

# **Express Management**

## **iOS Manual**

- 1 – Logging In
- 2 – Inventory
  - 2.1 – Barcode Scanning
  - 2.2 – Product Information
  - 2.3 – Add New Item
- 3 – Department
  - 3.1 – Add Department
- 4 – Reports
- 5 – Settings
- 6 – Tips and Tricks

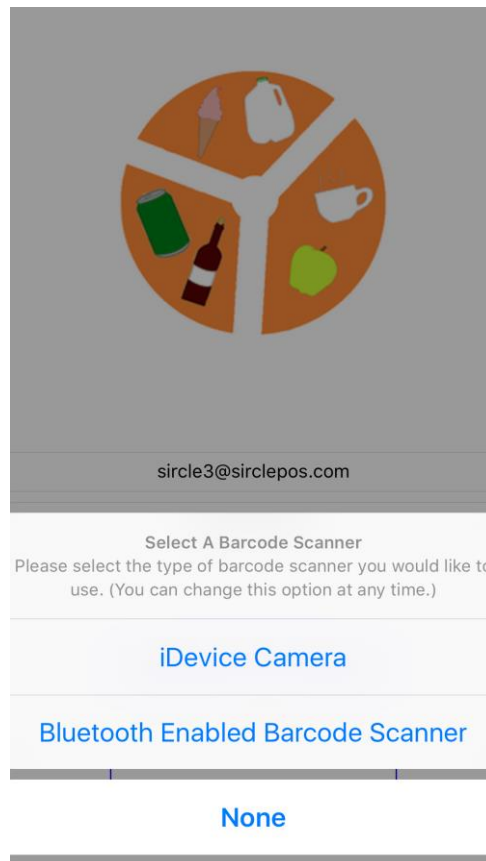
## 1 --- Logging In

Log in to the Express Management app using the same credentials given to you when you purchased the POS software and tablet and press the 'Login' button.

If you require assistance, press the 'Help' button to visit our website, send us an e---mail or call our support line.

Once you log in, you will be given an option for the type of barcode scanner you would like to use.

- ... iDevice Camera uses your iPhone's camera.
- ... Bluetooth Enabled Barcode Scanner uses an external Bluetooth barcode scanner that is connected to your iPhone.
- ... None lets you enter barcodes in manually

