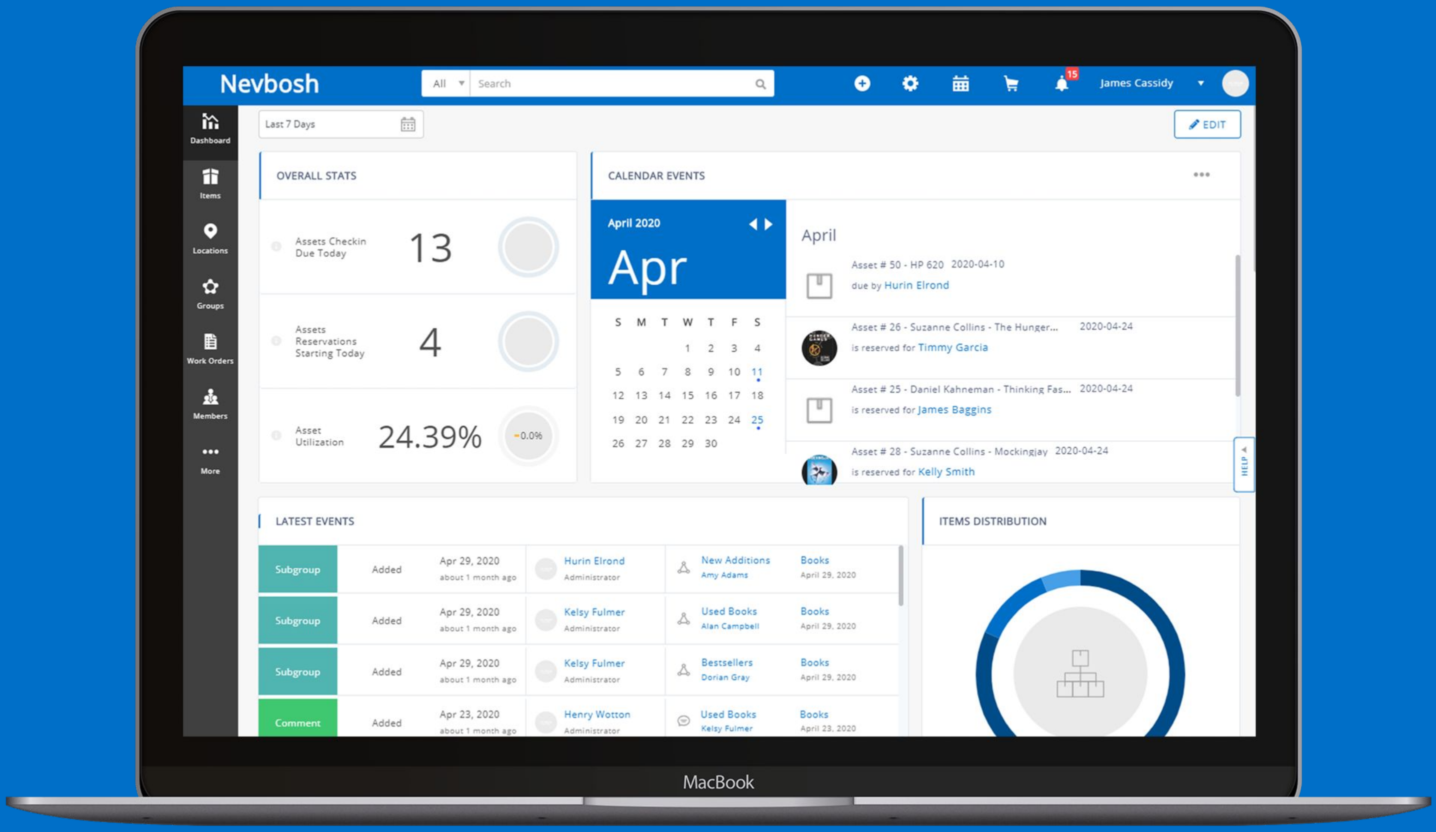


GETTING STARTED WITH

EZOfficeInventory

Asset tracking & inventory management done right

Blog | Contact us

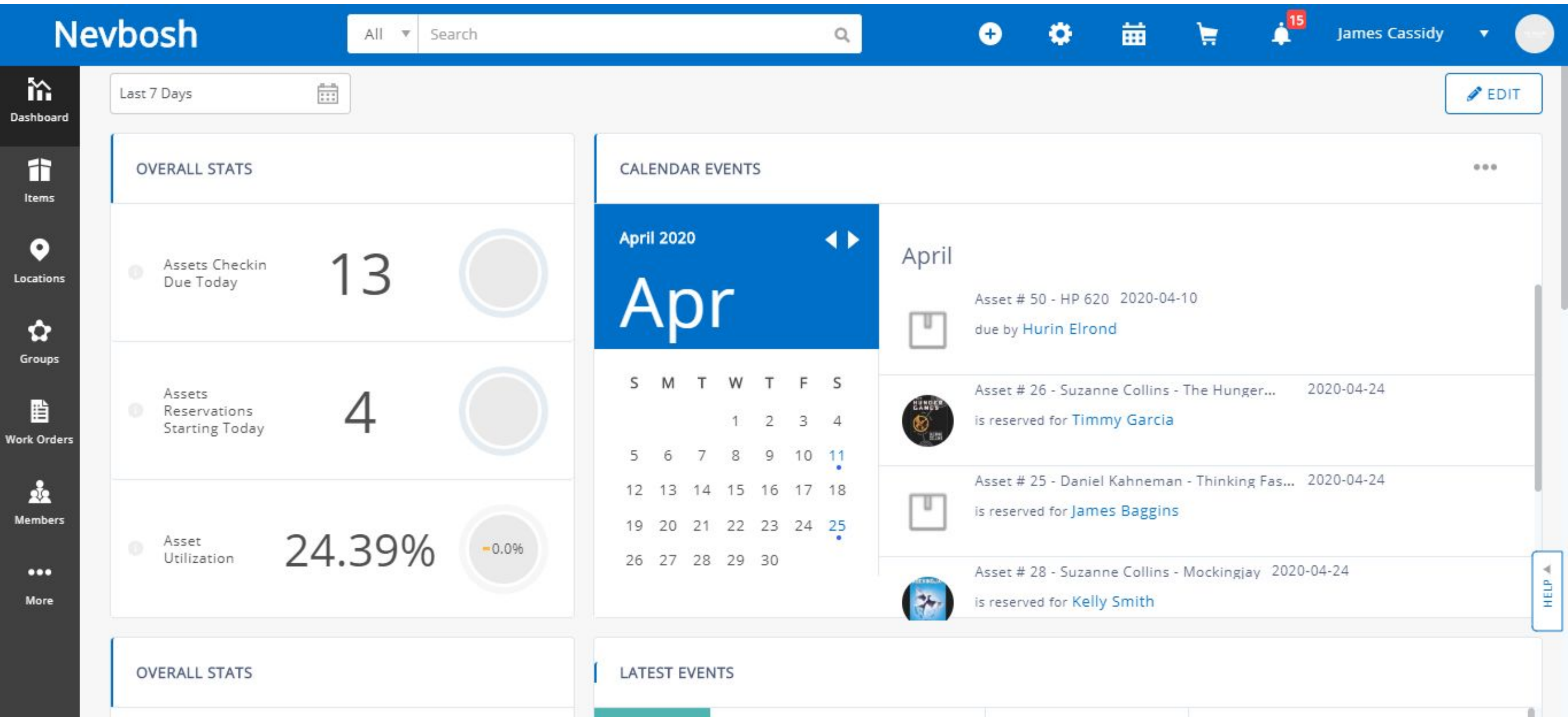
EZ OfficeInventory

Version: 2020

CONTENTS

1 First look

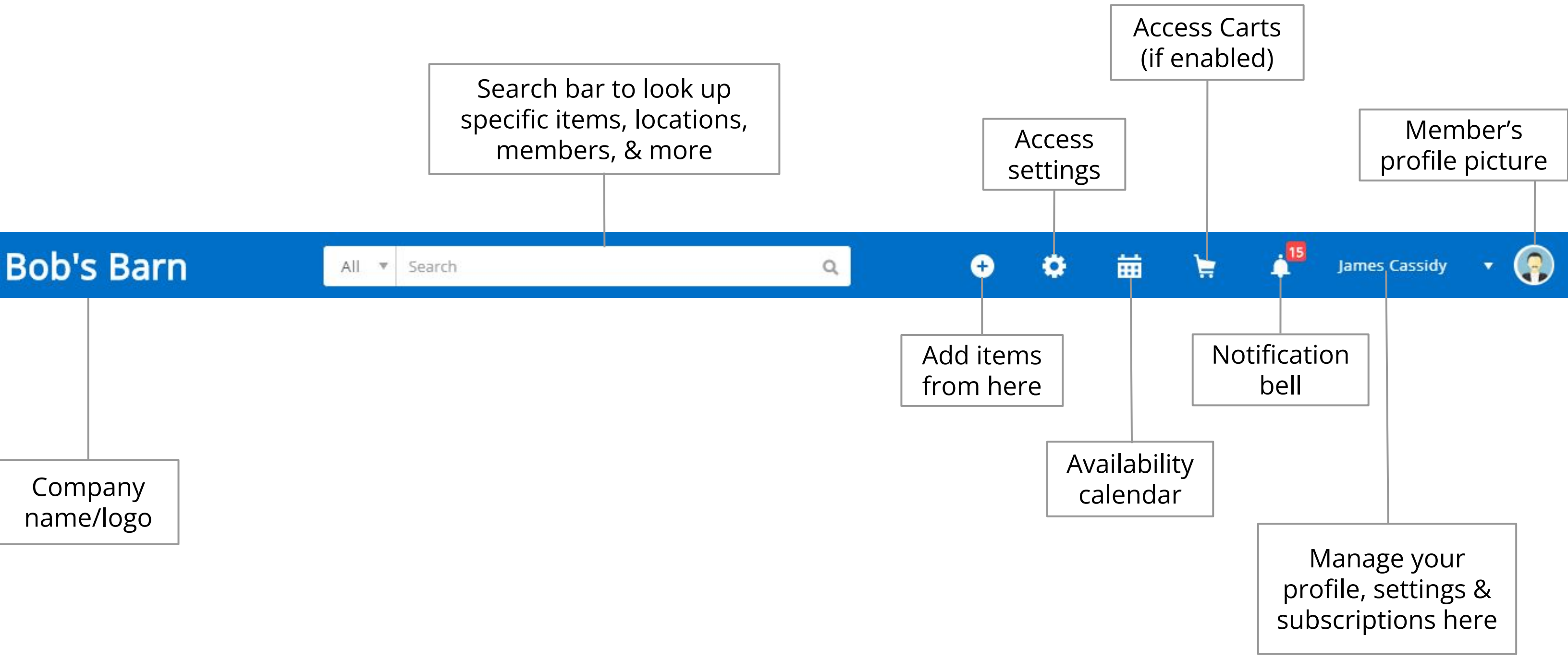
Here's what you're going to see when you log into your account:



