

EZ OfficeInventory
Asset Tracking, Simplified

Introducing the Redesigned Mobile App

Navigation | Global Search | Quick Actions

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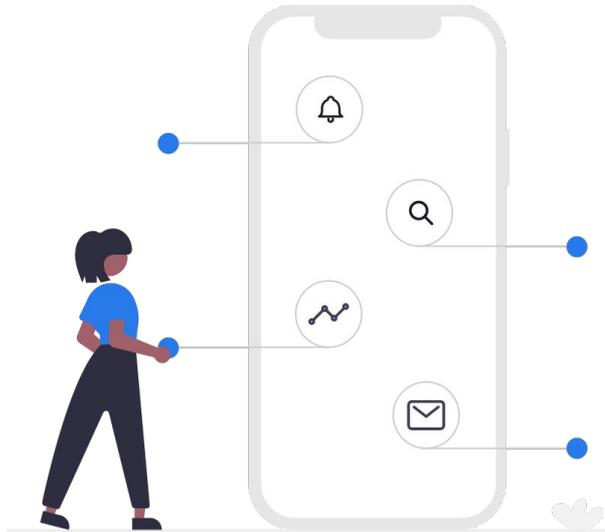
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EZOfficeInventory Mobile App: Quick and Easy Actions on the Go



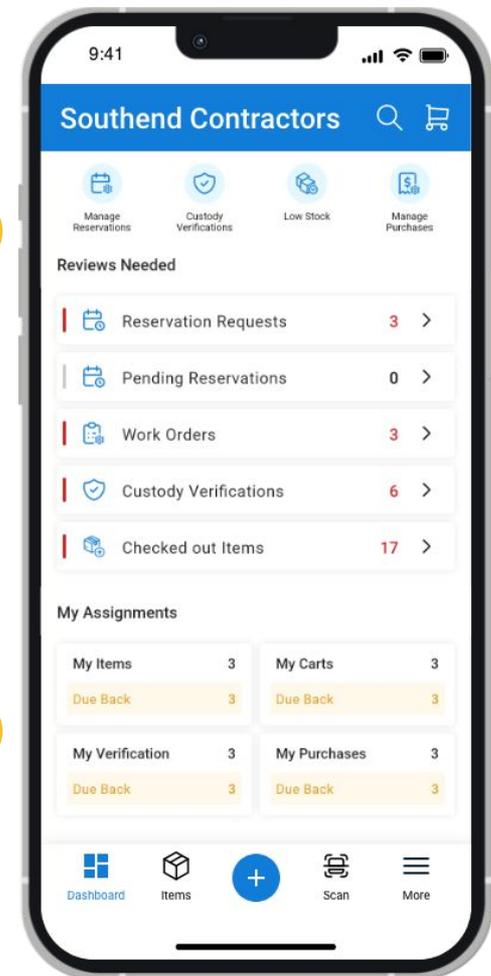
- Information at your fingertips
get what you need, fast
- Performance
new technology stack
- One Place for Item Actions
all in one fast, convenient place
- Global Search
fast lookup & find item
- Easy Forms & Actions
redesigned for clarity & ease
- Universal Scan
scan and take all actions
- Scan Checkpoint
tag an item anytime, anywhere

1. THE DASHBOARD

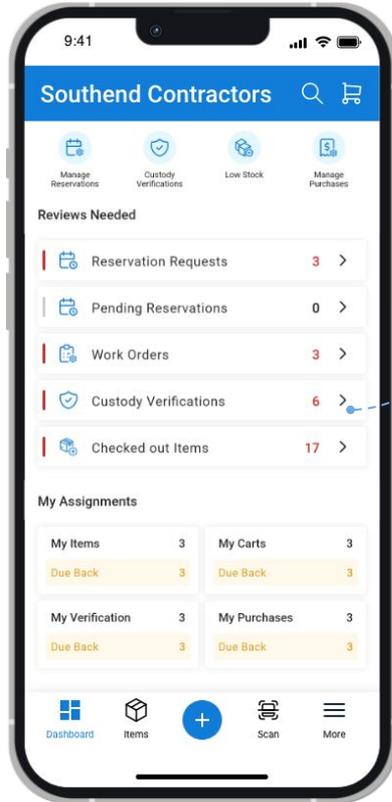
The Dashboard gets you started on your asset-related activities and enables you to get a quick summary of all Item events in minutes!

- 1. Top Navigation:** Access important information from Global Search and View Carts.
- 2. Quick Actions:** Easily find and start the most common actions like verifying custody and reviewing Reservations.
- 3. Instant Reviews:** Perform instant reviews for item requests as soon as you log in.
- 4. Assignments:** Get a snapshot of all activities related to you.
- 5. Bottom Navigation:** Switch between the Dashboard, Item Center, Scan Center and More options.

Note: Staff Users can only view data for items that are assigned to them.



1.2. ADMIN AND STAFF DASHBOARDS



Admin Dashboard

Quick Actions

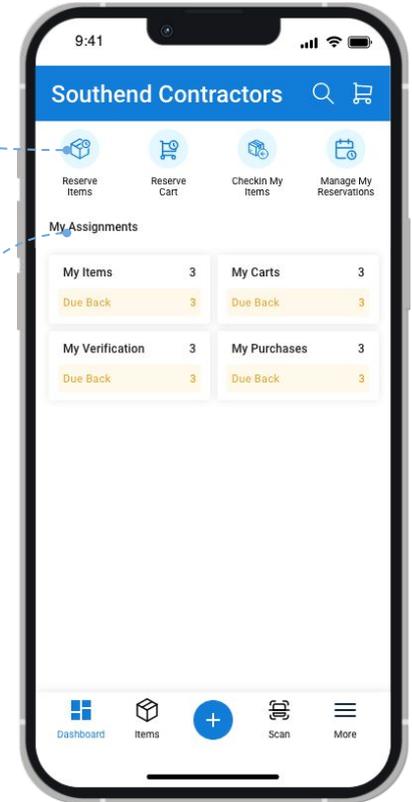
Shows the most relevant actions based on your role access

Reviews Needed

Primarily for supervisions - list of reviews/approvals required for reservations, check in/out, and even pending custody verifications.

My Assignments

Items or Work assigned to you and what is currently due (e.g. due today, tomorrow, or overdue)

