

**EZ** OfficeInventory  
by ezo

Asset Tracking, Simplified

# Introducing the Redesigned Mobile App

Navigation | Global Search | Quick Actions

# C O N T E N T S

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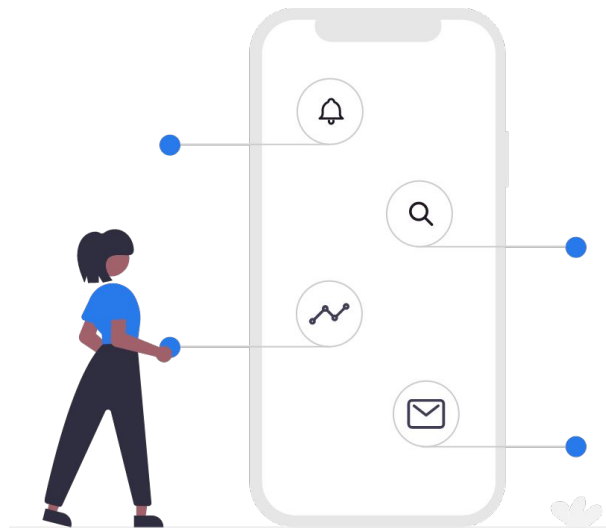
- 8.1. Packages Listing
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## EZOfficeInventory Mobile App: Quick and Easy Actions on the Go



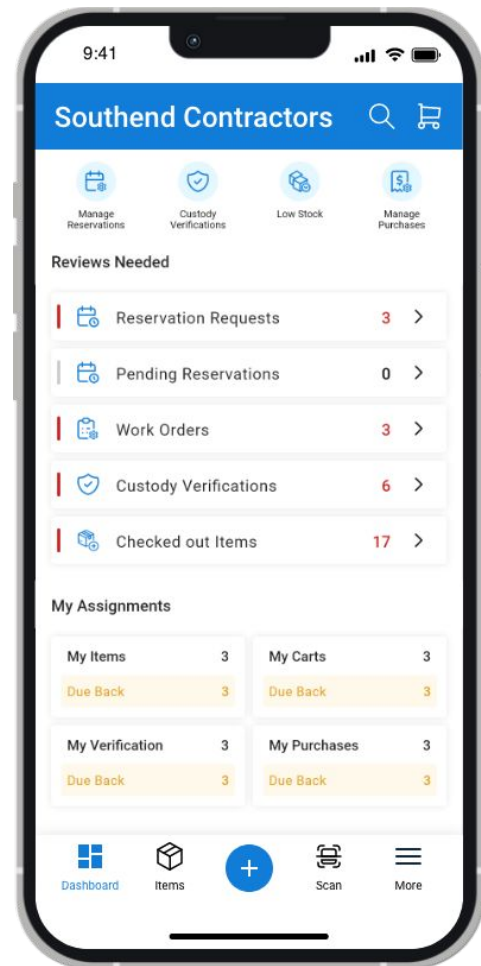
- Information at your fingertips  
get what you need, fast
- Performance  
new technology stack
- One Place for Item Actions  
Centralized for convenience and speed
- Global Search  
Faster, unified search results
- Easy Forms & Actions  
redesigned for clarity & ease
- Universal Scan  
scan and take all actions
- Scan Checkpoint  
tag an item anytime, anywhere

# 1. THE DASHBOARD

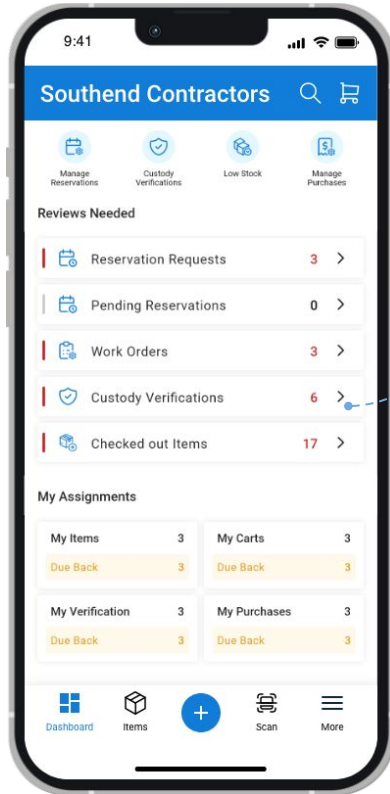
The Dashboard gets you started on all asset-related activities and enables you to get a quick summary of all Item events instantly!

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. Click [here](#) to view the Dashboard overview video.



## 1.2. ADMIN AND STAFF DASHBOARDS



Admin Dashboard

### Quick Actions

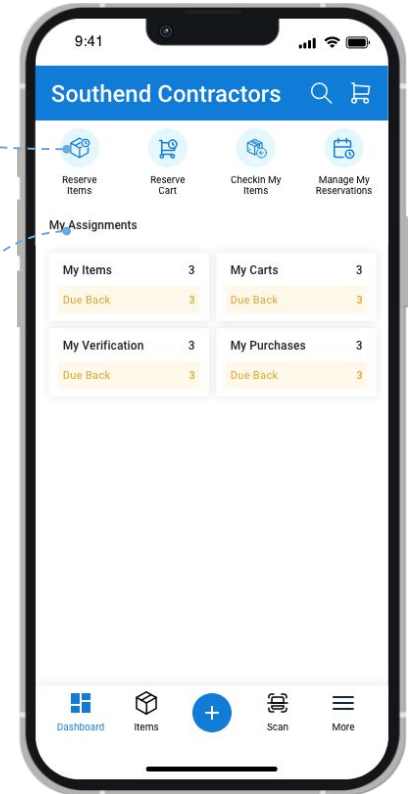
Shows the most relevant actions based on your role access

### Reviews Needed

Primarily for supervisions, this is a 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)



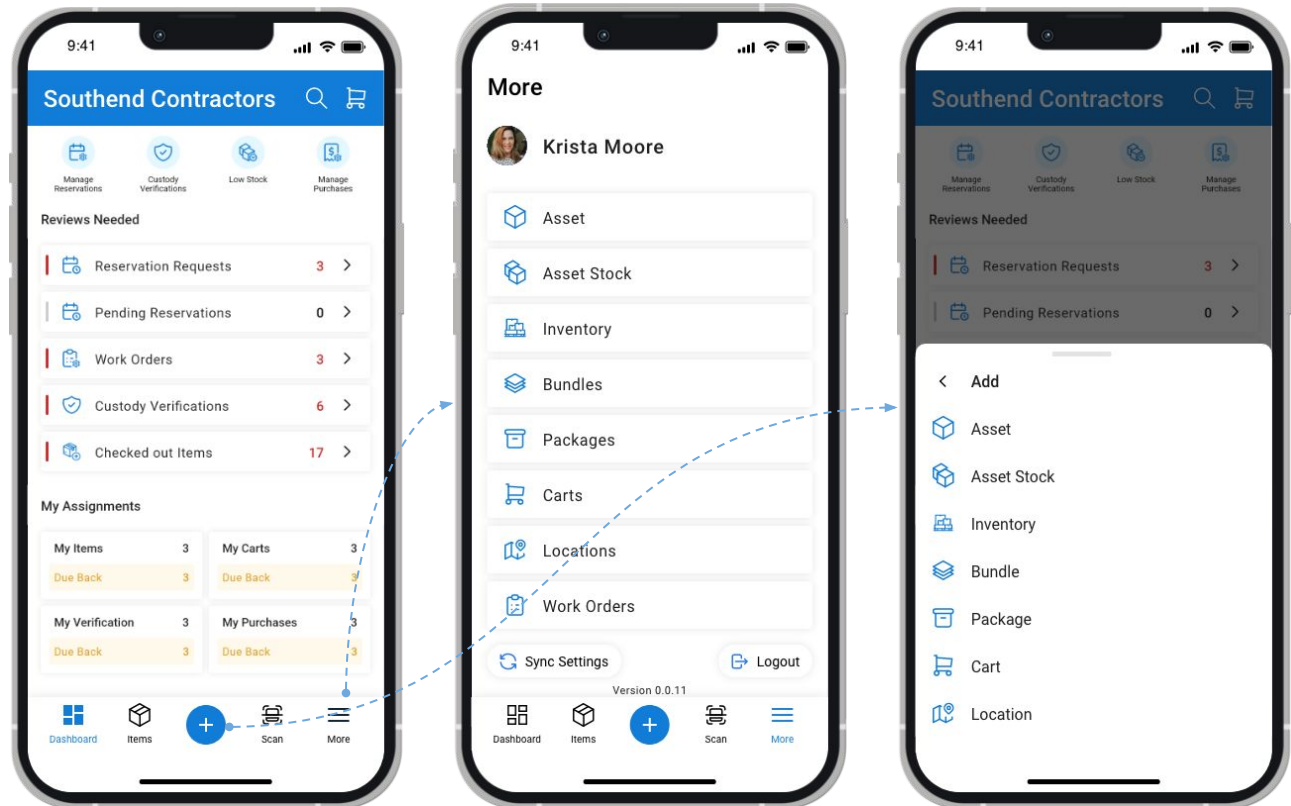
Staff Dashboard

## 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.

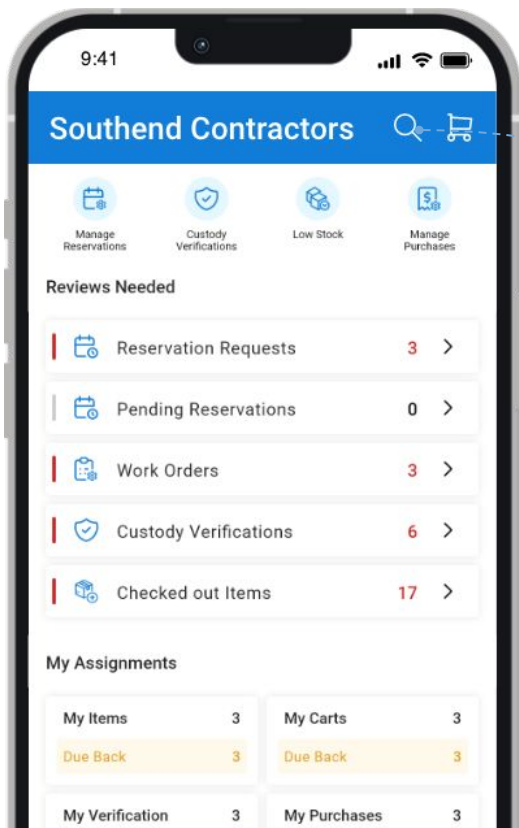
**Quick Add:** The 'Add' button enables you to create a new listing for various items just a single tap.

Learn more about Quick Add in this [video](#).  
See this [video](#) on how to access more modules.

