

Admin Utilities Guide

Utilities in AdvancePro

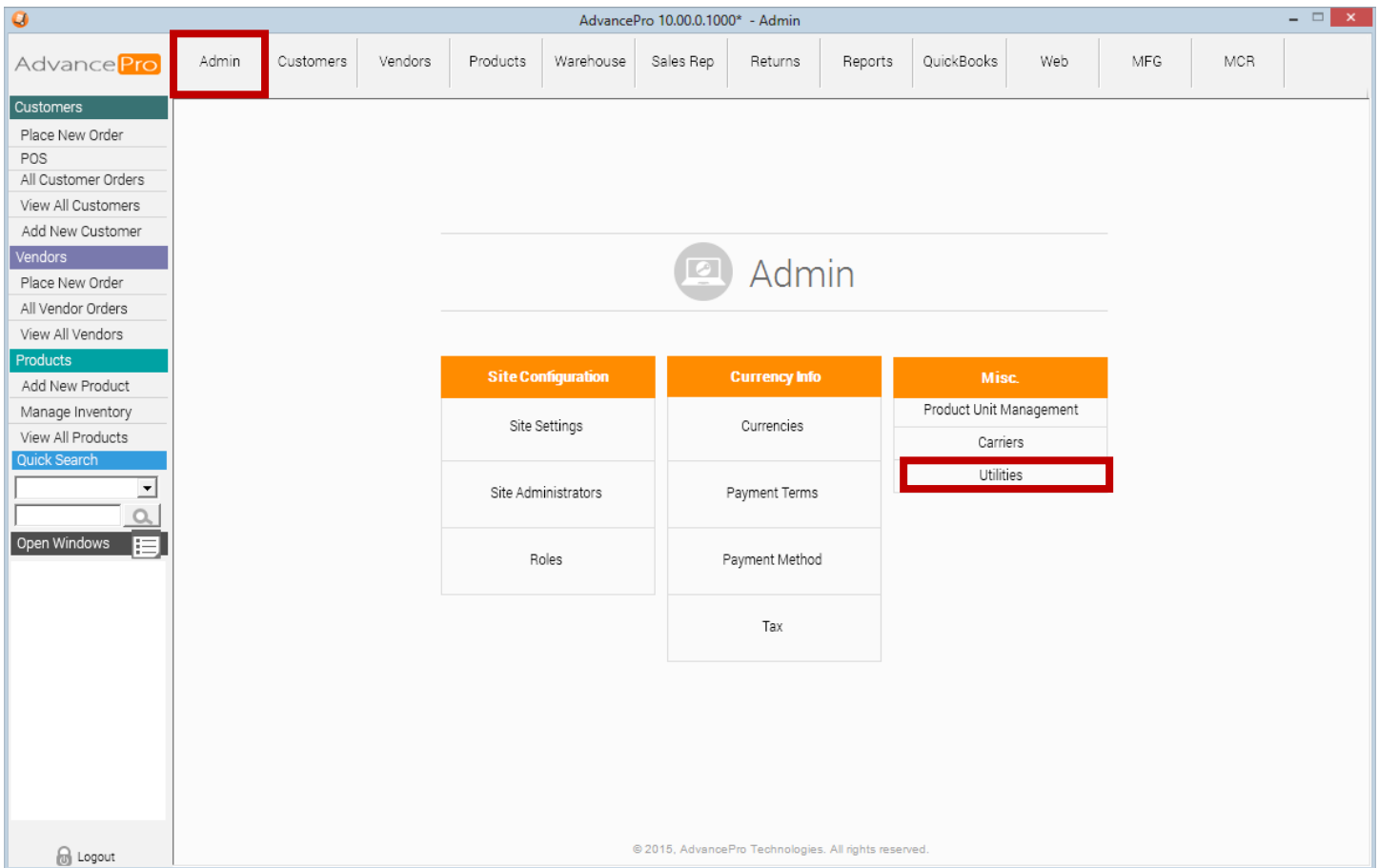
AdvancePro is a robust program with many options and settings. You will find access to functions such as backing up your database, setting up certain features and setup of modules in AdvancePro's Utilities.

