's data.



- You can also view the item details and purchase history as well as perform item substitutions.

- **Item Substitutions**

You can also perform an [Item Substitution](#) which is used to replace an item in the loading sheet with another item from Inventory. The use of [Item Substitution](#) is covered in the next section of this chapter.

- **Sorting Line Items**

Tap any column header in the **Loading Sheet** screen and the up/down arrow will display in the header column and reveal the sort direction. Tap the column header again to change the sort direction. In this example we are sorting by Description. The sort direction arrow is outlined in red.

#	Item No	Q. Ord	Q. Shp	Picked	UOM	Description	▲	Pack	Wh. Loc
4	18216	1.00	1.00	0.00	PC.	BLUE CHEESE CRUMBLES		4/5#	CB1172A
1	10532	2.00	2.00	0.00	CASE	BUTTER SALTED		36/1 #	CB1361B
2	10534	3.00	3.00	0.00	CASE	BUTTER UNSALTED		36/1 #	CB1361A
9	20425	2.00	2.00	0.00	BAG	CHICKEN BREAST BONELESS 10# BAG		1/10#	R550G
3	10590	4.00	4.00	0.00	CASE	EGGS LARGE GRADE A		15 DOZE	CC1121B
6	19968	5.00	5.00	0.00	CASE	GROUND BEEF 80% FRESH		5/4 #	R5541W
				0.00				0.00	


**Viewing Item Details & Purchase History**

If you double tap a line item listed in the loading sheet the item details screen will be displayed.

Tap the **Back** button to return to the **Loading Sheet** screen.

- At the bottom of the Item Details screen is the **Purchases** button.

Back
10590 - EGGS LARGE GRADE A



Item Number	10590		
Description 1	EGGS LARGE GRADE A		
Brand Name	LAND O LAKES	Class	DAIRY
Inventory Detail			
Unit MS	CASE	On Hand Qty	137
Pack Size	15 DOZEN	On Hand Wgt	0
Constant Wgt	0	Cubic Feet	0
Average Wgt	0	Temp Zone	R
Gross Weight	0	UPC	CC1121B
Warehouse Loc.	CC1121B	Secondary Loc.	
Track by Lot	N		

Purchases



- When you tap the **Purchases** button in the Item Details screen the purchase order history data for that line item is displayed.

Back
10590 - EGGS LARGE GRADE A

Date	PO#	Vendor #	Vendor Name	Qty Rec'd	Wgt Rec'd
10/10/2008	122709	HILLAN	HILLANDALE FARMS	119.0	0.00
10/6/2008	122575	HILLAN	HILLANDALE FARMS	120.0	0.00
10/3/2008	122439	HILLAN	HILLANDALE FARMS	90.0	0.00
9/30/2008	122302	HILLAN	HILLANDALE FARMS	120.0	0.00
9/26/2008	122141	HILLAN	HILLANDALE FARMS	150.0	0.00
9/23/2008	121956	HILLAN	HILLANDALE FARMS	120.0	0.00
9/19/2008	121800	HILLAN	HILLANDALE FARMS	120.0	0.00
9/15/2008	121712	HILLAN	HILLANDALE FARMS	120.0	0.00
9/15/2008	121169	HILLAN	HILLANDALE FARMS	120.0	0.00
9/11/2008	121541	HILLAN	HILLANDALE FARMS	90.0	0.00
9/9/2008	121383	HILLAN	HILLANDALE FARMS	90.0	0.00
8/29/2008	120910	HILLAN	HILLANDALE FARMS	180.0	0.00
8/26/2008	120781	HILLAN	HILLANDALE FARMS	150.0	0.00
8/25/2008	120620	HILLAN	HILLANDALE FARMS	150.0	0.00
8/20/2008	120485	HILLAN	HILLANDALE FARMS	120.0	0.00
8/15/2008	120289	HILLAN	HILLANDALE FARMS	150.0	0.00

## Enter Catchweight Values

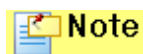
In the example here there are 2 cases to enter weight values for. Here is how it works:

1. Tap the red weight entry box and the number touch keypad will open.

#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Description	Pack	Wh Loc	
6	19968	5.00	5.00	0.00	CASE	GROUND BEEF 80% FRESH	5/4 #	R5541W	
7	20005	2.00	2.00	0.00	CAS		10 OZ AV	CC1221A	
8	20373	3.00	3.00	0.00	CAS		20# AVG	R8812A	
9	20425	2.00	2.00	0.00	BAG		1/10#	R550G	
Total Picked				0					

Highlighted in **red** are the weight entry boxes and **Picked** column that need values. Data entry boxes will turn yellow when they are being edited and white once the data is entered. The black arrowhead on the touch keypad above will point to the data entry area being edited.


2. Use the number touch keypad to enter the weight values using either the **Tap & Enter Method** for each case or capture the values from a Bluetooth Scale using the **Scale Method**.




**Note** Both weight entry methods including label printing options are described below in the **Catchweight / LB. Entry Methods** section below.

See the [Number Touch Keypad Tools](#) section of [Common Features](#), to learn more about the use of the number touch keypad tools pictured below.

3. To immediately print your label use the number touch keypad tools:

- a. Tap  to print a single label for the currently selected case.

- b. Or tap  to print a label for each case on the line item.

#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Description	Pack	Wh Loc
1	10311	6.00	6.00	6.00	CASE	MILK WH	4/1 GAL	CE1351B
2	12200	4.00	4.00	0.00	EACH	PARSLE	3 EACH	2640
3	12303	1.00	1.00	0.00	EACH	WHITE AS	4/EA	2650
4	19485	3.00	3.00	0.00	CASE	PARMES	4/5 # TUB	CB1191A
5	19968	2.00	2.00	2.00	CASE	GROUND	5/4 #	R5541W
						22.10	20.55	

## Catchweight / LB. Data Entry Methods

### Tap & Enter Method

a. Tap the red weight entry box and use the number touch keypad to tap in the value.


b. Then tap the green **Enter** key to move to the next red weight box and tap in the numbers to enter the next weight value.

c. Continue this process until all the weight values are entered for the item.



### Scale Method

a. Tap the red weight entry box. Put the item case to be weighed on your Bluetooth Scale.

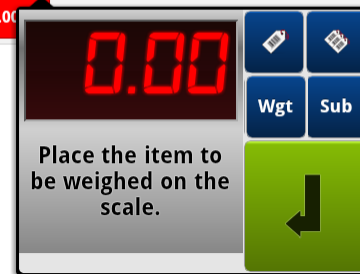
b. Then tap the **Scale** button  to begin the weight capture from the Bluetooth Scale.

c. The scale weight will now display on your tablet in a pop-up window with number touch keypad tools.

d. Follow the message displayed and "**Place the item to be weighed on the scale.**"

e. Once the weight value is displayed tap the green **Enter** key to accept the scale value.

#	Item No	Q. Ord	Q. Shp	Picked	UOM	Description	Pack	Wh. Loc
1	ELBEE	1.00	1.00	0.00	LB.	El Bea Period		
2	123456	5.00	1.00	0.00				



f. Tap the next red weight entry box.

g. To immediately print your labels use the number touch keypad tools.


h. Continue this process until all the weight values are captured from the Bluetooth Scale.


### Enter Item Picked Values

Once weights have been entered for all your Catchweight / LB. items then the **Picked** column will outlined in red so you can enter / update the **Picked** value.


- Items that do not require weight values will have just a **Picked** data entry box with a red fill so you know to enter the number picked.

1. Tap the red **Picked** data entry box.
2. Use the pop-up number touch keypad to tap in the value for the **Picked** column.
3. To immediately print your label use the touch keypad tools:


a. Tap  to print a single label for the currently selected case or catchweight item.

b. Or tap  to print a label for each case or each catchweight item of the selected line item.

#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Description
1	10590	3.00	3.00	0.00		CASE EGGS LARGE GRADE A
2	18346	1.00	1.00			
3	19485	3.00	3.00			
4	19950	2.00	2.00			
5	199696	1.00	1.00			



- c. The print feature will only print unprinted labels by default. You will be prompted to reprint if all labels have been printed.

 **Hot Tip!** If you want to quickly see the items that have not been picked yet, tap the "**Picked**" column header. This will sort the items by picked quantity bringing all the zero quantity items to the top. Otherwise you must scroll through all the line items on the screen to find any red boxes in the picked column.

### Loading Sheet Processing Buttons



- **Print Labels:** Tap to print all the labels associated with the loading sheet.
- **Hold:** Tap to save all data entered and release the current loading sheet. You will return to the [Route Loading Sheets](#) screen. You can come back later to complete the work on the loading sheet.
- **Finish:** Tap to save any changes, update the main **entrée** system and normally you will print the final invoice.

*The next topic is an overview of the Finish Process for Loading Sheets.*

## Finish Process for Loading Sheets

1. Once you have completed the process of entering values for all the catchweights and picked columns you will see the final **Total Picked** and **Total Weight** values for the invoice displayed.
2. Tap the **Finish** button at the bottom of the Loading Sheet screen and the **Finished Picking?** dialog box will display.
3. Tap **No** to return to the loading sheet screen or tap **Yes** to proceed with the Finish process.

Back Loading Sheet #231277

Invoice #	231277	Rev	B	Ship To	JBBBRO JOHNNY'S BAR AND GRILL 8436 BROOKFIELD AVE BROOKFIELD, NY 01513 MIKE (212) 485-4504
Inv. Date	10/11/2012	Route	MAIN	Stop	060
Comment	No Comments				

All Dry Frozen Refrigerated Cooler Add-Ons

CASE Only Non-CASE Only Catchweights Remove Pckd

#▲	Item No	Q. Ord	Q. Shp	Picked	UOM	Pack	Wh. Loc	Pckd
	TOP SIRLOIN STEAK FR							
8	20434	3.00					FD1071A	<input type="checkbox"/>
	CHICKEN TENDERS FRE							
9	10532	4.00	4.00	4.00	CASE	36/1 #	CB1361B	<input type="checkbox"/>
	BERK RACK OF PORK CH OFF							

Total Picked 25.00 Total Weight 929.2500

Remove Scan 532 - CHOCOLATE CAKE ICED INDIVIDUAL WRPD

Class	DESSERTS	Whse. Loc	FB1352A	Min Wgt	0.00
Brand	SARA LEE	Sec. Loc	N/A	Max Wgt	0.00
Pack	24 CT	Const. Wgt	0.00	Gross Wgt	6.76
Lot #	N/A				

Print Labels Hold Finish

4. If you tap **Yes** the **Print Labels** dialog box will display. If you tap **No** the label print process will be aborted.

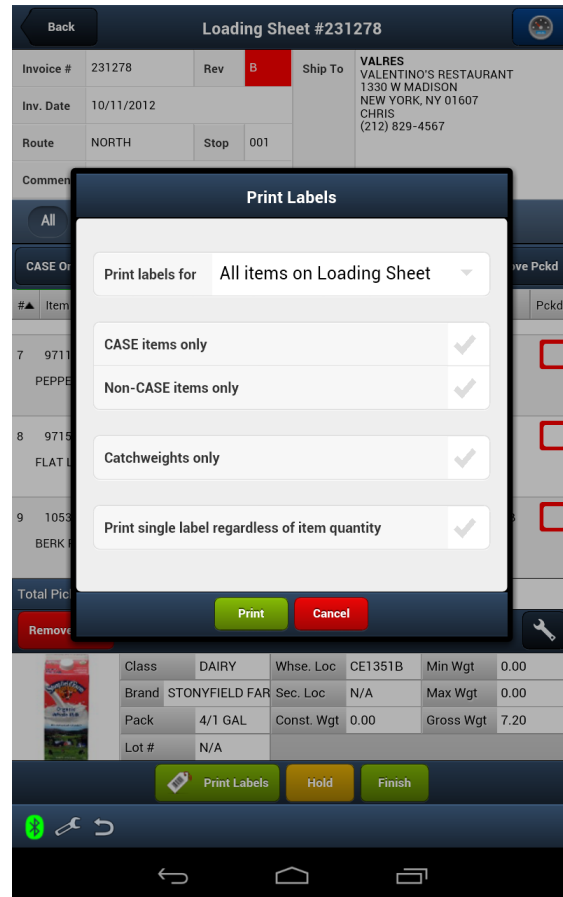
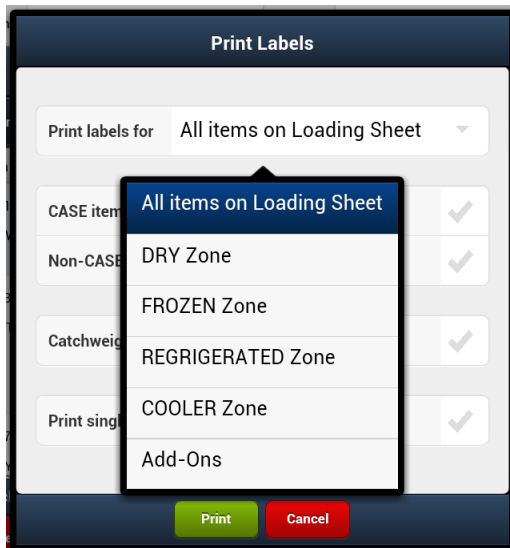
Label print options are:

- Print Labels for (see options below)
- Case items only
- Non-Case items only
- Catchweights only
- Print single label regardless of item quantity

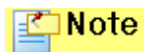
Tap the gray check marks to select what you would like printed.