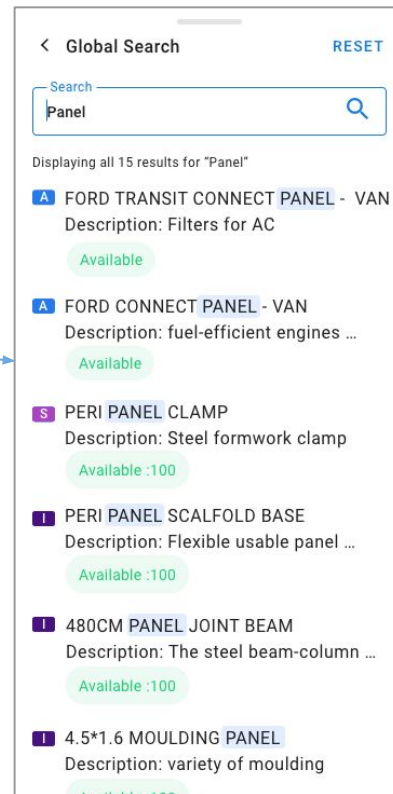


### 3. GLOBAL SEARCH

Quickly find anything you need - anytime, anywhere



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

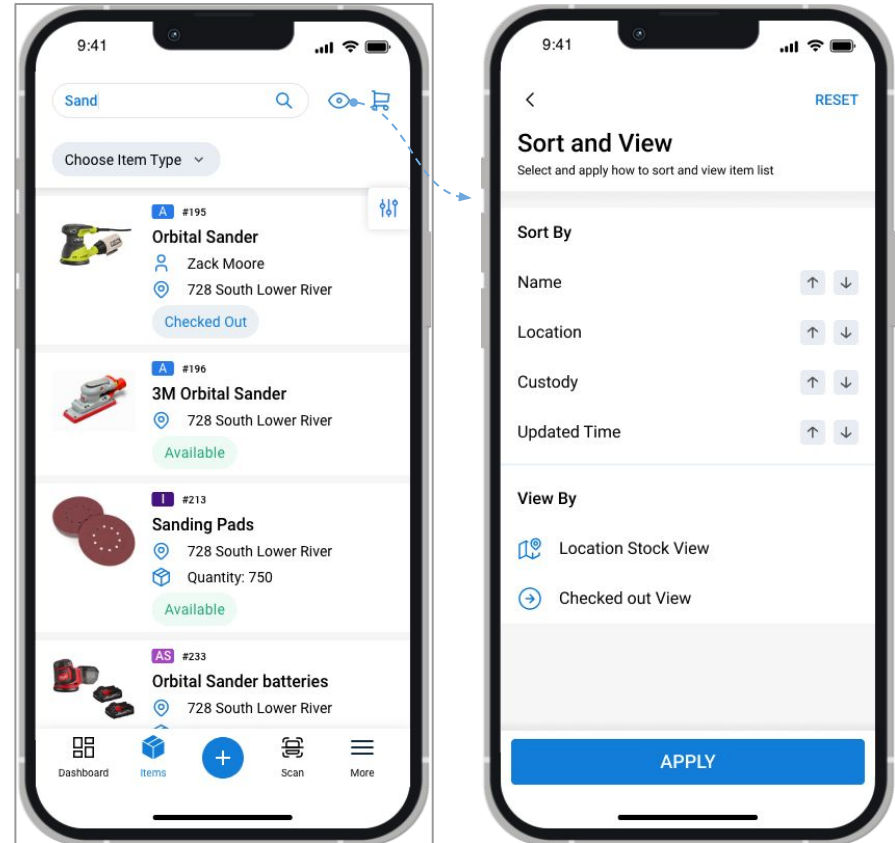


## 4. ITEM CENTER

Find and take actions across any item types

1. Use the **Quick Search** to find 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, and Time** to get a comprehensive view of workflows.

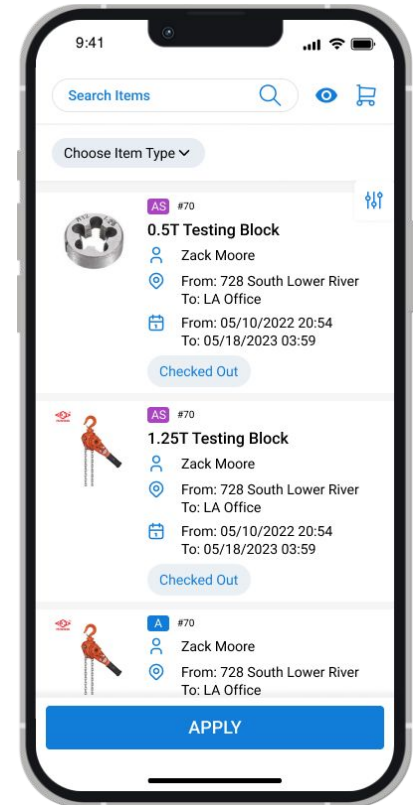
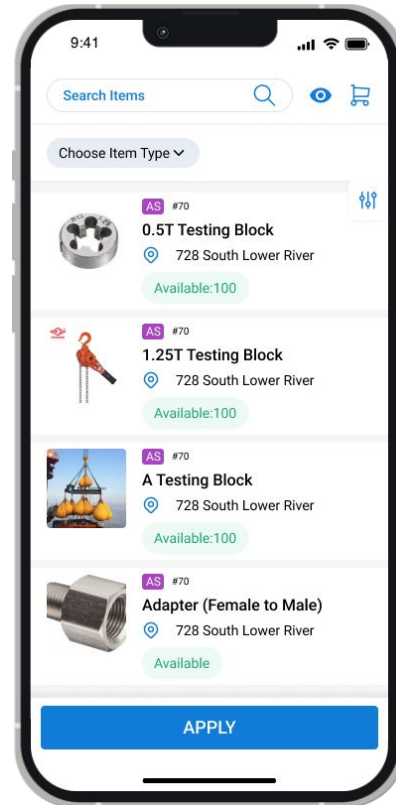
Click [here](#) to watch a quick snapshot of the Item Center in our mobile app video.





## 4.1. ITEM CENTER: LOCATION AND CHECKOUT VIEW

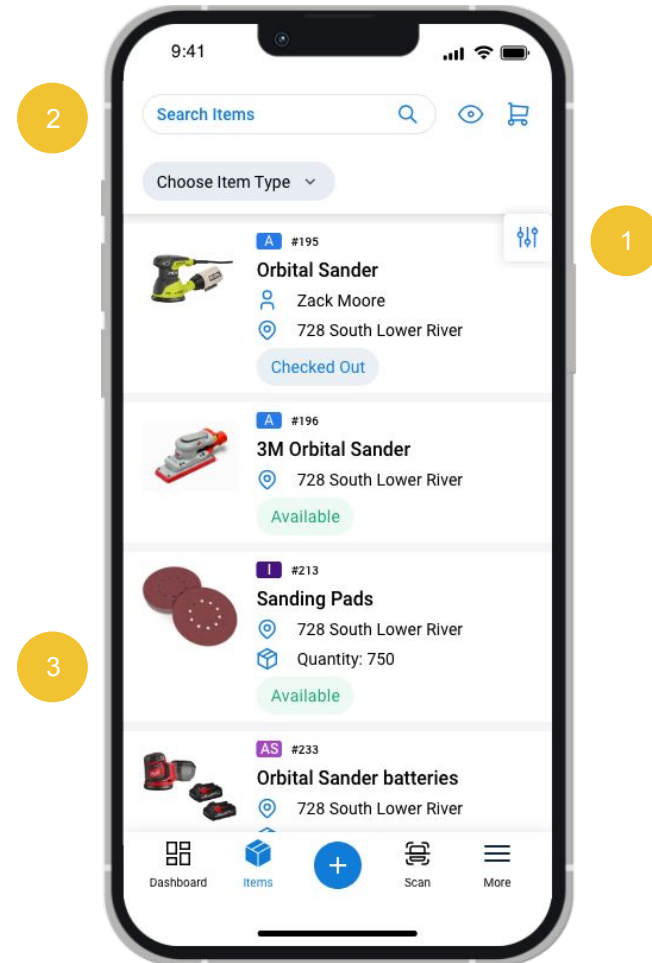
1. Sort Items by different states to help you quickly scroll through the results.
2. The **Location Stock** view displays all Inventory and Stock quantity available at multiple locations.
3. The **Checkout view** displays a list of all Asset and Asset Stock that are checked out to users.



## 4.2. ITEM CENTER MIX LISTING PAGE

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

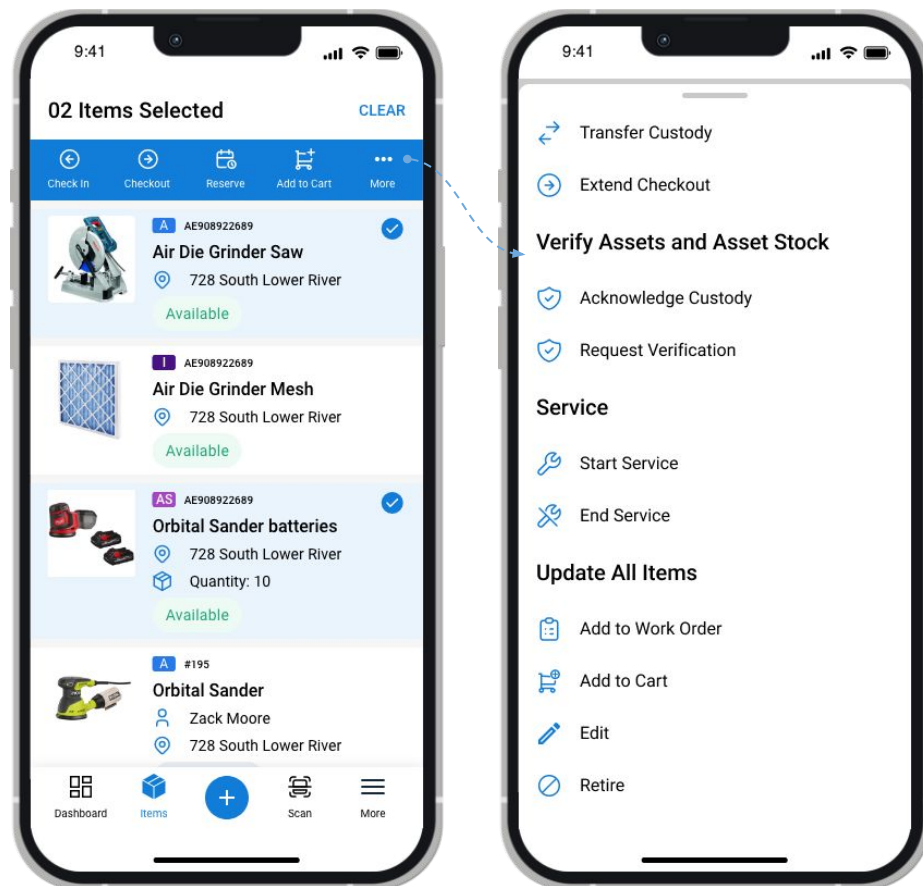
1. **Filtering items:** Tap on the 'Filter' button to apply Primary and Availability Filters to customize your view.
2. **Navigating to the Item Details Page:** To head to an Item Details Page, tap on the item card.
3. **Actions on Mix Listing page:** Simply tap and hold the Item and select the required action.