In this guide, we will walk you through a few of the functions that you can perform using the 'Utilities' in AdvancePro, including:

- 1) Checking your version of AdvancePro
- 2) Backing Up Your Database
- 3) Excel Import
- 4) Setting Up Payment Processor
- 5) Setting Up Multiple Picking Locations

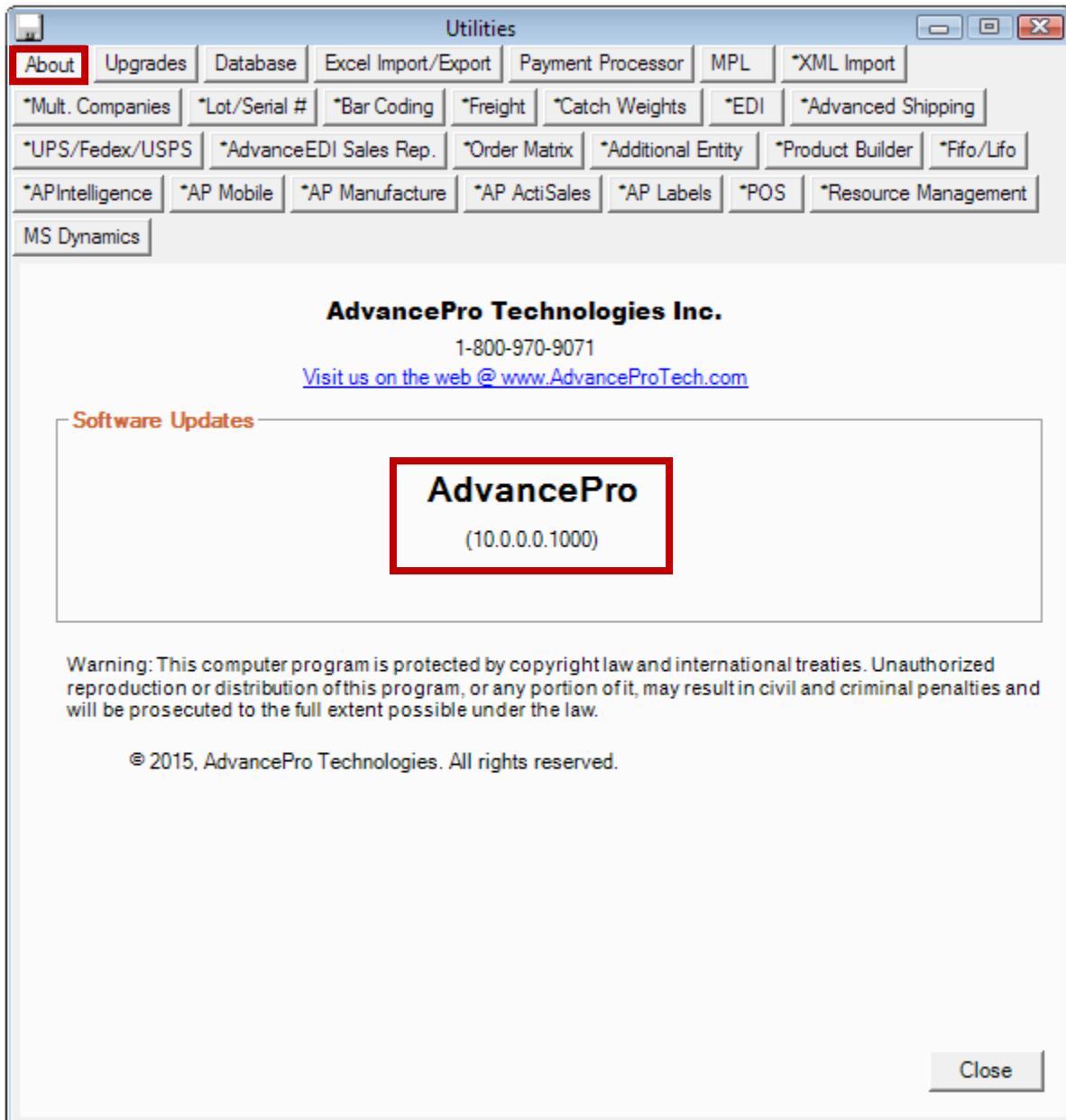
To access utilities in AdvancePro:

1. Click "Admin".
2. Click "Utilities".



Checking Your Version of AdvancePro

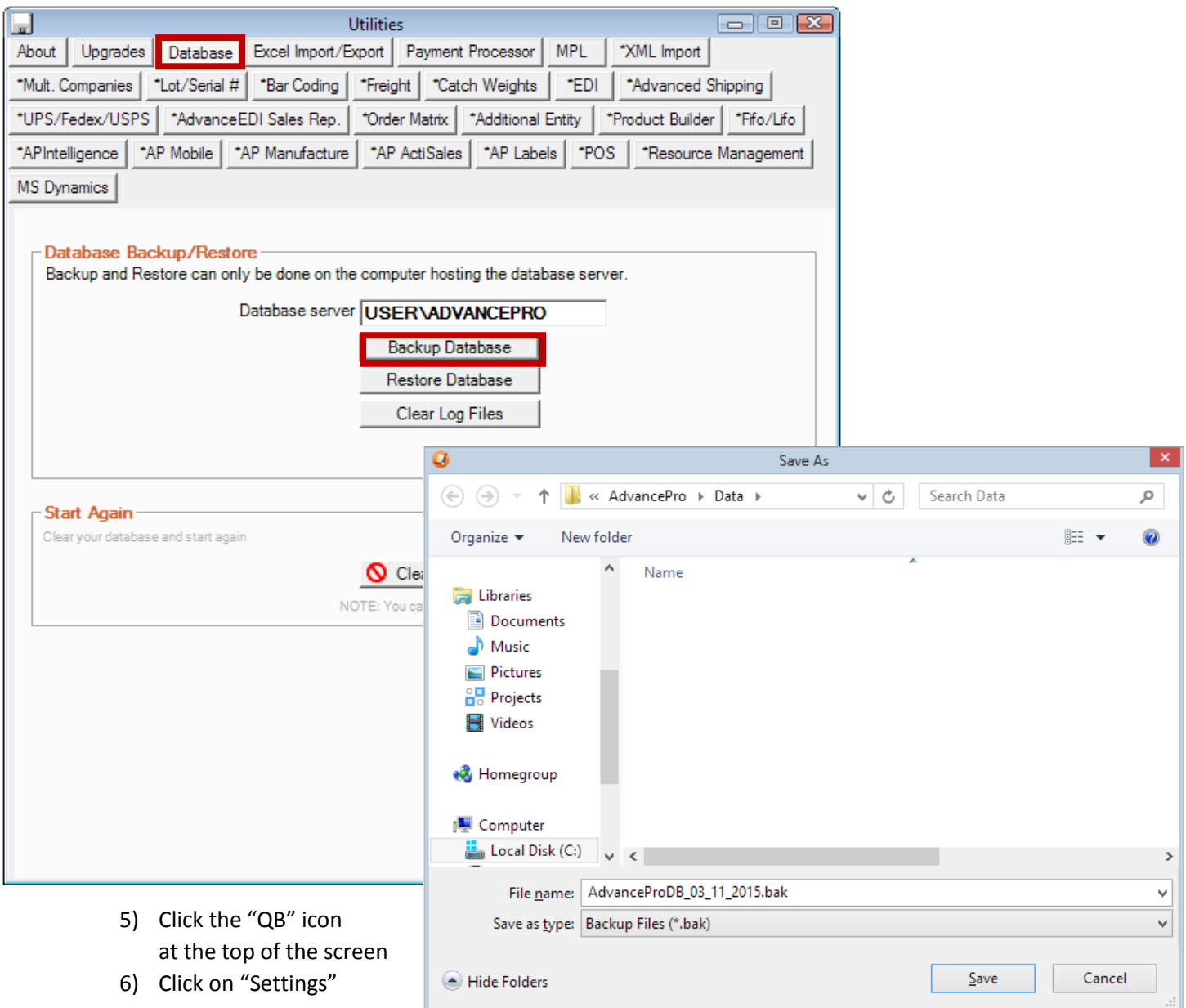
When getting support, it helps to know which version of AdvancePro you are running. This can be found by clicking on “About” at the top of the “Utilities” screen.



Backing Up Your Database

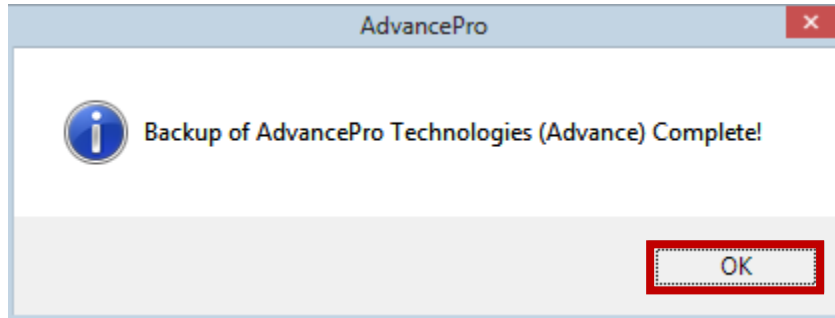
It is highly recommended to create a backup of your database on a regular basis. When you backup, you are creating a restore point that you can go back to in case your data gets lost or becomes corrupted.