We're going to break this down further into three parts to explain the following individual elements:

1. The top navigation bar
2. The side navigation bar
3. The dashboard

1) TOP NAVIGATION BAR

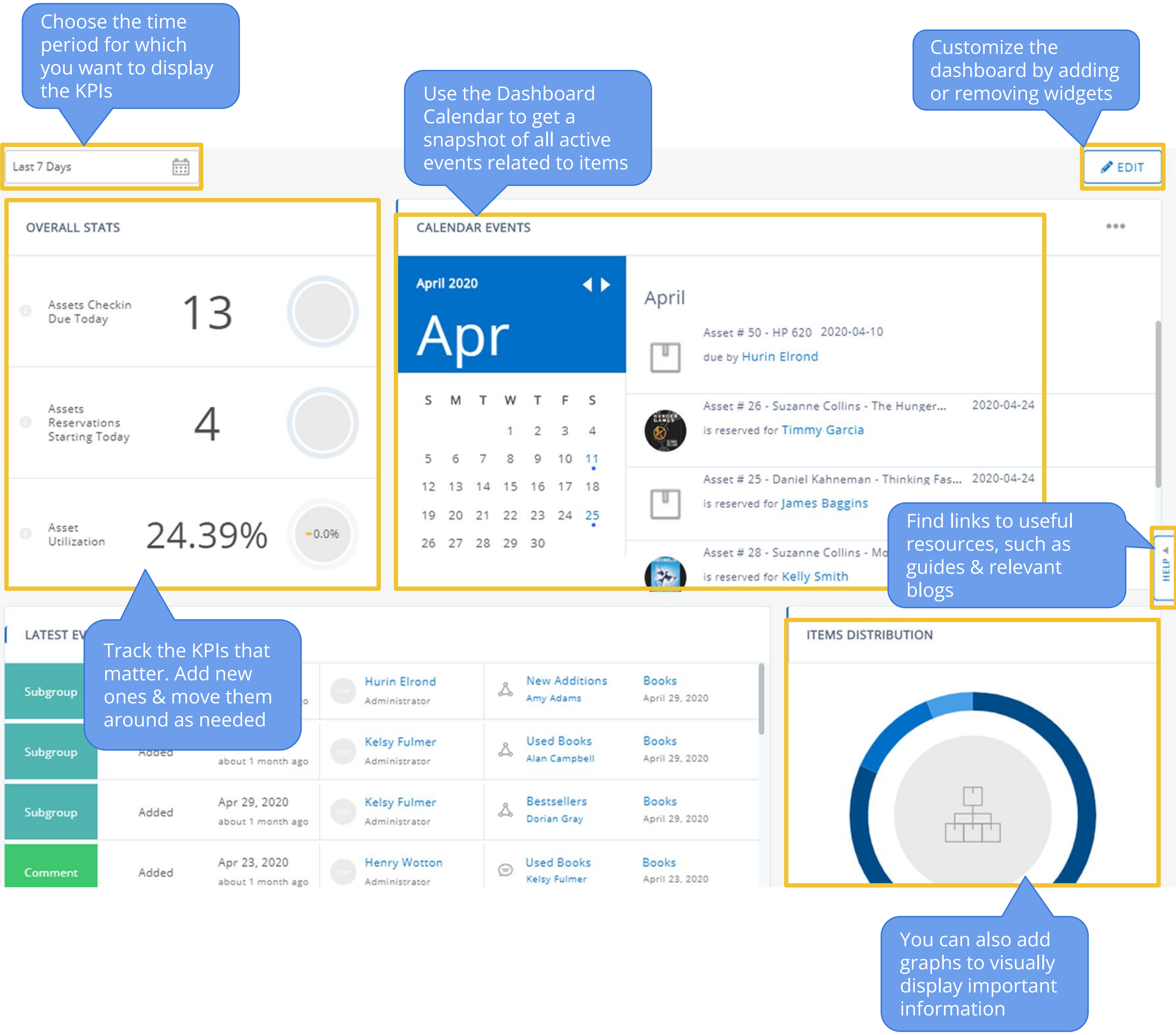


2) SIDE NAVIGATION BAR

A convenient way to navigate to all the major modules. All other modules, such as Purchase Orders, Custom Fields, Bundles, Reports, Alerts, and Vendors, can be found by clicking on 'More'.

