



Setup and user guide

AP Mobile v1.2.4 for iOS and Android

TABLE OF CONTENTS

1. System Requirements
2. Getting Started
 - a. Installation (Server Side)
 - b. Mobile Device Installation
 - c. User Setup
 - d. Configure your AP Mobile
 - e. Logging in
3. General use
 - a. Incoming Vendor Orders
 - b. Outgoing Customer Orders
 - i. Picking
 - ii. Packing
 - c. Warehouse Management
 - i. Cycle Counts
 - a. Creating a Cycle Count
 - b. Completing a Cycle Count
 - ii. Transfers
 - iii. Adjustments
 - d. Lookup

1. System Requirements

Minimum System Requirements

- A local or cloud-hosted Advancepro Server with Mobile configured
- An android 4, or an iOS 8+ device
- A bluetooth infra-red scanner peripheral (unless the device has a built-in scanner)

Recommended devices

all-in one solution

- Opticon H-27

Standalone handheld devices

- iPhone 4s or higher
- iPod 5th Generation or higher
- iPad mini 3rd generation or higher
- iPad 4th generation or higher
- Samsung galaxy S3 or higher

Recommended Scanning Peripherals

- Opticon PX20
- Socket Mobile CH8 8Ci

2. Getting Started

a. Installation (Server Side)

This process must be performed by an AdvancePro Technical Specialist. To begin using AP Mobile - please contact your account manager or call toll-free at:

1 (800) 970-9071

Be sure to record your Service URL and your Security Key

b. Mobile Device Installation and updates

You can download the latest version of AP mobile to any iOS device from the app store.

You can also download from the google play store on android devices.

c. User Setup

To set up or configure users for AP mobile:

1. Logged in as a Super Admin user, navigate to Admin>Site Administrators.
2. If creating a new user, click 'add new' if editing an existing user, scroll down the user list and click the checkbox next to the desired username.
3. To enable AP mobile use, check the 'AP Mobile User' checkbox (note that you cannot have a user with the same username and password for both desktop and mobile applications)
4. If creating a new user, please fill in relevant information, including login and password (required fields marked in red).
5. To allow the AP Mobile user to make adjustments to stock quantities using the mobile adjustment feature, check the 'Enable QTY Adjustments' checkbox
6. To Set user permissions for actions the AP mobile user can take - click on the 'AP Mobile Settings' button that appears when the 'AP Mobile User' checkbox is enabled.
 - a. The 'Inbound' checkbox allows the user to receive vendor orders into the warehouse
 - b. The 'Outbound' checkbox allows the user to pick and pack customer orders.
 - c. The 'Warehouse' checkbox allows the user to execute warehouse and picking location transfers, Adjustments (if allowed) and Cycle Counting.

- d. The 'Lookup' checkbox allows the user to search the AdvancePro database using the Lookup feature.
- e. Use the Manage warehouse button to associate the user with particular warehouses where they can execute their job functions.
- f. Use the settings on the 'Manage Preferences' tab to configure the information displayed with a product on a document and the order products will appear on an order.

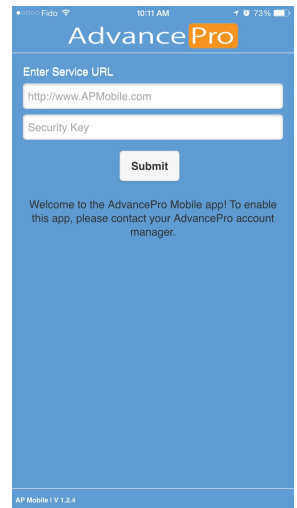
d. Configure your AP Mobile

The first time you start the AP Mobile app, you will be required to provide a Service URL and a Security Key. you can always reset this information by clicking the gear icon in the lower right.