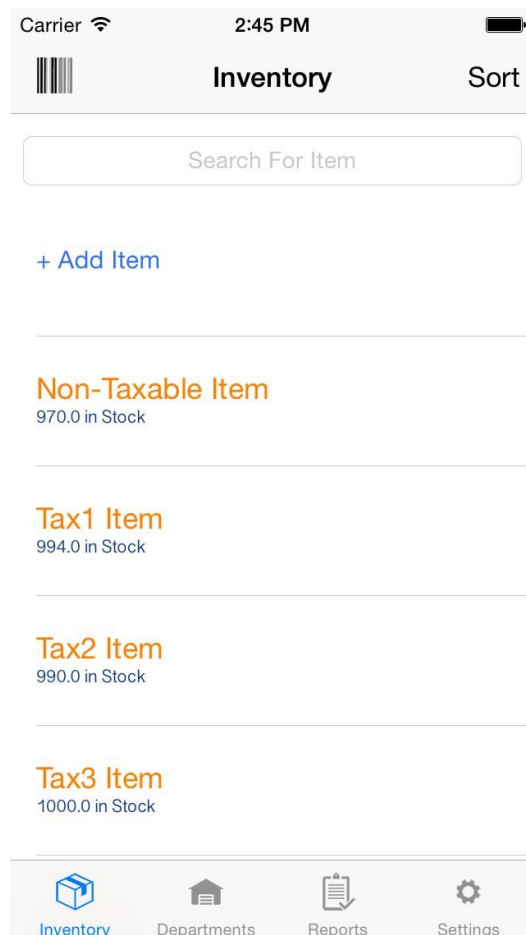


## 2 --- Inventory

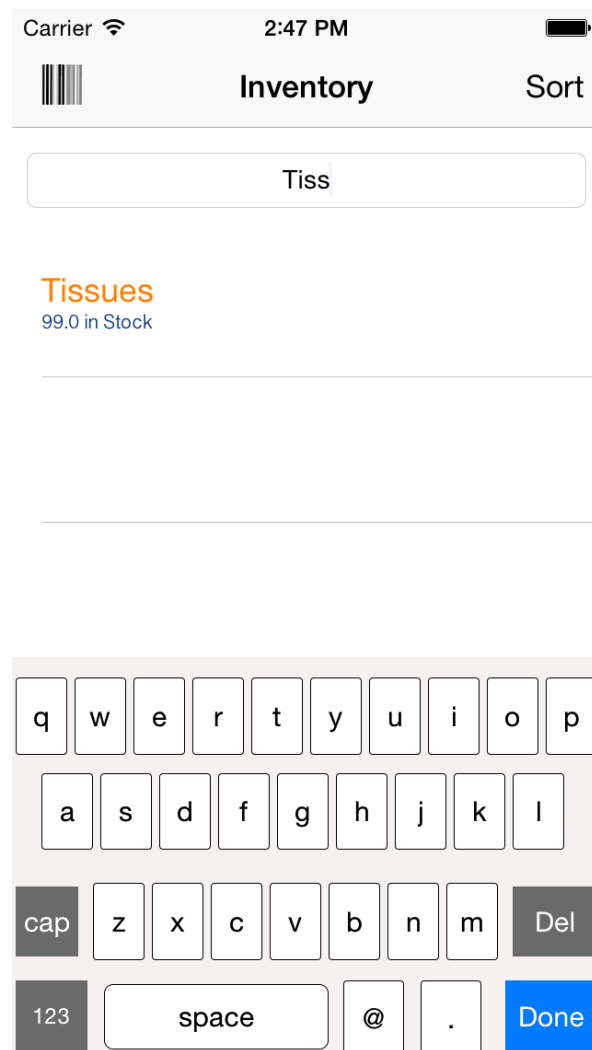
Once you are logged in, you will be able to view your inventory. You can view items that have been loaded while your whole inventory is initializing. The spinner on the top right corner indicates that your inventory is still loading.

Once your inventory has fully loaded, you will be able to sort your inventory by stock, re---order level, or p r i c e .

You can also start scanning items with the barcode scanner icon on the top left corner (see 2.1 – Barcode Scanning)



You can search for any item in your inventory by product name from the search bar.



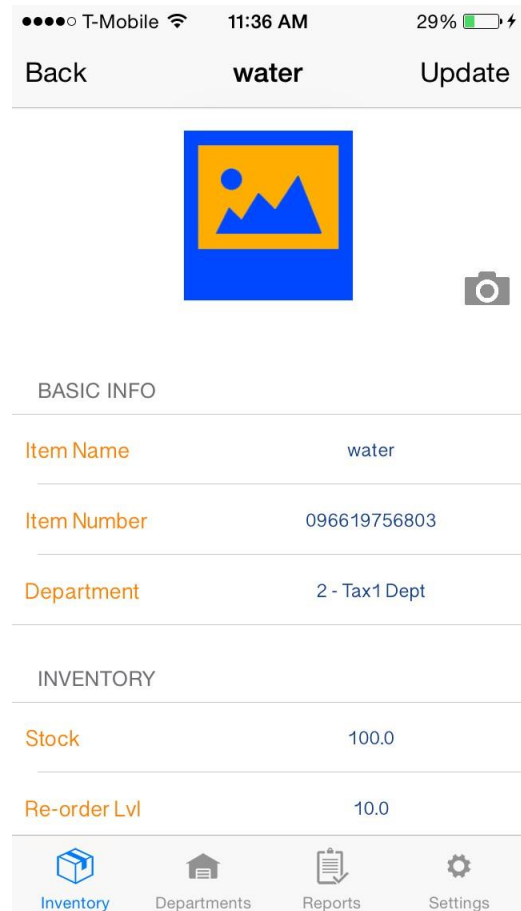
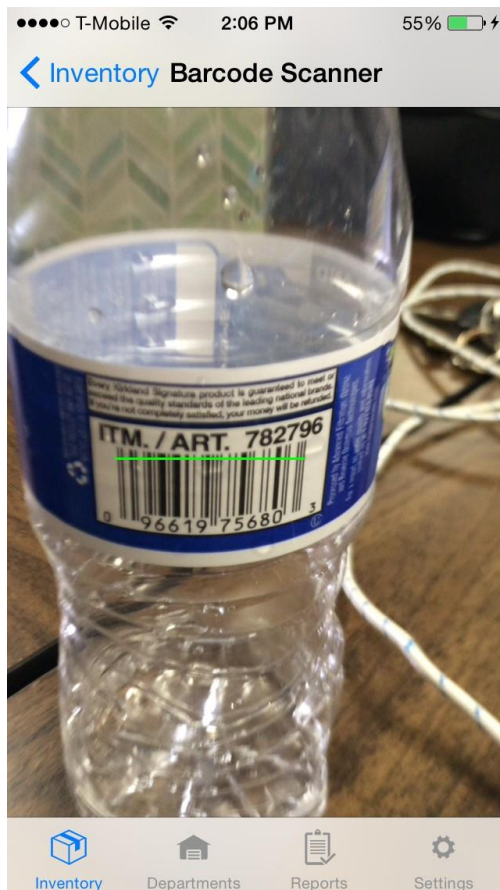
## 2.1 – Barcode Scanning

