

InventoryBook

By iDataCrunch
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<https://idatacrunch.com>

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Introduction

InventoryBook is a general purpose inventory management app which you can use in various settings such as Warehouses, Restaurants, Small biz, Retail Stores or just your Home to track your inventory, i.e. how much of what is where. Having a clear understanding of your inventory and log of activity helps you manage your operations such as ordering, production, shipping smoothly. Your data is backed by our secure cloud system, you will need to have access to a reasonable speed internet connection to use the app smoothly.


InventoryBook is an enterprise class solution packaged and offered to all consumers as an easy to use app at a very low cost.

Login / Signup

First Step in using the app is to sign up, a 14 day trial is included. No payment or itunes subscription is required during sign up, only after 14 days the app will ask you to subscribe. You can subscribe at any point during the trial. See subscribe section for details.

10:04 PM Mon Feb 1 100%

[Back to Login](#)



Inventory Book New User SignUp
14 day Free Trial

Email

First Name **Last Name**

Password
 (8 chars min)

Business users, providing Company Name, location, helps us provide better service.


Company
 Optional

City **State** **Country**

Optional Optional Optional

By clicking **Sign up**, you agree to our [Terms of Service](#) & [Privacy Policy](#).

Sign Up

InventoryBook By iDataCrunch

[Support](#)

Required: Email, First Name, Last Name, Password (8 chars min).

Optional:

- Company Name, if provided will help us support you better
- City, State, Country. If provided will help us route your support.

Review our privacy policy and terms which can be found at

<https://idatacrunch.com/about-us>

Note that we are a subscription based service and we will not rent or sell your data. We are based in the US in the SF bay area.

Post Signup

You will see an alert box welcoming you. You will also receive an email asking you to validate your email address this will come from our hosting service with address `monitoring@netandhost.com` and subject line: Please verify your email, the link will be to our server of the form `https://idc-scm.idatacrunch.com/<other encodeddata>`.

You can login to the system right away. If at any time you forget your password you can reset it via an email link that will be sent to your registered email.

A test item is already created for you to play around with. Preset locations are already created for you to hit the ground running.

Quick Start: Operation Sequence With The Test Item

For first time users we recommend performing some inventory operations on the test item to understand the flow. Details on each screen are provided in this manual which you can come back to after initial testing.

Receive

Receive some inventory - for starters receive say 2 cases of the test item in the receive screen, just enter a quantity, leave the unit of measure as CASE, and click on the check box, this marks the process of you receiving an item to your facility (which could be your biz, home, a restaurant, a warehouse etc). All inventory is received into the system via the Receive operation.



Select the test item and then enter a quantity in Receive Qty and then click on the green Check box. The display of inventory is informational, you will always receive product to a location called “Receiving”. You have received the item! If all went well you will hear a bell. Tap on the item again and you will see the inventory updated in “Receiving”

Move

Note that the system automatically creates some locations for you - Receiving, Ambient, Freezer, Refrigerated, Production, Shipping

Now we will move the test item to another location in the facility. For the quick start sequence first tap on the test item, then select *From* as *Receiving*, *To* as say *Ambient*, select quantity as say 2 leave unit of measure as CASE. Click on green check box, now you have moved inventory to Ambient from receiving. Here we are showing the follow where you open a package in your receiving doc/location and move it to its first destination. In your daily operations you will be performing many such move operations.

10:52 AM Sun Feb 21 44%

Ship Stocktake Logout

Item Number 1000000021

Item	Item Name	Vendor / Supplier
1000000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
1000000022	SWEET KALE > BULK	General Supplier
1000000031	APPLES FUJI	General Produce

From Receiving

From Inventory Location
Refrigerated 1.00 CASE
Receiving 16.00 CASE
Ambient 0.00 CASE
Freezer 0.00 CASE

Pick Lot (Default...
6414371
L123

Clear lot in From

To Refrigerated

To Inventory Location
Refrigerated 1.00 CASE Lot:6414371,L123
Receiving 16.00 CASE Lot:6414371,L123
Ambient 0.00 CASE Lot:
Freezer 0.00 CASE Lot:

Quantity 2

LB Lb Oz Gg Kg Pallet

Receive Move Adjust Ship Reports Setup Settings

Adjust

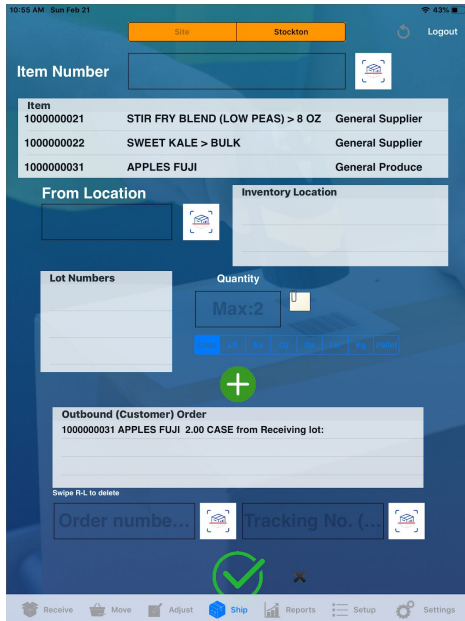
Here you are adjusting the inventory, typically performed as part of inventory control to correct errors and discrepancies. Let's say 1 case got damaged during our move from Receiving to Ambient, in this screen you will update the inventory in Ambient.



Select the test item, then select the Inventory location as Ambient where you should see inventory because you moved it there in the previous step. Now change the quantity here from say 2 to 1 to account for damage. Click on the notes icon and note down a test log of what happened. Come back to the screen and click on the green check box, you have now Adjusted inventory! Tapping on the item again will show the adjusted inventory.

Ship

Inventory is eventually consumed somewhere, in the case of warehouses it is packed up and sent off as packages fulfilling customer orders. For restaurants it is the customer order that consumes the inventory. For your home it is just you using up the inventory. Ship is the screen where the inventory is eventually decremented.



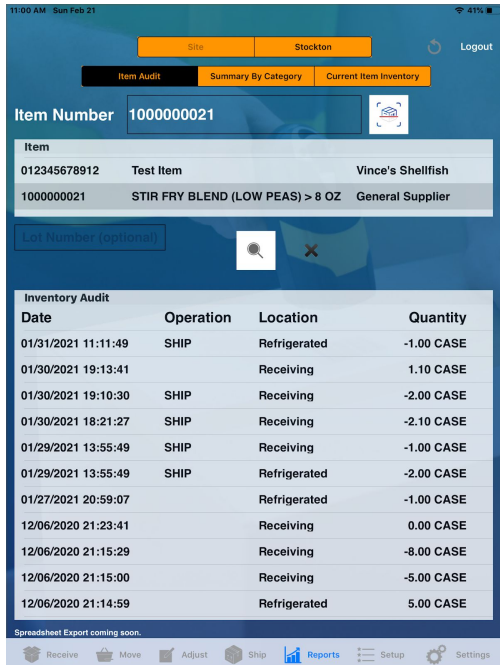
Select the Test Item, then select Ambient and then select some available quantity say 1 and then hit the green plus button to add it to the order or consumption.

Now click the check box to record your ship operation! Though the operation is called Ship it might just be you consuming the inventory.

Congrats - so far you have performed Receive, Move, Adjust, Ship on the test item, the inventory came in and got consumed! Now let's check some reports.