Options for **Print Labels** for:

- Tap the arrow to view the print options menu.
- Then tap the desired print option.



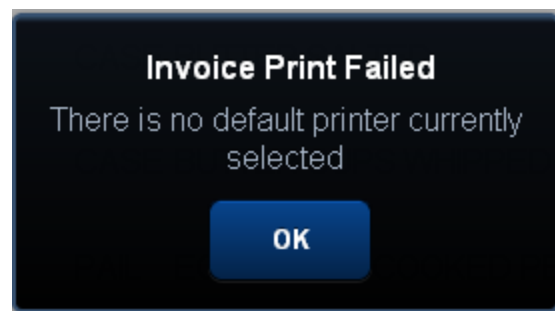
5. Tap the **Print** button to proceed with printing to the assigned printer.



**Note** In **entrée** the Printers tab of System Preferences in where you can assign printers for this task.

If there is a problem with printing you may see an error message like this one display.

Please check the Printers tab of System Preferences in **entrée** to be sure a default printer has been assigned.



**The next topic is an Item Substitutions in Loading Sheets.**

## 17.2 Item Substitutions

### entr e Item Substitution Settings

There are occasions when an item substitution is needed in a Loading Sheet. For a warehouse operator to perform item substitutions they must have the proper authorization setting on their User Account.



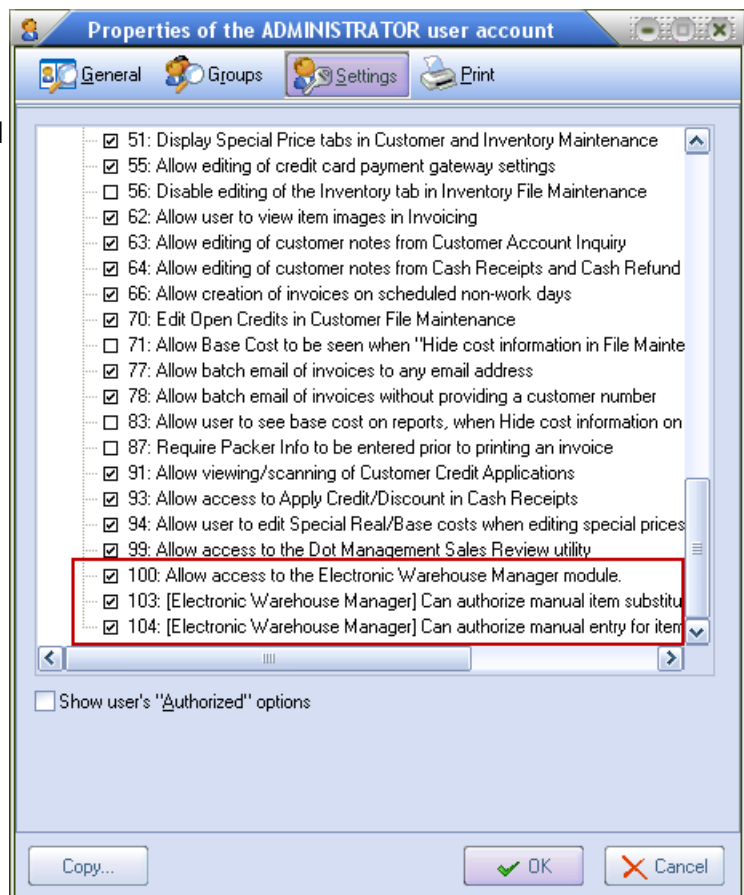
When there is a difference in Unit Price between the original item and the substituted item the default behavior in the **entr e** system is to retain the Unit Price on the Invoice for the original item.

We added **entr e** System Option # 176, "Recalculate Unit Price when applying an item substitution", can be enabled to recalculate the unit price on the invoice based on the substituted item. See the [Configure entr e System Options](#) section for more information.

### entr e User Account Settings

- Warehouse employees who you want authorized to perform manual item substitutions must have **option # 103** in their User Account Settings list enabled to be able to use the Item Substitution feature in **EWM**.
- Warehouse employees who you want authorized to perform manual item entry must have **option # 104** Can authorize manual entry for items set as "Required item to be scanned". Check the box only if you want the particular employee to be able to manual enter items in **EWM** and bypass scanning.

See the [entr e Settings & Dashboard](#) chapter for details on **entr e** User Account creation and Settings.



### Inventory File Maintenance Substitute Items

You can facilitate manual item substitution in the warehouse by setting up substitute items in the **entrée** system.

In the Inventory File on the **Misc1** tab you can add substitutions for line items (outlined in red below) in the Substitute Items section of the screen. See the [Adding Substitute Items in entrée](#) topic for these instructions.

The screenshot shows the 'Inventory File Maintenance' window. At the top, the 'Item Number' is 0310, 'Description' is 'RUSSETTE SUPERDRY SHOESTRING FF', and 'Brand Name' is 'LAMB WESTON'. The 'Unit of Measure' is 'CASE', 'Pack Size' is '6/6#', 'Warehouse Loc.' is 'F103', and 'Class' is 'FRENCH FRIES'. The 'Misc 1' tab is active. Below the tabs, there are fields for 'Description 2', 'Description 3', 'Description 4', and 'Category'. To the right, there are fields for 'Deposit', 'Cost Plus', 'DEX UPC/EAN Item #', 'Shrinkage %', 'Piece => Case Break Point', 'Retail Units', 'Broker', 'Storage Cost', 'Secondary Location', 'Corrosive Hazard Comment', 'Tare Weight Multiplier', and 'Special Order Item'. At the bottom, there are buttons for 'Min/Max Breakdown...', 'Item Notes', and 'Picking Labels'. The 'Substitute Items' table is highlighted with a red border and contains the following data:


Item	Description	Brand	Pack Size
10339	FRIES SHOESTRING MCCAIN	MC CAIN	6/4.5#

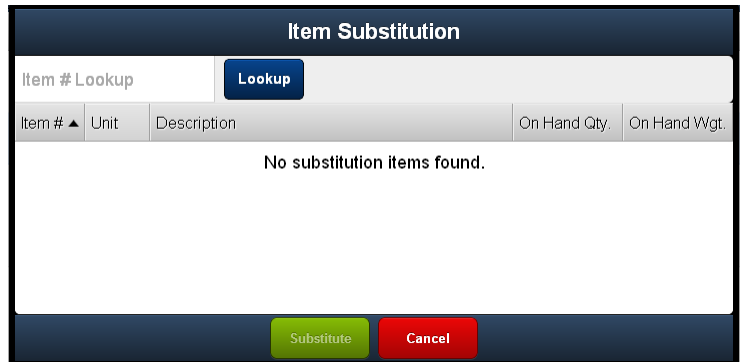
At the bottom of the window, there are navigation buttons (back, forward, etc.), a record count of '103 records', and buttons for 'Add Item', 'Copy Item', 'Delete Item', 'OK', 'Cancel', and 'Apply'.


The defined substitute items will be listed in the **EWM** item substitution process for you to select from when processing loading sheets.

When you configure **EWM** in **entrée System Preferences** you will set these options related to item substitution. See the [Configure entrée System Options](#) section of this guide for information.

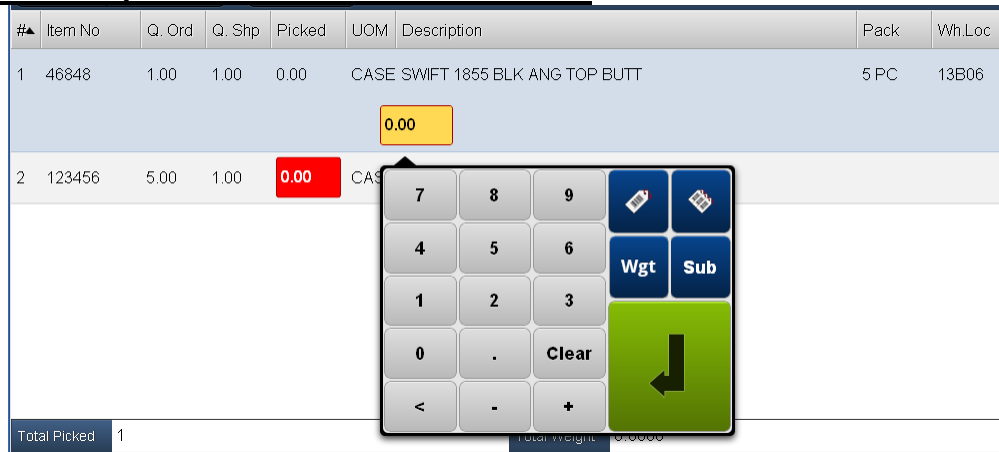
### How to Use Item Substitution in EWM

1. Tap the **Sub** button  in the pop-up number keypad.
2. **EWM** will search for and display any substitute items for the item in the **Item Substitution** dialog box.
3. If you have a defined item substitutes in **entrée** they will be listed. If you do not have substitutes defined proceed to the **Using the Lookup Process for Item Substitution** section later in this section.
4. Tap an item in the list to select it.
5. Tap the **Substitute** button and the manual item substitution is done or tap **Cancel** to abort the item substitution process.
6. If no substitute items were added to the item in the main **entrée** system then the "**No substitution items found**" message will be displayed.
7. Your only option now is to enter an item number and use the **Lookup** process to find a substitute item.



 **Note** To use the **Lookup** process you must know the item number for the substitute item.

### Using the Lookup Process for Item Substitution



1. For the line item that needs a substitute item tap the picked or weight entry box to open the number touch keypad.

- Tap the **Sub** button and the **Item Substitution** dialog will open.

#	Item No	Unit	Description	On Hand Qty.	On Hand Wgt.
1	46848				
2	123456				

Item #	Unit	Description	On Hand Qty.	On Hand Wgt.
85141	CASE	SEABOARD PORK TENDERS	315.00	0.0000

Total Picked: 1      Total Weight: 0.0000

- You must know the item number that will be used as the substitute. Tap the **Item # Lookup** text box area.
- Use the number touch keypad to enter the item number for the substitute.
- Tap the **Lookup** button.
- The information about the substitute item will be displayed as seen in the image below.
- Tap the item substitute in the list.
- Tap the **Substitute** button and you will be returned to the Loading Sheet screen with the substitute item now displayed.

#	Item No	Q. Ord	Q. Shp	Picked	UOM	Description	Pack	Wh.Loc
1	85141	1.00	1.00	0.00		CASE SEABOARD PORK TENDERS	12 PC	4F07
						0.00		
2	123456	5.00	1.00	0.00		CASE TOBY'S NON-CATCHWEIGHT ITEM		

Total Picked: 1      Total Weight: 0.0000

- If the "**Automatically add manual items substitutions to the substituted items list**" auto save feature has been turned on in **entrée**, (see the [Configure entrée System Options](#) section), then the substitute item number will be automatically saved and appear in the list the next time the item needs a substitute.