Depending on the barcode scanner option you have chosen, you can scan or enter in a barcode (this can be changed in settings. See 5 – Settings). Using the 'Bluetooth Enabled Barcode Scanner' and 'None' barcode scanner options opens a pop-up that allows you to enter or scan the barcode into. A quick view product information page is opened, where you can quickly update the stock and price of the item. You may also view the 'Product Information' page by selecting the 'View Item' button (see 2.2 – Product Information). If the barcode does not exist in your inventory, you will be sent to the 'Add New Item' page (see 2.3 – Add New Item).

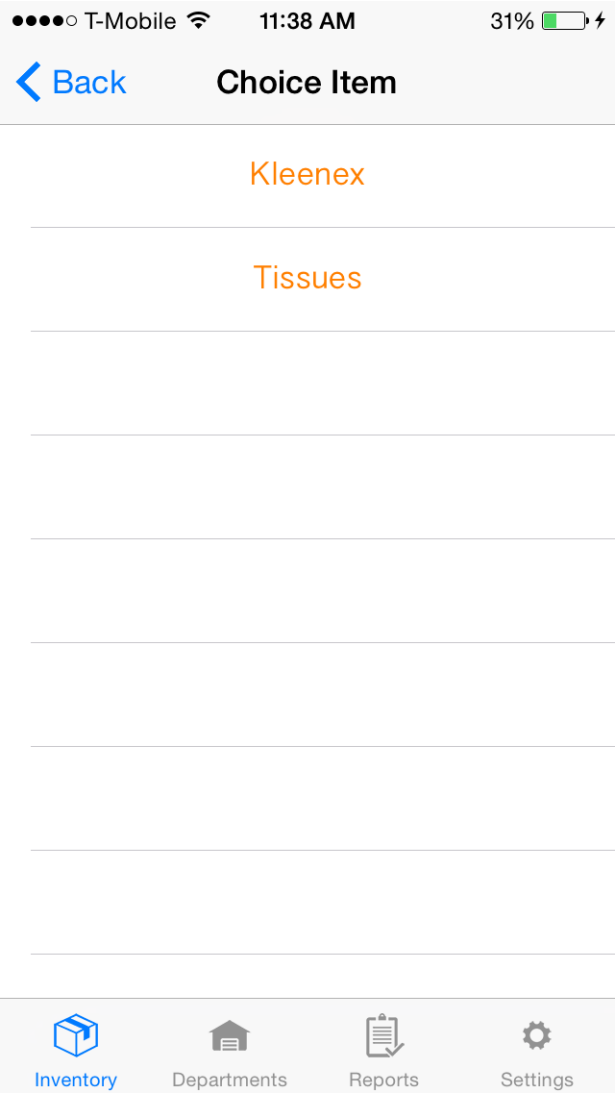
This screenshot shows a mobile app interface with a status bar at the top displaying 'Carrier', signal strength, '1:42 PM', and battery level. The app header shows a back arrow, 'Inventory', and 'Barcode Scanner'. A central dialog box titled 'Enter Item Number' with the instruction 'Please enter the item number' contains a text input field with '00011' and a blue cursor. Below the input are 'Cancel' and 'Search' buttons. At the bottom is a numeric keypad with digits 1-9, 0, and a decimal point, along with 'ABC', '#', 'Del', and 'Done' buttons.

