

# SouthWare Physical Counts via Handheld Quick Reference

## Operator

- **To Login**

Click on the appropriate link or bookmark as set up by your administrator and enter your name/password. Then select "Inventory Counts" from the menu. You may then enter a batch ID for your counts or default to your operator code as the batch ID (batch IDs are not applicable if you use Warehouse Tracking).

- **To Record Items**

The "Enter" section lets you scan or enter item counts.

- Scan or enter the item number. The program verifies that the item is valid.
- You may click on the "Assume Qty 1 per item" option to specify to assume a quantity of 1 for each item number entered. You may then scan the next item unless tracking/serial numbers are needed.
- If quantity is needed the screen will ask for quantity.
- If serial or tracking numbers/quantities are needed the screen will ask for them.

- **To Change the Batch ID**

Click on the Batch ID link shown above the entry field. This will display the Batch ID screen you used during login so that you may enter a different Batch ID.

- **To Undo the Last Item Count**

When you enter an item the screen shows the last item and displays an "Undo" button. This will undo the last item/quantity count entered.

- **To Review the Count(s) for an Item**

You may verify the counts already entered for an item by clicking on the "Review Item" link at the top of the page. This displays an entry field so that you may enter or scan an item number. Submit the item number to display a list of all counts for the item and the total counted.

- **To Access the Inventory Operator Menu**

Click on the "Menu" link at the top of the page. This displays the menu of available handheld inventory options.

- **To Log Off**

Click on the Logoff link to end your session and free up your license seat. The resulting page includes a link to start a new session.

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## Manager or Office Operator

- **To Set Up the Login Page on an Operator's Handheld**  
The NetLink request for inventory operator login is "wihhinvlogin". The URL would be "http://yourNetLinkpath?request\_id=wihhinvlogin" (with an optional "&co\_id=xxx" if you use multi-company). You should make it simple for the operator to access this by adding a bookmark, favorite, link, etc. that calls this URL.
- **To Set Up Logging of Operator Activity**  
In the Administrator portal you may use the Setup tab to configure the number of days of activity to retain. Then from the Operator tab you may zoom to the maintenance to activate logging for the operators to log.
- **To Review the Logged Activity for an Operator**  
You may use the Administrator portal to view today's activity for an operator. Click on an operator in the Operator tab list to view the report of today's logged activity.