3) THE DASHBOARD

Track ongoing events, upcoming reservations, metric cards, and other key business information - all from one place. Learn more about the Dashboard here.



2 Introduction to Items

2.1. Differentiate between Asset, Asset Stock and Inventory

Identify what type of items you will track. There are three different types in EZOfficeInventory.

ITEMS TO KEEP

ASSETS

Items that are used over time and tracked individually, e.g. forklift trucks and cars.

Assets are checked out to people, reserved, serviced or moved across locations.

If you have 10 similar trucks, add them as 10 assets. Use the clone functionality to do things faster.

ASSET STOCK

Items that are used over time and are tracked in bulk rather than individually, e.g. cables and chairs.

Asset Stock quantities are checked out, reserved or moved across different locations.

If you have 100 chairs, add an Asset Stock and add a stock of 100 to the record.

ITEMS TO CONSUME

INVENTORY

Perishable items that are consumed and permanently removed from stock count once utilized, e.g. water bottles or fuel.

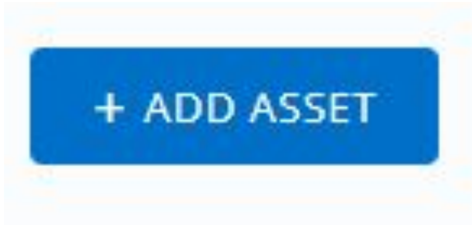
Inventory stock quantities are reserved or sold to customers through orders.

If you have 300 water bottles, add an Inventory. Then add a stock of 300 to this inventory record.

Asset Stock and Inventory modules can be turned off from the Add Ons if you don't need them.

2.2. Add Items

Let’s go ahead and create an Asset. Click on the quick add button from the top navigation bar or go to *Items* → *Asset* from the side navigation bar. You’ll see the ‘Add Asset’ button in the top right corner:



Once you click on the button, you have to fill out each detail about the Asset yourself in the ‘Create Asset’ form. Let's look at some important fields for you to populate when adding the item details:

Field Name	Description
Group	You can categorize and organize items using groups. Choose a Group or Subgroup for the new Asset from the dropdown menu.
Identification Number	You can assign your own unique sequence numbers to identify items. It can also be printed and scanned as part of a barcode.
Vendor	You can list all your Vendors in EZofficeInventory. Then when you’re adding a new item, choose which Vendor you bought the item from.
Location	You can specify which Location the item is stored at.

Similarly, to create Asset Stock and Inventory, go to the respective pages under ‘Items’ from the side navigation bar and you will find the same options available.

You can also create Bundles to package together items that are usually rented out together. To do so, go to *More* → *Bundles* and click ‘Add Bundle’.

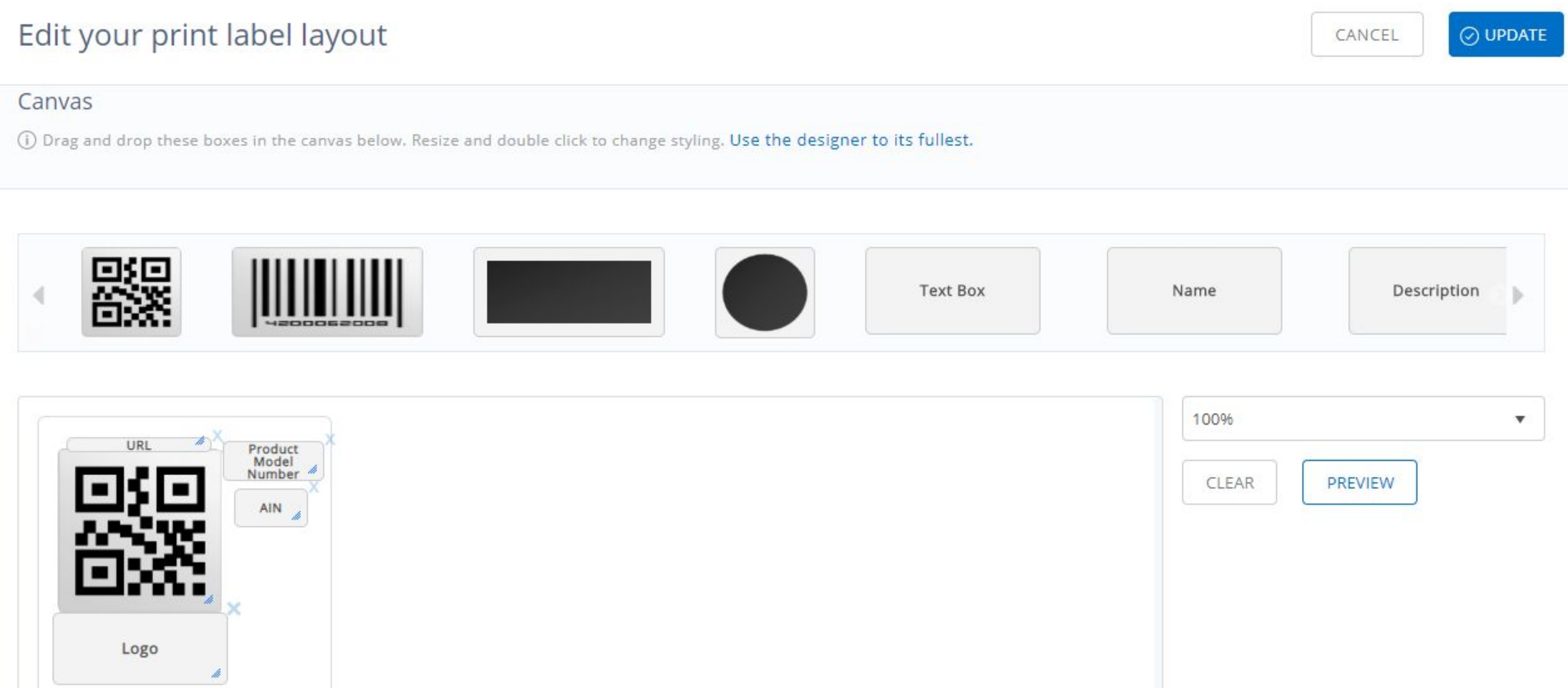
2.3. Add Items via scanning

You can add assets by scanning as many asset labels as you want using a barcode scanner. First enable this feature from *Add Ons → Handheld Scanner Integration → Barcode Reader*.