This screenshot shows the 'Thyme - Fresh' product detail page. The status bar and app header are identical to the previous image. The page displays the item name 'Thyme - Fresh'. Below it are two input fields: 'Price:' with the value '0.99' and 'Quantity:' with the value '100.0'. An 'Update' button is positioned below these fields. Further down are two blue links: 'View Item' and 'Scan Another Item'. The bottom navigation bar contains four icons with labels: 'Inventory' (highlighted), 'Departments', 'Reports', and 'Settings'.

If the 'iDevice Camera' barcode scanner option is chosen, the camera view is opened. You will be allowed to scan barcodes in real---time. The 'Product Information' page is opened when the item is successfully scanned. If the barcode does not exist in your inventory, you will be sent to the 'Add New Item' page.



If there are choice items in your inventory that have the same barcode, you will be shown all the choice items when you scan the barcode. You can select one of the items to view the 'Product Information' page.





## 2.2 --- Product Information

In the 'Product Information' page, you can view, delete, and edit all the details of an item in your inventory, including the item image, the department, stock, re---order level, cost, price, taxes, display on touch screen, and choice items.

Carrier 2:46 PM

Back Tilapia - Smoked Update



BASIC INFO

Item Name

Tilapia - Smoked

Item Number

00001

Department

1 - Non-Tax Dept

INVENTORY

Stock

100.0

Re-order Lvl

10.0

Inventory

Departments

Reports

Settings

Carrier 2:46 PM

Back Tilapia - Smoked Update

Price

9.99

Tax Rate 1

On

Tax Rate 2

Off

Tax Rate 3

Off

Foodstampable

Off

OTHER

Display On TS

On

CHOICE ITEMS

+Add Choice Item

Delete Product

Inventory

Departments

Reports

Settings



## 2.3 – Add New Item

In order to add a new item to your inventory, either scan an item that does not exist in your inventory with the barcode scanner, or press the '+ Add Item' button on the 'Inventory' page. When you add an item with the '+ Add Item' button, you will be given two options, 'Single Add' or 'Bulk Add'.

'Single Add' allows you to add a 'Standard Item' or a 'Choice Item'.

When adding 'Standard Item', you are adding an item to your inventory. Only the 'Basic Info' fields are required, including the item name, number and department. The rest of the fields are optional, you can change them at any time from the 'Product Information' page. Scroll down and select the 'Save' button to save the item.

Carrier 2:47 PM

Add New Item

Standard Item Choice Item

Image Placeholder

BASIC INFO

Item Name Item Name

Item Number Item Number

Department Department

INVENTORY (OPTIONAL)

Stock 100

Re-order Level 10

Inventory Departments Reports Settings

When adding a 'Choice Item', you are required to enter a 'Choice Text' and select items from your inventory to make a choice item. To select items, press the '+ Add Choice Item' button and select any item from your inventory to add to the choice item. Press the 'Save' button to save the choice item.