# Chapter 18

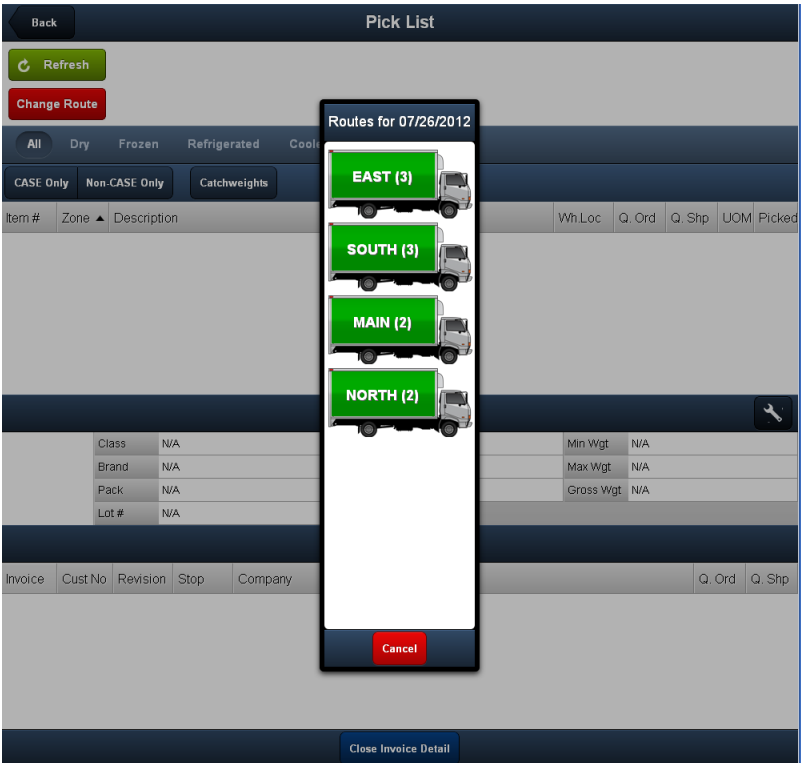
## Pick List

# 18 Pick List

## Pick List Route Selection

The **Pick List** menu option will first open the **Routes for** dialog box for the selected Delivery Date. It will be displayed in a pop-up window with trucks representing each of your routes. Route trucks will be color coded. See the Index of Route Truck Colors below for details.

- Tap a **Route** truck in the **Routes for** dialog box to open that route in the **Pick List** screen.
- If you tap **Cancel** here it will bring you back to the **EWM** main menu.



### Index of Route Truck Colors



Blue - The currently selected route.



Green - The number of printed invoices for the route are between zero - 33%.



Yellow - The number of printed invoices for the route are between 34% - 66%.



Orange - The number of printed invoices for the route are between 67% - 99%.




Red - All invoices for the route have been printed - there is nothing to pick.

**Pick List Screen Overview**

Back
MAIN Route Pick List for 10/11/2012

↻ Refresh




Change Route

All
Dry
Frozen
Refrigerated
Cooler

CASE Only
Non-CASE Only
Catchweights
Remove Pckd

Item #	Zone ▲	Description	Wh. Loc	Q. Ord	Q. Shp	UOM	Picked
20533	F	SHORT LOIN TAT DEF (BOP) FD1352B [BEEF]		26.00	26.00	LB.	<input type="checkbox"/>
30118	F	BATTERED GREEN BEANS [APPETIZERS]	FA1322B	1.00	1.00	CASE	<input checked="" type="checkbox"/>
51532	F	CHOCOLATE CAKE ICED IN [DESSERTS]	FB1352A	3.00	3.00	CASE	<input type="checkbox"/>




10311 - MILK WHOLE ORGANIC

	Class	DAIRY	Whse. Loc	CE1351B	Min Wgt	0.00
	Brand	STONYFIELD FAR	Sec. Loc	N/A	Max Wgt	0.00
	Pack	4/1 GAL	Const. Wgt	0.00	Gross Wgt	7.20
	Lot #	N/A				

Invoices requiring item #10311

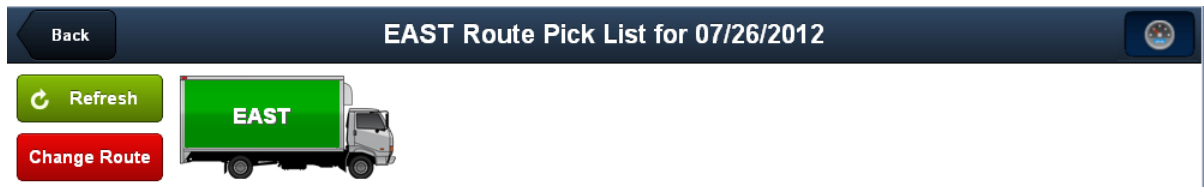
Invoice #	Cust No	Revision	Stop	Company	Q. Ord	Q. Shp
231277	JBBBRO	B	060	JOHNNY'S BAR AND GRILL	6.00	
231283	PUNCHI	A	080	PUNKY'S PIZZA, PASTA & MOF	1.00	

Hide Invoice Detail

## Route Section

Once you select a route the **Route** truck will be displayed at the top of the **Pick List** screen identifying the route you are working on.

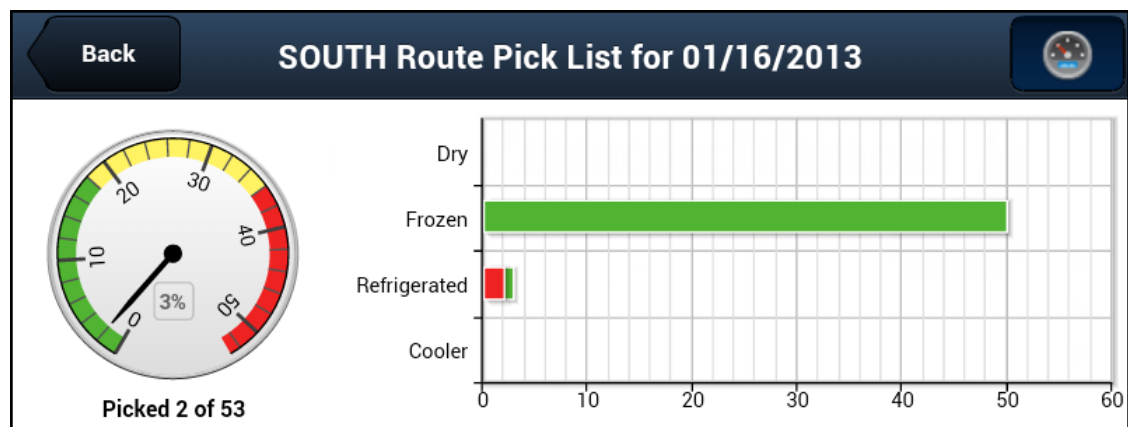


### Buttons:

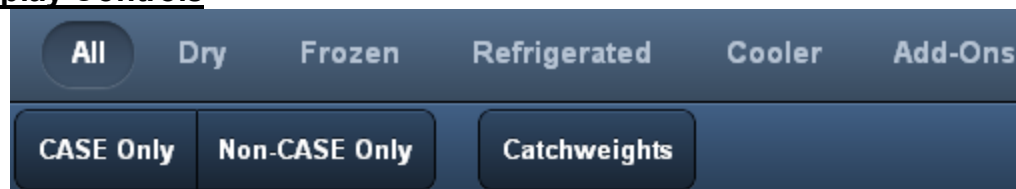
- **Back** - Takes you back to the previous screen.
- **Refresh** - Tap to update the route's item data in the screen.
- **Change Route** - Tap to display the **Routes for** dialog box to select a different route.



The **Progress Dashboard** button will quickly get you information about the status of the Picking in **EWM** during the day. See the [Progress Dashboards](#) topic in [Common Features](#) for more information.



## Item Display Controls



See the [Buttons](#) section of [Common Features](#), for details about the use of these buttons. Use these button to control the items that are displayed on the screen.

**Pick List Items Section**

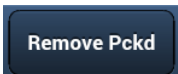
- The Pick List Items section is used as a checklist to organize the items required for the route delivery.
- The quantities in this section are the **TOTAL** amount needed for the route. This is the same concept used in the main entrée system "Pick List" report.
- You can control what items are viewed by using the Item Display Control buttons. In this example the Frozen button was tapped.

<span>All</span> <span>Dry</span> <b><span>Frozen</span></b> <span>Refrigerated</span> <span>Cooler</span>							
<span>CASE Only</span> <span>Non-CASE Only</span> <span>Catchweights</span>		<span>Remove Pckd</span>					
Item #	Zone ▲	Description	Wh.Loc	Q. Ord	Q. Shp	UOM	Picked
19950	F	GROUND BEEF 90% FRESH [BEEF]	FD1413B	1.00		CASE	<input type="checkbox"/>
2044513	F	CHICKEN BREAST STRIPS 1/2" WHITE [POULTRY]	FC1342B	7.00		CASE	<input type="checkbox"/>
20611	F	SHRIMP BEER BATTERED 16-20 FNTL [SEAFOOD]	FC1122B	1.00		CASE	<input type="checkbox"/>

Now only items designated frozen in the **entrée** system Inventory file are being displayed in the pick list screen above.

- Once a line item is picked, tap the red box to mark it. A green box and green check mark will display to indicate this item has been picked.


<span>CASE Only</span> <span>Non-CASE Only</span> <span>Catchweights</span>		<span>Remove Pckd</span>					
Item #	Zone ▲	Description	Wh.Loc	Q. Ord	Q. Shp	UOM	Picked
10396	R	SOUR CREAM LIGHT [DAIRY]	CE1341A	1.00	1.00	PAIL	<input type="checkbox"/>
10532	R	BERK RACK OF PORK CH O [PORK]	CB1361B	6.00	6.00	CASE	<input type="checkbox"/>
10559	R	BUTTER CUPS WHIPPED 5 [DAIRY]	CB1341B	2.00	2.00	CASE	<input checked="" type="checkbox"/>
12430	R	TOMATO ROMA PLUM [PRODUCE]	T0202	3.00	3.00	CASE	<input type="checkbox"/>
19355	R	MOZZARELLA SMOKED [CHEESE]	CC1371B	1.00	1.00	CASE	<input checked="" type="checkbox"/>
199697	R	SALAMETTI MILD 10/1# [DELI MEATS]		8.00	8.00	CASE	<input type="checkbox"/>



- Use the **Remove Pckd** button features to organize your work and keep track of unpicked versus picked items on the loading sheet.
  - Tap the **Remove Pckd** button to remove all the picked items with a green check from the loading sheet screen.
  - Tap the **Remove Pckd** button again and the picked items will return to the screen.

**Item Information Panel**

Just above the **Invoices Required** section is the **Item Information Panel** which displays the details about the currently selected item.

515195 - CARROT CAKE PREMIUM						
	Class	DESSERTS	Whse. Loc	C724A	Min Wgt	0.00
	Brand	SARA LEE	Sec. Loc	C950A	Max Wgt	0.00
	Pack	6 CT	Const. Wgt	0.00	Gross Wgt	33.50
	Lot #	N/A				

- To get instructions on how to customized it to suit your needs see the [Item Information Panel Setup](#) section of the [Common Features](#) chapter of this guide.

**Viewing the Invoice Detail Section**

At the bottom of the screen is the **Invoices Requiring Item** information panel. The Item Details section can be opened or hidden as you require using the button at the bottom of the screen or when a line item in the pick list section is tapped the **Invoices requiring item** section will open and list the invoices on the route that require that item.




To view a list of invoices requiring the selected line item just tap the **Open Invoice Detail** button at the bottom of the **Pick List** screen.

Invoices requiring item #19968						
Invoice	Cust No	Revision	Stop	Company	Q. Ord	Q. Shp
231305	FRNDOR	A	010	FRONT DOOR CAFE	2.00	2.00
231314	VALRES		010	VALENTINO'S RESTAURANT	5.00	5.00



To increase the number of line items displayed on the screen tap the **Hide Invoice Detail** button at the bottom of the **Pick List** screen.

The image here shows the bottom of **Pick List** screen with the Invoice Detail section hidden.

10396 - SOUR CREAM LIGHT						
	Class	DAIRY	Whse. Loc	CE1341A	Min Wgt	0.00
	Brand	KEMP'S	Sec. Loc	N/A	Max Wgt	0.00
	Pack	1/30#	Const. Wgt	30.00	Gross Wgt	0.00
	Lot #	N/A				



# **Chapter 19**

## **Purchase Order Receiving**

# 19 Purchase Order Receiving

The **Purchase Order Receiving** option is used to view and process open purchase orders when the product is delivered to the warehouse. This feature works in conjunction with the main **entrée** system Inventory menu "Receive by" options. **EWM** will provide **entrée** with the Quantity, Cases, Non-Case items and Weight received for products on open purchase orders.

**Buttons:**

- **Back** - Takes you back to the previous screen.
- **Refresh** - Tap to update the data in the screen.