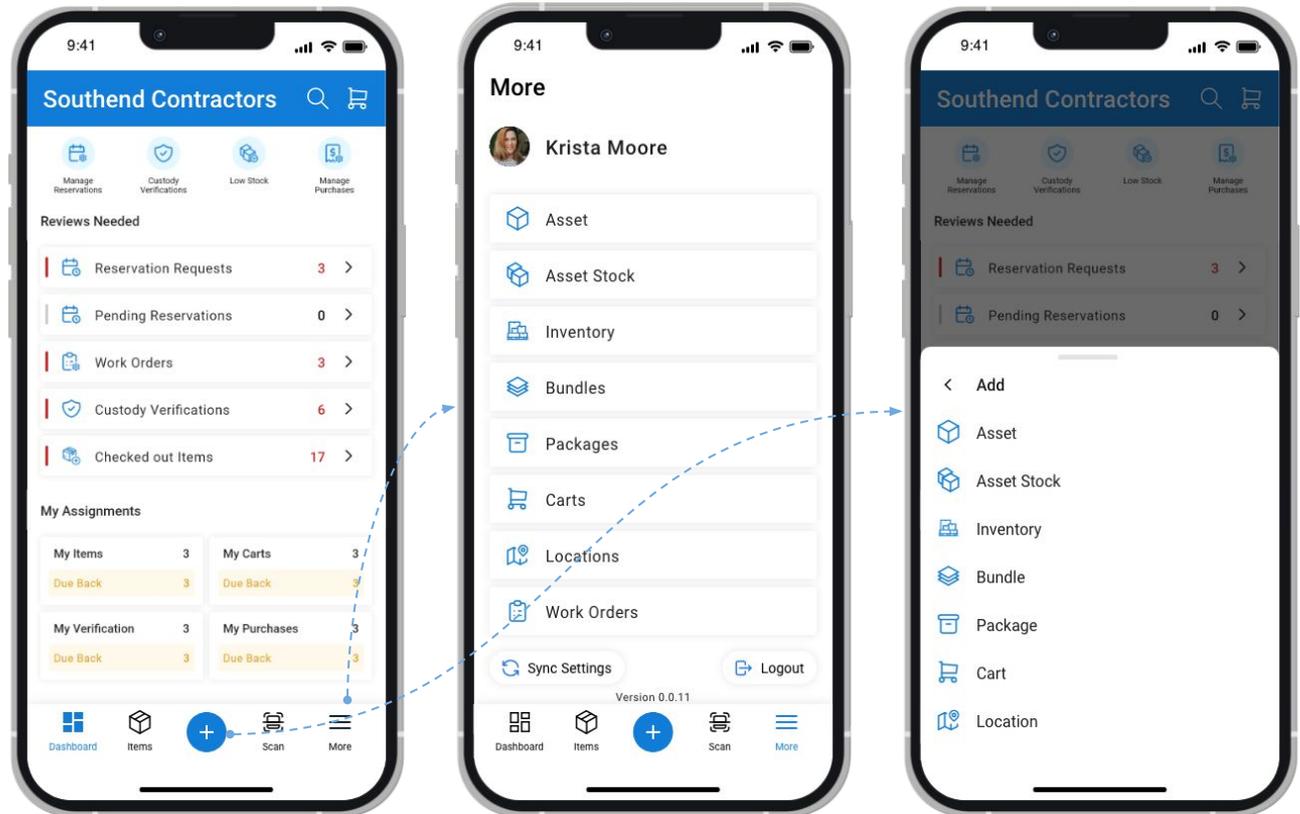


Staff Dashboard

2. NAVIGATION MENU

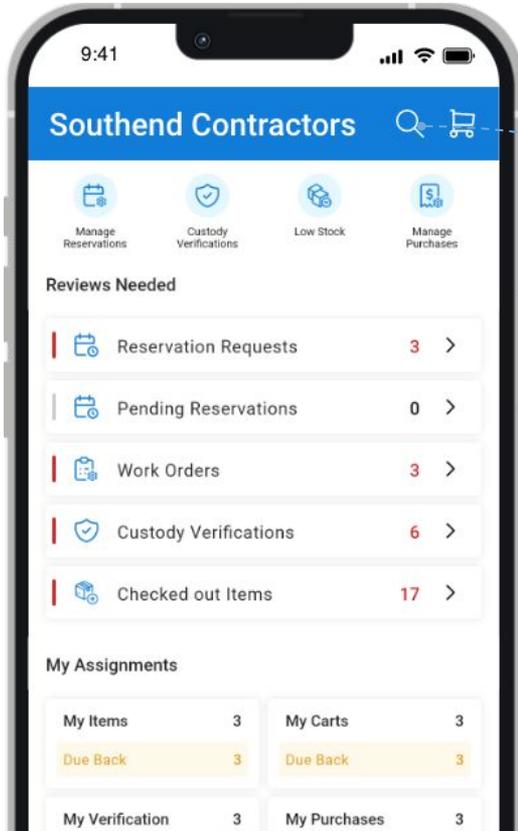
Enhanced menu and more features: From the bottom navigation bar, tap on 'More' to view Items, Bundles, Packages, Carts, Locations and Work Orders.

Quick Add: The 'Add' button enables you to create a new listing for various items just by a single tap.

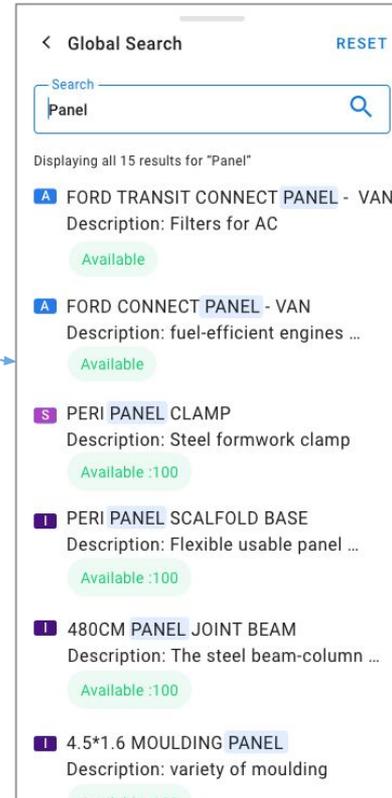


3. GLOBAL SEARCH

Quickly find anything you need - anytime, anywhere



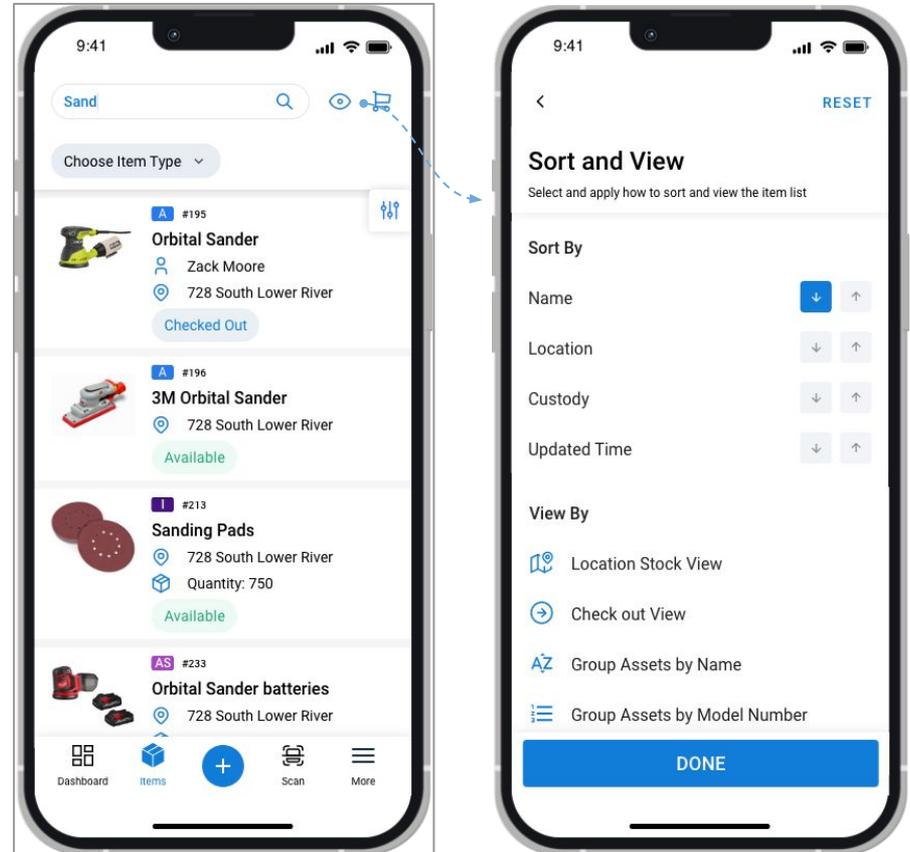
Use the Search Bar on the Dashboard to find anything across modules instantly.



4. ITEM CENTER

Find and take actions across any item types

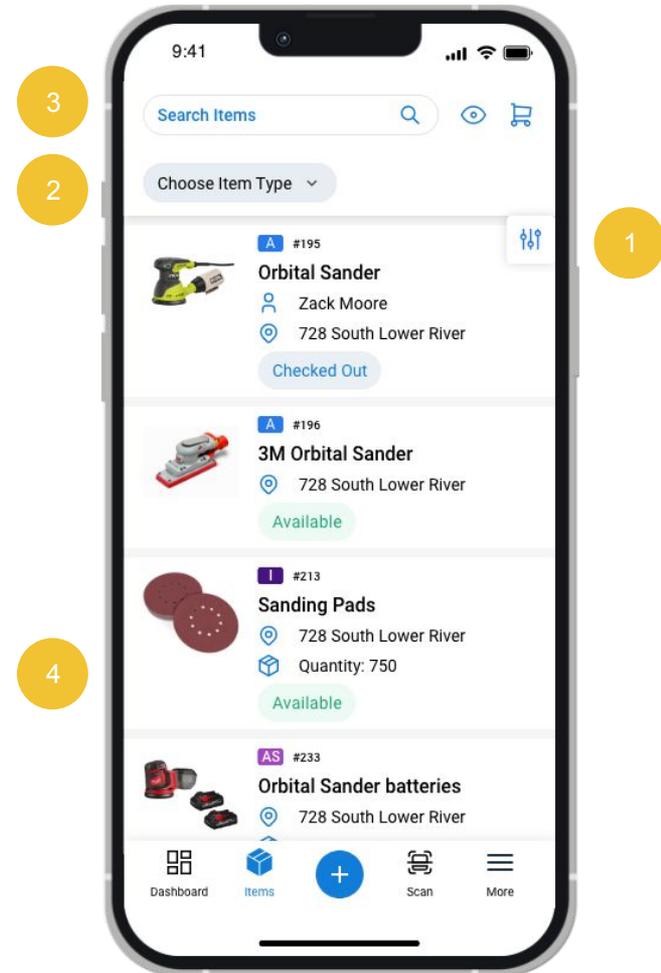
1. Use the Global Search to look for the required Items.
2. The search results will display Items across all modules: Assets, Asset Stock and Inventory and is called the 'Mix Listings page'.
3. Sort Items based on Name, Location, Custody and Time to get a comprehensive view of workflows.
4. View by Location, Checkout and Groups to get instant insights on the Item actions taken by users.



