Disclaimer:

This manual is licensed under the axiUm software and maintenance agreement. You may not use this manual except in compliance with the license. The information contained in these materials is proprietary and confidential to Exan and/or its subsidiaries or affiliates and is provided for the sole use of the individual or entity to whom it is addressed. These materials must be kept in the strictest confidence.

The contents of these materials are protected by federal and international intellectual property laws. The Exan logo is a registered trademark and is the sole and exclusive property of Exan.

These materials may contain third-party copyright and/or trademark materials, the use of which has not always been specifically authorized by the intellectual property owner. All copyrights and/or trademarks contained in these materials are the sole and exclusive property of their respective owners.

Information in this document is subject to change without notice. No portion of these materials may be reprinted, republished, modified, reproduced, sold, disseminated, disclosed or distributed in any form to any other party without the express written consent of Exan.

All names used in axiUm (whether online, in print, or any other media) are fictitious and are used herein for the purposes of example and demonstration on how to use axiUm. Any similarity to real people is a coincidence.

Copyright © 2012 Exan. All rights reserved.

Botan (http://botan.randombit.net/) is distributed under these terms:


Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

1. Redistributions of source code must retain the above copyright notice, this list of conditions, and the following disclaimer.

2. Redistributions in binary form must reproduce the above copyright notice, this list of conditions, and the following disclaimer in the documentation and/or other materials provided with the distribution.

This software is provided by the author(s) "as is" and any express or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose, are disclaimed. In no event shall the author(s) or contributor(s) be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this software, even if advised of the possibility of such damage.
# Table of Contents

*About this Manual* .......................................................................................................... iii  
*Document Conventions* ................................................................................................. iii  
*Document Icons* .............................................................................................................. iv

## Chapter 1: Field Definitions ......................................................................................... 1

- Edit Inventory Order Window ................................................................................................. 1
- Edit Received Details Window ................................................................................................. 6
- Filling Details Window ............................................................................................................. 8
- Inventory Adjustment Window ................................................................................................. 9
- Inventory Count Window ........................................................................................................ 11
- Inventory Order Window ....................................................................................................... 14
- Inventory Setup Window ....................................................................................................... 18
- Inventory Window ................................................................................................................... 19
  - Inventory Window - Pending Orders Tab ................................................................................. 24
  - Inventory Window - Closed Orders Tab ............................................................................... 25
  - Inventory Window - Product Levels Tab .............................................................................. 26
  - Inventory Window - Received Tab ......................................................................................... 27
  - Inventory Window - Usage History Tab ............................................................................... 29
- Inventory Usage Window ...................................................................................................... 29
- Order Filling Selection Window ............................................................................................ 30
- Order Filling Substitution Window ........................................................................................ 31
- Order Filling Window ............................................................................................................ 33
- Product Overview Window .................................................................................................. 36
- Receipt of Goods Window ..................................................................................................... 37
- Repackage Product Window ................................................................................................. 39
  - Product Info Section ........................................................................................................... 40
  - Repackaged Product Section .............................................................................................. 41
- Requests for Vendor Window ................................................................................................. 42
- Show Back-Ordered Locations Window .................................................................................. 43
- Split Received Product Window ............................................................................................. 44
  - Original Receipt Section ................................................................................................... 45
  - Split Receipt Section ........................................................................................................ 46
- Transfer Products Window .................................................................................................... 47
About this Manual

This axiUm Reference Manual will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Inventory module windows.
• Use the fields and options in various Inventory module windows.

The examples in the axiUm Reference Manual show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm Reference Manual may look different from your axiUm setup.

Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td>**Monospace</td>
<td>Data entered by the user.</td>
</tr>
<tr>
<td><strong>Fonts</strong></td>
<td></td>
</tr>
</tbody>
</table>
Document Icons

This guide also uses the following icons to identify the different document elements:

- **Note and helpful information.** For example, things that will become apparent later on in the procedure.

- **Important information or steps you must take.** For example, if you do not complete this step you may be unable to complete a task later on.

- **Tips, ideas, and alternative methods.** For example, using shortcuts, applying previously learned tools, or suggesting different uses.

- **Warning before taking action.** For example, precautions against irreversible actions, or actions that require a lot of work to undo.

- **Challenges and extra steps.** For example, steps that take you beyond the basic procedures.
This chapter defines all the interactive screen elements in the Inventory module, such as:

- fields
- drop-down fields
- check boxes
- options
- list boxes
- list views

All the screen names that appear in the Inventory module are listed in alphabetical order. Screens that are accessible through the Inventory module may belong under a different module and are not shown in this document. For these field definitions, refer to another axiUm Reference Manual.

1 Edit Inventory Order Window

You can access this window by:

- Going to the Inventory window’s Pending Orders tab and selecting the Edit Orders right-click option or double-clicking on a record. For information on the Inventory window’s Closed Orders tab, see Inventory Window - Pending Orders Tab on page 24.