## 4.3. TAKING MASS ACTIONS

Use the Item Listings to take mass actions. Tap and hold the Item card. Once you begin selecting, the mass action menu will pop up at the top of the page, where you can:

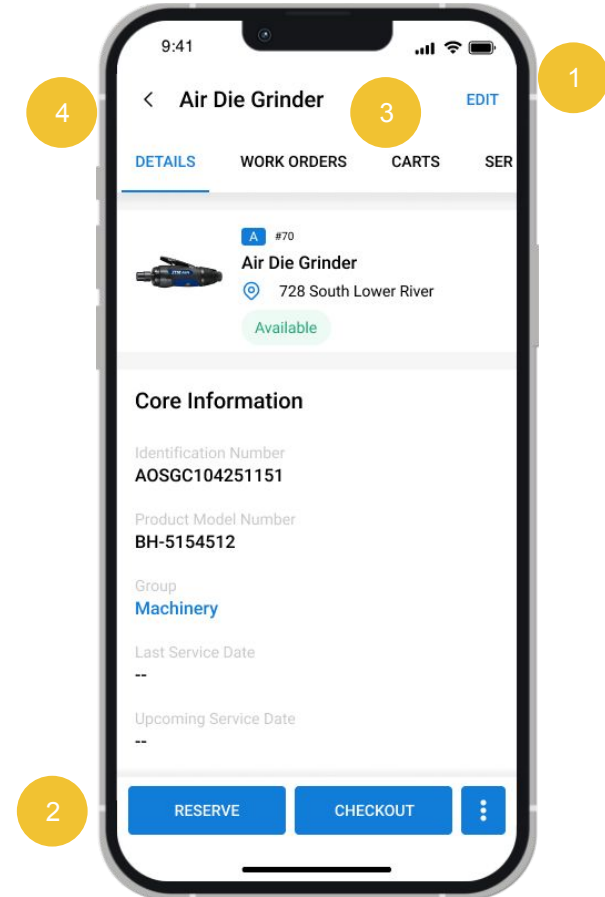
1. **Check items in and out** or extend checkouts.
2. **Reserve items** in advance from any location.
3. **Retire** multiple items in one go.
4. **Verify possession or Transfer Custody** for an assortment of items.
5. **Add items to the** active or reserved **Cart**.
6. Add multiple items to **Purchase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



## 4.4. ASSET DETAIL PAGE: ACTIONS AND TABS

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.

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. **Tabs:** Access associated Carts, Work Order, Reservations, Comments and History directly from the details page.
4. **Navigating back to the listing:** tap on the back arrow "<" to go back to the listing.

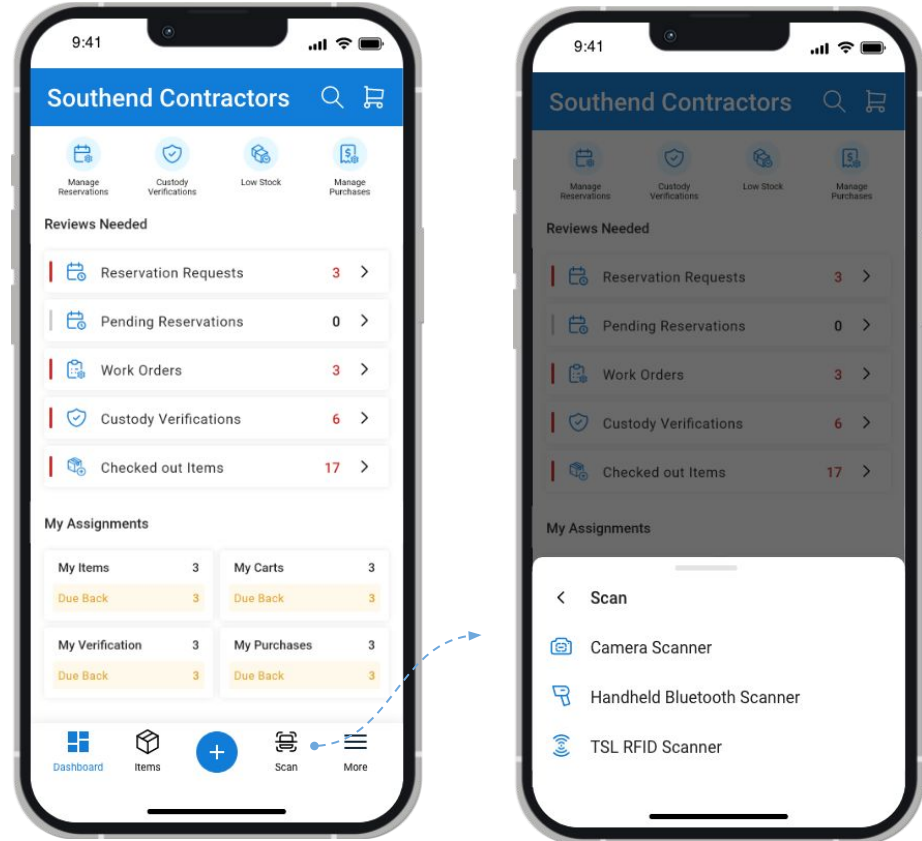


## 5. SCANNING ITEMS

Scan items in quick succession with EZOfficeInventory's Scan Center to create 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. A pop up will appear asking you to select a suitable scanner.
3. Next, position the barcode or QR code within the designated area. Upon detection, the screen will display the Item #.
4. The scanned Items will be displayed in the "Items Tab".

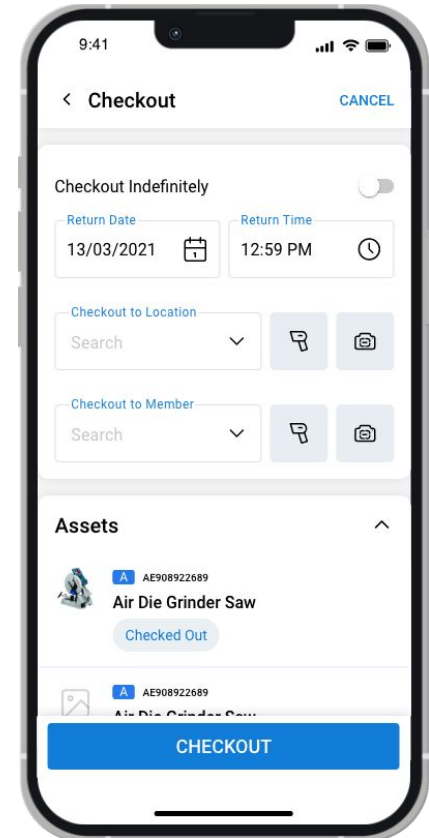
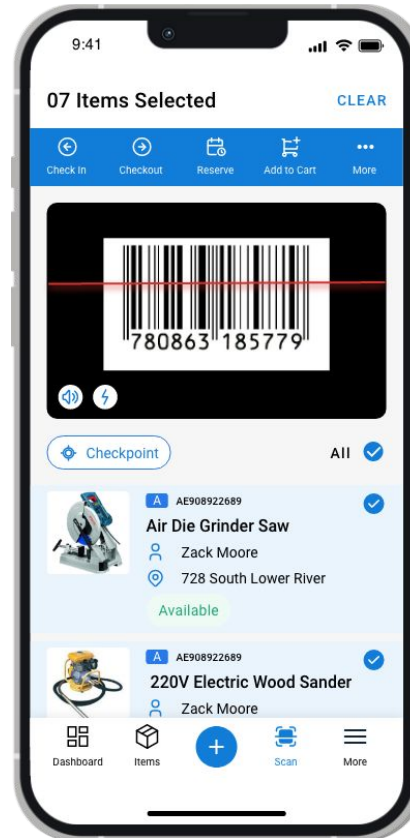


## 5.1. ACTIONS ON SCANNED ITEMS

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.

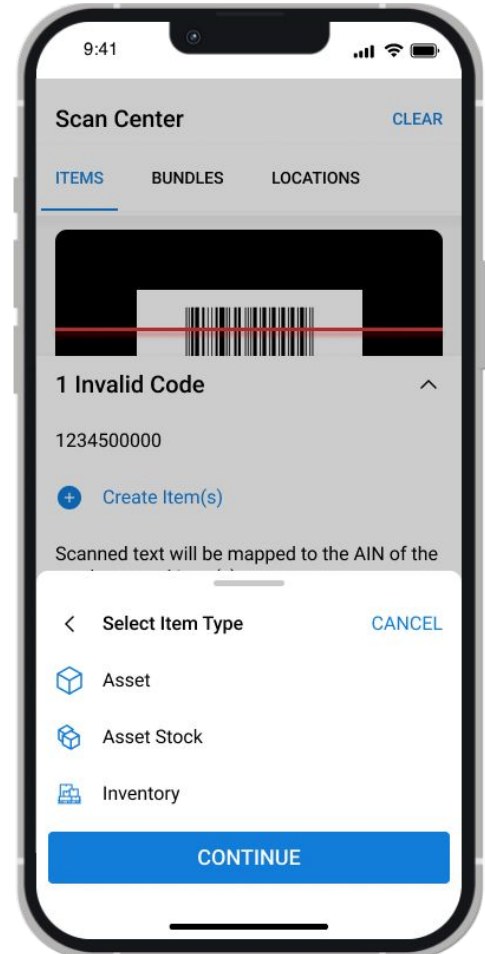
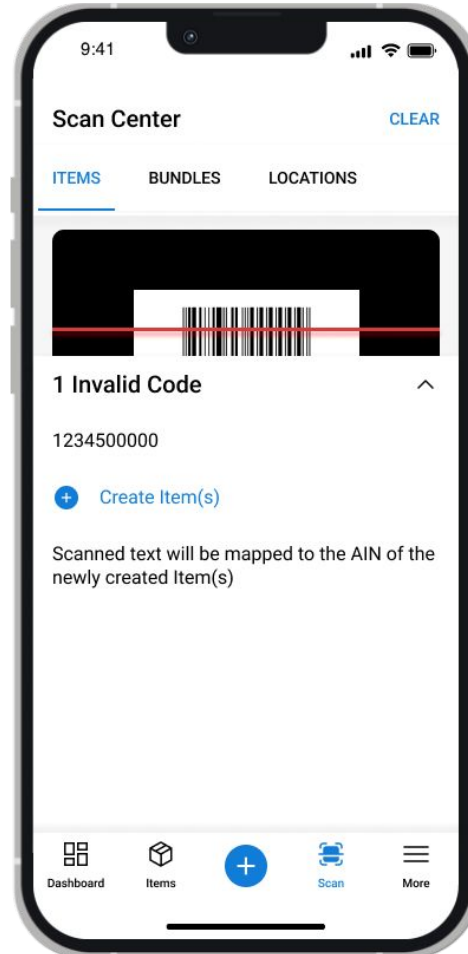
Click [here](#) to watch the video on Scan center.



## 5.2. ADDING NEW ITEMS VIA SCANNING

1. Scan the barcode/QR code of the Item you want to add to your database.
2. Tap on the "Invalid Code" overlay. Here you will be able to see all the codes of the Items you have scanned.
3. Next, tap on "Create Item(s)" and select the Item Type you want to add.
4. Complete the action by hitting Continue.

[Here](#) is a video showing how to add Items via scanning. Click [here](#) to learn how to add multiple items.

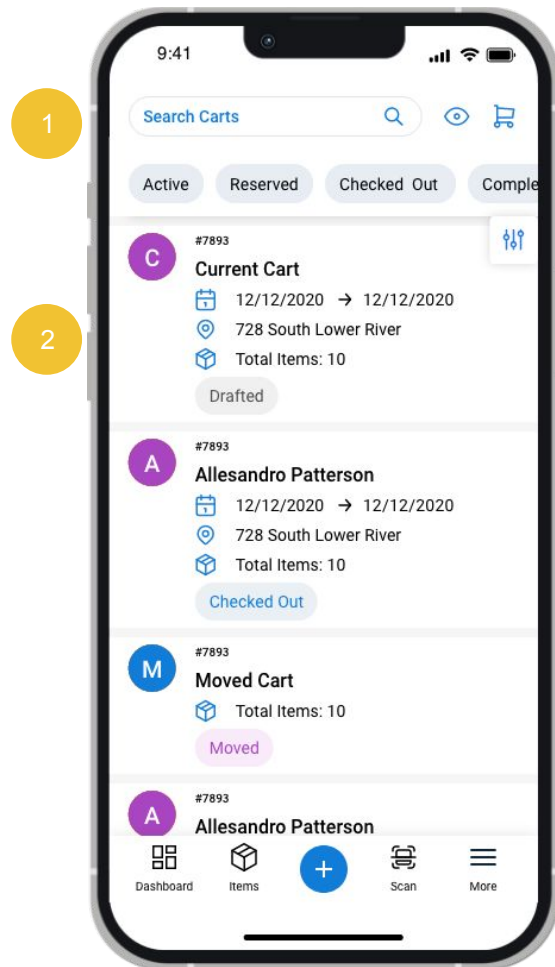


## 6. CARTS

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.