4.1. ITEM CENTER MIX LISTING PAGE

On the Item Listing page, you can take the following actions:

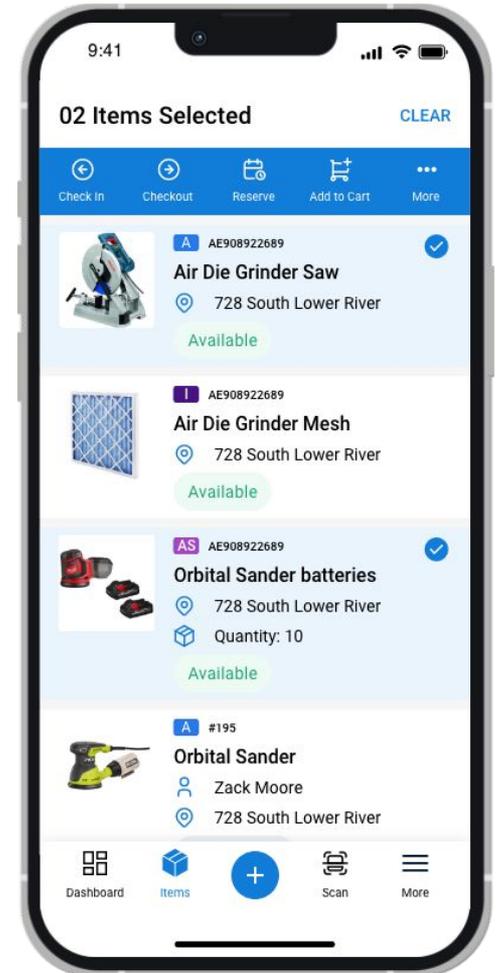
- 1. Filtering items:** First select the required Item from 'Choose Item Type' dropdown and then tap on the 'Filter' button to apply Primary and Availability Filters to customize your view.
- 2. Switch Item view:** Use these dropdowns to switch between Assets, Asset Stock and Inventory, and select the required States, Locations and Groups.
- 3. Instant Search:** Search for Asset, Asset Stock and Inventory directly from the top bar for quick results.
- 4. Navigating to the Item Details Page:** To head to an Item Details Page, tap on the item card.
- 5. Actions on Mix Listing page:** You can take multiple actions from the Mix Listings page. Simply tap and hold the Item and select the required action.



4.2. TAKING MASS ACTIONS

Use the Item Listings to take a variety of mass actions like adding several items to Cart or checking in multiple tools after a job is done. Tap and hold the Item card to select multiple items. Once you start selecting, the mass action menu will pop up at the top of the page, where you can:

1. Check items in and out or extend checkouts.
2. Reserve items in advance from wherever you may want.
3. Retire multiple items in one go.
4. Verify possession or Transfer Custody for an assortment of items.
5. Add items to the active or reserved Cart.
6. Add multiple items to Purchase Orders and Work Orders in one go.

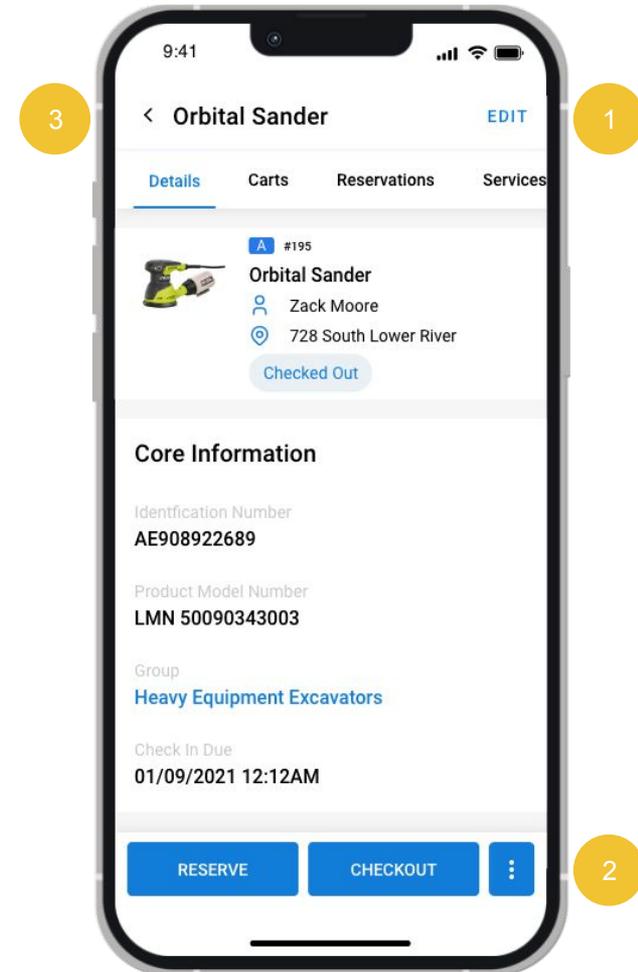


4.3. DETAIL PAGE: CHECKING ITEMS IN AND OUT

The Item Details Page serves as the source of all data on an item. Scroll down the page to see a host of different data points like the item's Location, Group, and Custom Fields.

You can check items in and out, and edit their details from the Item Details Page.

- 1. Editing items:** tap on the edit button at the top-right to edit item details for the concerned item.
- 2. Check out/in and Reserve:** tap on the relevant button to log data regarding checkouts, reservations, purchase orders and more from anywhere.
- 3. Navigating back to the listing:** tap on the back arrow '<' to go back to the listing.

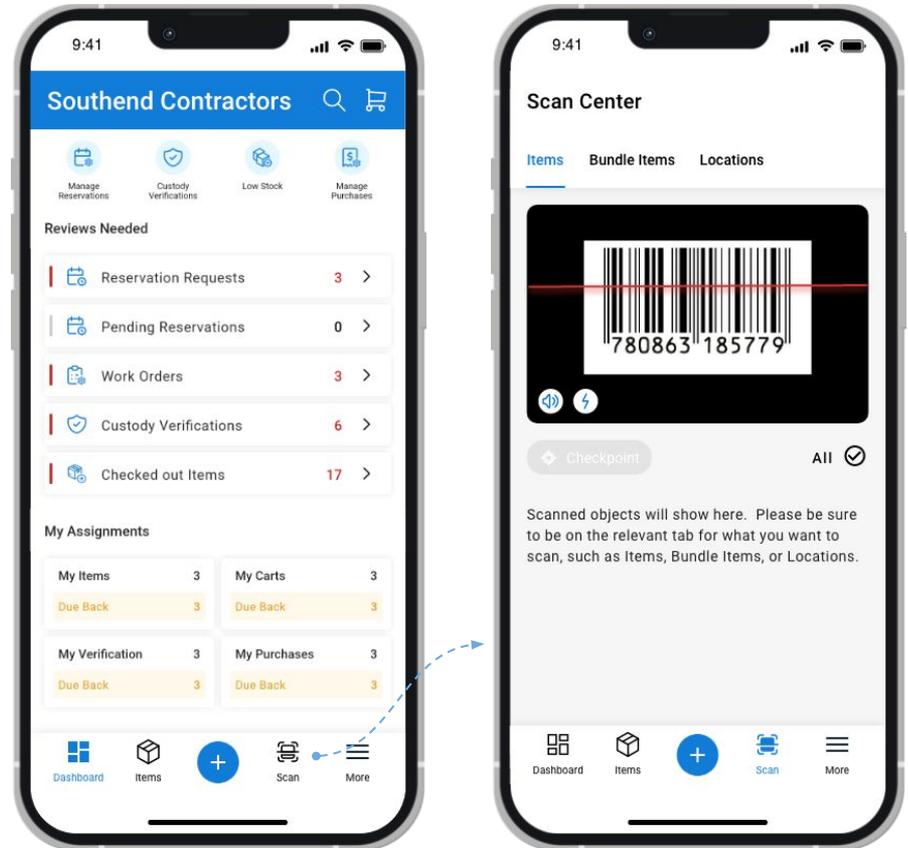


5. SCANNING ITEMS

Scan items in quick succession with EZOfficeInventory's Scan Center to make a list or take various actions.