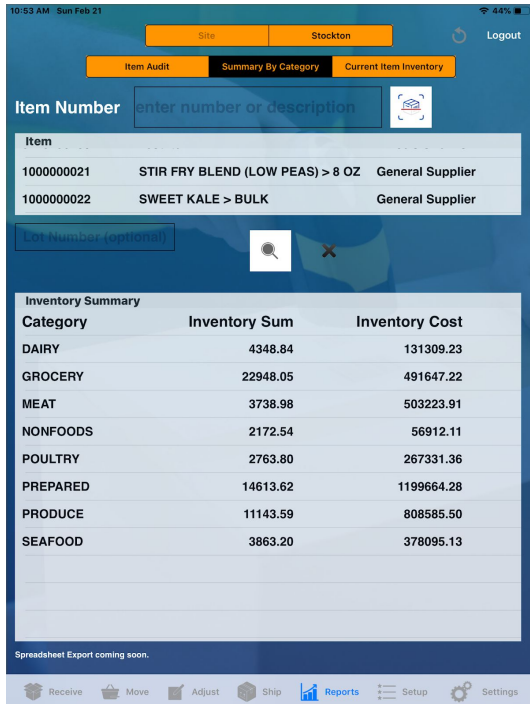
Reports

We have 3 reports (more to come in future versions) - Audit Report, Category Summary and Item Inventory.



Tap Audit and select the test item. Click on the search button. You will see a list of all the operations you just performed. Tap on the table rows to see more details.

Category Summary: Here you see the summary view of inventory in your system, item selection is not required in this report. You will see quantity and cost - the cost is based on the item's price. The quantity is total quantity (to be noted that in this report we assume all quantities are same unit, more in details section)



Current Inventory report: Shows how much of what is where. Select the test item and get a report.

Note export to CSV will be released in the upcoming version at no additional cost to you.

This concludes the section on Quick Start with the test item! As you can see we have tracked inventory movements in your facility with the help of InventoryBook. Now more details in the next section.

Subscription


If you like our app and would want to use it regularly please subscribe to our monthly plan. Go to the Receive tab and tap the subscribe button. Details section provides more info. We have a monthly subscription plan which includes support for 500 items.


Detailed Manual


We highly recommend you to read the quick start section above first. Now we will start using the app to suit your needs and explore various features in this section.


We will go through : master data setup, inventory operation details, reports and subscribe.

First introducing some common icons:

Scanners: Wherever you see the scan icon  you can scan that field from barcode/QR code using the camera or a bluetooth scanner.

Hit the refresh  button to clear any entries and refresh with the latest data. You might lose you changes if not saved using the checkbox.

Wherever you see  you can tap on it and add notes to the operation. In upcoming releases we plan to add ability to tag photos. If a note is added a tiny pencil icon will appear under it. You can edit the note before saving.

 icon is where you tap to save or complete a transaction. If successful you will hear a bell followed by a refresh of the screen and a toast message at the bottom.

 icon is where you cancel out a transaction, and remove any transient data.

Common Terms:

UOM - unit of measure - e.g. CASE, LBS, Liters

Lot Numbers: These are tags found on products indicated a manufactured batch, useful for recall tracking.

Master Data: Refers to your Items, Locations

Vendor: Supplier of the item

Master Data Setup

The screenshot displays a mobile application interface for Master Data Setup. At the top, the status bar shows the time as 10:48 AM on Sun Feb 21 and a battery level of 46%. The app header includes a 'Site' dropdown set to 'Stockton' and a 'Logout' button.

Items

Search by item number or description [Barcode icon]

Item: Number, Desc.
1000002 SWEET KALE > BULK
10000021 STIR FRY BLEND (LOW PEAS) > 8 OZ
1000000 APPLES - FUJI

+ Add Item

10000021 [Barcode icon] **STIR FRY BLEND (LOW PEAS) > 8 OZ**

*** Item Number Uniquely identifies item, used in inventory operations, can be numbers and/or chars. Required. Consider using item bar code or case UPC code.**

*** Description of the item, useful for searching item. Required.**

PRODUCE

Category of item. Useful in reporting.

23.17 **24.00** **1.00** **General Supplier**

Unit price. Price per procured unit. Default 0. **Numbers of Units/Eaches per Case. Number defaults to 1.** **Numbers of Case in a Pallet. Number defaults to 1.** **Vendor of item, defaults to blank.**

Alternate Id (optional) [Barcode icon]

Alternate Id such as UPC, or Vendor item number.

Save [Green checkmark icon] [Red X icon]

Delete operations - coming soon.