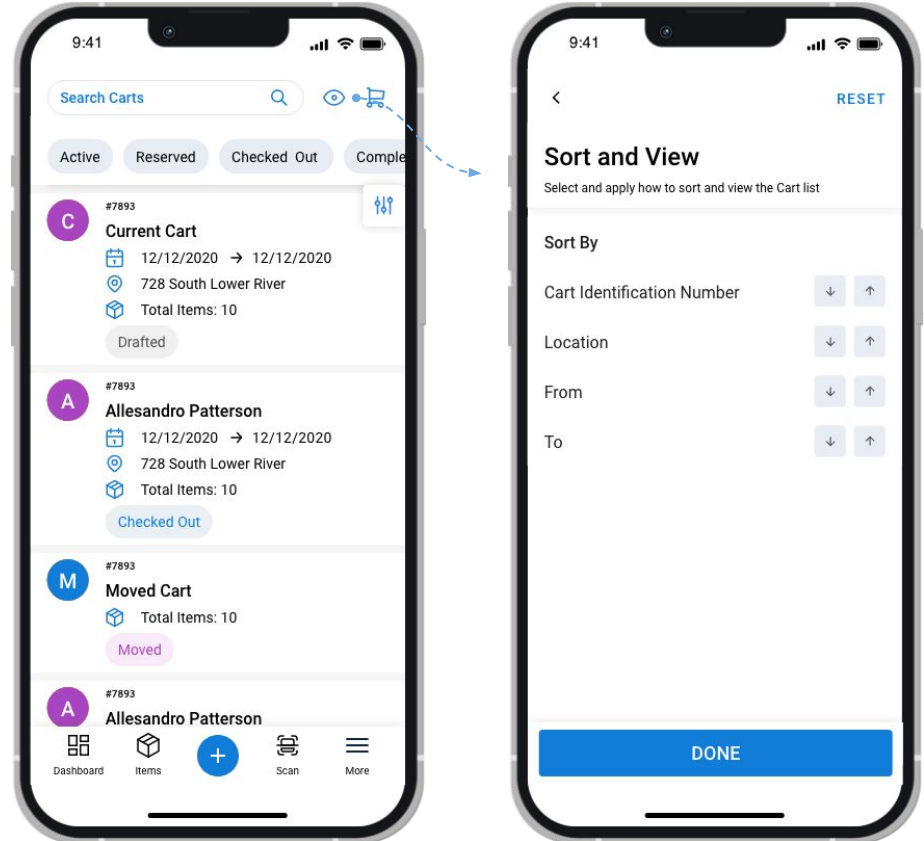




## 6.1. SORT AND FILTER CART TRANSACTIONS

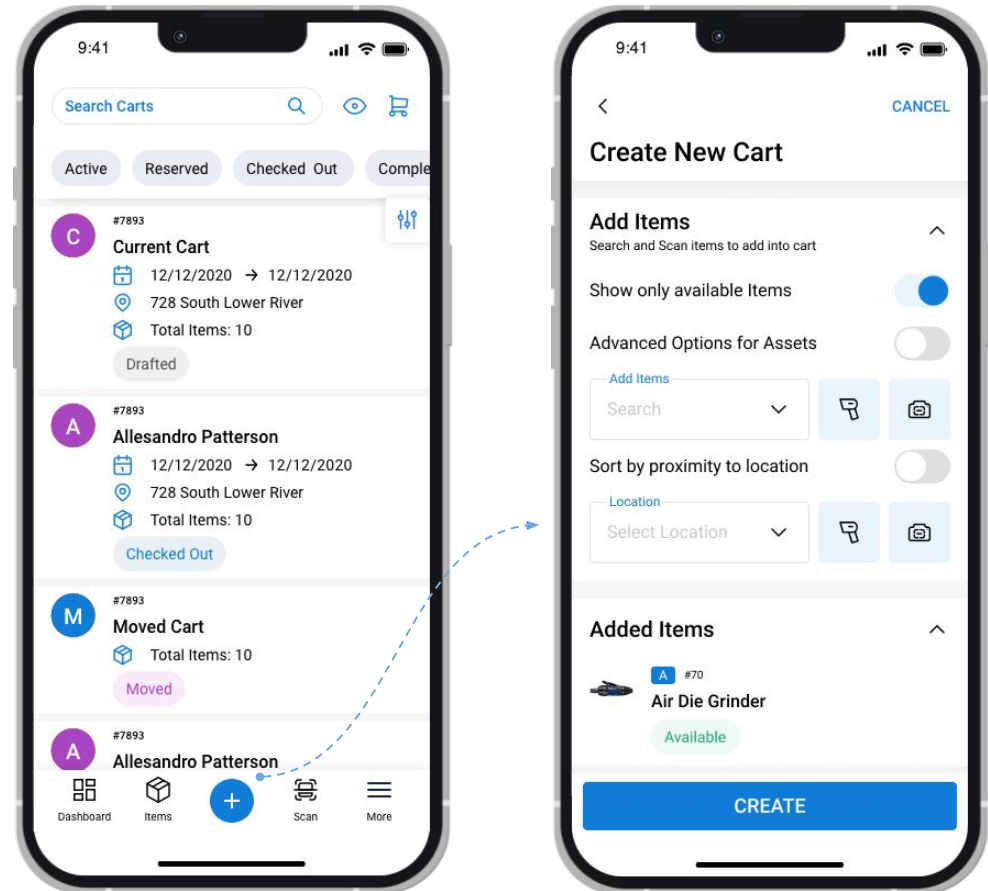
Get a quick recap on all your Cart Transactions from this section:

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.



## 6.2. ADDING A NEW CART

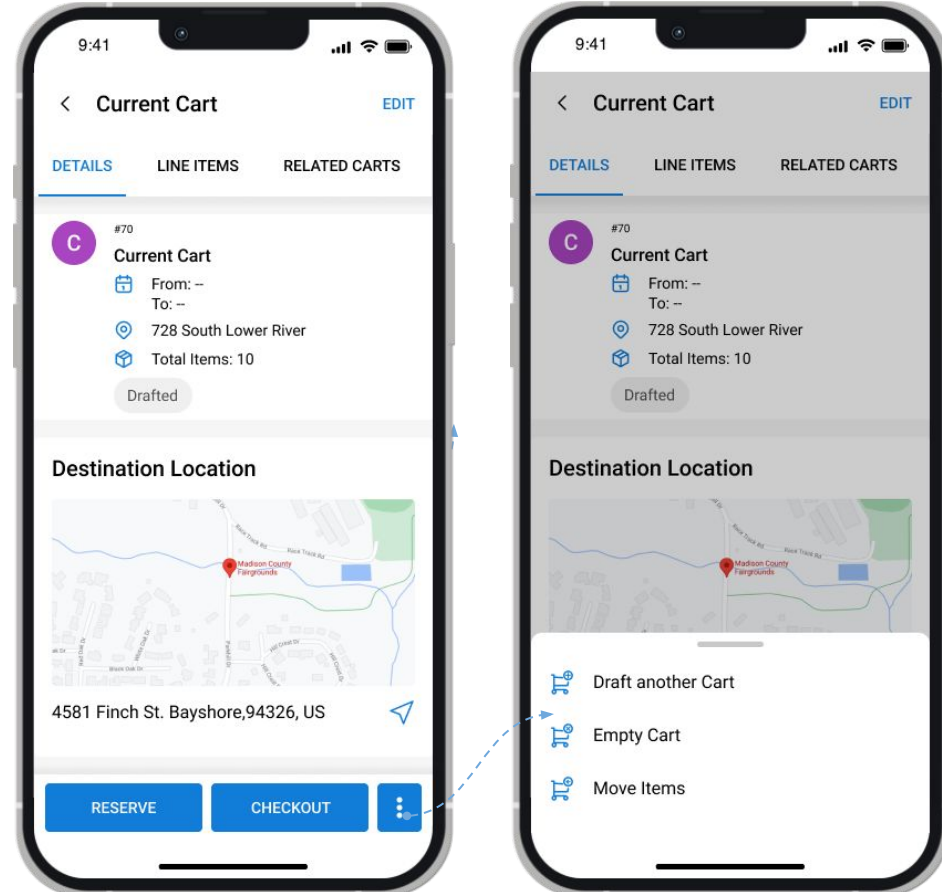
1. To add a new Cart tap on the “+” button in the bottom navigation bar and select “Carts” from the “Add” overlay.
2. Create a new Cart by adding Items through simple search or even scan them through scanner or your camera.
3. Next, Scan or search for a Location for your Cart.
4. Complete your Cart by hitting “Create”.



## 6.3. CART ACTIONS: DRAFTED STATE

For Carts in Drafted state, you have the flexibility to Move Items or Empty Cart:

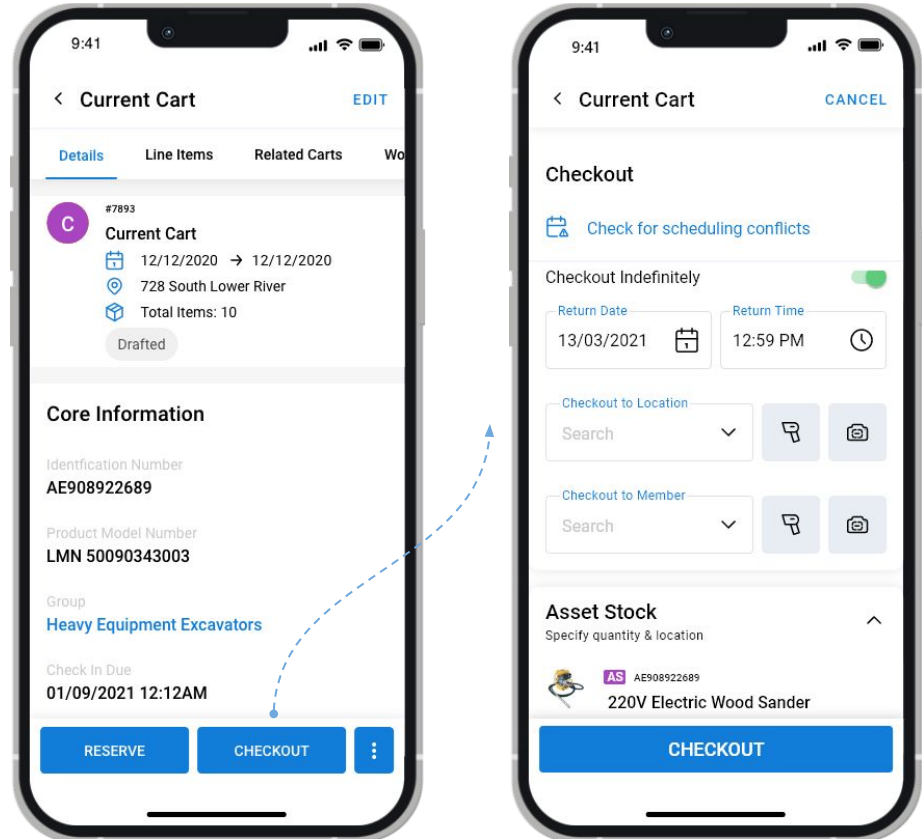
1. Tap on 'Move Items' and enter a new Location for the Cart.
2. Here you can either scan Location via camera or hardware scanner.
3. Once you enter the Location, tap on Move and the Cart will be moved to the new Location.
4. Similarly when you tap on 'Empty Items' a prompt message will appear before the action is executed.