Here's how to do it:

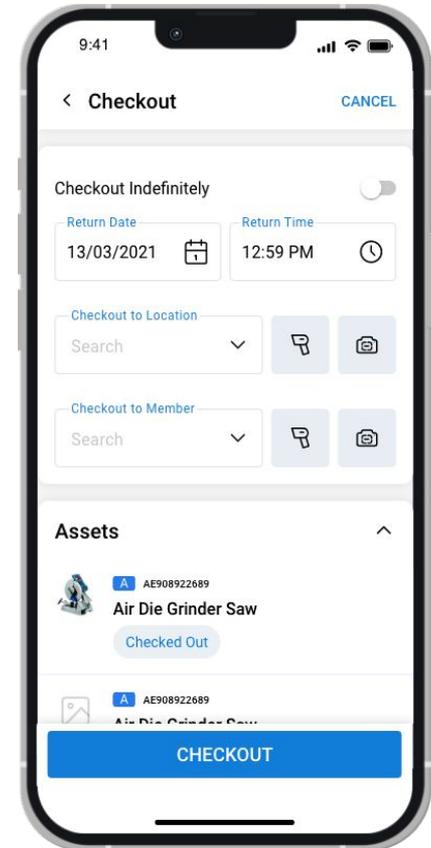
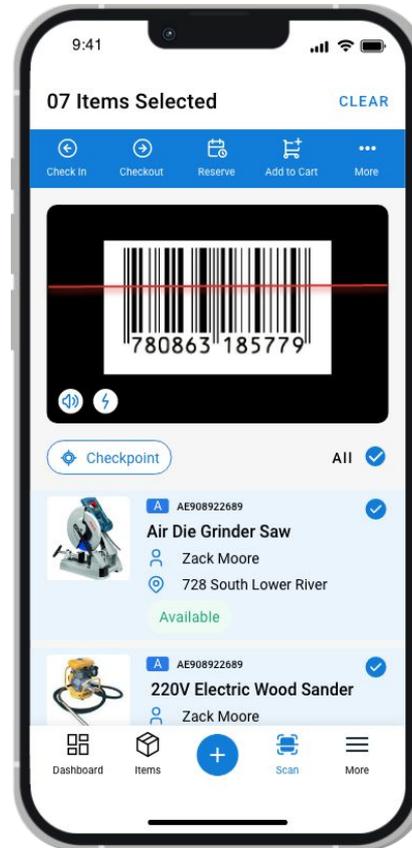
1. Tap on the 'Scan' button in the bottom panel on the Dashboard.
2. Position the barcode or QR code within the designated area. Upon detection, the screen will display the Item #.
3. The scanned Items will be displayed in the "Items Tab".



5.1 ACTIONS ON SCANNED ITEMS

Once scanned, you can take multiple actions on the items:

1. From the top bar, select any action such as Check in, Checkout or Reserve.
2. Fill in the details and complete the action to return to the scanned Items list.
3. Once you complete an action the scanned Items list will be cleared.

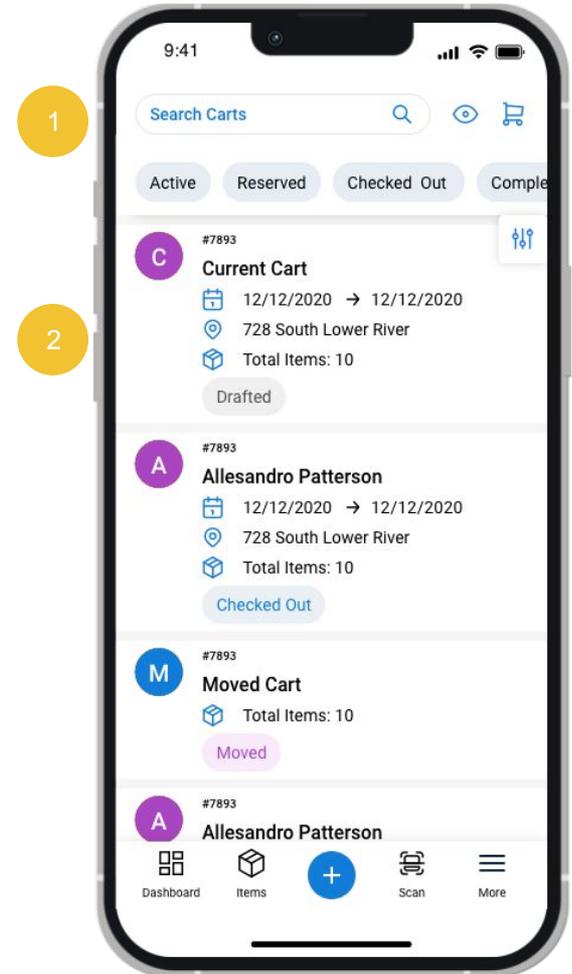


6. CARTS

Carts enable you to check out or reserve multiple items together. The Carts Add On must be enabled from the desktop app in order to show up on the Mobile App. To do this, head to *Settings* → *Add Ons* → *Carts* from the desktop app and enable the Add On.

Once enabled, open the Carts Tab from the Mobile App and toggle between Cart states for Active, Reserved, Current, Checked Out and others.

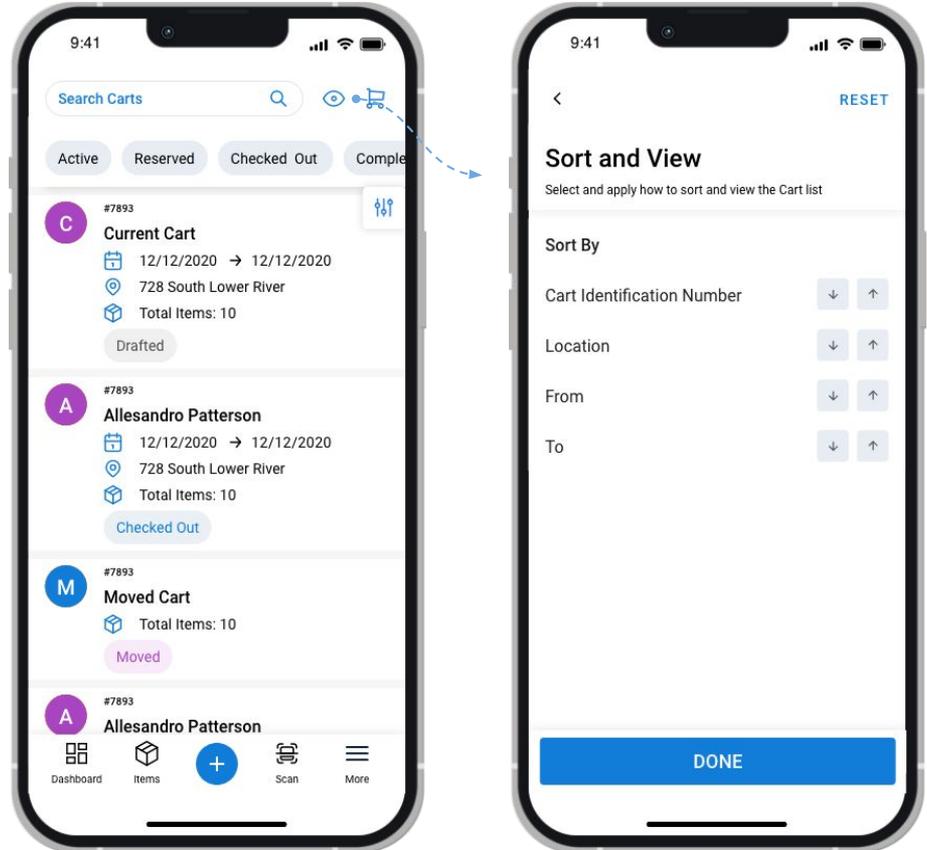
1. Search through Carts and filter according to Cart Items and dates.
2. Tap in to see the Cart details. Organized and sectioned with tabs for further details.