Keep in mind that your Service URL might start with either HTTP:// or HTTPS:// - you must include this portion of the URL. if your URL is invalid during login, ensure that your server is set to maintain a static IP address.

e. Logging in

Enter the Username and password for an AP Mobile enabled user from AdvancePro, select the company the user will login to and tap the login button



3. General use

a. Incoming Vendor Orders

To receive an incoming Vendor Order using APMobile:

I. From the main menu, tap the 'Inbound' button. This will take you to the 'Expected Today' filter, which is based on the expected date on the order in AdvancePro.

II. If there are orders expected today, they will be displayed in this filter, you will be able to open an order by tapping on it.

III. If there are not orders expected today, you will see a link to the 'To receive' filter, which shows all non-received



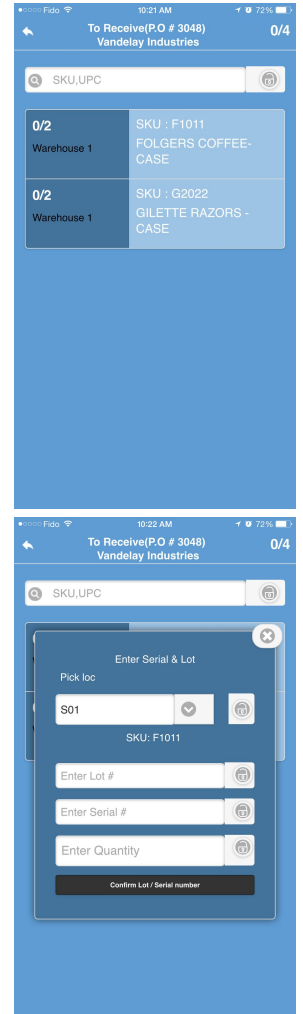
orders. you can also access this filter from the menu button in the upper left. (using the same menu button, you can access the 'partially received' and 'received' filters as well).

IV. Once you have opened an order you will see a list of the products expected. you can scan or tap a product to bring up the product entry popup.

V. This popup allows you to set the location where you will receive the goods (the product's default picking location will be selected by default) It also allows you to enter the serial or lot information for the product (For products using serial numbers, set the lot number first if applicable, then scan or input serial numbers one at a time until you have receive all item. For products using lot only, set the lot and quantity being received, you can receive into more than one lot) Close this window at any time to receive fewer items than ordered.

- a. If you are scanning items by UPC or SKU only (not recording any Lot or Serial # items) and do not require the Picking location to be displayed on the screen, you can click the lock button in the scanning field to disable this popup for a faster product scanning workflow.
- b. If you are receiving items with serial numbers only, or lot numbers only, you can 'lock' the relevant fields to disable them or to use the same content repeatedly (in the case of a lot).

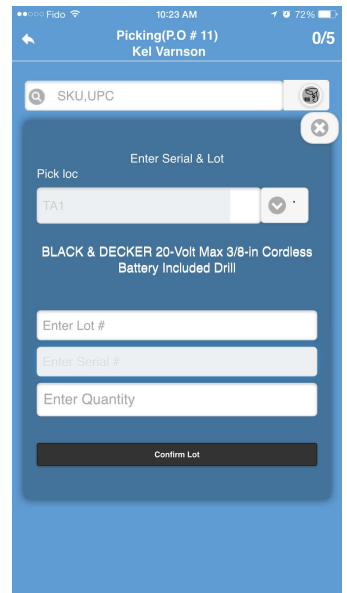
- VI. Repeat step V for each item being received.
- VII. Once you have successfully received each item, tap the complete order button, and enter the bill or reference number for this order. This will finish receiving the order and return you to the relevant order list



b. Outgoing Customer Orders

i. Picking

- a. From the main menu, tap the 'Outbound' button. This will take you to the 'Picking' filter, which is based on the order's pick/pack/ship status in advancepro.
- b. Tap an order in the display to open that order for picking. you can also tap the menu button to change filters to view the 'Pack' filter (see below).
- c. Within the order screen items on the order will be listed, along with the optimum picking location to retrieve the items from. Scan an item by SKU or UPC or tap the item to open the product entry popup
- d. On the Product entry popup you can change the picking location that the product is being picked from to any location that the product is in. locations that do not contain the product will not be allowed. you can also scan serials (one at a time) or lot numbers with the qty from each lot being picked. Close this popup at any time to short-ship the items.