Now go to *Items → Asset* and click on the 'Add Assets via Scanning' button in the top right corner.

You can scan existing labels or design and print new labels of different sizes, styles and formats using the [**label designer**](#).

Go to *More → Printout Templates* and click 'Add Print Label Template' to start. You can choose to create labels for Items, Bundles, Members, and Locations.



Note: When using Barcodes it is necessary to enter the 'Identification Number' or a Barcode number for your items.

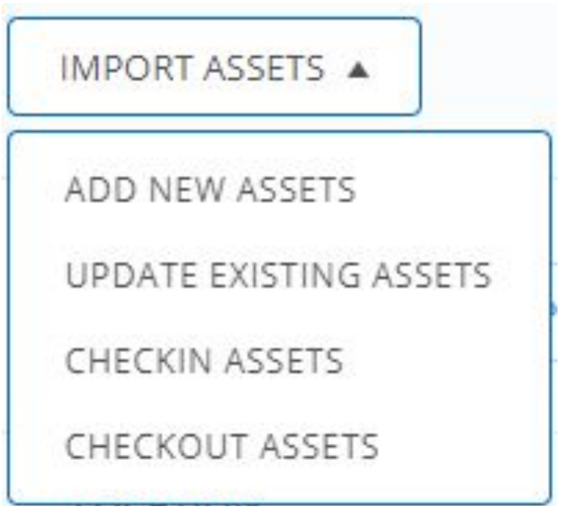
Learn More: How to setup an external Barcode | QR Code Scanner | RFID

More about Label Designing & Printing

Best Practices & Recommendations for QR Codes & Barcodes

2.4. Import Items

You can upload all Assets and their details straight from an Excel file. Go to *Items → Asset → Import Assets dropdown* and select 'Add New Assets'.



When importing items, you need to map the columns to the appropriate fields available in EZOfficeInventory. Go over this Data Dictionary to understand what each field means.

If you need to add new fields that are not available in the system, you can do so with the help of **Custom Fields**. Go to *More → Custom Fields* and click 'Add Custom Field'.

Apart from importing new assets or updating existing ones, you can also **mass check in or check out** assets by importing a spreadsheet listing all the assets you want to check in/check out.

Similarly, you can also import data to:

- Create Locations, Groups, Members or Vendors
- Assign Assets to Members
- Add stock to existing Asset Stock or Inventory

Learn More: How to Import Items into EZOfficeInventory

3 Take actions on Items

Take actions like check items in/out, reserve items, add to cart, send items into maintenance and place custody verification requests. Here's a comprehensive list of possible actions you can take on items:

ASSETS

- Check-in
- Checkout
- Extend Checkout
- Request Check-in
- Transfer Custody
- Custody Verification
- Acknowledge Custody
- Reserve
- Add to Cart
- Start Service
- Extend Service
- End Service
- Retire
- Print Labels
- Add to Purchase Order

ASSET STOCK

- Check-in stock quantity
- Checkout stock quantity
- Extend Checkout
- Reserve
- Add to Cart
- Retire Stock
- Add Stock
- Transfer Stock Location
- Custody Verification
- Acknowledge Custody
- Print Labels
- Add to Purchase Order

INVENTORY

- Remove stock quantity
- Add Stock
- Transfer Stock Location
- Request Stock
- Reserve
- Add to Cart
- Retire Stock
- Print Labels
- Add to Purchase Order

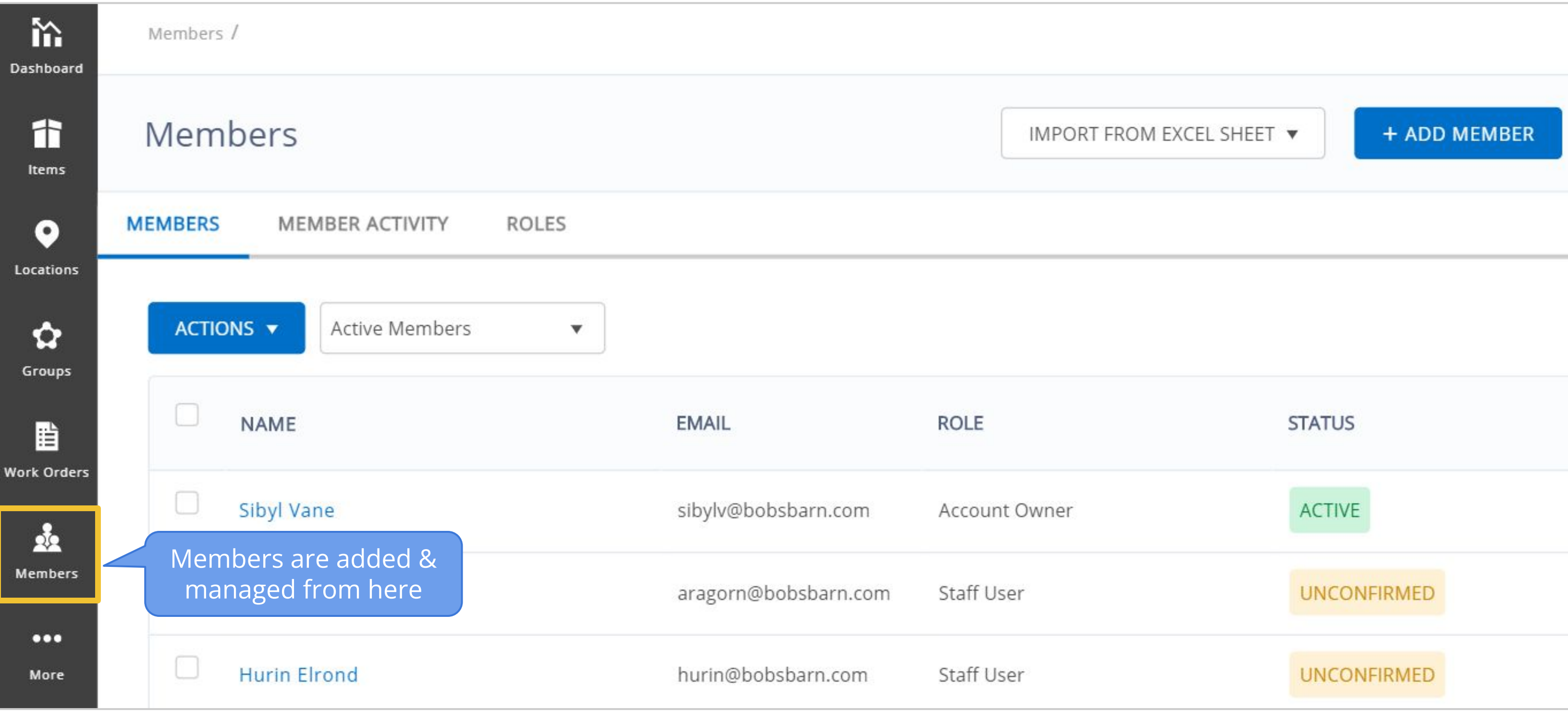
Here are some useful resources to help you understand what a few of these actions are:

- Learn about Custody Verification
- Learn about Service and Maintenance Events
- Learn about Carts
- Learn about Reservations
- Learn more about actions on Inventory items

4 Add Members

Members are individuals who checkout Assets or Asset Stock items, or consume stock from Inventory. There are two types of members in EZOfficeInventory:

1. **Admins**, who have full access and can add and update records. They can also take actions for Staff Users.
2. **Staff Users**, who cannot add or update items and can't view reports. They can only take actions for themselves.