1. To create a backup of your database:
 - 1) Click “Database”
 - 2) Click “Backup Database”
 - 3) Find the “Data” folder in the “AdvancePro” directory. By default it should be found at the path: “C:\Program Files (x86)\AdvancePro\data”
 - 4) Create a filename: “AdvanceProDB...bak” and click “Save”.



- 5) Click the “QB” icon at the top of the screen
- 6) Click on “Settings”

2. You will then receive a confirmation that your backup has been completed.
 - 1) Click “OK” and your backup is now complete.



Excel Import

Instead of updating individual records one at a time, AdvancePro allows you to add or update information about your customers, products and vendors in a batch by importing from Microsoft Excel. Customer specific pricing for specific products can be imported as well.

Instructions for importing [products](#), [customers](#) and [vendors](#) from Excel, as well as other information guides can be found on the [AdvancePro Knowledgebase](#).

Setting Up Payment Processor

You can receive credit card payments in AdvancePro using PayPal PayFlow Pro, Authorize.Net or Virtual Merchant (US Bank).

1. Select the "Payment Processor" tab.
2. Choose your processor from the drop down menu.
3. Enter the details of your selected payment processor account.
4. Click "Save"

Utilities

About Upgrades Database Excel Import/Export **Payment Processor** MPL *XML Import

*Mult. Companies *Lot/Serial # *Bar Coding *Freight *Catch Weights *EDI *Advanced Shipping

*UPS/Fedex/USPS *AdvanceEDI Sales Rep. *Order Matrix *Additional Entity *Product Builder *Fifo/Lifo

*APIntelligence *AP Mobile *AP Manufacture *AP ActiSales *AP Labels *POS *Resource Management

MS Dynamics

If you are going to be using online credit card or check transactions with PayPal/Authorize.net please enter your information below.

Processor **PayPal**

PayPal PayFlow Pro Settings

Check and Credit Card processing.

Vendor Case-sensitive Vendor ID that you defined while registering for the account.

User Name Case-sensitive login ID for the Payflow account that you defined while registering for the account.

Password Case-sensitive 6- to -12 character password that you defined while registering for the account.

Partner The authorized PayPal Reseller that registered you for the Payflow Pro service provided you with a Partner ID. If you registered yourself, use PayPal. Case-sensitive.

Authorize.net

Credit Card processing only.

Login ID Your Authorize.net Login ID

TxnKey The secure transaction key can be obtained from the Authorize.net Merchant Interface.

Virtual Merchant

Credit Card processing only.

Merchant ID Your Virtual Merchant Login ID

User ID Case-sensitive User ID for the Virtual Merchant

User Pin Case-sensitive PIN for Virtual Merchant

Disable Module **Save** Close

Setting Up Multiple Picking Locations (MPL)

Finding products within a warehouse containing many products can be challenging. Without a good system for tracking the locations of products, your warehouse staff are rendered inefficient by zig-zagging around the warehouse trying to correctly pick orders. New hires will also struggle to learn the correct places to find inventory, leading to a long learning curve. The MPL feature of AdvancePro allows you to keep your warehouse organized, and receiving and picking processes efficient.



1. Select the “MPL” tab
 - 1) Tick the checkbox for “Enforce Picking Location Inventory”
 - 2) Click “Save”
 - 3) Click “Manage MPL”

The screenshot shows the 'Utilities' window with the 'MPL' tab selected. The interface includes a menu bar with options like 'About', 'Upgrades', 'Database', 'Excel Import/Export', 'Payment Processor', 'MPL', and '*XML Import'. Below the menu bar are several sub-menus for various features. The main content area is divided into sections: 'MPL Module' with a checked 'Enforce Picking Location Inventory' checkbox; 'Warehouse' with a dropdown set to 'Warehouse 1' and an 'Apply to all Warehouses' checkbox; 'Global MPL Product Level Settings (2nd Level)' containing 'CPO Settings' and 'VPO Settings' sections, each with a checked 'Use DEFAULT MPL' option and checkboxes for 'Quantity Asc', 'Quantity Desc', 'Exp. Date', 'Name', and 'Reference'; and 'MPL Level Settings (1st level)' with a highlighted 'Manage MPL' button. At the bottom right, there are 'Save' and 'Close' buttons, with 'Save' being highlighted.