**When the first Purchase Order Receiving screen opens you will see:**

- Each truck on the left will represent each vendor's and their open purchase orders. The selected truck will be the color **blue** and unselected trucks are colored **red**.
- The top truck will be selected with the open purchase orders for that vendor displayed in the purchase order section of the screen.
- The **Show** value will default to **All**, so all open purchase orders will be displayed.
- The **Delivery Date** from the main menu screen will populate the dates in the **Show** section at the bottom of the screen.



### Using the Show Section Tools

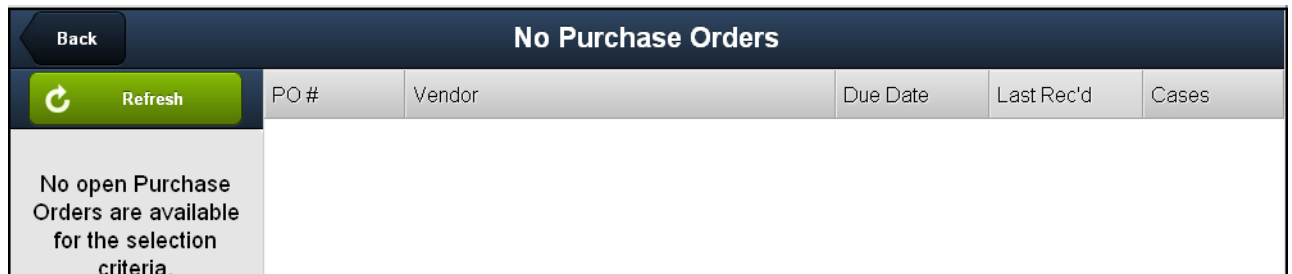
Use the **Show** options and calendar tool at the bottom of the screen to customize your view of open purchase orders.



- Tap **All** to see all your open purchase orders. (This is the screen default.)
- Tap **Today** to see only the open purchase orders for the current date.
- Tap **Range** and use the calendar tool to select your start and end dates to focus on a date range.

### No Purchase Orders Message

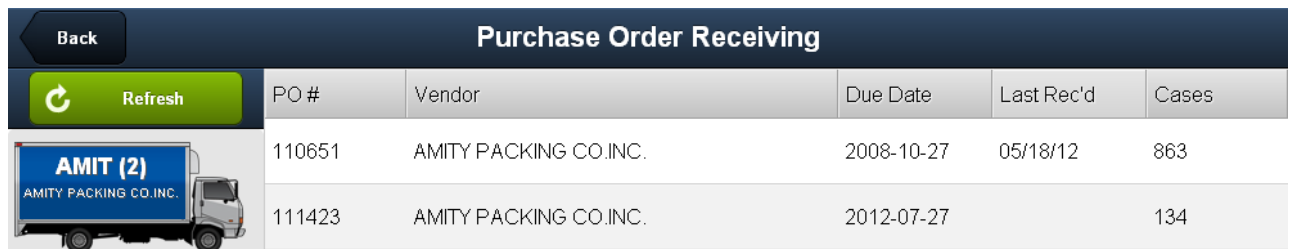
If there are no open purchase orders for a selected date or date range then the "No Purchase Orders" at the top of the screen will display in the title bar at the top and "No open Purchase Orders are available for the selection criteria" will display on the side where trucks are normally shown.



- Select **All** for the **Show** option or change your date values to see your open purchase orders.

### Selecting Purchase Orders for Processing

- Tap the desired Purchase Order in the screen to begin processing your **Purchase Order Receiving**.



The next topic is [Purchase Order Processing](#) where receiving information is entered in EWM.

### 19.1 P.O. Receiving Processing

When a purchase order is tapped it opens and displays all the items in the purchase order for processing receiving.

In this screen you can process receivables by:

- Manually entering the **Quantity Received** and **Weight Received** values for each item using the number touch keypad.
- Scan the barcode of the items being received to capture the information about the item.

The values entered will then update the main **entrée** system Inventory File.

Back
Purchase Order #203197

PO #	203197	Vendor	ADVANCE FOOD CO. 13800 WIRELESS WAY OKLAHOMA CITY, OK 73134-		
PO Date	10/18/2012				
Req Date	10/18/2012				
Comment	No Comments	Ref	Tap here to enter Reference		

All
Dry
Frozen
Refrigerated
Cooler

CASE Only
Non-CASE Only
Catchweights

Item #	Q.Open	Q.Recvd	W.Open	W.Recvd	UOM	Description
10590	75.00	0.00	0.00	0.00	CASE	EGGS LARGE GRADE A

CASE Ord:	75.00	Recvd:	0.00	Open:	75.00
WGHT Ord:	0.00	Recvd:	0.00	Open:	0.00

Remove Scan
10590 - EGGS LARGE GRADE A

	Class	DAIRY	Whse. Loc	CC1121B	Min Wgt	0.00
	Brand	LAND O LAKES	Sec. Loc	N/A	Max Wgt	0.00
	Pack	15 DOZEN	Const. Wgt	0.00	Gross Wgt	0.00
	Lot #	N/A				

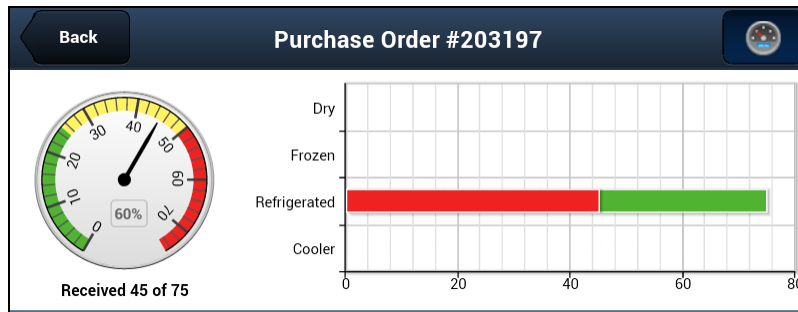
Hold
Finish

**The 3 Sections of the P.O. Receiving Processing Screen**

- The top section has the **Purchase Order / Vendor** information with the **Item Display Control** buttons below.
  - **Back** - This button at the top of the screen takes you back to the previous screen.



The **Progress Dashboard** button will quickly get you information about the status of the Purchase Order Receiving in **EWM** during the day. See the [Progress Dashboards](#) topic in [Common Features](#) for more information.



- In the middle section of the screen is the **Purchase Order Item Detail** section which lists all the items ordered on the selected purchase order. Tap the screen and drag up to scroll down to view the complete list of items purchased. In the bottom of this section the **Case Ordered, Case Open, Case Received, Weight Ordered** and **Weight Received** values are displayed.
- The **Item Information Panel** is in the bottom section of the screen and displays the details about the currently selected line item.

To get instructions on how to customized it to suit your needs see the [Item Information Panel Setup](#) section of the [Common Features](#) chapter this guide.

- At the very bottom of the screen are the buttons you will use to process the purchase order, **Hold, Finish** and **Receive All**.

**Purchase Order / Vendor Section**

Back		Purchase Order #111423		Progress Dashboard	
PO #	111423	Vendor	AMITY PACKING CO.INC. DEPT 77-2785 CHICAGO, IL 606782785 312/942-027070 Contact: JIM STAMM		
PO Date	07/27/12				
Req Date	07/27/12				
Comment	No Comments	Ref			

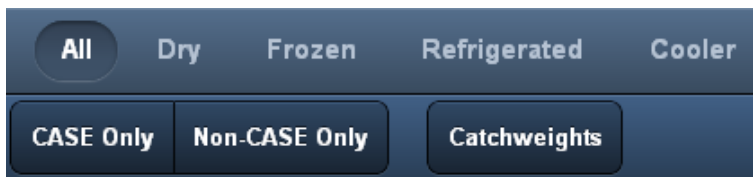
The Purchase Order / Vendor section includes:

- **Vendor** - The vendor company name, address and contact information as defined in the main entrée system in Vendor File Maintenance.
- **P.O. #** - The P.O. numbers assigned in the main entree system when the purchase order was created.
- **P.O. Date** - The date the purchase order was created.
- **Req Date** - Required date is the date the product should be received.
- **Comments** - The comment added to the purchase order to be sent to the vendor. Tap **View Comment** when it is in this field to open the comment display box. It works the same as the Loading Sheet comment display.
- **Ref** - The Reference field is used to a brief description of the transaction, users initials or an invoice number.

Item Display Controls

These buttons control what items are displayed on the screen. So if you need to receive Frozen foods just tap it and only those items will display.

- See the [Buttons](#) section of the [Common Features](#) chapter for details about the use of these buttons.



Purchase Order Item Detail Section

This section of the screen will list all the items on the purchase order. The columns in this section: #, Item Number, Quantity Open, Quantity Received, Weight Open, Weight Received, UOM, and Item Description.

- Here you will enter the **Quantity Received** and **Weight Received** values per item using the number touch keypad. You can also view the item details and view purchase history in this section.

<span>All</span> <span>Dry</span> <span>Frozen</span> <span>Refrigerated</span> <span>Cooler</span>									
<span>CASE Only</span> <span>Non-CASE Only</span> <span>Catchweights</span>									
Item #	Q.Open	Q.Rec'd	W.Open	W.Rec'd	UOM	Description			
999236	1.00	0.00	20.00	0.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS			
999236	5.00	0.00	98.00	2.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS			
999703	13.00	0.00	0.00	0.00		CASE CRYOVAC BAGS 8 X 10			
999718	8.00	0.00	0.00	0.00		CASE FORMING FILM 12 3/4"			
999719	17.00	0.00	0.00	0.00		CASE NON FORMING FILM 16 1/2"			
999729	21.00	6.00	0.00	0.00		CASE TRIM BOXES BOTTOMS			
999752	1.00	0.00	0.00	0.00		EACH BUTCHERS TWINE			
<b>Cas.Ord</b>	134.00	<b>Cas. Open</b>	134.00	<b>Cas. Rec.</b>	8.00	<b>Wgt. Ord.</b>	1301.00	<b>Wgt. Rec.</b>	11.00

### Sorting Line Items

Tap any column header in the **Purchase Order Receiving** screen and the up/down arrow will display in the header column and reveal the sort direction. Tap the column header again to change the sort direction.

### Viewing Item Details & Purchase History

It works the same way you would use it in the loading sheets screen. Double tap a line item listed in the loading sheet the item details screen will be displayed.

- Tap the **Back** button here to return to the **Purchase Order Receiving** screen.



At the bottom of the Item Details screen is the **Purchases** button. When you tap the **Purchases** button in the Item Details screen the purchase order history data for that line item is displayed.



The primary reason for the **Remove Scan** feature is to allow workers to remove the scanned quantity and weight to correct errors during the scanning process. This button can also be used to remove scanned data on the item in the screen to allow for manual data entry.

- Tap the scanned item to select it.
- Tap the **Remove Scan** button.
- The "**Scan the item to be removed.**" dialog box will display waiting for you to scan the item.
- Once the item has been scanned you can re-scan the item or manually enter the item's data.

### Enter the Quantity Received Values

The **Q.Rec'd** column will be highlighted in red so you can enter the **Quantity Received** value for that item on the purchase order.

1. Tap the red **Q.Rec'd** data entry box.
2. Use the pop-up number touch keypad to tap in the value for the **Q.Rec'd** column.

Item #	Q.Open	Q.Rec'd	W.Open	W.Rec'd	UOM	Description
999236	1.00	0.00	20.00	0.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS
999236	5.00					CHICKEN BREAST RANDOM FOR FAJITAS
999703	13.00					PLASTIC BAGS 8 X 10
999718	8.00					35mm FILM 12 3/4"
999719	17.00					35mm FILM 16 1/2"
999729	27.00					MEAT PIES BOTTOMS
999752	1.00	0.00	0.00	0.00		EACH BUTCHERS TWINE

**Enter the Weight Received Values**

The **W.Rec'd** column will be highlighted in red so you can enter the **total Weight Received** value for that item on the purchase order.

1. Tap the red **W.Rec'd** data entry box.
2. Use the pop-up number touch keypad to tap in the value for the **total W.Rec'd** for the item in the column.

Item #	Q.Open	Q.Rec'd	W.Open	W.Rec'd	UOM	Description
999236	1.00	0.00	20.00	0.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS
999236	5.00	0.00	100.00			CASE CHICKEN BREAST RANDOM FOR FAJITAS
999703	13.00	0.00	0.00			CASE CRYOVAC BAGS 8 X 10
999718	8.00	0.00	0.00			CASE FORMING FILM 12 3/4"
999719	17.00	0.00	0.00			CASE NON FORMING FILM 16 1/2"
999729	27.00	0.00	0.00			CASE TRIM BOXES BOTTOMS
999752	1.00	0.00	0.00			EACH BUTCHERS TWINE

**Weight & Case Section**

In the bottom of this section of the Purchase Order Receiving screen the **Case Ordered, Case Open, Case Received, Weight Ordered** and **Weight Received** values are displayed. As each line item in the selected purchase order is updated the **Wgt.Rec** and **Case.Rec** values will change.