You can also have **non-login staff**, who can't log in but their records are maintained. Admins checkout/reserve items for such users. Additionally, you can deactivate members that are not part of your company anymore.

You can further configure asset visibility and usage rights of members from Settings. You can set up both Simple Access Control for staff users as well as Advanced Access Control, which includes Arbitration in a User Listing.

Note: These are just the default roles in the system. You can create more roles by enablin Custom Roles.

Learn more about the types of members and their access rights here.

5 Add Groups & Locations

5.1. Add Groups

Use Groups and Subgroups to categorize your items. For example, all the camera lenses and tripods can go to the Camera Accessories group.

To add a new group, find the Groups icon on the side navigation bar.

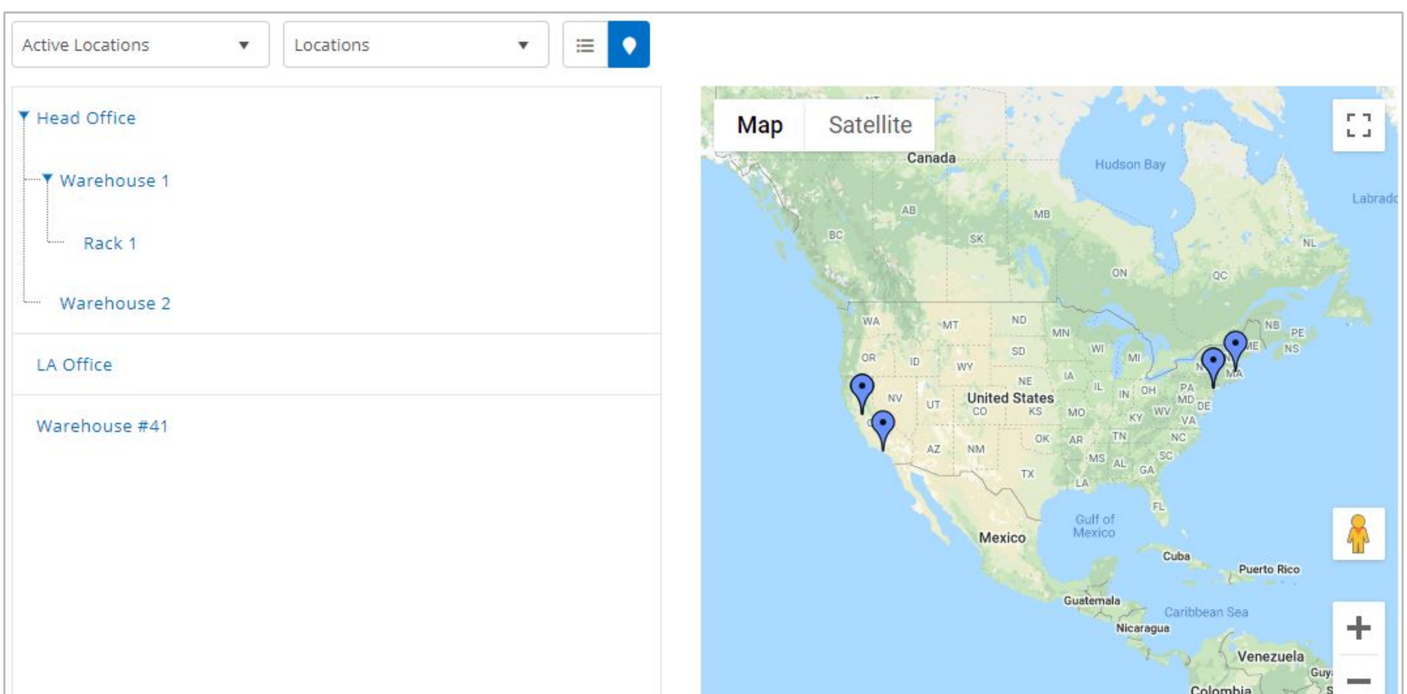
You can also restrict users to only view the asset groups they have permission to access.

5.2. Add Locations

You can track Assets and stock quantities across different locations. Set up parent-child locations, and nest locations so you can track items from a country to a state, city, street, warehouse, all the way down to a single shelf.

To add a new location, find the Locations icon on the side navigation bar. Learn more about Locations here.

All Stock Locations created can be seen on a map from the Locations tab.



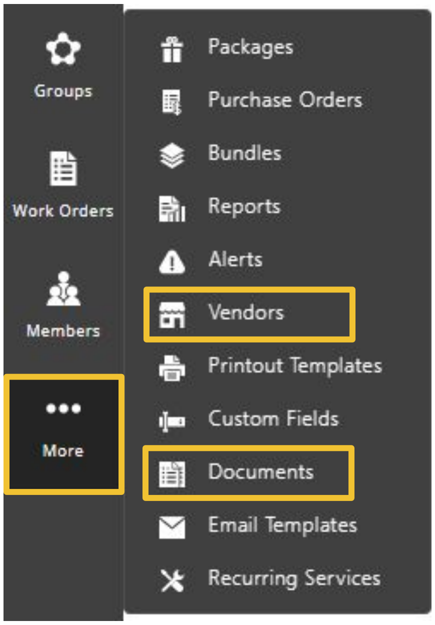
6 Add Vendors & Documents

6.1. Add Vendors

Vendors who provide services, or supply assets and inventory go here. For example you can record all services that Caterpillar provided for your cranes, or all the Cranes that you got from Caterpillar.

To add vendors or manage existing ones, go to *More → Vendors*.

Learn more about Vendors here.



6.2. Add Documents

All images and documents in your account can be placed in a central location. Any file that you upload to an item or a group, even a user's signature, gets added to the library.

To access the documents library or upload new ones, go to *More → Documents*.

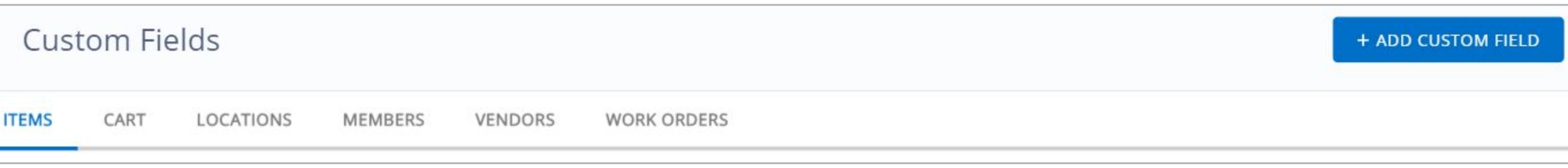
Note: You can also add documents from the Documents section present in each module.

Learn more about Documents and how to import them from Excel here.