6.1. SORT AND FILTER CART TRANSACTIONS

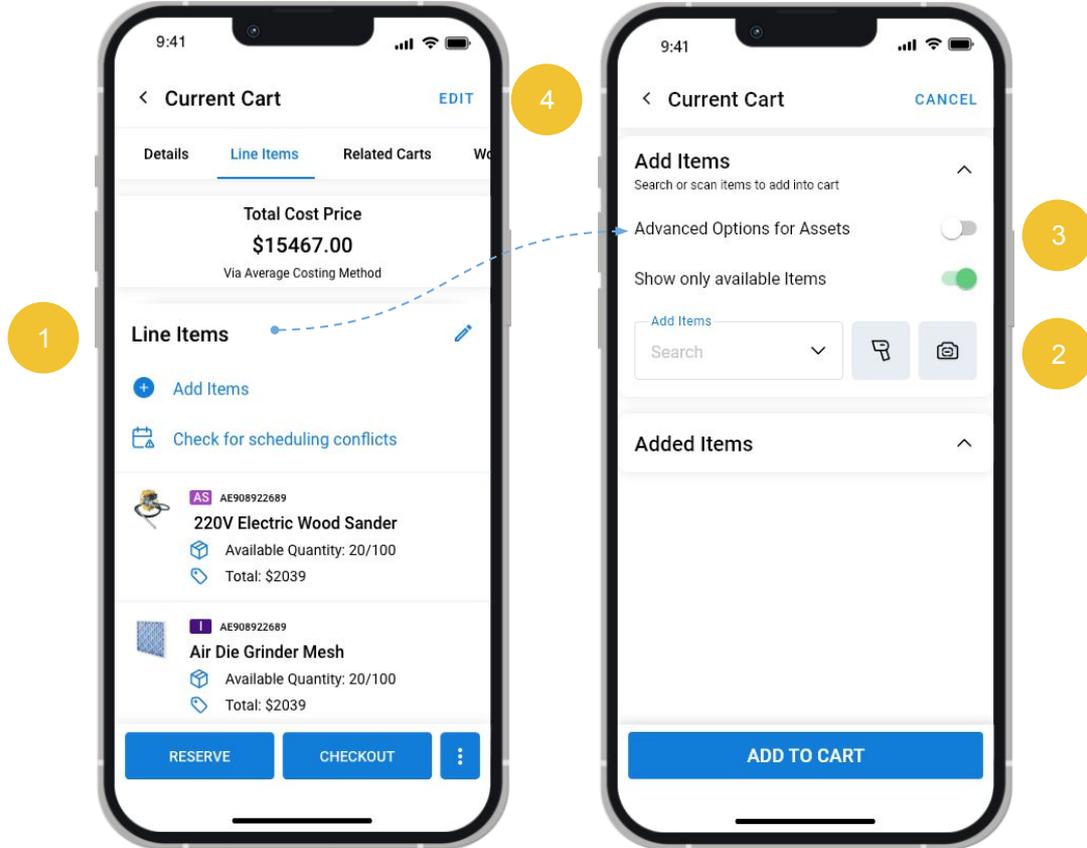
Get a quick recap on all your Cart Transactions from this section:

1. Sort Carts using the Quick Filters from the top of the Listing page.
2. For more customization , tap on the 'Filter' button to sort Carts that contain specific Bundles, Packages and Locations.
3. Sort and View Carts according to your preferences.



6.2. ADD OR EDIT ITEMS IN THE CART

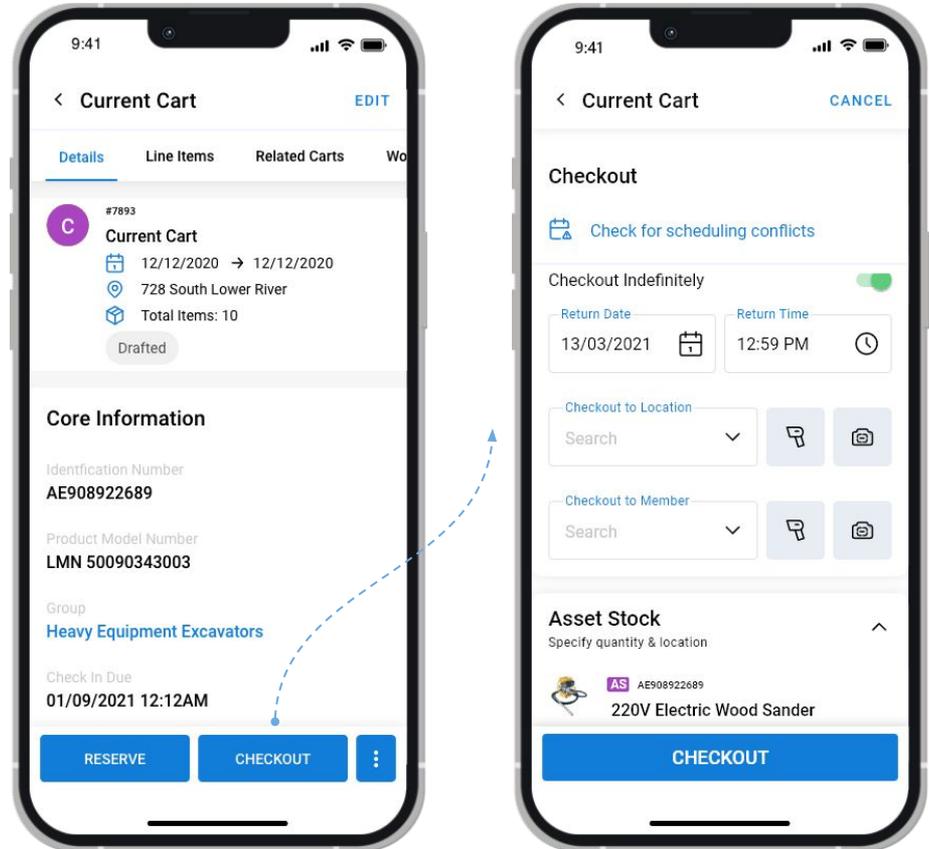
1. View all Line Items and their costs, availability status and quantity.
2. Use simple search or scan to add new Items.
3. Turn on the Advanced search to add Items from a set to the Cart.
4. Edit the Cart to make changes and Clone to create a copy of the same Cart.



6.3. CART TABS AND ACTIONS

From the Carts listing page, tap on the Cart you want to take actions for. This will open the Cart details page where you can take the following actions:

1. Top actions for Current Cart are Reserve and Checkout. Rest can be viewed under More.
2. Easy forms with icons to help facilitate quick Checkouts.
3. Item review to verify all Cart Items and edit quantity to accommodate last minute changes before Checkout.
4. Enter any additional comments for users and complete the Checkout action.



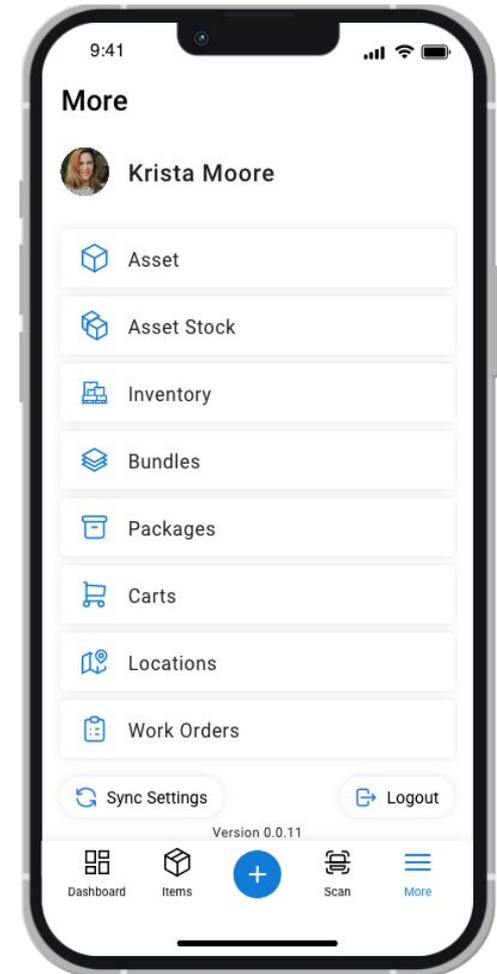
7. BUNDLES

Bundles in the EZOfficeInventory Mobile App enable companies to group items based on their own company workflows in order to speed up item processing and enhance productivity.

To use Bundles, you will first have to enable the Add On from the desktop app. The Bundles Tab will not be visible in the mobile app if the Add On is disabled.

To enable Bundles, go to *Settings* → *Add Ons* → *Bundles* from the desktop app. Note that Bundles cannot be enabled if the Carts Module is disabled.