 **Example** In the example below the **W.Rec'd** value of 20 entered is reflected in the **Wgt.Rec** value below.

Item #	Q.Open	Q.Rec'd	W.Open	W.Rec'd	UOM	Description			
999236	1.00	0.00	0.00	20.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS			
999236	5.00	0.00	100.00	0.00		CASE CHICKEN BREAST RANDOM FOR FAJITAS			
999703	13.00	0.00	0.00	0.00		CASE CRYOVAC BAGS 8 X 10			
999718	8.00	0.00	0.00	0.00		CASE FORMING FILM 12 3/4"			
999719	17.00	0.00	0.00	0.00		CASE NON FORMING FILM 16 1/2"			
999729	27.00	0.00	0.00	0.00		CASE TRIM BOXES BOTTOMS			
999752	1.00	0.00	0.00	0.00		EACH BUTCHERS TWINE			
<b>Cas.Ord</b>	134.00	<b>Cas.Open</b>	134.00	<b>Cas.Rec</b>	0.00	<b>Wgt.Ord</b>	1301.00	<b>Wgt.Rec</b>	20.00

### P.O. Receiving Processing Buttons

- **Hold:** Tap to release the current purchase order and return to the main [Purchase Order Receiving](#) screen. You can come back later to complete the work on the purchase order.
- **Finish:** Tap to save any changes in the main **entrée** system and move the purchase order to the next step in processing.
- **Receive All:** Tap to receive all items on the purchase order.

999236 - CHICKEN BREAST RANDOM FOR FAJITAS						
NO IMAGE AVAILABLE	Class	HPF	Whse. Loc	2C02	Min Wgt	0.00
	Brand	OUTWEST	Sec. Loc	N/A	Max Wgt	0.00
	Pack	20#	Const. Wgt	0.00	Gross Wgt	0.00
	Lot #	N/A				

Hold Finish Receive All

## 19.2 Pallet Scan



Within **Purchase Order Receiving** there is a **Pallet Scan** feature.

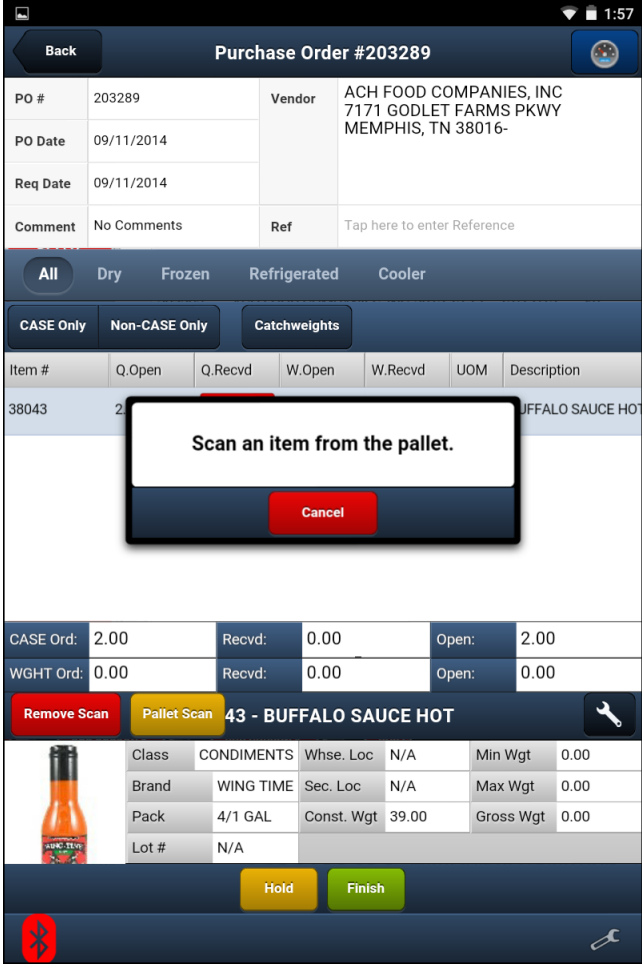
### Buttons

- **Back** - Takes you back to the previous screen.
- **Remove Scan** - Tap this button then scan the item to remove the previously scanned item from the list on the screen.
- **Cancel** - Aborts the current scan activity without saving the changes.
- **Hold** - Saves the current screen data for retrieval so you can come back later to complete the work. Then returns you to the main menu.
- **Finish** - Updates the **entrée** system Inventory File on the server.

**Pallet Scan** is used to process open purchase orders when pallets of products are delivered to your warehouse. You will scan the items on the pallet to receive them and update the **entrée** Inventory on your server.

**Using Pallet Scan**

1. When you first tap the **Pallet Scan** button the **Scan an item from the pallet** message will display.
2. Continue with scanning the items on the pallet to receive them. The items will be displayed on the screen as you scan them.
  - Tap the **Hold** button to save what you have scanned and finish your work later.
  - Tap **Cancel** to cancel the pallet scan.
3. The item details will be display in the item information area at the bottom of the tablet screen.



4. Scan any other items on the pallet that must be received at this time.
5. Tap **Finish** to save the changes to the Inventory File and update the **entrée** system server.

# Chapter 20

## Receive Kit Inventory

## 20 Receive Kit Inventory

This feature is *ONLY* for Kit Items. Now some basics on how things work.

### entrée work before you begin

You must have your kit items defined in the main **entrée** system in the Inventory file **Kits Tab**. The Kits tab is where the ingredients of a kit item can be defined. Kit items are items that are processed prior to being sold.

\*\* See the entrée V4 System Guide for details about setting up your kit items properly.

### **Automatic case breaking for kit ingredients follows entrée rules with the following exceptions:**

- It is not possible to receive kit inventory with lot based ingredients without assigning lots for the required batch quantity so an automatic lot assignment routine has been implemented.
- entrée receive by item processes PIECE like a CASE. entrée will pull the case inventory and proof the inventory if the piece is not an LB.

### **Rules that apply when dealing with Lot Based Items:**

- Lots from the CASE item are selected using a simple FIFO method.
- If there is not enough inventory on the CASE it will receive the missing quantity into a SHORTAGE lot then break into the piece from that lot.
- If the CASE is "track by lot" but the PIECE item is not, the system will pull from a lot and simply drop the inventory onto the PIECE.
- If the PIECE is track by lot but the CASE is not, the system will automatically assign a lot number to the inventory moved into the PIECE item using the same method as the entrée system auto-assign Lots option.

### **Buttons**

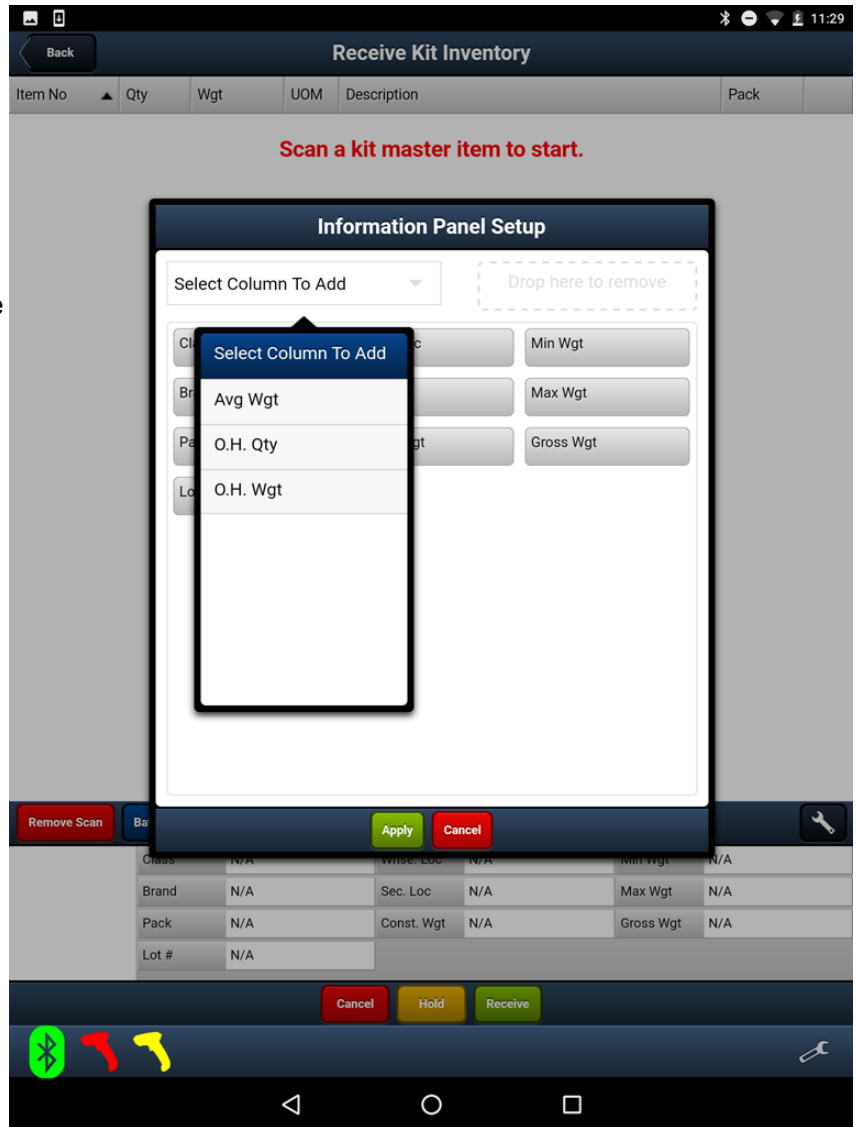
- **Back** - Takes you back to the previous screen.
  - **Remove Scan** - Tap this button then scan the item to be removed from the list on the screen.
  - **Batch Entry** - Tap to enter your kit items with total quantity and weight data using the key pad instead of the scanner. You must scan the item first to identify it then you can use batch entry.
  - **Cancel** - Aborts the current activity without saving changes.
  - **Hold** - Saves the current screen data for retrieval later to complete the work. Then returns you to the main menu.
  - **Receive**: Tap to receive the kit items into inventory.
-

### Information Panel Setup



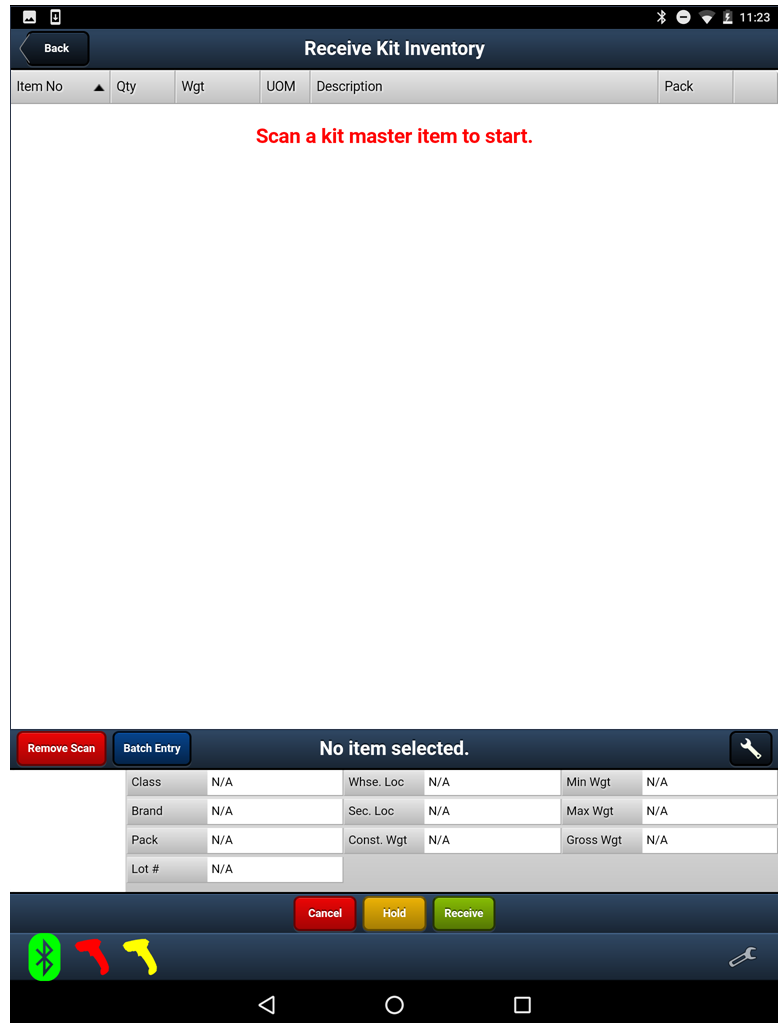
In the tool bar tap the wrench icon to open the **Information Panel Setup** tool.