7 Introduce Custom Fields

Items in EZOfficeInventory come with a predefined set of fields. However, if these fields do not fully meet your business requirements, you can also add Custom Fields.

To add Custom Fields, go to *More → Custom Fields* and click the 'Add Custom Field' button.



After you have created a Custom Field, it will start appearing on the relevant Item Details pages.

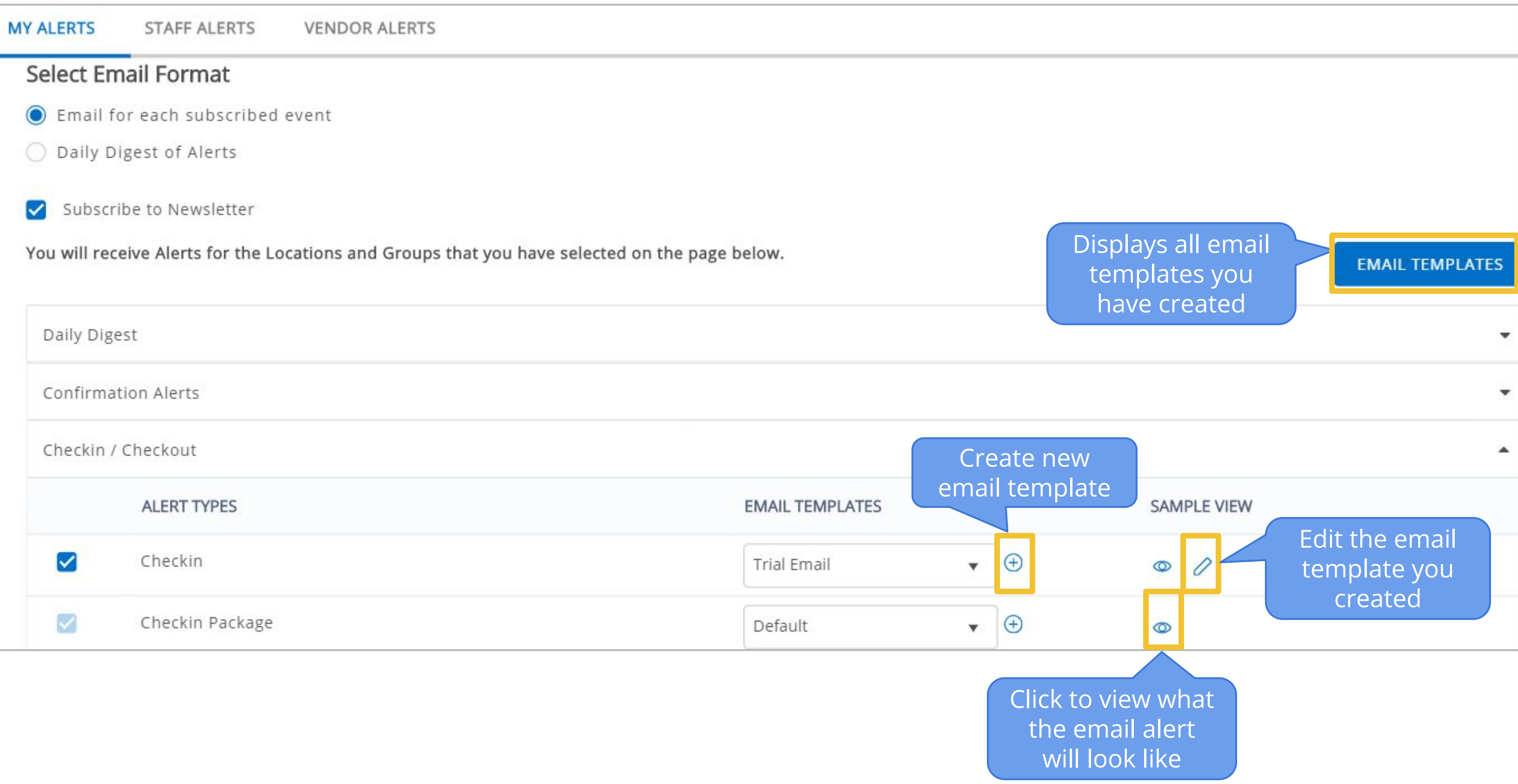
Apart from the Items module, here are the other modules that support Custom Fields:

- Carts
- Work Orders
- Members
- Vendors
- Locations

Learn More: [Guide to Custom Fields] | [Associating Groups with Custom Fields]

8 Subscribe to Email Alerts

To subscribe to and manage alerts, go to *More → Alerts*. You can select the actions you want to receive alerts for and also customize email templates better suited to your needs.



All confirmed members receive emails based on their selected actions of interest, for example, checkout, check-in, etc.

Staff members receive emails they've subscribed to only when they're involved in the action, while administrators receive emails for all actions across the company.

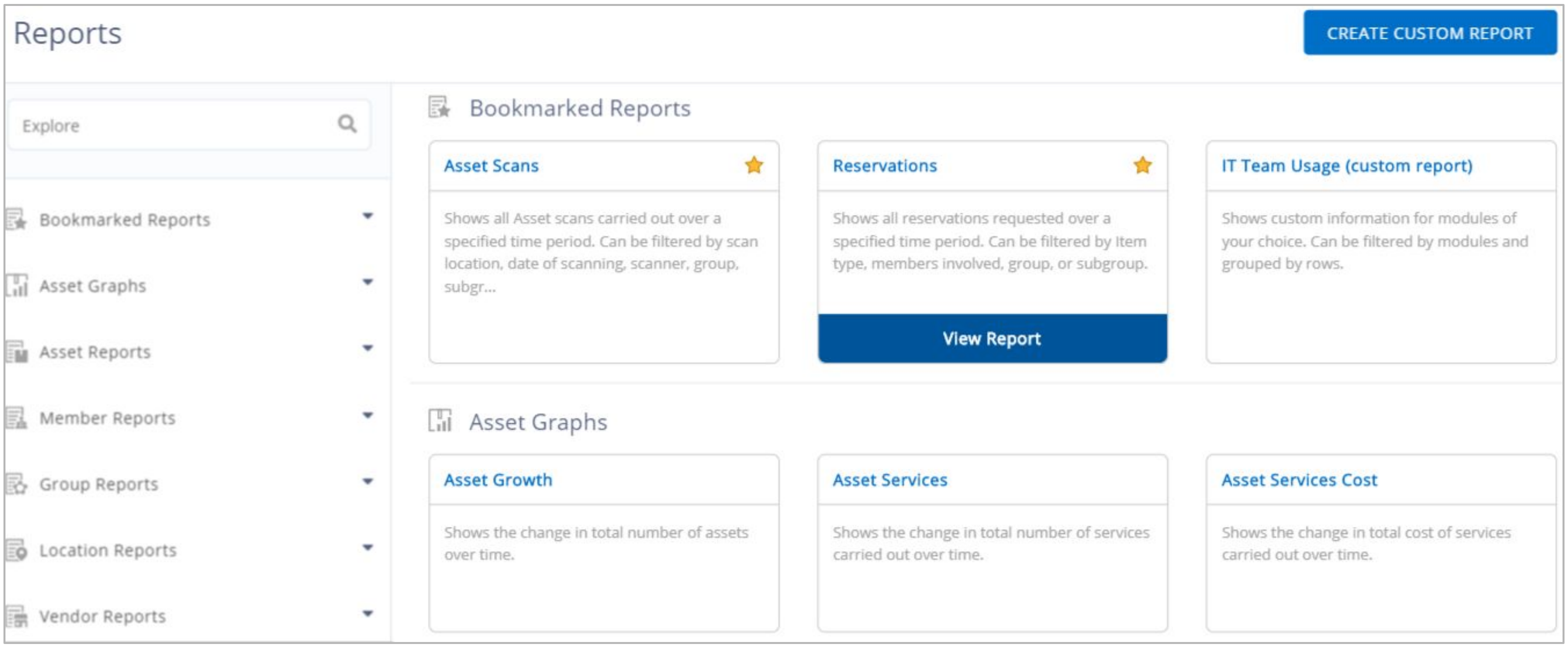
An important element to note here is the **Daily Digest**. You can either choose to receive emails for each event as it happens, meaning several alerts a day. Or you can opt for the 'Daily Digest of Alerts' which sends out a single email at day-end which includes all events from that day.