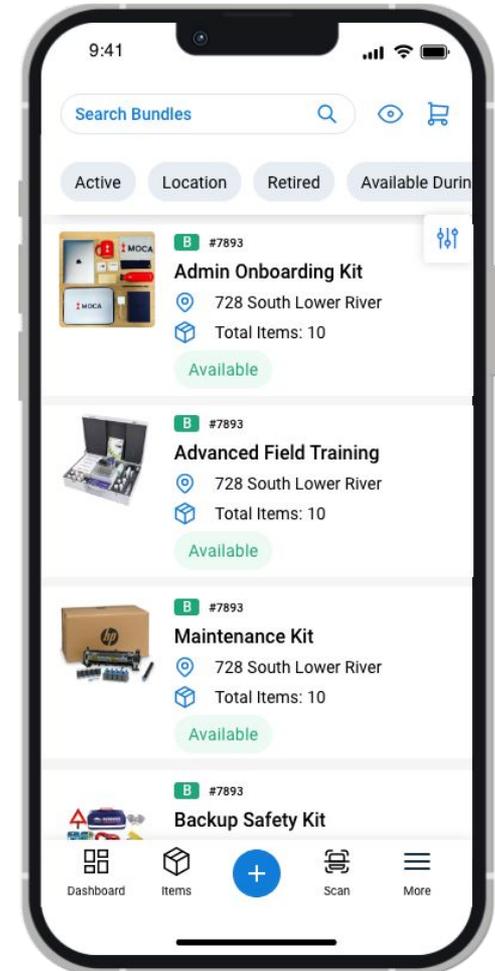
That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.



7.1. BUNDLES LISTING

The Bundles Listing enables you to get a bird's eye view of all your Bundles so you can access them to take further actions.

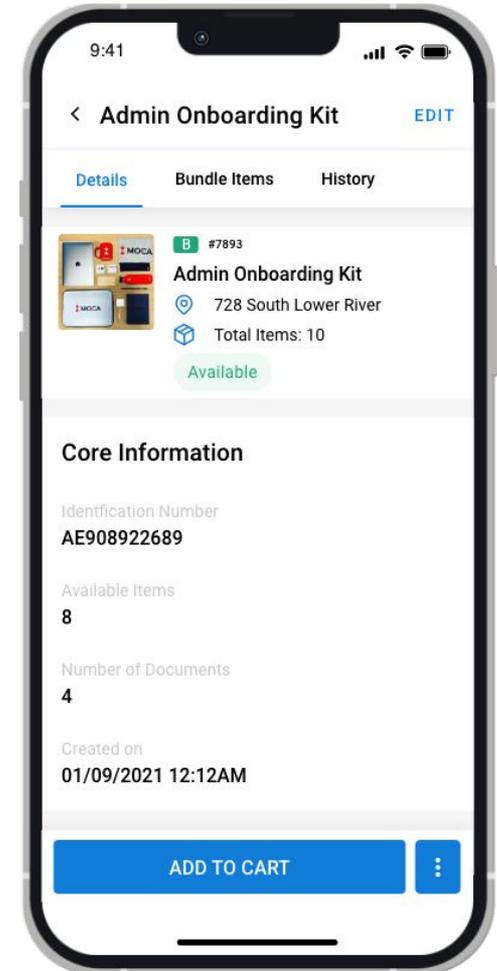
1. Use the top navigation to filter Bundles by the following statuses:
 - Available
 - Location
 - Retired
 - Available During
2. Tap on a Bundle to go to its details page.
3. Hold and tap multiple Bundle images to select them for mass actions.



7.2. TAKING ACTIONS ON BUNDLES

You can use the Bundles Tab to add a Bundle to Cart by going to its details page. This expedites the checkout process and enables users to find everything they need efficiently.

1. Tap on the 'Add to Cart' button to add the Bundle to Cart. You will be able to select or deselect Bundle Items before adding them to the Cart that you want to check out.
2. Edit the Bundle Items, by adding or removing Items as required.
3. Tap three ellipses to Clone or Retire the Bundle.



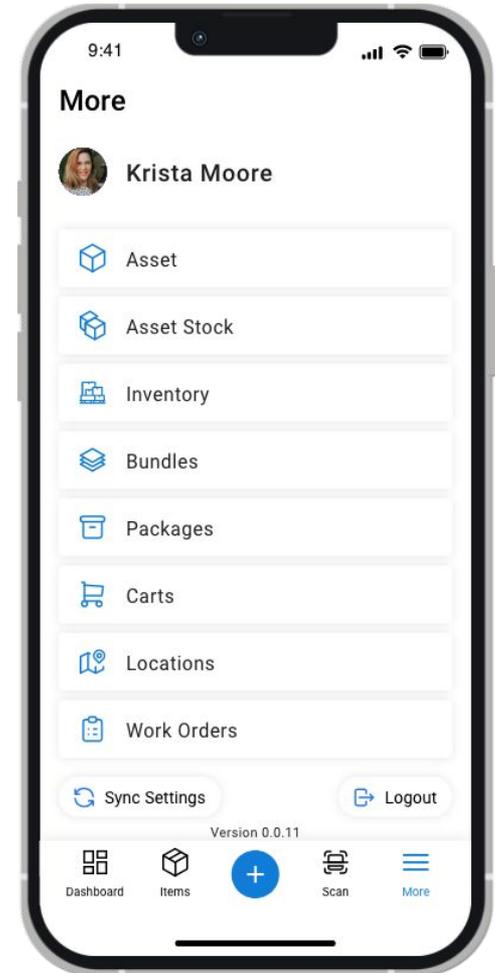
8. PACKAGES

Packages in the EZOfficeInventory Mobile App enable companies to group items that are frequently used together to facilitate company workflows that enhance productivity.

To use Packages, you will first have to enable the Add On from the desktop app. The Packages Tab will not be visible in the mobile app if the Add On is disabled.

To enable Packages, go to *Settings* → *Add Ons* → *Packages* from the desktop app.

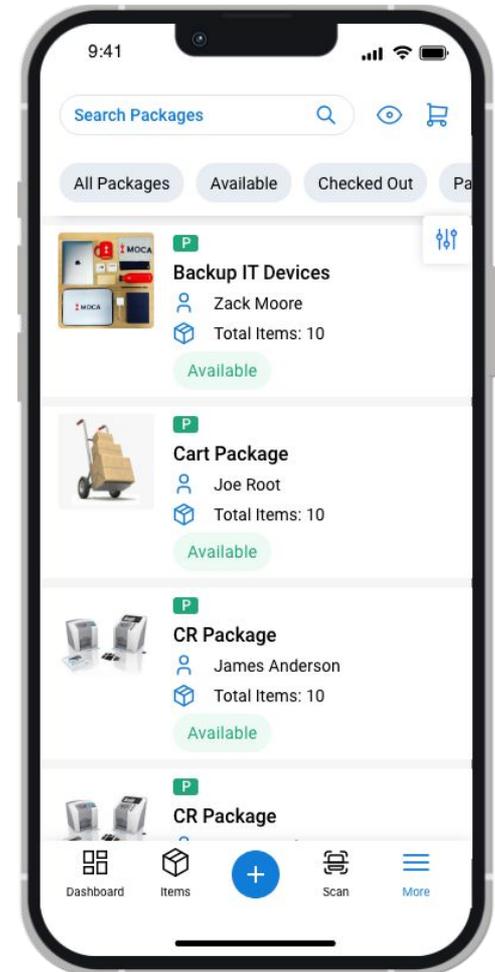
That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.



8.1. PACKAGES LISTING

The Packages Listing enables you to get a quick snapshot of all your Packages so you can access them to take further actions.

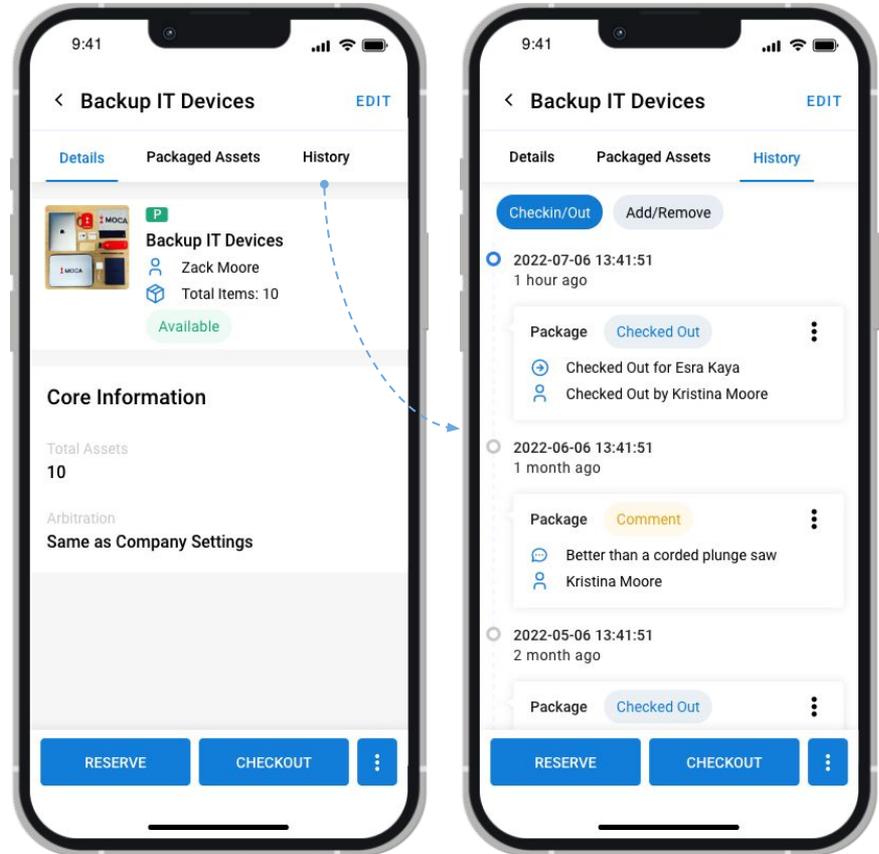
1. Use the top navigation to filter Bundles by the following statuses:
 - Available
 - Checked Out
 - Packages in Custody
2. Tap and hold to select them for mass actions.
3. Tap on a Package to go to its details page.