Use this tool to customize the data displayed in the lower section of the screen.



## Scan to Receive Kit Items

1. Tap the **Receive Kit Inventory** option in the main menu.
2. Scan the items which must be a kit master item defined in the main **entrée** system.
3. The receive process works similar to the [P.O. Receiving Processing](#) which you can reference for details.
4. Use the **Remove Scan** feature to delete items from the screen as needed.
5. Once all the kit items are scanned and item data entered tap the **Receive** button.



### Remove Scan

The primary reason for the **Remove Scan** feature is to allow workers to remove the scanned item to correct errors during the scanning process. This button can also be used to remove scanned data on the item in the screen to allow for manual data entry.

- Tap the scanned item to select it.
- Tap the **Remove Scan** button.
- The "**Scan the item to be removed.**" dialog box will display waiting for you to scan the item.
- Once the item has been scanned you can re-scan the item or manually enter the item's data.

# Chapter 21

## Transfer Out

## 21 Transfer Out

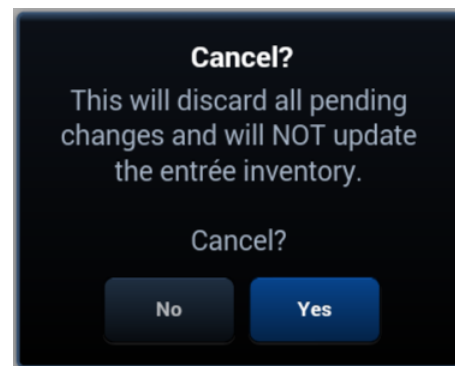
**Transfer Out / Transfer In** features will manage inventory for items you use in the processing or manufacturing of products and the new items that are created.


The **Transfer Out** feature allows producers of food products to quickly scan items to remove them from inventory so they can not be sold. Then these items can be brought to be processed into new products.

Once all the items are processed and used to make the new product that item will be scanned using the **Transfer In** to add the new item to inventory so it is available for sale.

### Buttons

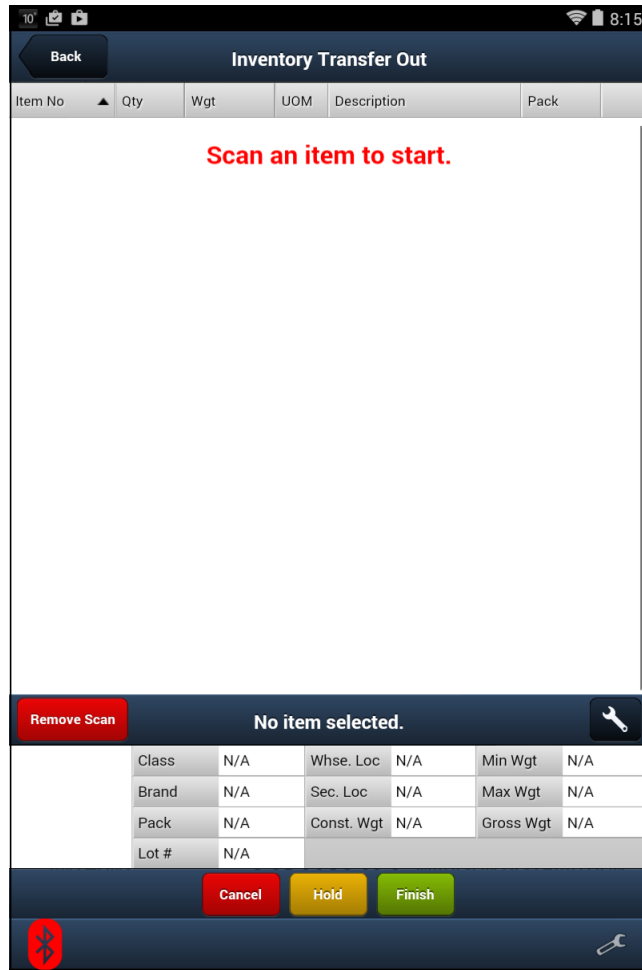
- **Back** - Takes you back to the previous screen.
- **Remove Scan** - Tap this button then scan the item to remove the previously scanned item from the list on the screen.
- **Cancel** - Aborts the current activity without saving changes.



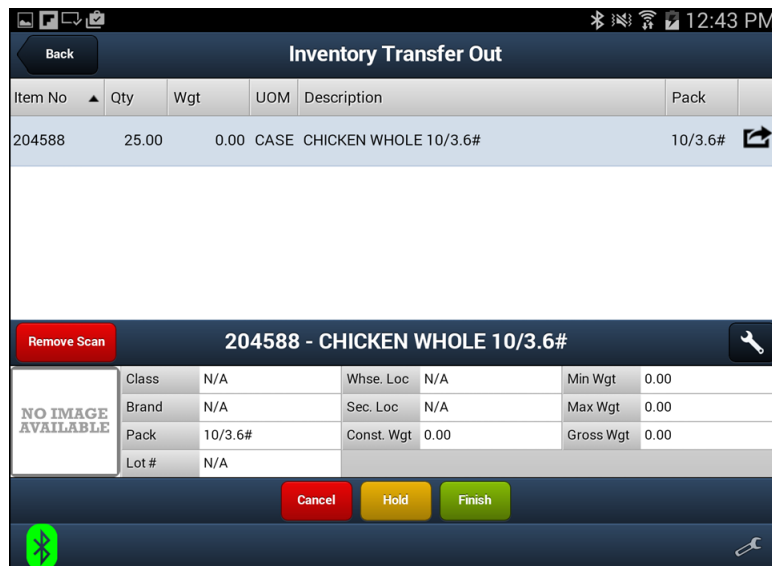
- **Hold** - Saves the current screen data for retrieval so you can come back later to complete the work. Then returns you to the main menu.
- **Finish** - Updates the **entrée** system Inventory File on the server.
- Tap the Tool icon  to open the **Information Panel Setup** tool to change the data that is displayed in the bottom section of the screen.

**Using Transfer Out**

1. Tap the **Transfer Out** option in the main menu.
2. When the **Transfer Out** screen opens you will see the **Scan an item to start** message on the screen.
3. Scan the item and it will be displayed in the scanned items area of the tablet screen.
  - You can tap the **Hold** button to save what you have scanned and finish your work at a later time.
  - Tap **Cancel** to cancel the transfer.
4. The item details will be display in the item information area at the bottom of the tablet screen.



5. Scan any other items that must be transferred out at this time.



6. Tap **Finish** to save the changes to the Inventory File and update the **entr ee** system server.

# Chapter 22

## Transfer In

## 22 Transfer In

**Transfer Out / Transfer In** features will manage inventory for items you use in the processing or manufacturing of products and the new items that are created.

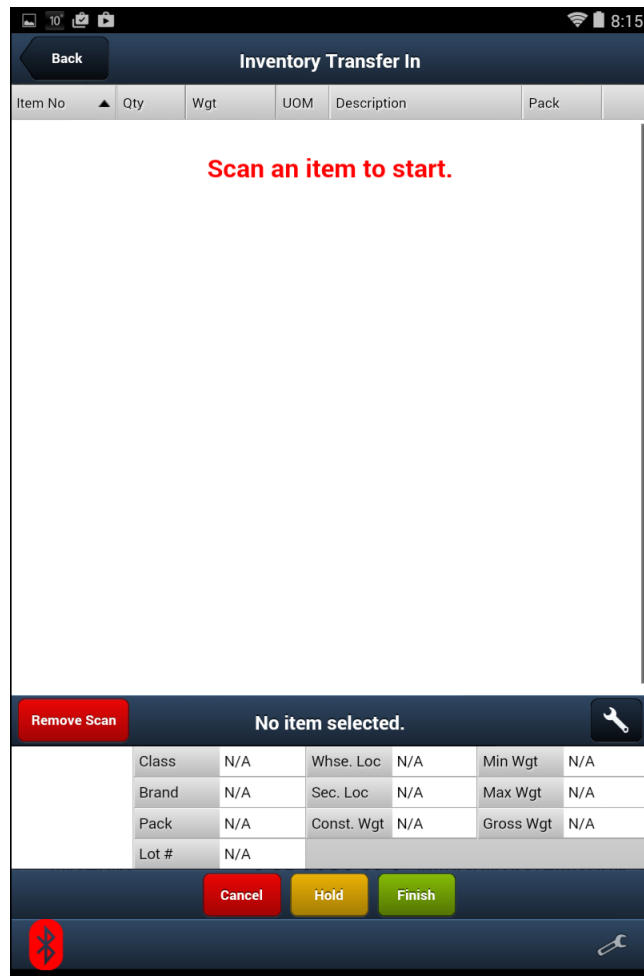
**Transfer In** is used to add the product you created from processing or manufacturing to **entrée**. The items scanned will be added to the inventory file so they are available for sale.

### Buttons

The buttons are the same as those documented for the **Transfer Out** screen.

### Using Transfer In

1. Tap the **Transfer In** option in the main menu.
2. When the **Transfer In** screen opens you will see the **Scan an item to start** message on the screen.
3. Scan the item and it will be displayed in the scanned items area of the tablet screen.
4. The item details will be display in the item information area at the bottom of the tablet screen.
5. Scan any other items that must be transferred in at this time.



- If you need to print production labels for these items see the [Production Labels](#) topic that follows in this guide.

- You can tap the **Hold** button to save what you have scanned and finish your work at a later time.
  - Tap **Remove Scan** then scan the item to remove the previously scanned item from the list on the screen.
  - Tap **Cancel** to cancel the transfer.
6. Tap **Finish** to save the changes to the Inventory File and update the **entrée** system server.

Item No	Qty	Wgt	UOM	Description	Pack
204492	125.00	0.00	CASE	CHICKEN WINGS BUFFALO STYLE	5/5#
204493	25.00	0.00	CASE	CHICKEN WINGS ASIAN SWEET & SPICY	3/5#
204494	50.00	0.00	CASE	CHICKEN WINGS HONEYSUCKLE WHITE	4/4.5#
204593	80.00	0.00	CASE	CHICKEN WINGS BONELESS HONEY BBQ	3/5#
20470	50.00	0.00	CASE	CHICKEN WINGS BUFFALO HOT	1/12#
204919	10.00	0.00	CASE	CHICKEN WINGS BREADED BONELESS	2/5#

204492 - CHICKEN WINGS BUFFALO STYLE						
NO IMAGE AVAILABLE	Class	POULTRY	Whse. Loc	FB1162A	Min Wgt	0.00
	Brand	PERDUE	Sec. Loc	N/A	Max Wgt	0.00
	Pack	5/5#	Const. Wgt	25.00	Gross Wgt	0.00
	Lot#	N/A				

Buttons: **Cancel** (red), **Hold** (yellow), **Finish** (green)

# Chapter 23

## Production Labels

## 23 Production Labels

Food distributors who further process or manufacture items can take advantage of the Production Label feature of the **Electronic Warehouse Manager (EWM)**. You can both design your own label format with **entrée's** barcode label designer and print these labels in your production room. You can mount a tablet running the **Electronic Warehouse Manager** near a Bluetooth enabled scale and a thermal barcode printer and generate labels on demand as inventory is processed.

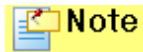
Before you can print production labels in **EWM** you must first design and assign the label configurations to the items in the main **entrée** system. An overview of the label creation process follows for both versions of the **entrée** system.

### **entrée Lot Number Assignment**

Warehouse staff cannot assign lots in EWM. You have 3 possible methods for getting Lot numbers assigned in the **entrée system**.

1. Your office staff can manually assign lot numbers in **entrée** during invoicing.
2. You can turn on **entrée** system option **#106** to Auto Assign lots during invoicing.
3. You can scan the lot number embedded in the barcode label that comes on the product during receiving.


Once one of the 3 options lot number assignments options above are implemented **entrée** can automatically assign the Lot Numbers and other key information in **EWM** to meet your labeling requirements.