Learn More: Types of Alerts in EZOfficeInventory | How to Customize Email Alerts

9 Run Reports

You can access the Reports module from *More → Reports*. Gain valuable insights with reports on:

- Items
- Asset utilization
- Reservations
- Members
- Groups
- Custody Verification
- Check in/Checkout events
- Asset Depreciation
- Work Orders
- Locations
- Services & Maintenance
- Purchase Orders
- Vendors
- Inventory & Stock levels



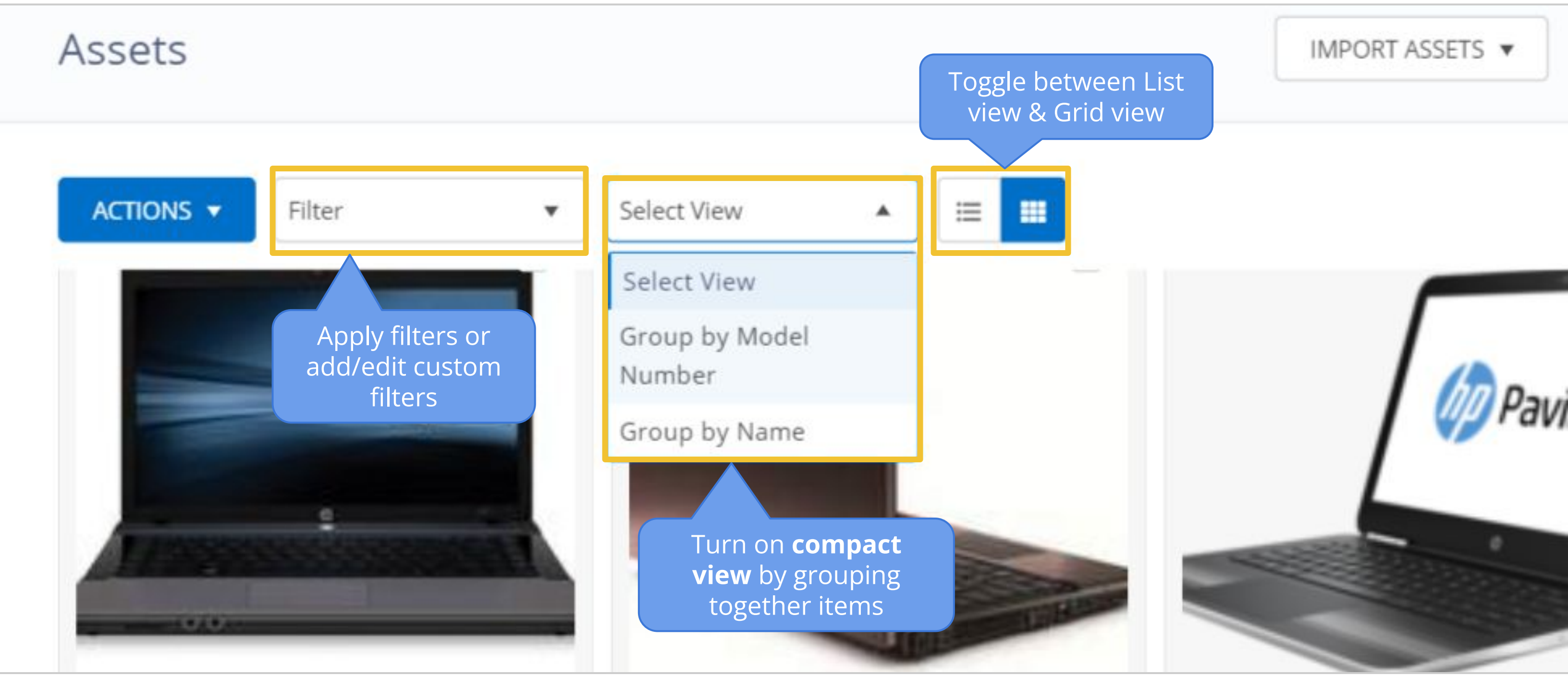
To get more specific information catering to your use case, you can also create, save and schedule **Custom Reports**.

You can also filter reports as per your requirements. For example, for asset reports you can filter by group, location, date, members and vendors. Lastly, to keep your reports safe, you can export them to CSV or PDF.

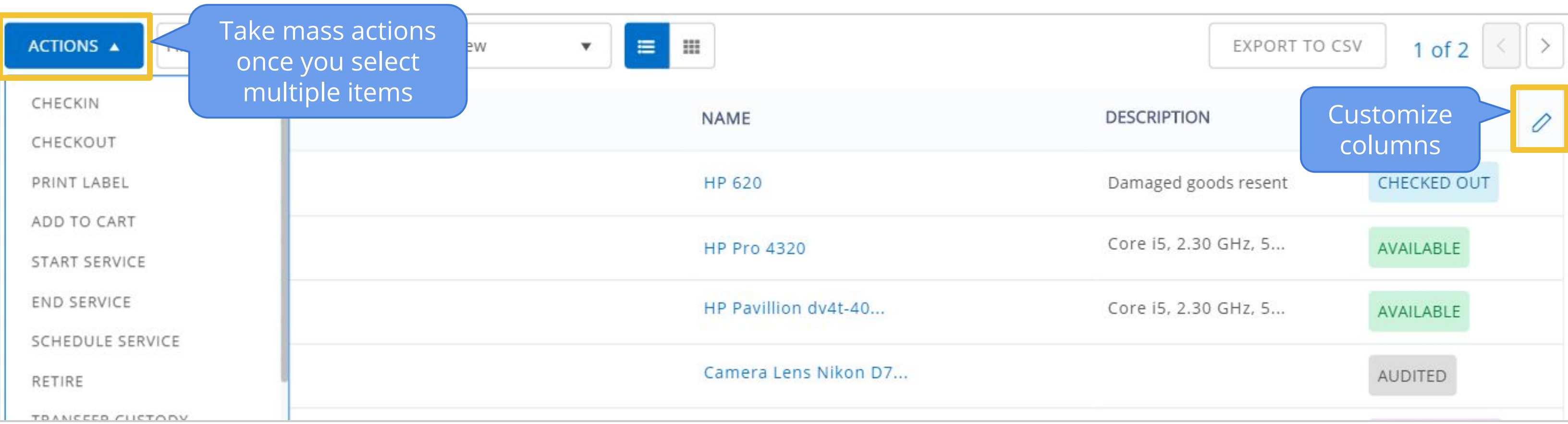
Learn more about Item Reports in EZOfficeInventory

10 Try out different Listing Views

GRID VIEW



LIST VIEW



Similar to *Compact View* in Assets, there's *Location Stock View* in Inventory and *Current Checkout View* in Asset Stock.