Carrier 2:47 PM

Add New Item

Standard Item Choice Item

Enter Choice Text

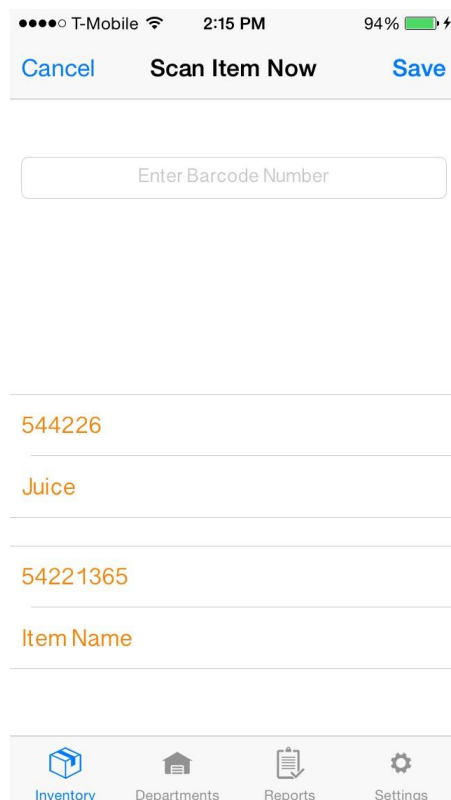
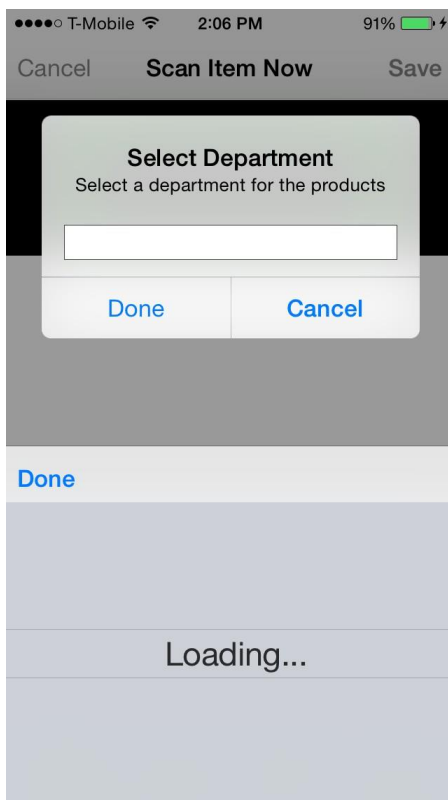
+ Add Choice Item

Save

Cancel

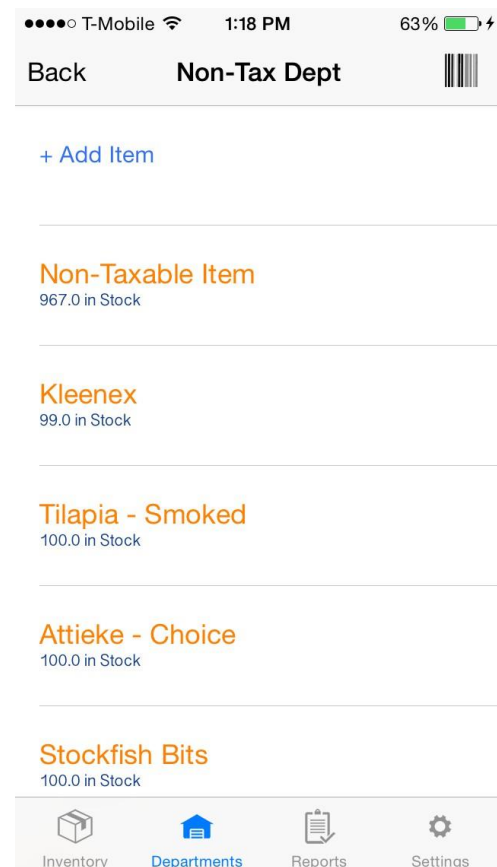
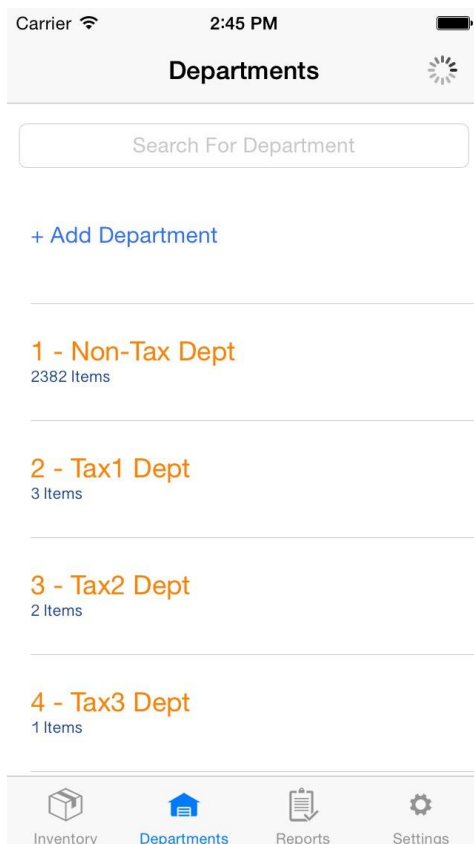
Inventory Departments Reports Settings

When adding multiple items using 'Bulk Add', you will first be given an option to choose a department you would like the items into. Depending on your barcode scanner option, two different views can be shown in the 'Bulk Add' page. If you have chosen either a 'Bluetooth Enabled Barcode Scanner' or 'None', a text box will appear where you can directly scan or manually enter your item numbers into. Once the item number is entered, you can enter the item name. If you have chosen the 'iDevice Camera', you can use the camera to scan barcodes and enter the item names once the barcode has been scanned.