8.2. TAKING ACTIONS ON PACKAGES

You can use the Packages Tab to add a Package to Cart by going to its details page. This escalates the checkout process and enables users to find everything they need without a hassle.

1. A Package can be checked out by adding it to a Cart. Reserve the Package for an upcoming project to save time and streamline workflows.
2. Edit the Package Items, by adding or removing Items as required.
3. View Package history to check the record of all changes made to the package along with user details.



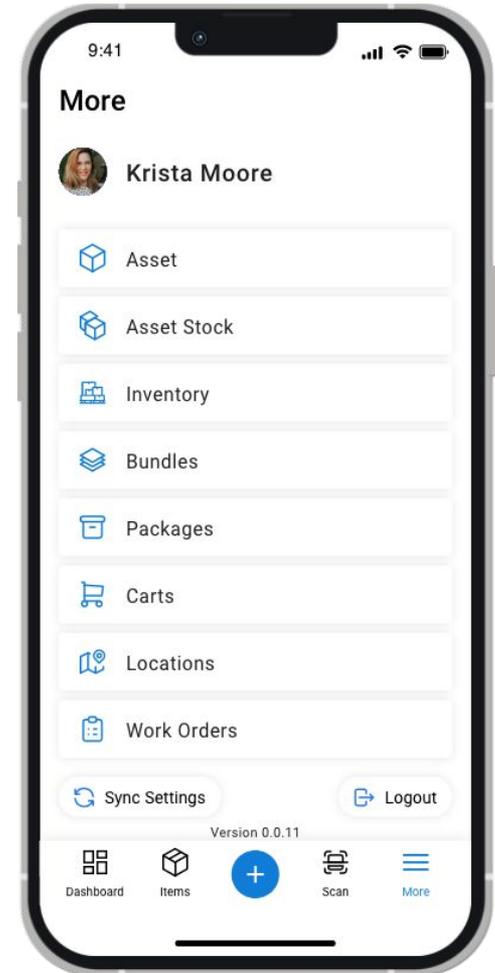
9. WORK ORDERS

Work Orders facilitate companies in tracking maintenance tasks and enable them to keep their Items in top shape. They are also great for assigning jobs and ensuring that all users are aware of the services that have been carried out on an Asset.

To use the Work Order Module, head to the desktop app and enable the Add On from *Settings* → *Add Ons* → *Work Orders*.

Now, access the Work Orders Listing from your mobile by tapping on the 'More' menu in the bottom navigation bar on the Dashboard.

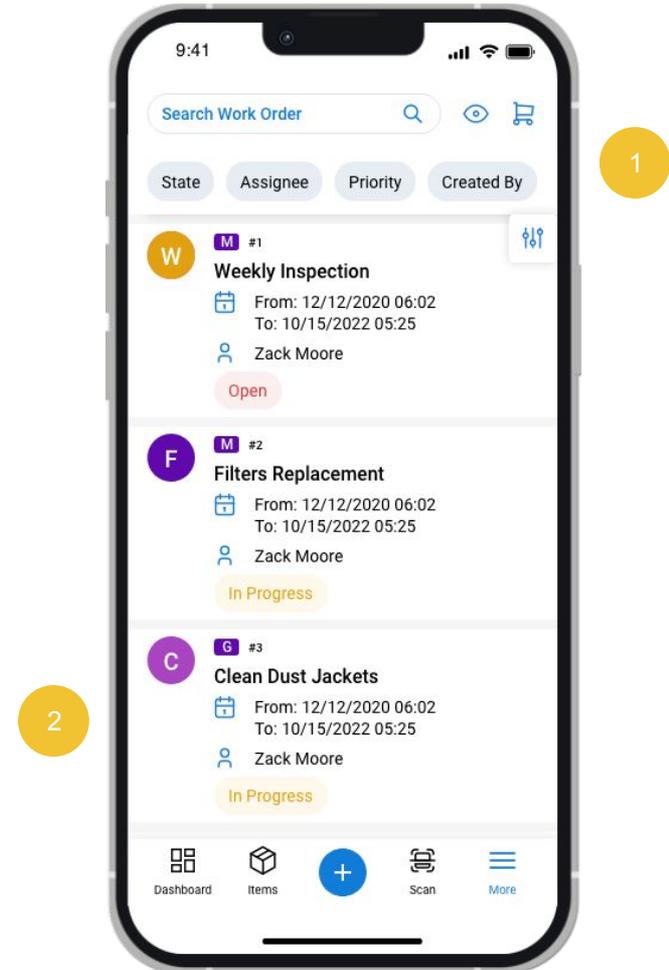
Note that Work Orders will only show up in the app if the Add On is enabled.



9.1. VIEWING THE WORK ORDER LISTINGS

The Work Order Listings Page provides a quick snapshot of all your Work Orders. Get up to speed with all your Work Orders by quickly verifying status, ID, Assignee, and Due Date.

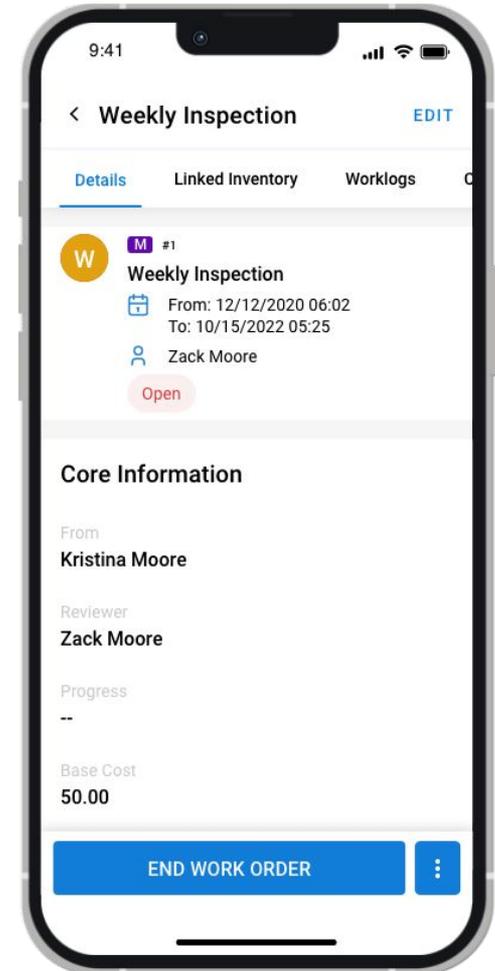
1. Use the filters in the top bar to sort Work Orders by:
 - State
 - Assignee
 - Priority
 - Created By
 - Reviewer
 - Due Date
 - Started On
2. Tap on a Work Order to go to its details page.



9.2. VIEWING WORK ORDER DETAILS

Use the Work Order Details Page to view the complete log for a Work Order.