I. If you

are scanning items by UPC or SKU only (not recording any Lot or Serial # items) and do not require the Picking location to be displayed on the screen, you can click the lock button in the scanning field to disable this popup for a faster product scanning workflow.

II. Items that currently have any Lot or Serial numbers associated with them in Advancepro will require those numbers to be registered at the time of picking.

- e. Repeat step d until the order is fully picked, then tap 'complete order' to finish picking this order. You will then be prompted if you want to Pick and pack the order, or Pick the order only.

ii. Packing

To pack an order, tap an order in the 'pack' filter, to open a similar screen to the picking process, repeat steps c and d above to pack the order.

c. Warehouse Management

i. Cycle Counts

a. Create Cycle Count

To create a cycle count:

- I. From the Main Menu, Navigate to Warehouse> Cycle count and click the '+' button in the upper right
- II. Fill out the cycle count name, assign a user (default selection is the current user), select a warehouse, and filter by picking location, vendor, category, or by a custom field value. Then tap the 'next' button
- III. AP mobile will populate a list of the products eligible to be counted. check off the products you will be counting with this cycle count
- IV. Tap save cycle count to save this cycle count for later completion, or tap start cycle count to count immediately.

b. Complete Cycle Count

To complete a cycle count

- I. Use the steps provided above to create a new cycle count and choose to start a cycle count OR navigate to Warehouse>Cycle count and tap a cycle count from the list with the status 'in progress'
- II. Scan or tap each item to bring up the product entry popup.
- III. From this popup, you can enter the quantity counted, and a comment (optional).
- IV. Repeat the above steps until you have completed your count. then tap 'complete' to finish the cycle count in AP Mobile. The count must be approved from AP Desktop before the new stock quantity is recognized.

ii. Transfers

- a. To perform a picking location or warehouse transfer, navigate to Warehouse > transfer
- b. Select the picking location you will be picking from (this can be scanned or chosen from a drop down) - this can also be locked so it is used for subsequent transfers.
- c. Select the destination warehouse - this can also be locked so it is used for subsequent transfers.
- d. Select the destination picking location - this can also be locked so it is used for subsequent transfers.
- e. Enter a reason for the transfer - this can also be locked so it is used for subsequent transfers.
- f. Enter a quantity for the transfer (if scanning by serial #, this will always be 1.
- g. Choose how you will be selecting the item (SKU, UPC, Serial, Lot)
- h. Scan the item using the criteria chosen, if you are using the serial # option you also have the option of scanning the lot in addition to the serial number so that you can verify the lot for various purposes.
- i. If you have manually entered the item and not scanned it, you will need to tap the transfer button at the bottom to complete the transfer.

iii. Adjustments

- a. To create a positive or negative inventory adjustment, navigate to Warehouse > Adjustments
- b. Select whether this will be a positive or negative adjustment, and choose the criteria you will use to select the product (SKU, UPC)
- c. Enter the quantity being adjusted
- d. Enter a reason for the adjustment

- e. Depending on the adjustment type, you will be able to tap either an add or reduce button.
- f. After tapping add or reduce, you will be taken to a picking location and serial/lot number entry screen. If using serials to add or remove product you will be required to scan the serials one at a time. if you are using lots, you must enter a quantity associated with the lot. if you are adding lots with serials, you must enter the lot # prior to scanning the serial #
- g. When finished, tap complete to reduce or add the items.

d. Lookup

- i. To look up item details, from the main menu navigate to 'Lookup'
- ii. Select the criteria you are searching by (SKU, UPC Serial # Lot # Pick Location)
- iii. Scan or manually enter the information
- iv. A list of product will display based on the best matches to your search terms.