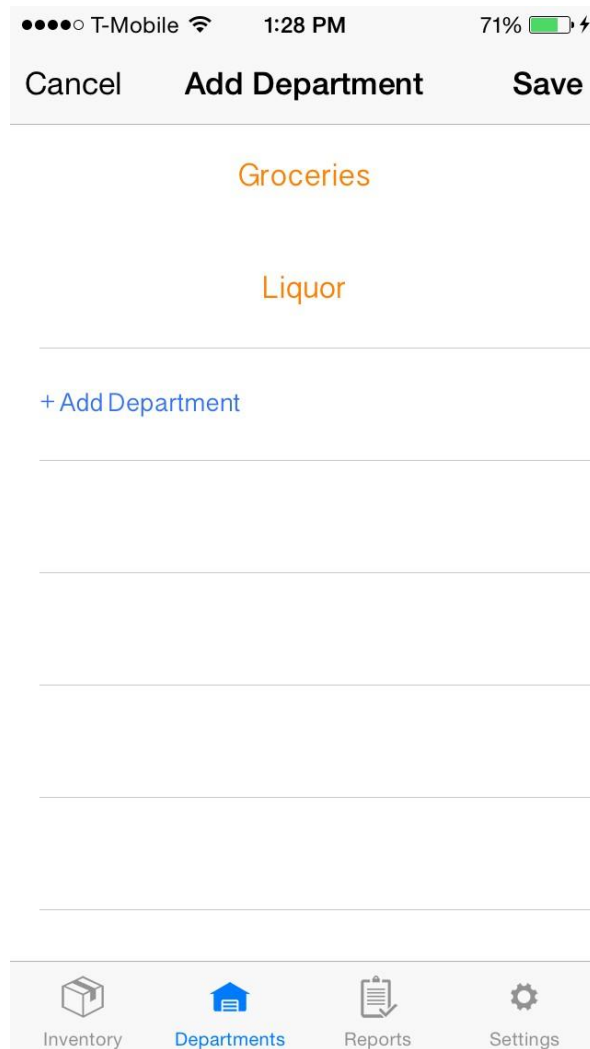
### 3 – Departments

You can view all your departments and number of items in each department in the 'Department' page. Select a department to view all inventory items in that department, and add new inventory items to that department. You can search for departments using the search bar as well. Press the '+ Add Department' button to add a new department in the 'Add Department' page (see 3.1 – Add Department).



### 3.1 – Add Department

To add a new department, just enter the department name and press the 'Save' button on the top right corner. If you would like to add multiple departments, press the '+ Add Department' button to enter another department name.



The screenshot shows a mobile application interface for adding departments. At the top, there is a status bar with 'T-Mobile', signal strength, time '1:28 PM', and battery level '71%'. Below the status bar is a header with three buttons: 'Cancel', 'Add Department', and 'Save'. The main area contains two text input fields, the first of which contains the word 'Groceries'. Below the input fields is a blue link that says '+ Add Department'. At the bottom of the screen is a navigation bar with four icons and labels: 'Inventory' (box icon), 'Departments' (house icon, highlighted in blue), 'Reports' (clipboard icon), and 'Settings' (gear icon).

## 4 – Reports

View your ‘Detailed Daily Report’, ‘Department Report’, ‘Report by Payment Type’, ‘zOut Report’, and export your ‘Inventory Report’ from the ‘Reports’ page.

In order to access all the reports other than the ‘Inventory Report’, you must enter the start and end dates and times that you would like to receive the data from. The ‘Start Date and Time’ automatically sets to exactly a month previous to the current date and time, and the ‘End Date and Time’ automatically sets to the current date and time.