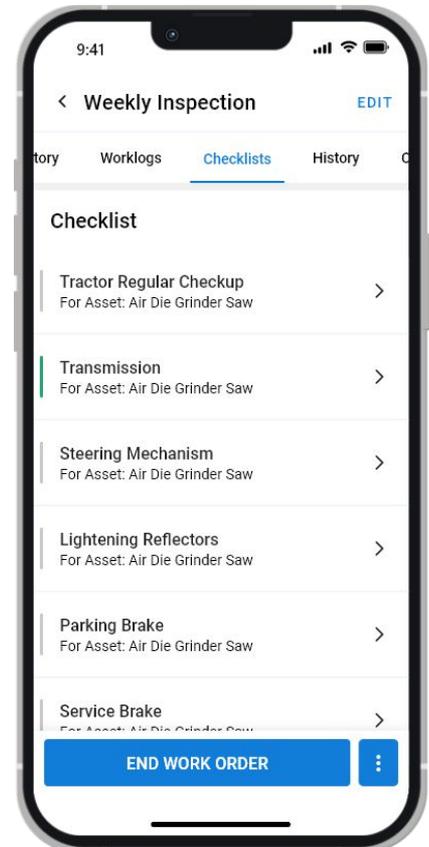
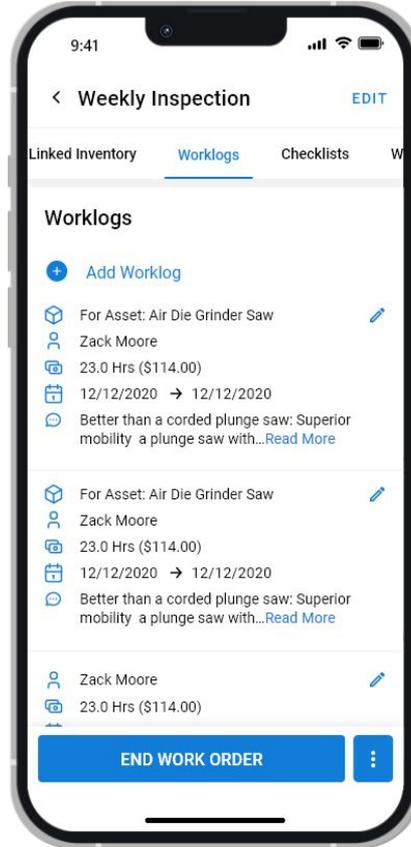
1. Check Work Order Status to see if a Work Order is yet to start, is in progress or has been completed.
2. Monitor Work Order Progress by checking all relevant dates including Created On, Started On and Due Date.
3. Verify inventory linked to the Work Order from the 'Linked Inventory' section.
4. Follow progress by discerning who was assigned the concerned task and how long they have spent on it, using the mobile app.



9.3. LOGGING IN WORK ORDER UPDATES

In addition to verifying details, the EZOfficeInventory Mobile App enables you to log Work Order updates from anywhere and at any time.

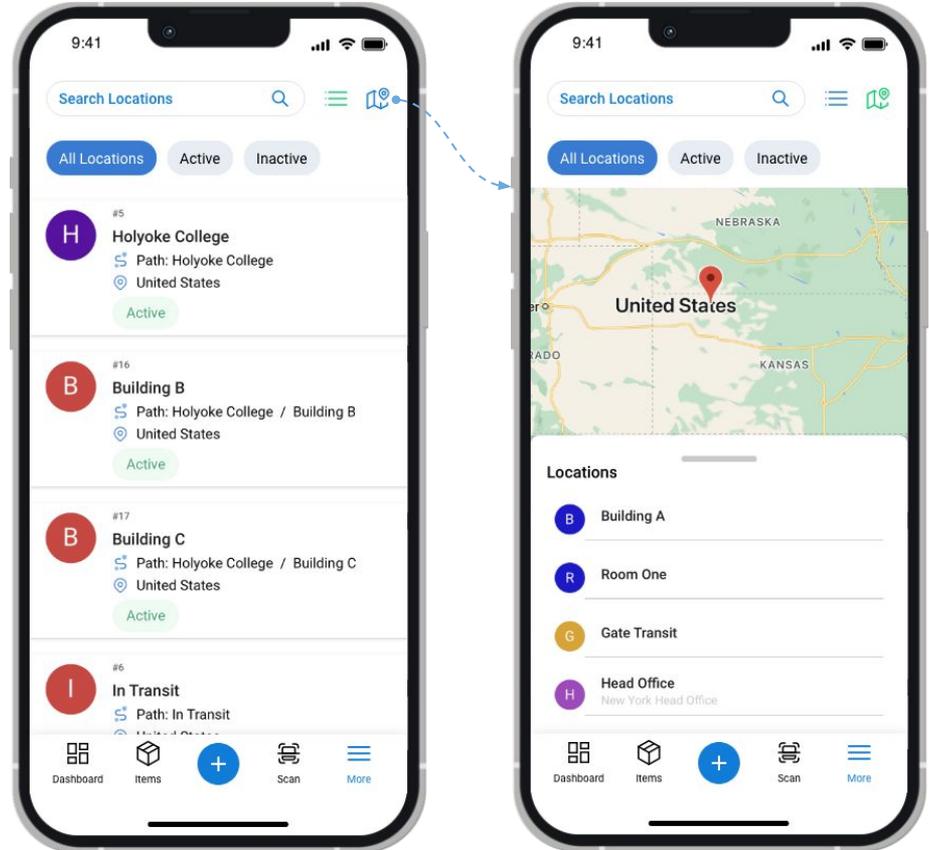
1. Update Checklists as sub-tasks (Checklist Line Items) to track progress.
2. View Work Logs and log time spent on a task from 'Work Logs' as tasks are carried out.
3. Download supporting documents like user manuals to your phone.
4. End Work Orders from the button at the bottom of the Work Order screen.



10. LOCATIONS

The EZOfficeInventory mobile app enables users to track Locations on the go, making it easier to check in and check out Items from remote sites.

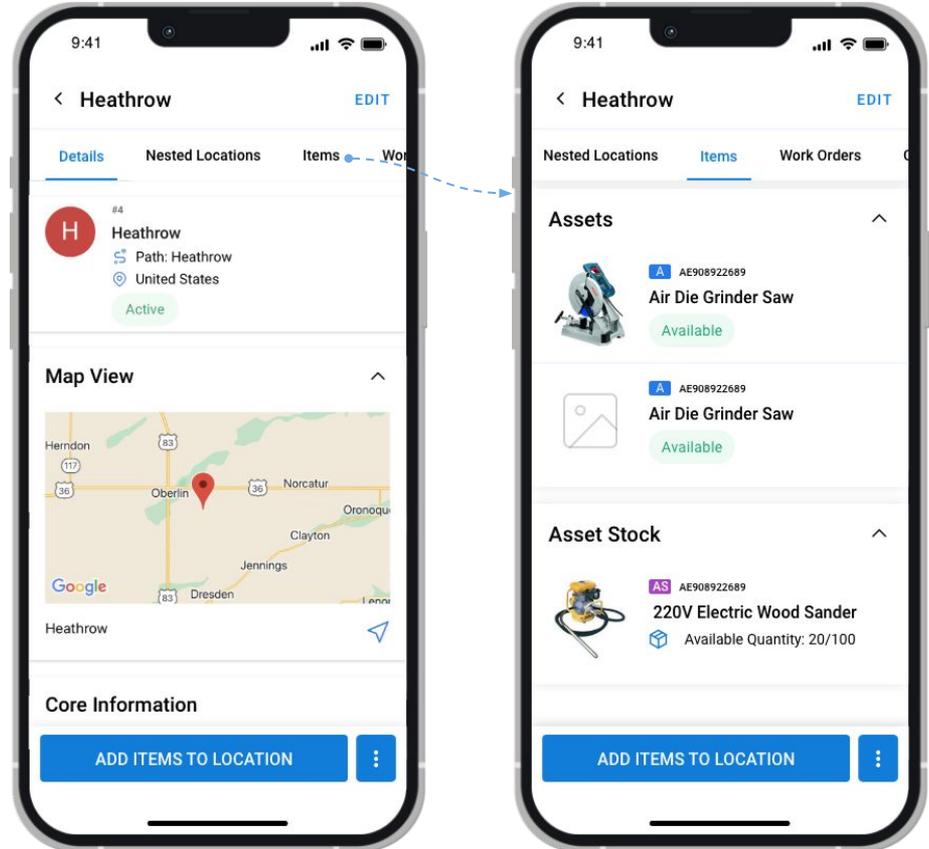
1. Use the search bar to look for variations Locations.
2. Filter out Locations by Active and Inactive states.
3. View all Locations on the map for a holistic view of business operations.



10.1. LOCATIONS ACTIONS

Tracking Locations on the go enables users to provide instant real time updates. With Locations, users can:

1. View core information like linked Items, their quantities and Nested Locations.
2. Add Work Orders and Items to a particular Location.
3. Upload related files for a particular project at a Location and Comments to keep track of progress at all times.



ABOUT EZOFFICEINVENTORY



We launched EZOfficeInventory in 2011 to help equipment-intensive organizations increase efficiency and reduce costs. Together with thousands of our customers, we have developed and refined best practices in asset management. By removing technology-related inefficiencies and enhancing employee productivity through the optimal usage of assets, EZOfficeInventory enables businesses to focus on their core strengths.

EZOfficeInventory is trusted by thousands of businesses – from small businesses to enterprises and from emerging companies to industry leaders.

Sign up for a free 15-day trial today, no credit card required

https://ezo.io/ezofficeinventory/sign_up/

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