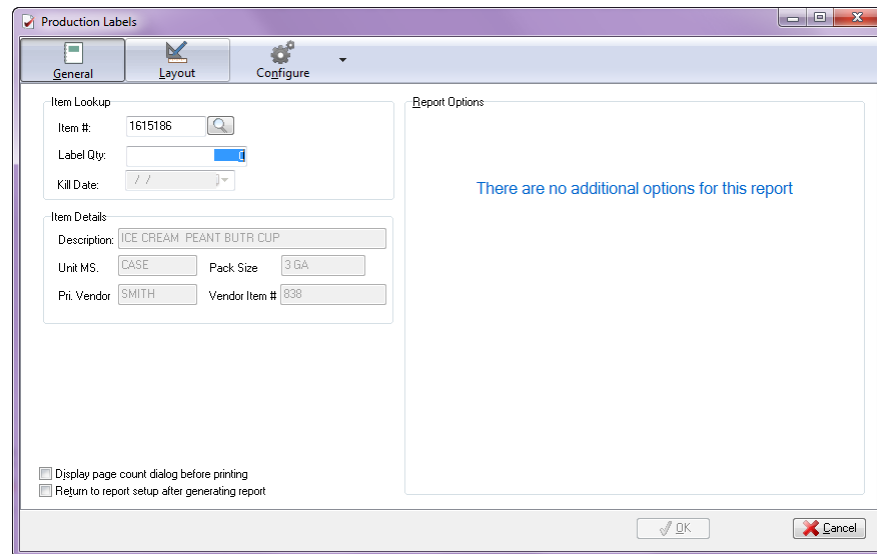


**Note** Saving the lot number scanned from the barcode label in receiving allows you to easily search for that lot number using the **entrée Product Recall Report** and quickly respond to recalls.

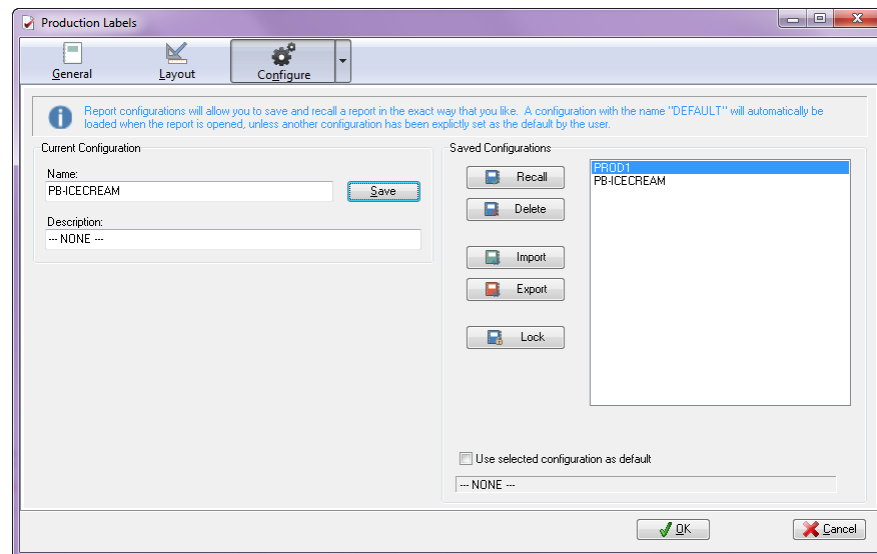
**entrée V4 SQL**

- To access all label design features go to the **Inventory** ribbon menu > **Inventory Reports** section > **Labels** drop down menu and select **Production**.

- Find the item using the search tool  or enter the item number if you know it.
- Enter **Label Qty** and **Kill Date** (if applicable). Click **Configure**.

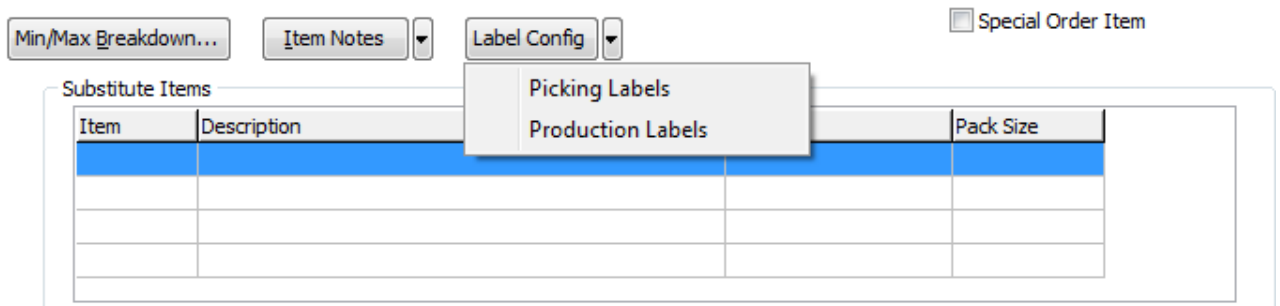


- Enter a **Name** for the configuration. Here we use PB-ICECREAM. Click **Save**.



- Now go to the **Inventory** ribbon menu > **Inventory** tab and find the item you just created the label for.

5. On the **Misc1** tab if a production label for the item has been designed and saved the **Production Labels** option will be activated in the **Label Config** menu.



6. Click the **Production Labels** option in the Label Config menu and the **Production Label Configuration Editor** opens so you can assigned the saved configuration to the item.

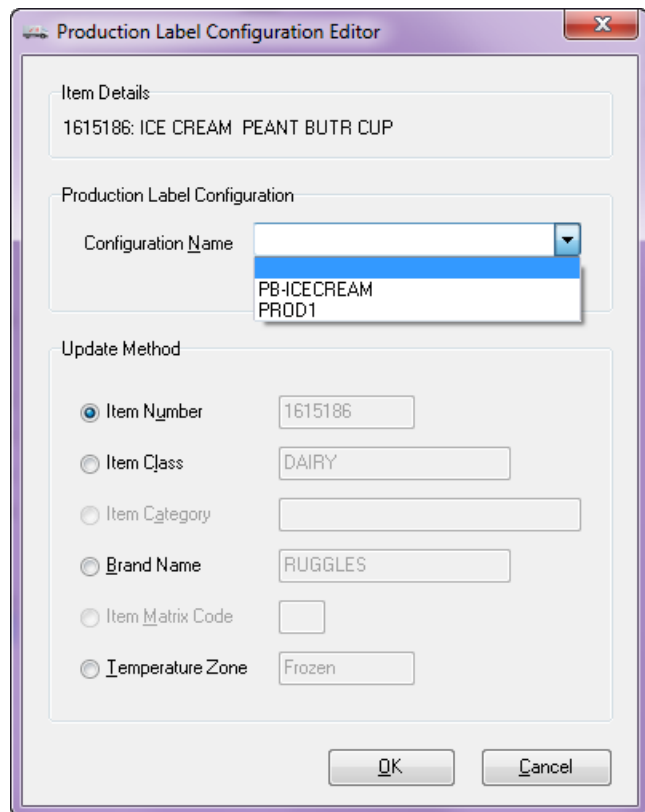
- In this **Production Label Configuration Editor** example we have already created and saved a configuration called PB-ICECREAM.

7. Now assign the configuration to the item by selecting it from the options in the **Configuration Name** drop down menu.

8. Click **OK**.

9. You are now ready to print production labels for the item in **EWM**.

- For detailed information about designing labels see the Inventory Reports chapter Labels section of the [entrée V4 SQL KnowledgeBase](#) system guide.



**entrée V3**

To access production label design features in **entrée version 3** use menu path: **Reports > Label Printing > Production.**

The screenshot shows the 'Production Labels' dialog box. It has a title bar with the text 'Production Labels' and standard window controls. Below the title bar are three tabs: 'General', 'Layout', and 'Configure'. The 'General' tab is selected. The 'Item Lookup' section contains three fields: 'Item #' (with a search icon), 'Quantity' (set to 0.0000), and 'Kill Date' (set to 03/12/14). The 'Item Details' section contains five fields: 'Description', 'Unit MS.', 'Pack Size', 'Pri. Vendor', and 'Vendor Item #'. At the bottom left, there are two checkboxes: 'Display page count dialog before printing' and 'Return to report setup after generating report'. The right side of the dialog is labeled 'Report Options' and contains the text 'There are no additional options for this report'. At the bottom right, there are 'OK' and 'Cancel' buttons.

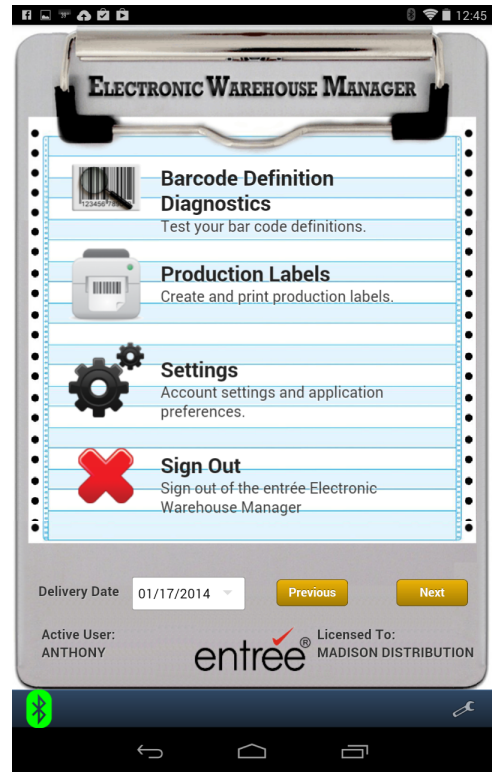
- For detailed information about designing and saving label configurations see the Reports chapter Label Printing section of the [entrée V3 KnowledgeBase](#) system guide.
- For instructions on how to assign a label configuration to an item see the Inventory File Maintenance chapter Misc1 Tab section topic on Picking Labels.

**entrée V3 Assigning a label configuration to an item.**

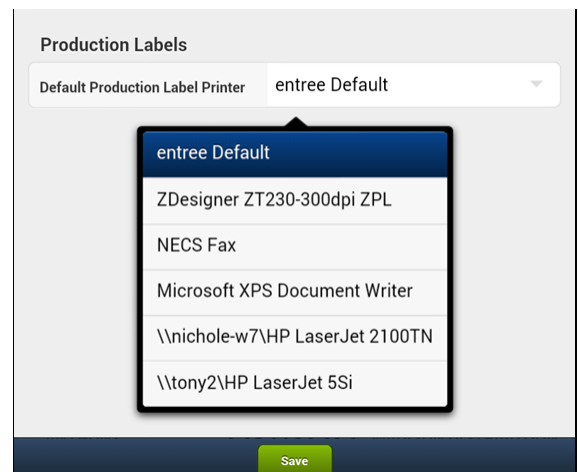
1. Go to the **File > Inventory File > find item > Misc 1** tab.
2. Click the **Label Config** drop down menu. The **Production** option is used to assign a saved label configuration to the item.
3. Select the label configuration to assign to the item and click **OK**.
4. See steps 6 - 8 in the version 4 instructions detailed earlier in this chapter for related information.

## How to Print Production Labels in EWM

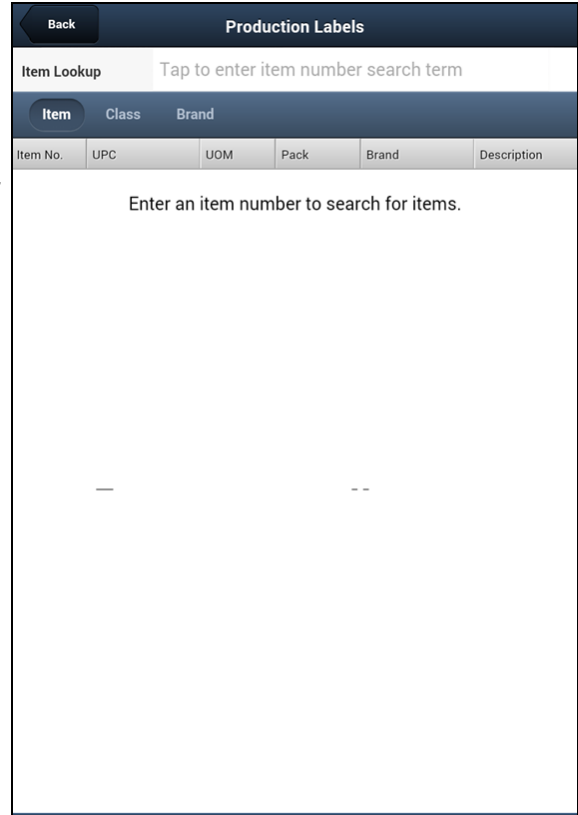
1. First on your tablet set the Default Printer in **EWM** to your label printer.
2. Click the **Settings** option in the EWM main menu.