## 6.4. CART ACTIONS: CHECKOUT

From the Carts listing page, tap on the Cart you want to take actions for. Top actions for Current Cart are Reserve and Checkout. The rest can be viewed under More.

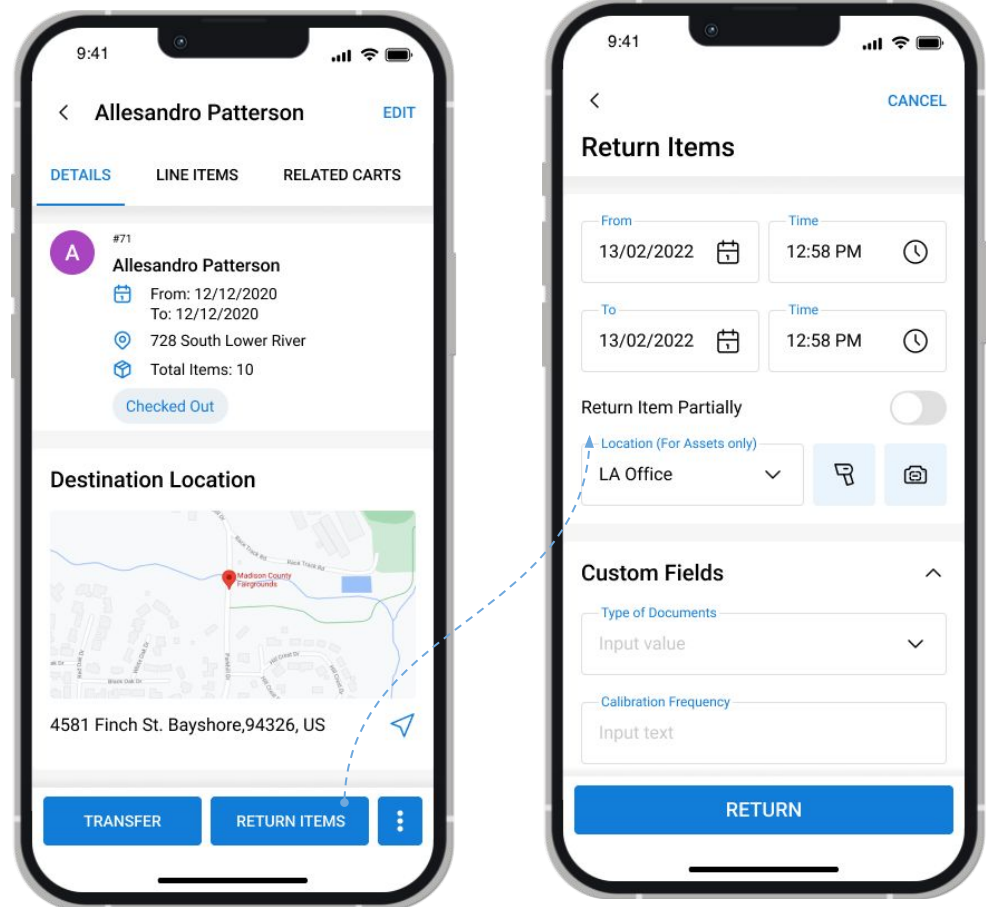
1. **Easy forms** with icons to help facilitate quick Checkouts.
2. **Item review** to verify all Cart Items and edit quantity to accommodate last minute changes before Checkout.
3. Enter any **additional comments** for users and complete the Checkout action.



## 6.5. CART ACTIONS: RETURN ITEMS

To Return a checked out Cart:

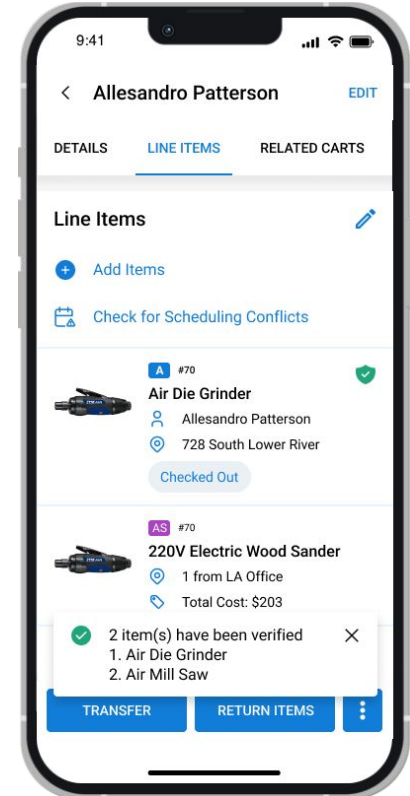
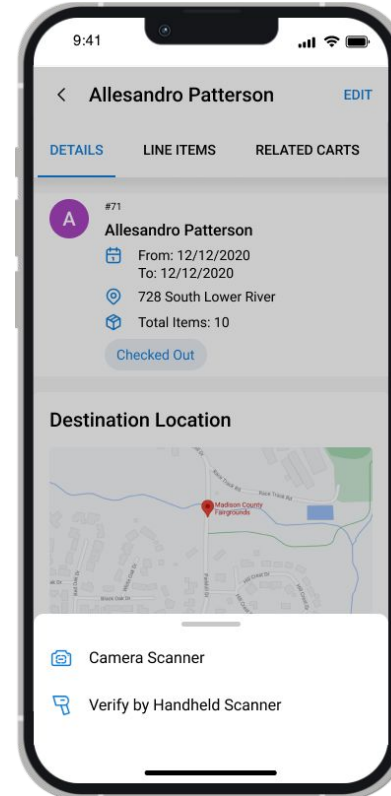
1. Go to the checked out Carts' detail page. Here tap the 'Return Items' button.
2. Then, scan the Locations for the Items.
3. You have the option to partially return Items if applicable.
4. Enter any comments and complete the action.



## 6.6. CART ACTIONS: VERIFY BY SCANNING

For a checked out Cart, you can verify Items by Scanning:

1. Go to the checked out Carts' detail page. Here tap the 3 dots button.
2. You can either choose "Camera Scanner", or "Verify by Handheld Scanner".
3. Next you will be prompted to scan items.
4. Once scanned, you will be able to verify custody of the scanned items in the Cart.



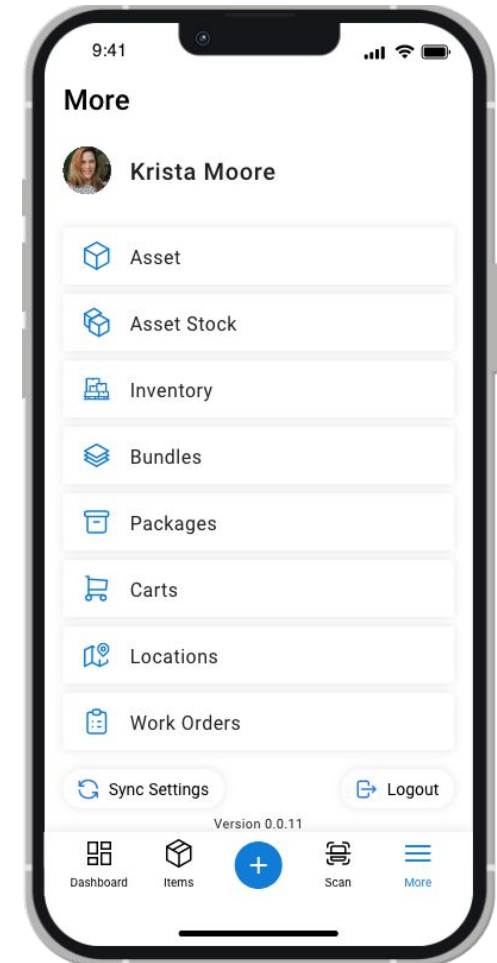
## 7. BUNDLES

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.

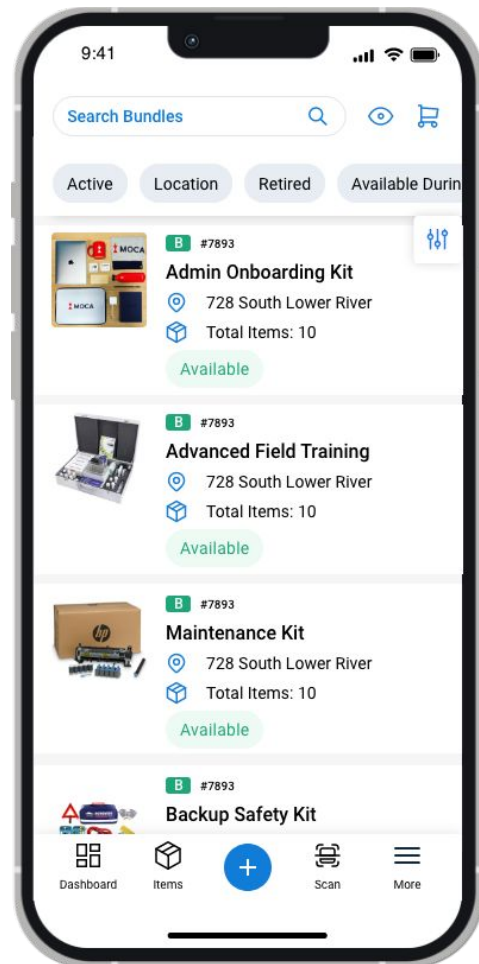
That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.



## 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**.

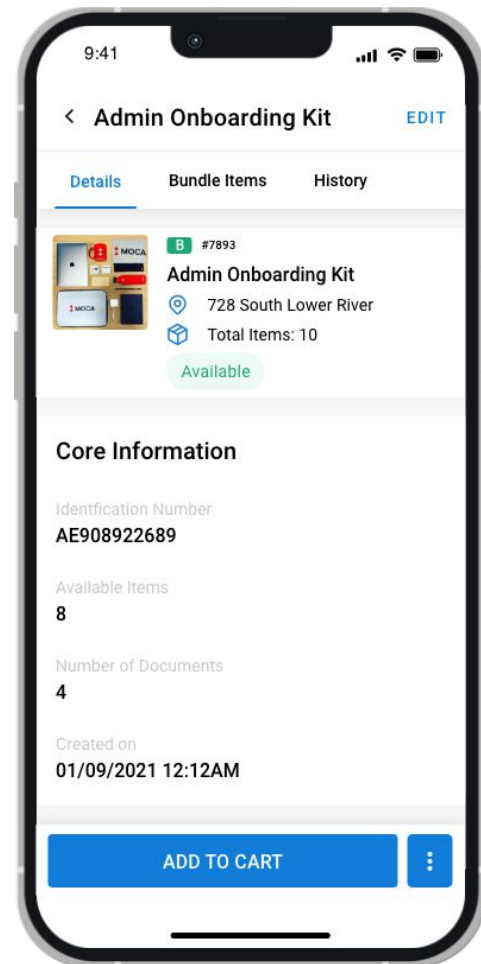




## 7.2. TAKING ACTIONS ON BUNDLES

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 3 dots to Clone or **Retire** the Bundle.