2. Create your picking locations

- 1) Select a warehouse
- 2) Enter the name of your picking location

NOTE: You can create any naming convention you wish. If you want to see what inventory is available in each location, you can generate a picking location report that shows your inventory by picking location. For example, if you wish to see what inventory is in Row1 on any shelf or bin, you would simply search for "Row1". If you wish to view only inventory in Bin 2 on Shelf1 in Row1, you would search for "Row1_Shelf1_Bin2".

- 3) Select the location type
 - i. Inventory can be received into "Receiving" locations.
 - ii. Inventory can be shipped from "Shipping" location.
 - iii. Inventory can only be transferred from and to another location from a "Storage" location. This location type is good for maintaining safety stocks.
 - iv. A "temporary" location can be created, which will expire either when the stock level within that location reaches zero OR at a specified expiry date.
- 4) Click "Add"
- 5) Click the  icon.
- 6) Click the  icon.

Manage Multiple Picking Locations

Create and manage your picking locations.

Warehouse: Warehouse 1

Create Picking Locations

Picking Location: Row1_Shef1_Bin2 [Update] [Clear]

Location Type: Receiving Shipping Storage Temporary Zero Stock Exp. Date: 10/ 2/2002 [?]

Reference (tag): []

Notes: []

Set MPL Sequence

Manual by Name by Reference (tag) by Exp. Date Apply to all Warehouses [Set]

Set Default MPL

SKU # [] Product [] [Find]

default MPL: [] [Default Picking Location] [Set]

Select a picking location from below to edit. Search [] []

No	PL Name	Warehouse	Tag				ExpDate		Notes			
1	Default Picking Locati...	Warehouse 1		↓	🚚	📦				🔍	📄	🗑️
2	Pick 2	Warehouse 1		↓	🚚	📦				🔍	📄	🗑️
3	Pick 3	Warehouse 1		↓	🚚	📦				🔍	📄	🗑️
4	Row1_Shef1_Bin2	Warehouse 1		↓	🚚	📦				🔍	📄	🗑️

Receiving Shipping Storage Temporary Zero Stock Exp. Date

Click To Assign/Edit Products Per Picking Location

Delete All MPL(s) [Zero Stock] [Exp. Date]

Default Allocation [Allocate] [?]

[Excel Import] [Close]

3. Assign Products to the picking location
 - 1) Search for the products you would like to put into the location, either by SKU or Product
 - 2) Check the products to be associated to the Picking Location.
You can choose "Select All" to select all products within your displayed product list.
 - 3) Click Apply


Assign Products to Picking Location

Select Products to assign to this picking location. Check Default column if default location for Product. Products already assigned to this location will appear with a check at the top of the list.

Picking Location

Picking Location Row1_Shelf1_Bin2
Warehouse Warehouse 1

F

No	SKU	Product	Default	
<input checked="" type="checkbox"/>	1	F00001	Apple	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	F00004	Banana	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3	F00004	 Banana - Box/24	<input type="checkbox"/>
<input checked="" type="checkbox"/>	4	F00010	Grapefruit	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	F00005	Grapes	<input type="checkbox"/>
<input checked="" type="checkbox"/>	6	F00007	Lemon	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7	F00009	Melon	<input type="checkbox"/>
<input checked="" type="checkbox"/>	8	F00002	Orange	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9	F00003	Pineapple	<input type="checkbox"/>
<input checked="" type="checkbox"/>	10	F00006	Tomato	<input type="checkbox"/>
<input checked="" type="checkbox"/>	11	F00008	Watermelon	<input type="checkbox"/>

Select All DeSelect All **Apply** Close

4) Click “Yes” to move inventory that has not yet been assigned to a picking location to the specified location.

AdvancePro

Do you want to move all un-assigned inventories of all selected items to this MPL?
Click No - to move stock to Deafult MPL
Click Yes - to move stock to this MPL
Click Cancel - to cancel

Yes No Cancel