Locations

+ Add Location

Location: Name, Type
Ambient AMBIENT
C1101A AMBIENT

Location Name, Requ... *** Name, unique in facility**

Ambient **Freezer** **Fridge** **Receive** **Ship** **Prod** **Oth.**

*** Location type for reporting, defaults to Ambient**

Receive **Move** **Adjust** **Ship** **Reports** **Setup** **Settings**

Setup new items, individual subscriptions allow for 500 items, 2000 transactions a day (plenty!).

Item Setup

Tap the green plus icon in the Items section, to start creating a new item.

Item Number:

Enter an item number or just scan its barcode/QR code using your camera. Standard bluetooth scanners will also work. Note that every item needs to have a unique number in InventoryBook. If there is an existing item with the same number add a prefix or suffix. Item Numbers can be characters and numbers. They can also be in a different language. In typical biz situations Item Number is the case upc, that is the barcode found on a case of the product; as mostly commonly you will purchase cases of products in a biz.

Item Description:

Enter a friendly name or description for the item e.g. "FUJI APPLES" you can search by the description or the name in various screens.

Category:

Use consistent category schemes so your reports are clean. If you are unsure of the Category, tag it as such e.g. "General" or something like that.

Unit of Measure (UOM):

This is the unit of measure of the item, typically businesses set to this to how the product is received. E.g. if the product is received in CASE then leave it as CASE. If unsure, leave as CASE, you can always come back and change it. Use Ga, LBS if you receive in bulk/loose and there is no packaging for it with a barcode. E.g. produce at home. Items with UOMs in LBS, Ga, Oz, Kg cannot be converted to cases and pallets during inventory operations, they are always in the same unit of measure.

Price:

Price of the item in your currency. InventoryBook does not do any currency conversions as of now. We assume all items are in currency that is local to the user.

Units Per Case:

This is the number of eaches in a case, e.g. a 6 pack has a Units per Case of 6. If this info is entered, you can perform inventory operations both in eaches and Cases. Defaults to 1.

Cases Per Pallet:

If you receive inventory in Pallets you can set up how many cases make a pallet. If you set both the units per case and cases per pallet correctly, you can perform inventory operations in either units, cases or pallets - giving you most flexibility. I.e. you can receive a pallet of product X, move 5 cases to Ambient, 3 eaches from Ambient to Production etc. Default to 1.

Vendor (optional): Vendor name of the product for your location. At a time we support one vendor tag; this is informational only for now.

Vendor Item Number (optional): If you want to track a different id given by the vendor, this is informational only and used in our enterprise deployments.

After creating a new item, the first step is to receive some of it in the receive screen, you cannot directly add new item inventory to a different location; it has to go to Receiving first, followed by Move. You cannot perform Move, Adjust, Ship operations on new items till have you received some inventory for it in the Receive screen. You could simulate a dummy receive if needed followed by an adjust down to create the inventory records.

CSV Uploads: Our enterprise deployment allows bulk upload/download of items via CSV. Contact support for details on enterprise deployment.

Editing items: Just tap on the item and change as needed and click on the green check box.

Deletion: Not currently supported use update to repurpose.

Location Setup

You can create new locations in your facility as needed. Tap the green plus to add a new location, enter a name which has been unique in your facility and type of location. Click on the check box to create the location. We advise you to stick to the standard locations and perhaps add a few more, too many locations can get confusing to you.

Enterprise customers can upload CSVs with Location data.

Update: You can update name and type and save.

Deletion: Not currently supported use update to repurpose.

Receive

10:51 AM Sun Feb 21 44%

Site Stockton Logout

Item Number 100000021

Item	Description	Supplier
012345678912	test item	vince's stevens
100000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
100000022	SWEET KALE > BULK	General Supplier
100000031	APPLES FUJI	General Produce

Inventory

Inventory Location

- 100000021 @ Receiving 16.00 CASE Lot:6414371,...
- 100000021 @ Refrigerated 1.00 CASE Lot:641437...
- 100000021 @ Ambient 0.00 CASE Lot:

Receipt Qty Rejected Qty

Case LB Ea Oz Ga Ltr Kg Pallet

Vendor PO Optional

Lot Number Optional

Expiry Date Optional

Receive Move Adjust Ship Reports Setup Settings

Select item, enter Receipt Qty in the UOM. You can tag a rejected quantity which will appear in reports. Make sure to receive in correct UOM (unit of measure). See master data section for details.