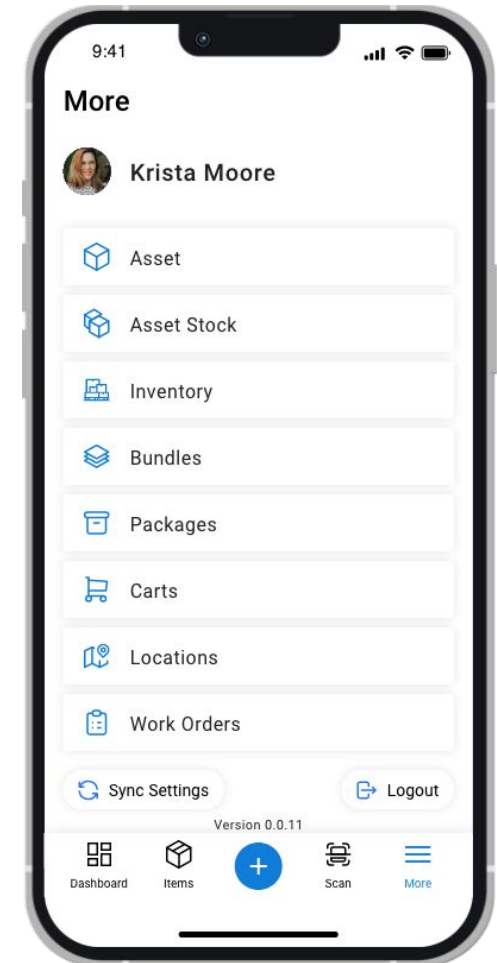
## 8. PACKAGES

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.

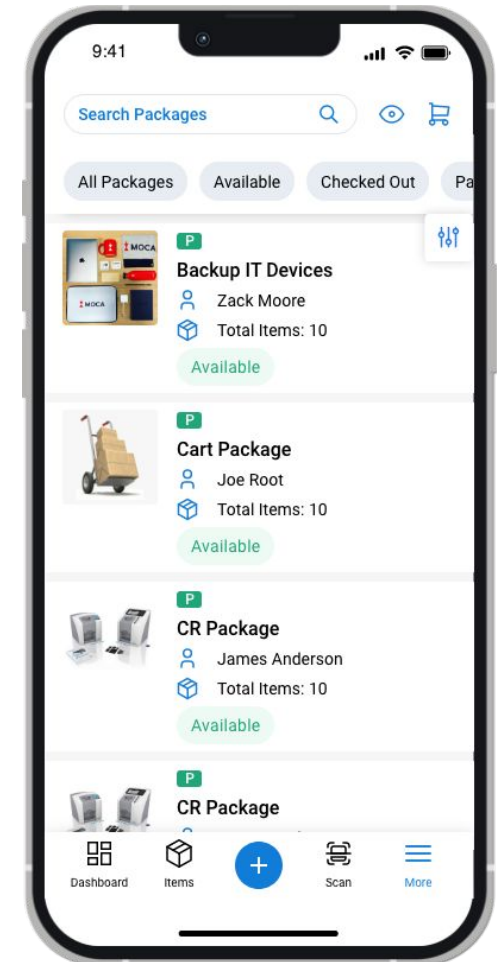
That's it! Now, access this tab from the mobile app by tapping on the 'More' button on the bottom navigation bar.



## 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.

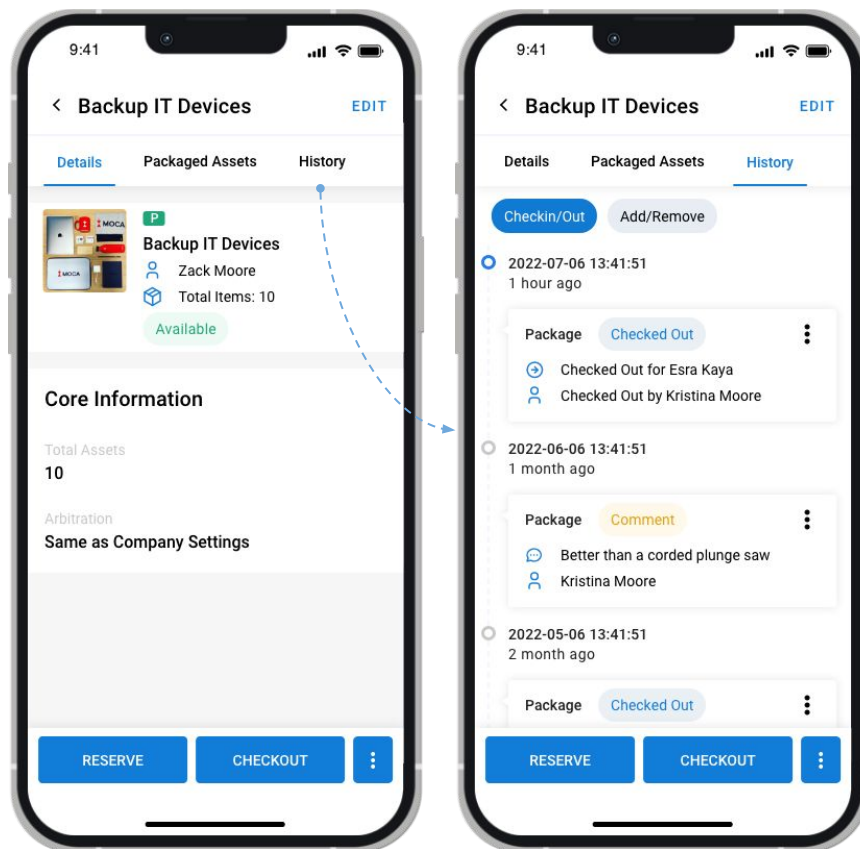
1. Use the top navigation to **filter** Packages by the following statuses:
  - Available
  - Checked Out
  - Packages in Custody
2. Tap and hold to select them for **mass actions**.
3. Tap on a Package to go to its **details page**.



## 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 easily.

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.



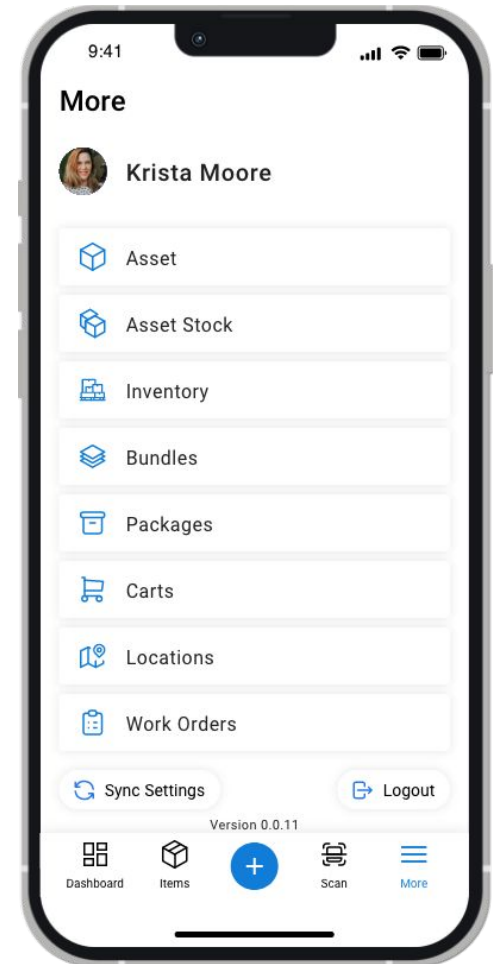
## 9. WORK ORDERS

Work Orders facilitate the tracking of maintenance tasks and enable teams 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*.

You can 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 displayed in the app if the Add On is enabled.



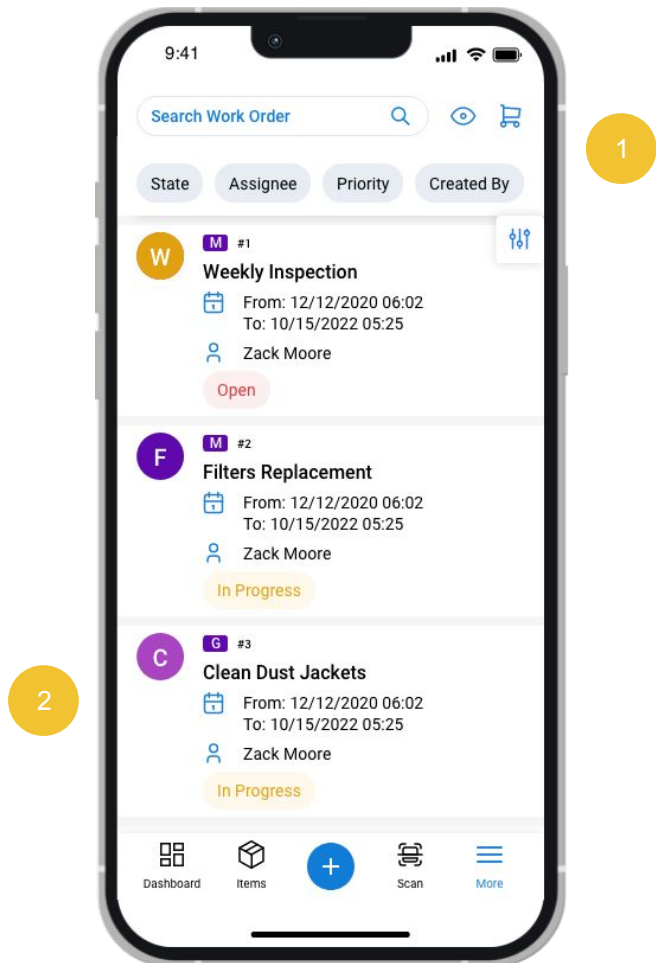
## 9.1. VIEWING THE WORK ORDER LISTINGS

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

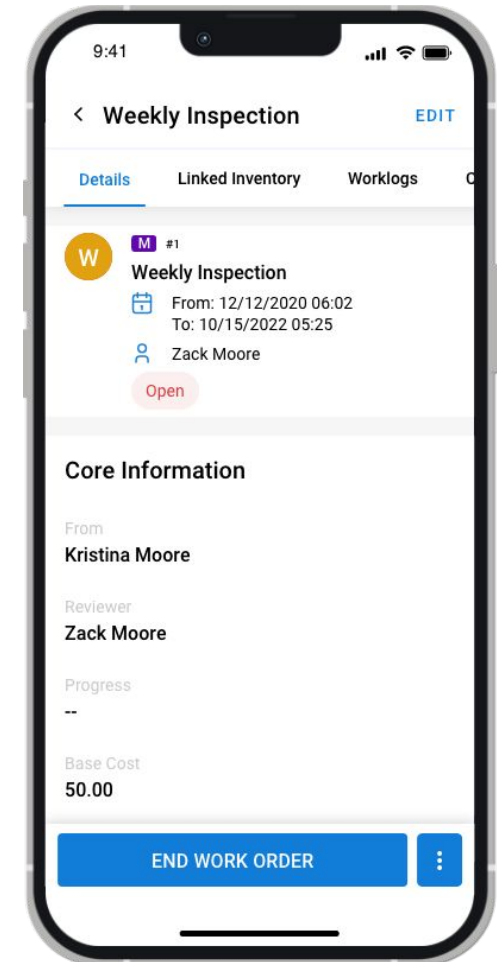
2. Tap on a Work Order to go to its **details page**.