Carrier 2:45 PM

**Get Report**

Start Date and Time:

2015/03/21

02:45:58

End Date and Time:

2015/04/20

02:45:58

[Export Inventory Report](#)

[View Detailed Daily Report](#)

[View Department Report](#)

[View Report by Payment Type](#)

[View zOut Report](#)

Inventory Departments **Reports** Settings

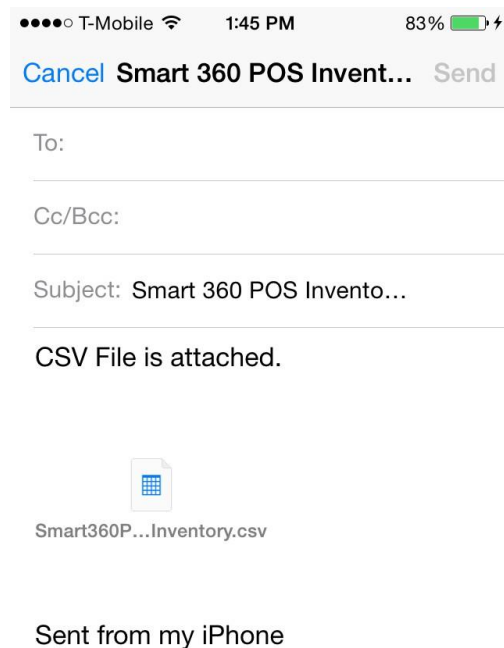
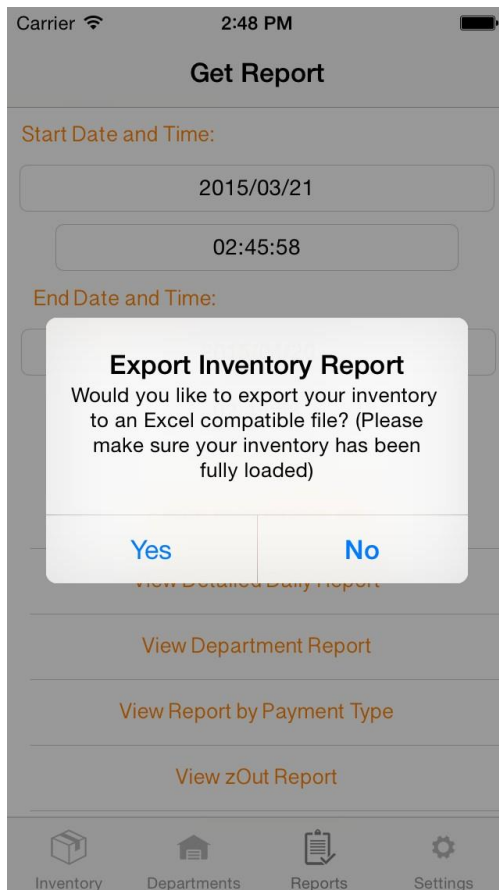
Carrier 2:48 PM

[Get Report](#) **zOut Report**

SALES TOTALS	
Total Undiscounted Sales	40.70
Whole Invoice Discounts	22.80
Net Sales	41.25
Net Tax1	
Net Tax2	23.46
Net Tax3	23.08
Grand Total Sales	25.46
Net Taxed Sales	124.05
Net Non Taxed Sales	