Lot number: Optional. This is the lot number you will find on products that indicates a manufacturing lot or tag for recalls. The lot number is inherited as the inventory moves along your facility. A new lot can only be introduced during receive.

Vendor PO: Optionally identifies the vendor PO number for inbound processes. Enterprise versions have enhanced received workflows based on Vendor POs.

Expiry Date: Item's expiry date.

Notes: Tap notes to capture any specifics on the receive. Next release will have ability to tag photos.

Click on the Green check box to complete the transaction.

Move

10:52 AM Sun Feb 21 44%

Site Stockton Logout

Item Number 100000021

Item	Item Name	Supplier
100000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
100000022	SWEET KALE > BULK	General Supplier
100000031	APPLES FUJI	General Produce

From Receiving

From Inventory Location

Refrigerated	1.00 CASE
Receiving	16.00 CASE
Ambient	0.00 CASE
Freezer	0.00 CASE

Pick Lot (Default...)

6414371
L123

Clear lot in From

To Refrigerated

To Inventory Location

Refrigerated	1.00 CASE Lot:6414371,L123
Receiving	16.00 CASE Lot:6414371,L123
Ambient	0.00 CASE Lot:
Freezer	0.00 CASE Lot:

Quantity 2

Case LB Ea Oz Ga Ltr Kg Pallet

Receive Move Adjust Ship Reports Setup Settings

Choose Item, From, To and Quantity. When moving you can select the lot number that you are moving in the pick lot. By default all lots numbers will move and get tagged to the To location. Set clear lots to on if you want to clear that lot on the From inventory post move.

UOM conversions only happen for CASE->EACH->Pallet when the Item UOM is CASE/PALLET/EACH and conversion factors are setup correctly. Else always move in same UOM as Item.

Adjust

11:02 AM Sun Feb 21 Site Stockton Logout

Item Number 100000021

Component	Test Item	Supplier
012345678912	Test Item	Vince's Shellfish
1000000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
1000000022	SWEET KALE > BULK	General Supplier
1000000023	APPLES FULL	General Supplier

Location Refrigerated

Inventory Location

- Refrigerated 1.00 CASE
- Receiving 16.00 CASE
- Ambient 0.00 CASE

Quantity 1.00

Lot Numbers	PO Numbers	Expiry Dates
6414371	2001052	20190620
L123	0123	

Swipe R-L to delete entries in above tables.

Receive Move Adjust Ship Reports Setup Settings

Select item, inventory location to adjust. You can adjust quantity. Lot numbers, po numbers and expiry dates can be removed by swiping left. Click on the green check box to save your transaction. Add notes optionally.

This operation is performed during inventory audit to account for discrepancies.

Ship

10:55 AM Sun Feb 21 43%

Site Stockton Logout

Item Number

Item		
1000000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
1000000022	SWEET KALE > BULK	General Supplier
1000000031	APPLES FUJI	General Produce

From Location

Inventory Location

Lot Numbers

Quantity

Outbound (Customer) Order
1000000031 APPLES FUJI 2.00 CASE from Receiving lot:

Swipe R-L to delete

Order number...

Tracking No. (...)

Receive Move Adjust **Ship** Reports Setup Settings

Inventory gets consumed in Ship from the “From Location”. You can select which lot number went into the shipment. Enter quantity and add with green plus icon. You add the same item multiple times here from different locations.

Enter the customer order number and tracking info for reporting. Click on green check box to save.

Reports

Every transaction that happens is logged in the backend DB in our cloud system, previous quantities are tracked as well.

Audit shows the lineage of the item inventory, what operations happened on this item. Taping on the row shows more data. You can optionally filter by Lot number (case insensitive).