## 9.2. VIEWING WORK ORDER DETAILS

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

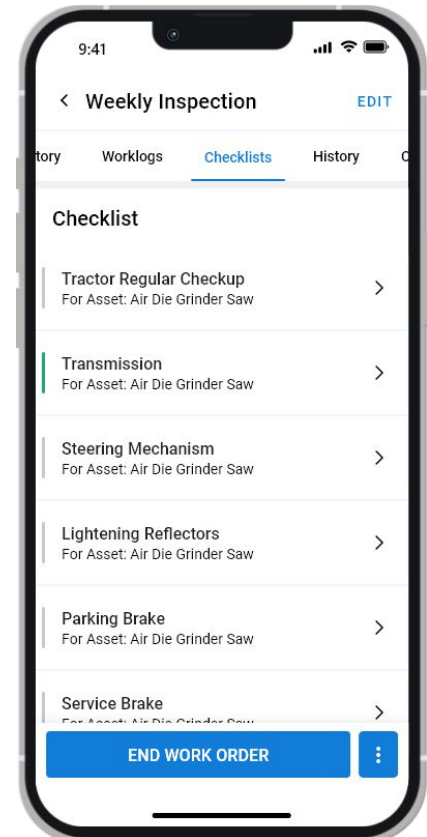
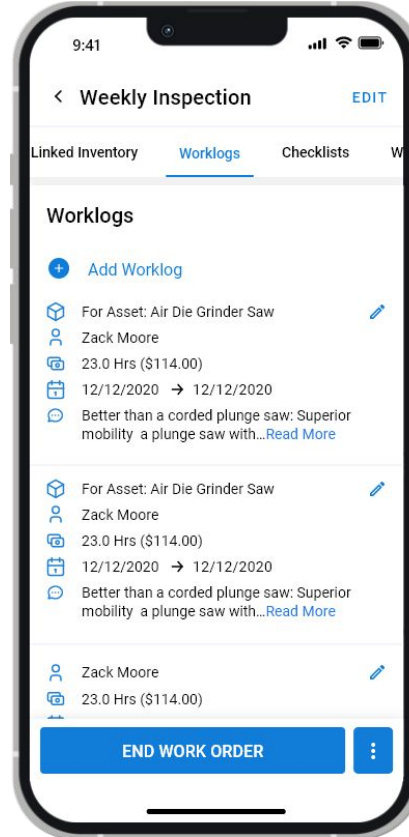
1. Check **Work Order Status** to see if a Work Order is yet to start, is in progress or has been completed.
2. Monitor **Work Order Progress** by checking all relevant dates including Created On, Started On and Due Date.
3. **Verify inventory** linked to the Work Order from the 'Linked Inventory' section.
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.

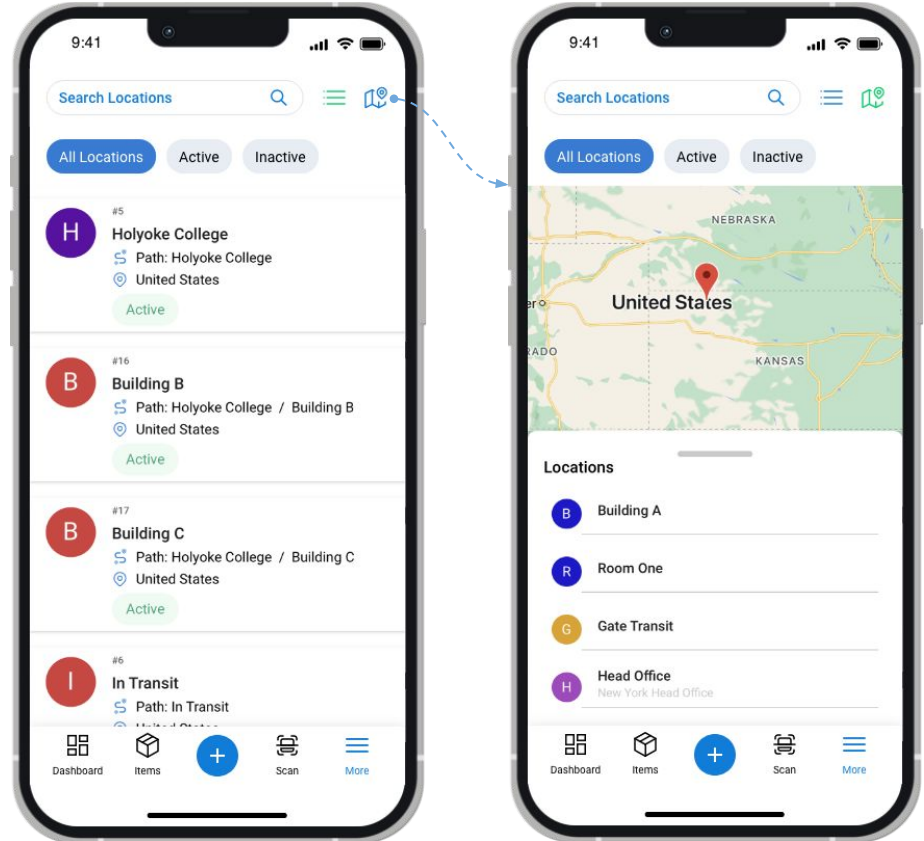




## 10. LOCATIONS

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.

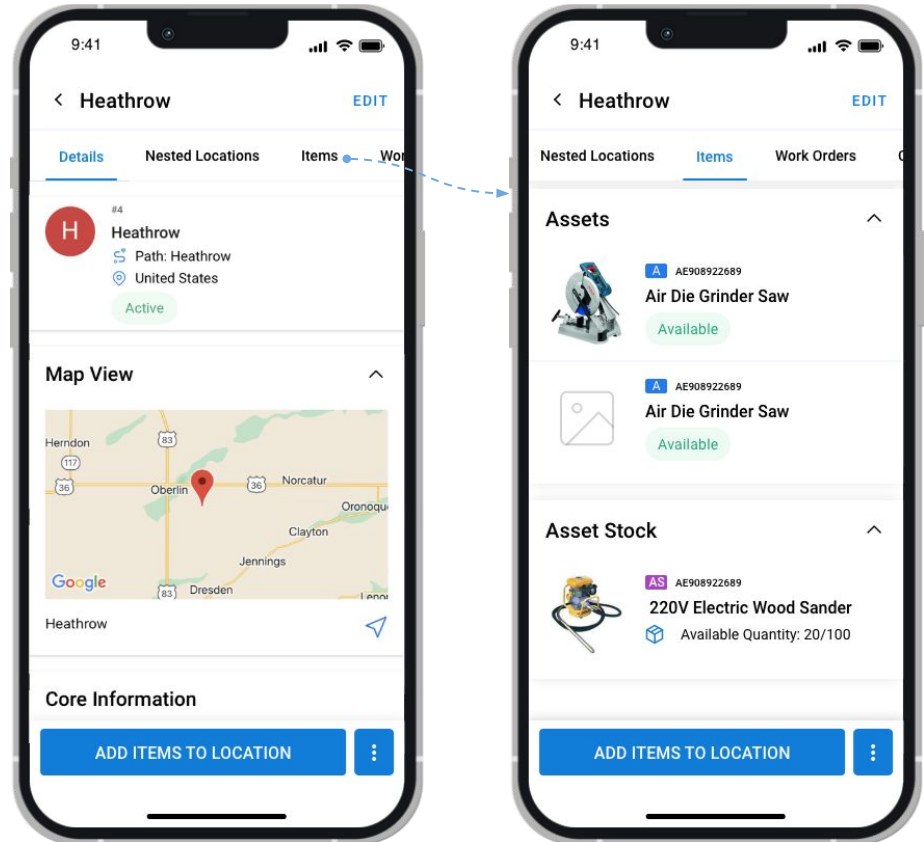
1. Use the **search** bar to look for variations Locations.
2. **Filter** out Locations by Active and Inactive states.
3. View all Locations on the map for a **global view** of business operations.



## 10.1. LOCATIONS ACTIONS

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

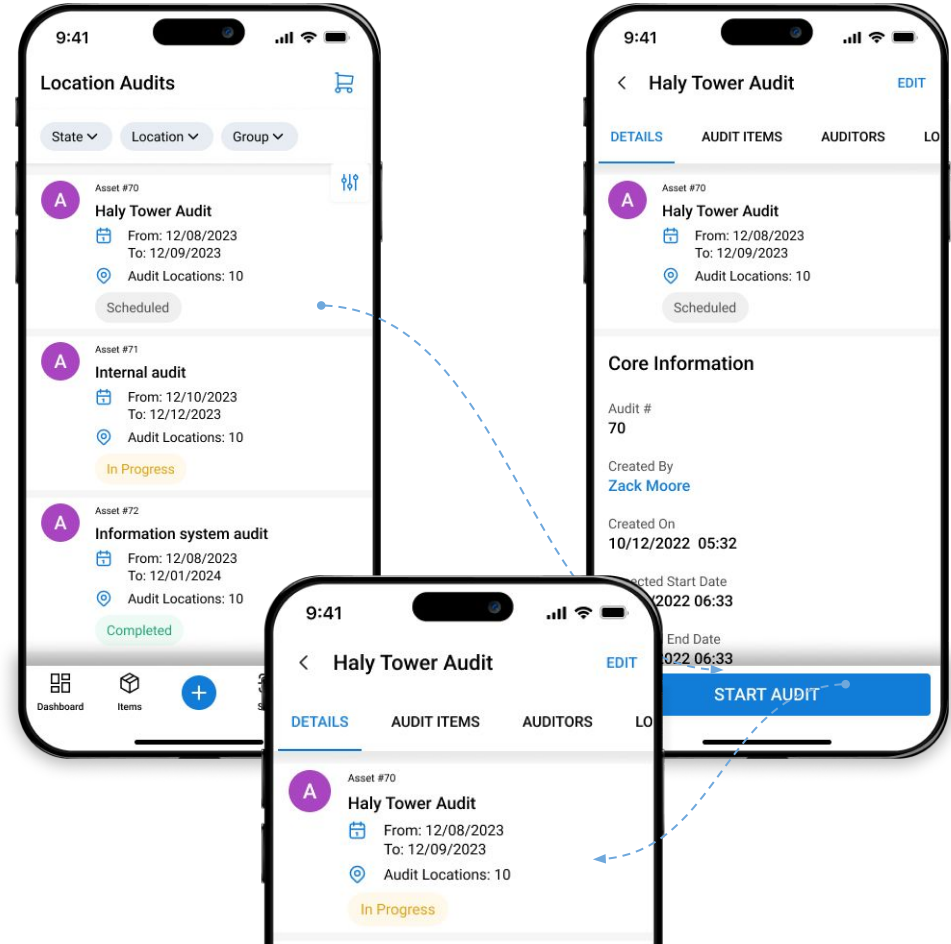
1. View **core information** like linked Items, their quantities and Nested Locations.
2. **Add Work Orders and Items** to a particular Location.
3. **Upload** related files for a particular project at a Location and Comments to keep track of progress at all times.