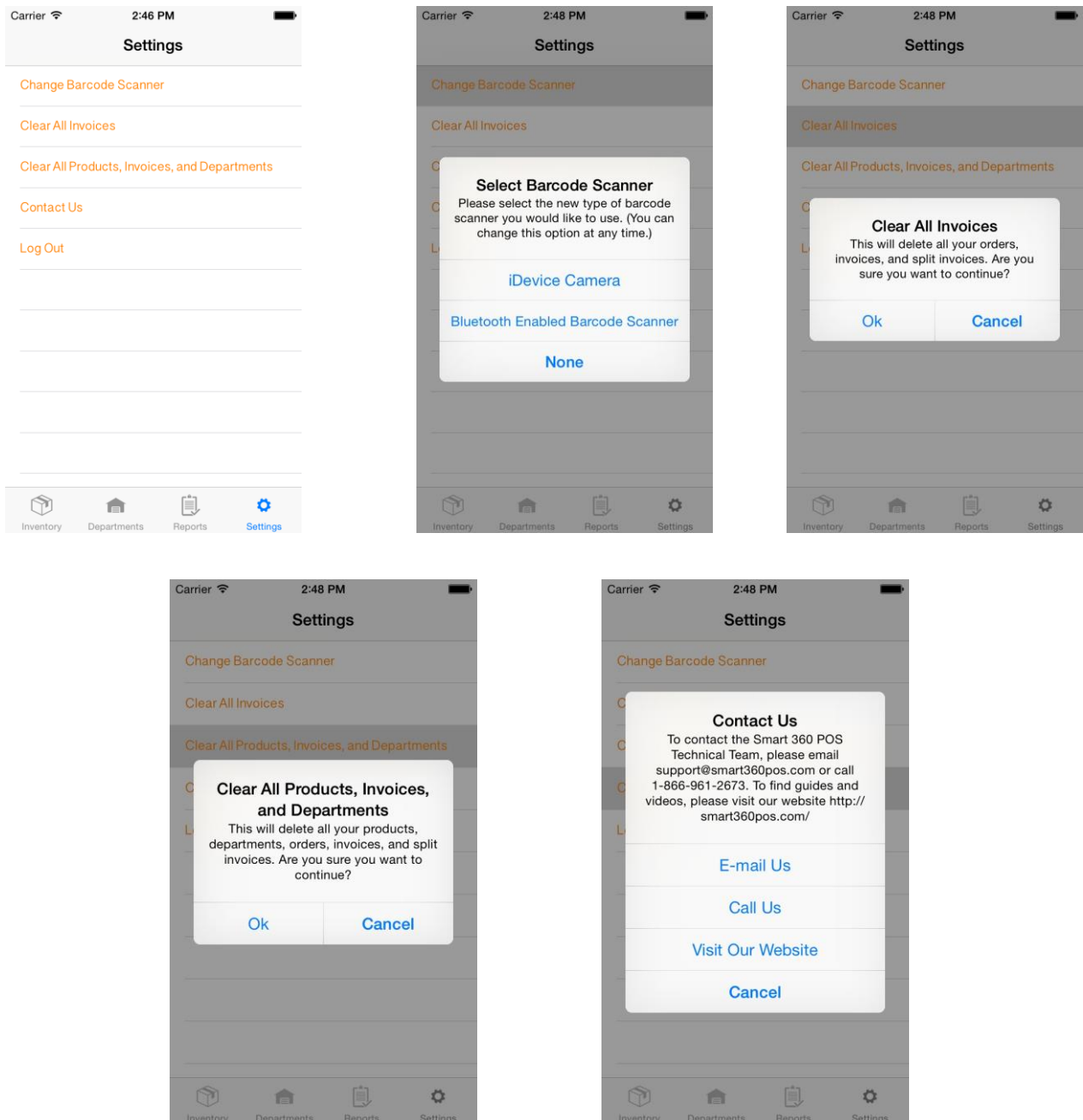
Inventory Departments **Reports** Settings

The 'Export Inventory Report' button allows you to export your inventory via e-mail to a CSV (comma-separated values) file that is compatible with Excel and can be imported into QuickBooks. **Please make sure your inventory has been fully loaded before you export the 'Inventory Report', otherwise not all your items will be exported to the report.**



## 5 – Settings

The 'Settings' page allows you to change your barcode scanner option, clear your invoices, clear your products and departments, get contact information and log out of the application.





## 6 – Tips and Tricks

--- When scrolling through the 'Inventory' or 'Department' page, if you wish to scroll back to the top, just tap on the time on the top of your screen. You will be automatically scrolled to the top of the page.

--- Easily import your inventory to QuickBooks using the 'Export Inventory Report' feature. You will be able to e-mail yourself a report with your inventory items in a CSV file that can be imported into QuickBooks right away.

--- In the 'Bulk Add' feature, if you press 'Done' without selecting a department, the department with id 1 will automatically be chosen.

--- In the 'Bulk Add' feature, the item name will automatically come up if the barcode is found in a database, otherwise you would have to enter the item name yourself.

--- If an item has reached your defined re-order level, the stock in the 'Inventory' page will be shown in red.