The screenshot shows a mobile application interface for inventory management. At the top, there's a header with 'Site' set to 'Stockton' and a 'Logout' button. Below this are three tabs: 'Item Audit' (selected), 'Summary By Category', and 'Current Item Inventory'. A search bar for 'Item Number' contains '100000021'. Below the search bar is a table of items:

Item		
012345678912	Test Item	Vince's Shellfish
100000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier

Below the items table is a 'Lot Number (optional)' search field with a magnifying glass icon and a close button. The main part of the screen is an 'Inventory Audit' table:

Date	Operation	Location	Quantity
01/31/2021 11:11:49	SHIP	Refrigerated	-1.00 CASE
01/30/2021 19:13:41		Receiving	1.10 CASE
01/30/2021 19:10:30	SHIP	Receiving	-2.00 CASE
01/30/2021 18:21:27	SHIP	Receiving	-2.10 CASE
01/29/2021 13:55:49	SHIP	Receiving	-1.00 CASE
01/29/2021 13:55:49	SHIP	Refrigerated	-2.00 CASE
01/27/2021 20:59:07		Refrigerated	-1.00 CASE
12/06/2020 21:23:41		Receiving	0.00 CASE
12/06/2020 21:15:29		Receiving	-8.00 CASE
12/06/2020 21:15:00		Receiving	-5.00 CASE
12/06/2020 21:14:59		Refrigerated	5.00 CASE

At the bottom, there's a navigation bar with icons for 'Receive', 'Move', 'Adjust', 'Ship', 'Reports', 'Setup', and 'Settings'. A note at the bottom left says 'Spreadsheet Export coming soon.'

Summary is a grouping view by Category and Current Inventory is a list of every place where the items is present in your facility. Note that summary inventory quantity is not relevant if you have a mix of UOMs i.e. if you have 2 items one in LBS and another in CASES the summary will show raw counts and not convert. Inventory cost shows the currency value of the inventory.

10:53 AM Sun Feb 21 44%

Site
Stockton
Logout

Item Audit
Summary By Category
Current Item Inventory

Item Number

Item		
100000021	STIR FRY BLEND (LOW PEAS) > 8 OZ	General Supplier
100000022	SWEET KALE > BULK	General Supplier

Lot Number (optional)

Inventory Summary		
Category	Inventory Sum	Inventory Cost
DAIRY	4348.84	131309.23
GROCERY	22948.05	491647.22
MEAT	3738.98	503223.91
NONFOODS	2172.54	56912.11
POULTRY	2763.80	267331.36
PREPARED	14613.62	1199664.28
PRODUCE	11143.59	808585.50
SEAFOOD	3863.20	378095.13

Spreadsheet Export coming soon.

Receive
 Move
 Adjust
 Ship
 Reports
 Setup
 Settings

Current Inventory Report: Shows current inventory for the selected item. Filterable by lot number.

10:54 AM Sun Feb 21 43%

Site **Stockton** Logout

Item Audit Summary By Category **Current Item Inventory**

Item Number

Item		
100000022	SWEET KALE > BULK	General Supplier
100000031	APPLES FUJI	General Produce

Lot Number (optional)

Inventory Report			
Location	Quantity	Lots	Notes
Refrigerated	2.00 CASE	6412756,20190...	
Receiving	38.00 CASE	6412756,20190...	
Kitting	0.00 CASE		
Preparation	0.00 CASE		
Ambient	0.00 CASE		
Freezer	0.00 CASE		
Production	0.00 CASE		
C1209B	0.00 CASE		
C1207A	0.00 CASE		
C1204C	0.00 CASE		
C1202B	0.00 CASE		

Spreadsheet Export coming soon.