## 10.2. LOCATIONS AUDITS

Run audits for all items placed at a specific location to verify ownership and improve transparency. Here is how:

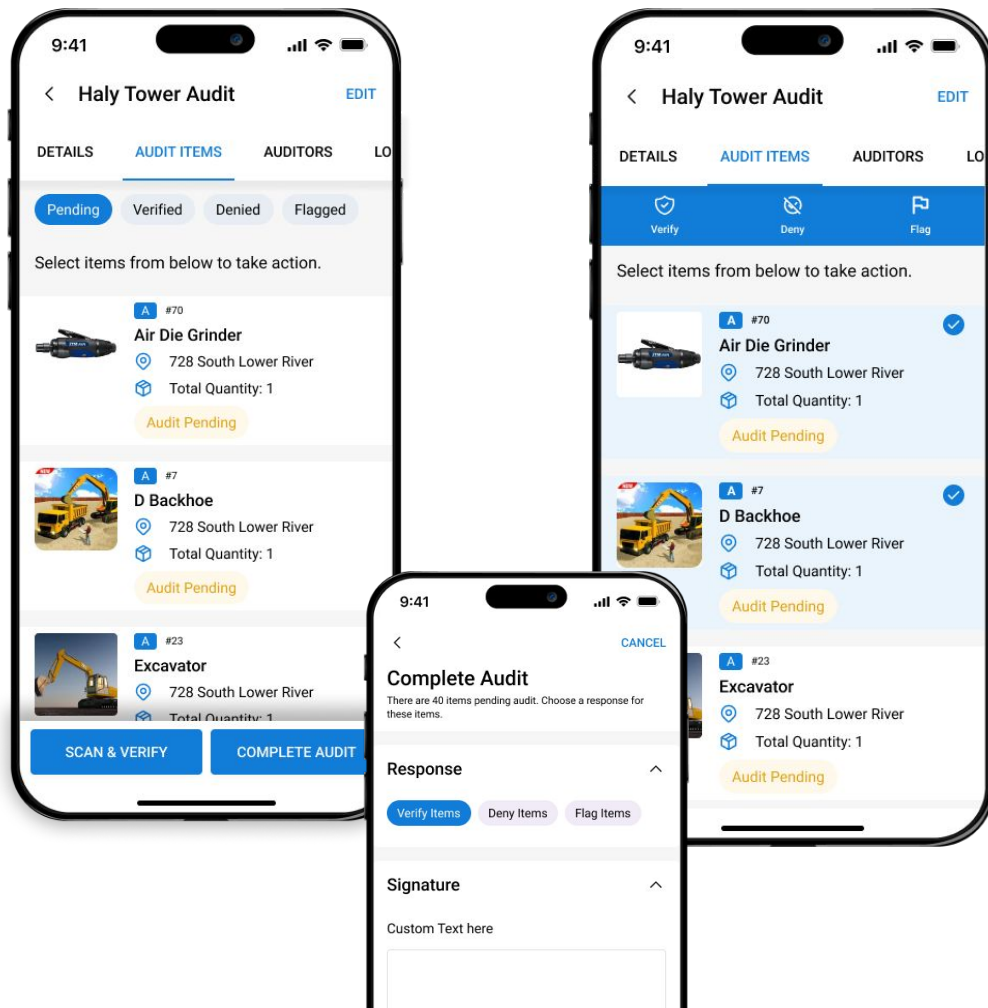
1. Tap the More button from the bottom navigation bar and select Audits.
2. From the **Listings page**, tap on a **Scheduled Audit** you want to start working on.
3. You will be redirected to the **Details page**, which displays information such as date of creation, time of Audit and Location.
4. Tap **Start Audit**. The status of the Audit will be changed to 'In Progress'.



## 10.3. LOCATIONS AUDITS: MANUAL ACTIONS

Once the Audit is in progress, you will be able to view a list of items to take actions for:

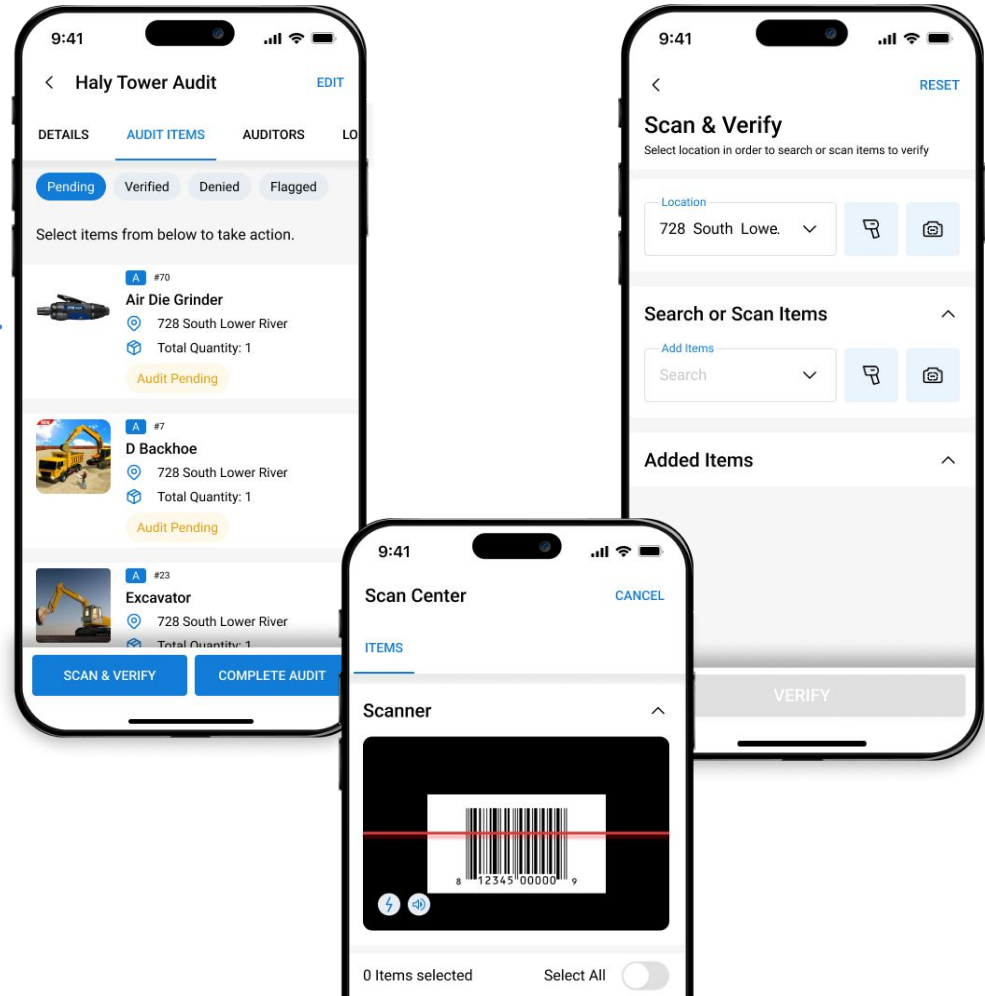
1. **Tap** all the items you want to take actions for.
2. Once selected, a blue ribbon will appear at the top of the page displaying possible actions: **Verify**, **Deny** and **Flag**.
3. Tap the verify action if all the selected items are present at the location of the audit.
4. You can even take **mass actions** for all the items present at the location. Select All, choose a response and **complete the audit**.



## 10.4. LOCATIONS AUDITS: SCAN ITEMS

You also have the option to scan and verify items:

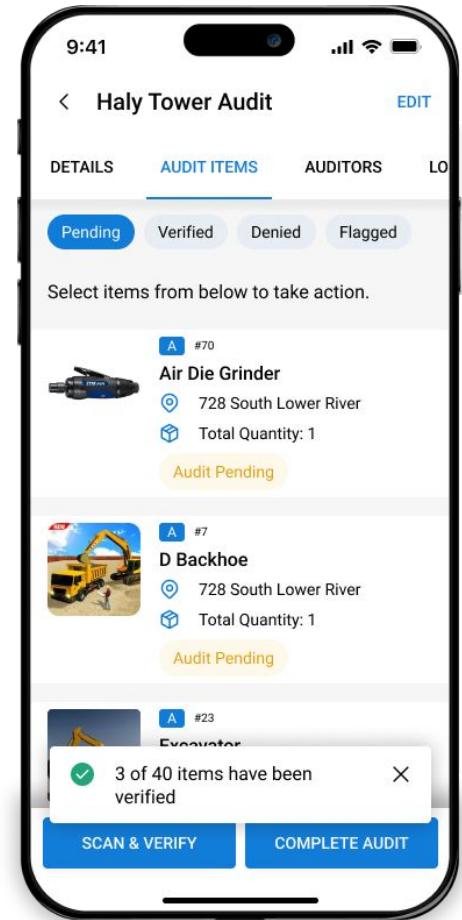
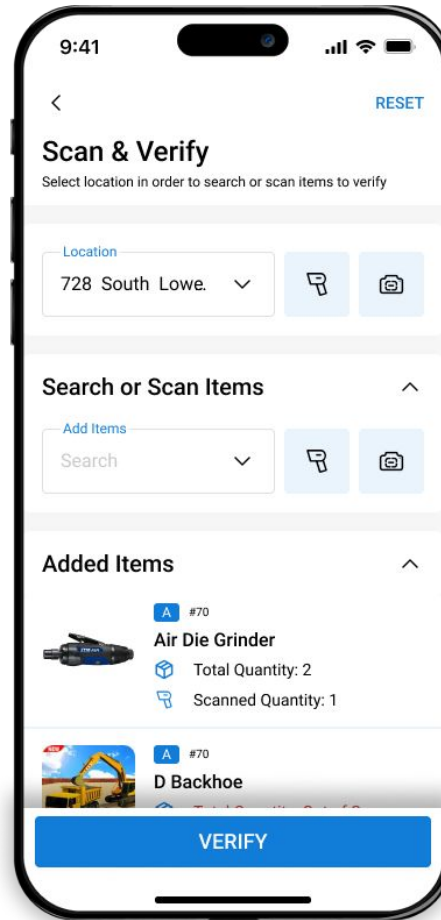
1. From the Audit details page, tap on '**Scan & Verify**'.
2. You have the option of either **searching** for the item or **scanning** it through the mobile app.
3. All the scanned items will populate under '**Added Items**'.



## 10.5. LOCATIONS AUDITS: SCAN ITEMS

Complete the audit:

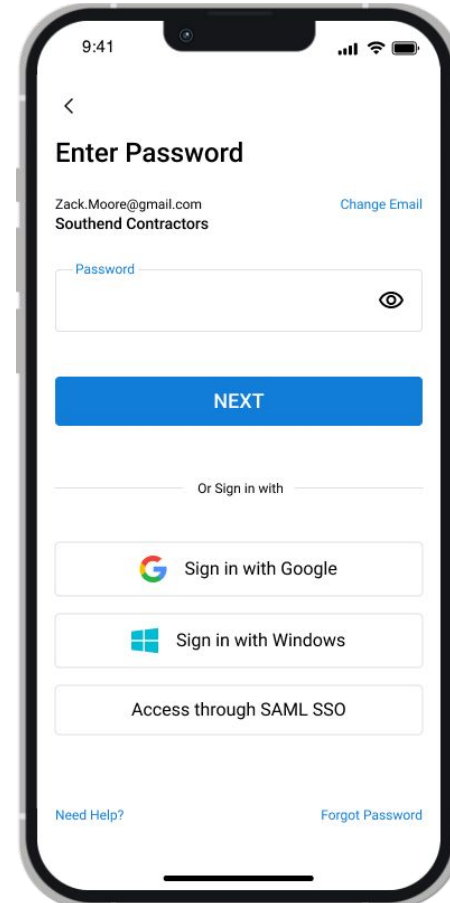
1. Tap the **'Verify button'** once all items have been scanned.
2. You will be redirected to the Audit Details page where the status of all items will be updated.



## 11. SINGLE SIGN ON (SSO) LOGINS

Team members can use a single sign on login to sign to the EZOfficeInventory mobile apps. On the Login page there are the following options:

1. Sign in with their Gmail address.
2. Sign in with their Outlook email address.
3. Also, you can tap on Access through SAML SSO.



# ABOUT EZO



EZO began as EZ Web Enterprises in 2011 with a mission to build easy-to-use yet powerful cloud-based applications for organizations worldwide. Our team is passionate about delivering consistently amazing user experiences with best-in-class functionality and enterprise scalability.

EZ Web Enterprises' products help thousands of organizations around the globe streamline operations in many key areas, including physical asset management with EZOfficeInventory.

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

*[www.ezofficeinventory.com/users/sign\\_in](https://www.ezofficeinventory.com/users/sign_in)*



## FOR FURTHER ASSISTANCE:

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