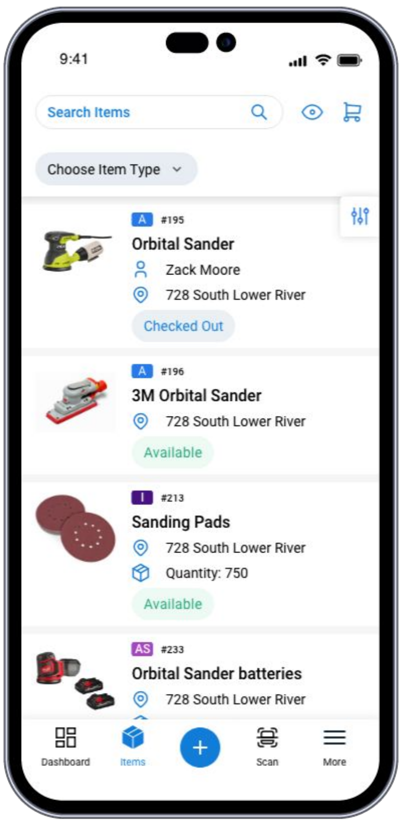
11 Take actions with the Mobile App

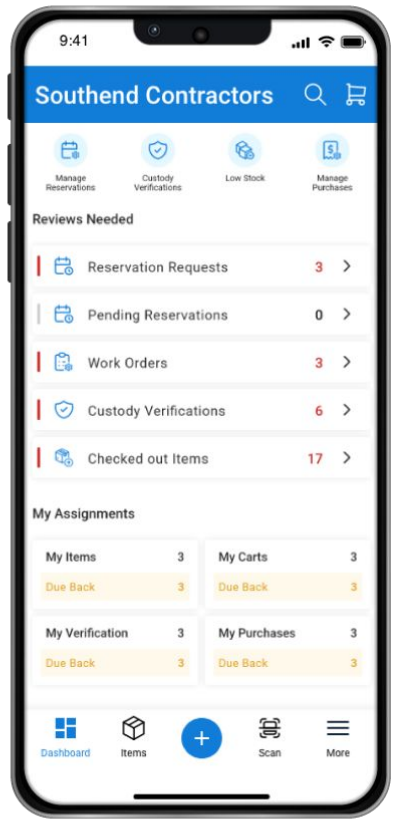
Pulling up items and taking actions becomes extremely convenient with the mobile app.

- One place for all action items
- Scan for fast actions
- Information at your fingertips
- Global search

DOWNLOAD

[For iPhone/iPad] [For Android Phones & Tablets]

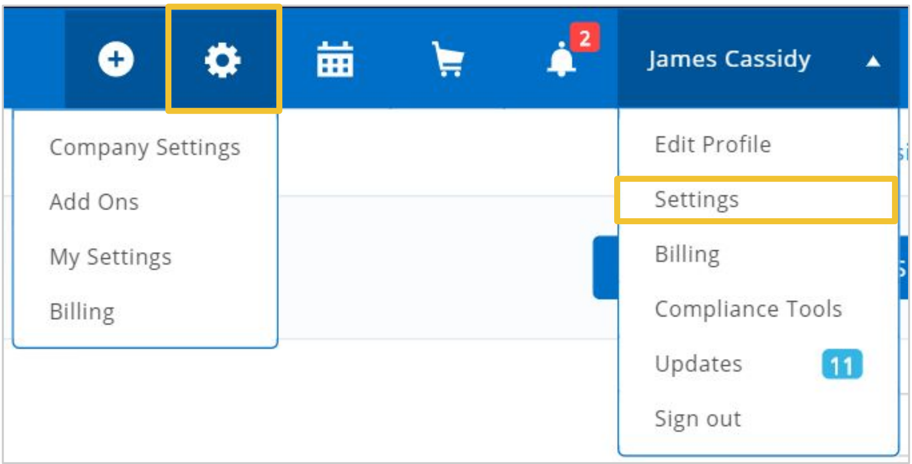




Learn More: EZOfficeInventory Mobile App Guide | Watch the Mobile App in Action

12 Explore Add Ons & Integrations

Once you're done with the basics, try out Advanced Settings and Add Ons.



In Company Settings, you can upload the company logo, select your time zone and configure a number of other policy level settings. Now let's look at some of the popular advanced features:

CARTS

- Add items to Carts for faster checkouts for jobs & events.
- Reserve Carts for yourself or others.
- Learn more

WORK ORDERS

- Create Work Orders & assign items to them.
- Assign Work Orders to members & track progress.
- Learn more

PURCHASE ORDERS

- Create Purchase Orders & add items to them.
- Send emails and invoices to vendors.
- Learn more

ADVANCED MAINTENANCE

- Automatically send asset into maintenance for specified duration after it is checked in.
- Set up recurring services.
- Learn more

BUNDLES

- Bundle together a flexible combination of items to create a kit, to checkout or reserve items together.
- Learn more

PACKAGES

- Use Packages to clamp assets together so they are always checked out & checked-in together.
- Learn more

DATA BACKUP

- Take automatic, periodic data backups using EZOfficeInventory.
- Sync your DropBox or OneDrive account with EZOfficeInventory to backup your data.

DEPRECIATION

- Use straight-line depreciation method to assess asset value over time.
- Define percentage depreciation for assets at the group level.
- Learn more

ZENDESK

- Connect Zendesk with EZOfficeInventory to link items & members with service desk tickets, end users & agents.
- Learn more

FUZZY LISTS

- Create Fuzzy Lists to streamline equipment management.
- Use these lists as dynamic reference points when reserving or checking out carts.
- Learn more

AVAILABILITY CALENDAR

- View items by availability using the Availability Calendar.
- Learn more

API

- Use our REST based APIs to access your assets.
- Learn more

CUSTOM ROLES

- Apart from the system's predefined user roles, configure unique roles for each user.
- Apply restrictions & create teams.
- Learn more

JIRA

- Integrate EZOfficeInventory with Jira for seamless issue tracking.
- Learn more

MULTIPLE LOGIN OPTIONS

- Integrate with **SAML** to sign in via a unified URL. Learn more
- Use **LDAP** credentials to log in. Learn more
- Integrate **G Suite** user directory to import members directly. Learn more
- Manage identity data of your employees with **SCIM**. Learn more

Please fill out this 30 seconds **Feedback Form** to tell us how we did!

FOR FURTHER ASSISTANCE:

blog.ezofficeinventory.com

support@ezo.io

+1 888 623 8654

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