3. In **Account Settings** go to the **Production Labels** section.
4. Click on the drop down menu for **Default Production Label Printer** and select your label printer.
5. Click **Save**.
6. Click the **Back** button to return to the **EWM** main menu.



7. In the main menu click the **Production Labels** option.
8. You first need to find the item. You begin the Item Lookup process by clicking one of these options: **Item**, **Class** or **Brand**.



9. If **Item** was selected you will begin entering the desired item number in the **Tap to enter item number search terms** area and tap in the area.
10. A list of items that match the search term entered will display.
11. Tap and select the desired item in the list.



12. The **Production Label** print feature will open with the item number selected displayed at the top.

13. Tap and enter the **Quantity** of labels to be printed using the keypad.

14. Enter the **Weight**, **Tare Offset** and **Kill Date** as required for the specific item.

Back Production Label - 10499

Directions: Enter quantity. Then touch Printer entree Default

Quantity 0

Weight

Tare Offset

Kill Date

7 8 9

4 5 6

1 2 3

0 . CLR

SET TARE

SET KILL DATE

PRINT

Item #	UOM	Pack	Description	Qty/Wgt	Status
No production labels have been printed during this session.					

15. The **entree Default** drop down menu on this screen allows you to change the printer to be used for the current production label.

In the event that you are having problems with one printer you can switch to another as needed.

Back Production Label - 10499

Directions: Enter quantity. Then touch Printer entree Default

Quantity 1

Weight

Tare Offset

Kill Date

7 8 9

4 5 6

1 2 3

0 . CLR

entree Default

ZDesigner ZT230-300dpi ZPL

NECS Fax

Microsoft XPS Document Writer

\\nichole-w7\HP LaserJet 2100TN

\\tony2\HP LaserJet 5Si

PRINT

Item #	UOM	Pack	Description	Qty/Wgt	Status
No production labels have been printed during this session.					

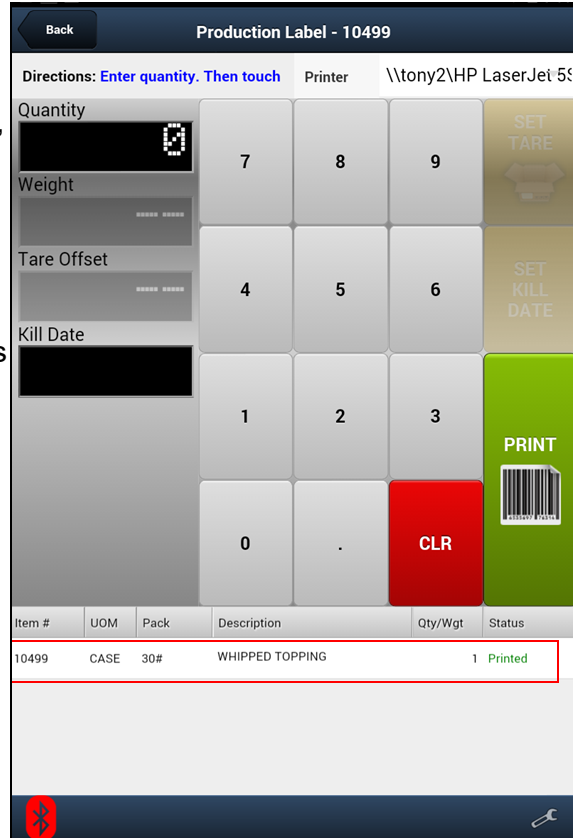
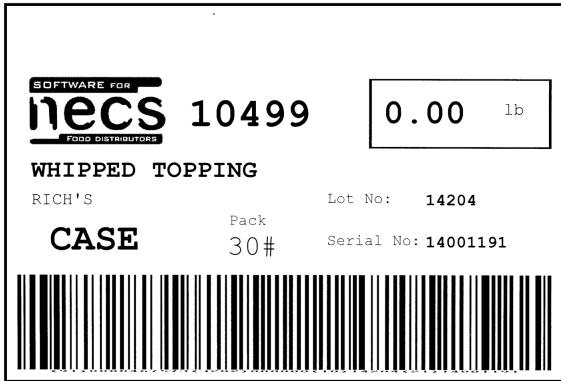
16. Tap the **Print** button to send the print job to the designated printer.

17. If the print job was successful you will see a message in the area below the keypad displaying the Item #, UOM, Pack, Description, Qty/Wgt and Status.

- When the Status is **"Printed"** the production label printing was successful.



**Example** This is the test label that was printed from the process described here.



- When the Status is **"Error"** you will see the error message below the item description as shown here.
- As you can see in the error messages below items need to have a primary vendor assigned and must have valid primary vendor item numbers before you can successfully print production labels.

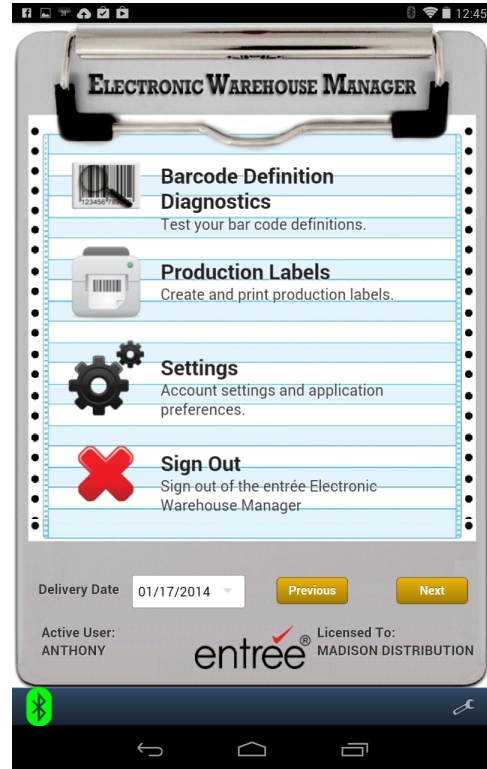
Item #	UOM	Pack	Description	Qty/Wgt	Status
51501	CASE	200 CT	CANNOLI SHELLS MINI Result Code: 0x00000004 Method execution failed. Item #51501 has not been assigned a primary vendor.	1	Error
10559	CASE	1/500 CT	BUTTER CUPS WHIPPED 5 GM Result Code: 0x00000004 Method execution failed. Primary Vendor Item # for Item #10559 is invalid. Item numbers for production labels must be numeric.	2	Error

# Chapter 24

Sign Out

## 24 Sign Out

- Tap the **Sign Out** option at the bottom of the main menu to exit the **EWM** application on your tablet.



- That will bring you back to the **EWM** application **Sign In** screen on your tablet.
- Tap the **Exit** button.

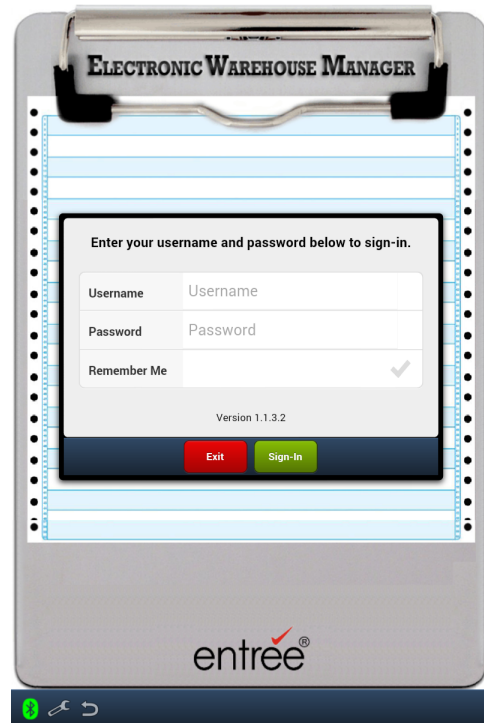


Now tap the tablet's Android OS **Home** icon in the bottom of the screen to return to your tablet's Home screen.

- The **EWM** application icon is located in the tablet desktop area where your apps are found.



- Just tap the **EWM** icon again to restart the **EWM** application.



# **Chapter 25**

## **GS1 Bar Code Glossary**

## 25 GS1 Bar Code Glossary

This section will provide you with definitions of terms and information about the use and locations of Identifiers and their related data on GS1 labels.

1. **Associated Weight Bar Code** - A bar code label only for Weight data.
  2. **Associated Lot Number Bar Code** - A bar code label only for Lot Number data.
  3. **Bar Code Label Types:**
    - **Item Label** is used for item identification data and may contain weight data.
    - **Weight Label** is used for weight data only and is paired with an item label.
    - **Lot Label** is used for lot data only and is paired with an item label.
  4. **Expiration Date** - The Expiration Date is a 6 digit numeric value with the format YYMMDD.
  5. **Expiration Date Identifier** - The Expiration Date Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (17) preceding the Expiration Date data.
  6. **Global Trade Item Number (GTIN)** - A numerical value used to uniquely identify a trade Item. A trade Item is any trade Item (trade Item or service) upon which there is a need to retrieve pre-defined information and that may be priced, ordered, or invoiced at any point in any supply chain. GTIN is one of the keys of the EAN-UCC System.
  7. **Global Trade Item Number (GTIN) Identifier** - A format for a GTIN-8, GTIN-12, or GTIN-13 used when a GTIN application requires a fixed field length, for example, when a GTIN-13 is encoded in GS1-128 Symbology using the Application Identifier (01).
  8. **GTIN 13** - The 13-digit GS1 Identification Key composed of a GS1 Company Prefix, Item Reference, and Check Digit used to identify trade items using the Application Identifier (01).
  9. **Item Number** - The Item Number is a unique alphanumeric field up to 8 digits long assigned to an item in the entrée inventory file.
  10. **Item Number Identifier** - The Item Number Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (01) preceding the Item Number data.
  11. **Lot Number** - The Lot Number field is a unique alphanumeric field up to 20 digits long assigned to items tracked by lot when they are received. entrée.UPC identifies the Lot Number for the item as the Production Date
  12. **Lot Number Identifier** - The Lot Number Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (10) or (23) preceding the Lot Number data.
  13. **Manufacturer ID** - The Manufacturer ID number is a unique alphanumeric field up to six digits long assigned to a Manufacturer in the entrée manufacturer file. One simple format of a Manufacturer ID number that can be used has the 3 letters from the manufacturer's name, followed by a 3 digit numeric code.
  14. **Packaging Date** - The Packaging Date has a 6 digit numeric value with the format YYMMDD.
  15. **Packaging Date Identifier** - The Production Date Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (13) preceding the Packaging Date data.
  16. **Production Date** - The Production Date has a 6 digit numeric value with the format YYMMDD. entrée.UPC identifies the Lot Number for the item as the Production Date
-

- 
17. **Production Date Identifier** - The Production Date Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (11) preceding the Production Date data.
  18. **Sell-By Date** - The Sell-By date is a 6 digit numeric value with the format YYMMDD.
  19. **Sell-By Date Identifier** - The Sell-By Date Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (15) preceding the Sell-By Date data.
  20. **Serial Number** - The Serial Number is a unique alphanumeric field up to 20 digits long assigned for identification.
  21. **Serial Number Identifier** - The Serial Number Identifier in the GS1 Bar Code is enclosed in parenthesis with the value (21) preceding the Serial Number data.
  22. **Weight Decimal** - The numeric values to the right of the decimal point in the weight field indicating the partial pound or kilogram for the weight data.
  23. **Weight Integer** - The numeric values to the left of the decimal point indicating the number of whole pounds or kilograms for the weight data.
  24. **Weight Identifiers** - The identifiers used for weight data in the GS1 Bar Code are:
    - **Net Weight Kilograms** is enclosed in parenthesis with the value (310x), where x is the number of decimal places in the weight, preceding the weight data.
    - **Gross Weight Kilograms** is enclosed in parenthesis with the value (330x), where x is the number of decimal places in the weight, preceding the weight data.
    - **Net Weight Pounds** is enclosed in parenthesis with the value (320x), where x is the number of decimal places in the weight, preceding the weight data.
    - **Gross Weight Pounds** is enclosed in parenthesis with the value (340x), where x is the number of decimal places in the weight, preceding the weight data.
-

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