Receive
 Move
 Adjust
 Ship
 Reports
 Setup
 Settings

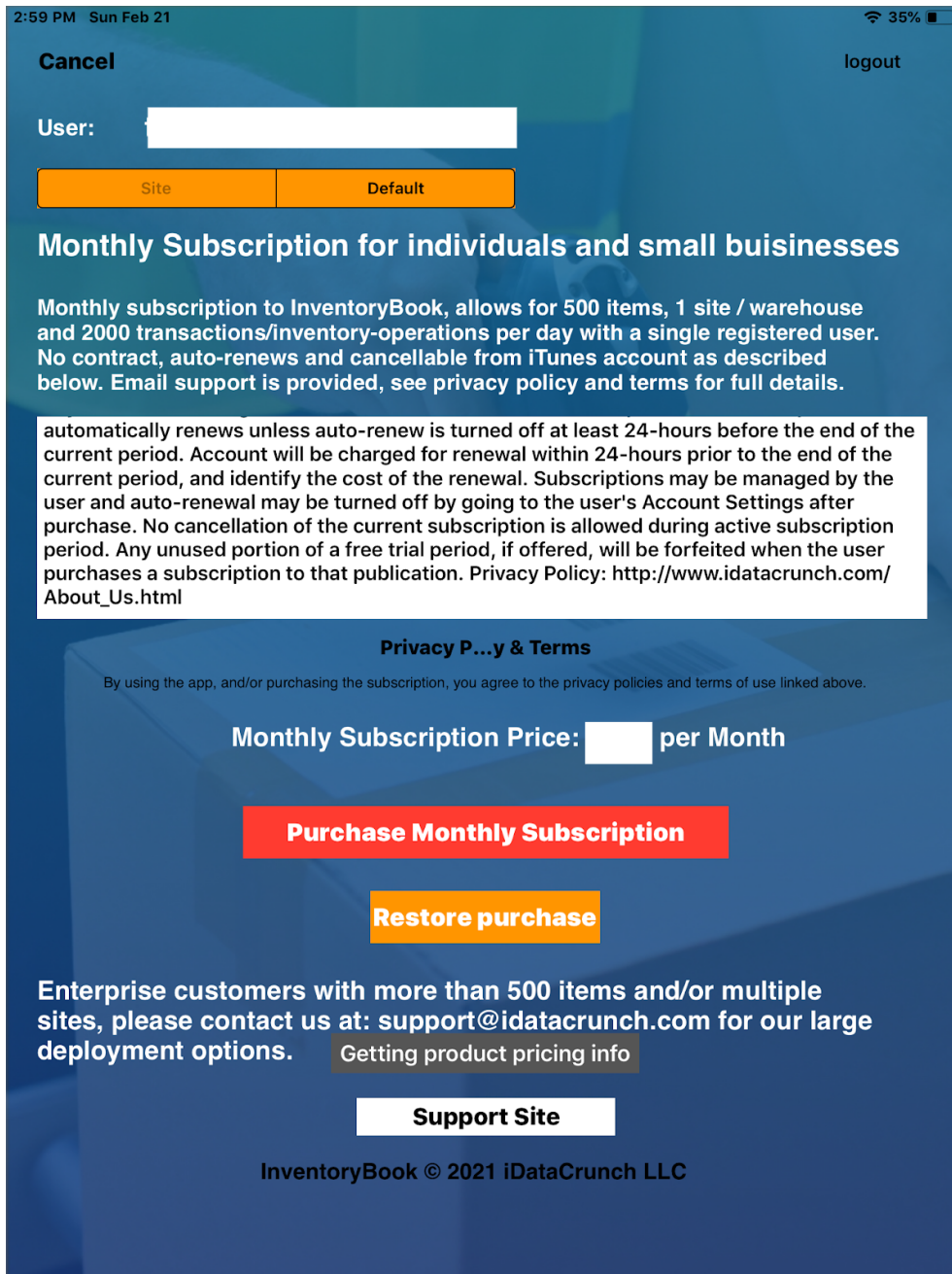
CSV Export: Planned in next release.

Enterprise Customers: Have access to more detailed reports such as excess inventory, stale inventory through web dashboard.

7d, 30d transaction report in upcoming release.

Subscribe

Subscribe to InventoryBook from the Receive tab. Tap on Subscribe and you will see the monthly subscription rates (subject to change, check latest on the app during signup). Monthly subscription terms are shown on this screen, with information on auto-renewal. One subscription is per a single registered user for 500 items max and 2000 transactions per day.



Contact

More Questions, want details on enterprise pricing?

Contact support@idatacrunch.com

And one of our associates will reach out to you.