- Going to the Inventory window’s Closed Orders tab and selecting the Edit Orders right-click option or double-clicking on a record. For information on the Inventory window’s Closed Orders tab, see Inventory Window - Closed Orders Tab on page 25.
Use this window to view all items on the order, including those filled, partially filled, and back-ordered.

**EDIT INVENTORY ORDER WINDOW**

This icon is disabled if you are viewing one of the following types of inventory order records:

- An external-type order that has been purchased. These inventory order records have the *Type* drop-down field displaying an external order option. See *Type* in this table.
- Either an external-type or internal type order that has been closed. These inventory order records displayed in the *Inventory* window’s *Closed Orders* tab.

Clicking this icon clears the entry fields. By clearing the fields, axiUm allows you to enter a new record.
**EDIT INVENTORY ORDER WINDOW**

![Add a new Record](image)

This icon is disabled if you are viewing one of the following types of inventory order records:

- An external-type order that has been purchased. These inventory order records have the *Type* drop-down field displaying an external order option. See *Type* in this table.
- Either an external-type or internal type order that has been closed. These inventory order records displayed in the *Inventory window's Closed Orders* tab.

Clicking this icon adds the new inventory order item you entered, and displays it in the list view.

![Modify Record](image)

Clicking this icon saves any modifications you made to the item selected from the list view.

![Delete Record](image)

This icon is disabled if you are viewing one of the following types of inventory order records:

- An external-type order that has been purchased. These inventory order records have the *Type* drop-down field displaying an external order option. See *Type* in this table.
- Either an external-type or internal type order that has been closed. These inventory order records displayed in the *Inventory window's Closed Orders* tab.

Clicking this icon permanently deletes the item selected from the list view.

![Preview Report](image)

Clicking this icon displays the *Inventory Order report*.

![Print Report](image)

Clicking this icon prints the *Inventory Order report* to the default printer.

![Requests for Vendor](image)

This icon is disabled if you are viewing one of the following types of inventory order records:

- An external-type order that has been purchased. These inventory order records have the *Type* drop-down field displaying an external order option. See *Type* in this table.
- Either an external-type or internal type order that has been closed. These inventory order records displayed in the *Inventory window's Closed Orders* tab.

Clicking this icon displays the *Requests for Vendor window*. For information on the *Requests for Vendor window*, see *Requests for Vendor Window* on page 42.

**Inactive**

This checkbox, if selected, indicates to include inactive orders in the list.

**Order #**

This disabled field indicates an axiUm-generated internal number that was assigned when you created the inventory order. This number is used for tracking this inventory order.

**Ordered by**

This disabled drop-down field indicates the location for which this order was made.

**Type**

This disabled drop-down field indicates the order type used for this inventory order.
**EDIT INVENTORY ORDER WINDOW**

**From**  
The *From* field is displayed if the Type drop-down field displays an external-type order, and indicates the vendor receiving this inventory order.

Clicking (ellipsis) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see *Vendors List Window* on page 402.

Clicking (delete) removes the currently selected vendor name from the field.

The *From* drop-down field is displayed if the Type drop-down field displays an internal-type order and is a disabled drop-down field indicating the inventory warehouse location receiving this inventory order.

**Date**  
This disabled field indicates the date of the inventory order.

**P.O.#**  
This disabled field is displayed if the Type drop-down field displays an external-type order.

This is the purchase order number you received from the vendor.

You can change this number if at least one of the items in the order has a status of Purchased, Picked, Filled, Back-ordered, or Closed.

**Special Order**  
This disabled checkbox is enabled if the Type drop-down field displays an internal-type order.

This checkbox, if selected, indicates that this is an internal order (e.g. from the main warehouse to another location), but the item you want is not in the database, and the warehouse you are requesting from must order it from an external source. This is a situation where an internal inventory order ultimately results in an external inventory order.

Selecting this checkbox displays the *Vendor* field.

**Vendor**  
This field is displayed if the Special order checkbox is selected.

This field indicates the vendor of choice for special requests (i.e. items not in the database).

Clicking (ellipsis) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see *Vendors List Window* on page 402.

Clicking (delete) removes the currently selected vendor name from the field.

**User**  
This disabled field indicates the name of the user who created the original inventory order.

**Approval User**  
This disabled field is displayed if this record is created by a user who requires approval to enter inventory orders.

This disabled field indicates the name of the approval user.

**Approve**  
This button is enabled if the order requires approval.

Clicking this button displays the *User Authentication* window for approving.
**Edit Inventory Order Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase</td>
<td>This button is displayed if the <em>Type</em> drop-down field displays an external-type order. Clicking this button indicates that the items in this inventory order have been purchased.</td>
</tr>
<tr>
<td>Product Code</td>
<td>This disabled field indicates the product code of the product in this inventory order. Clicking <em>...</em> (ellipsis) opens the <em>Inventory Products List</em> window. For information on the <em>Inventory Products List</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Inventory Products List Window</em> on page 393. When this field displays a product code, the <em>Product Info</em> button and the <em>Ordering Info</em> button are enabled.</td>
</tr>
<tr>
<td>Quantity</td>
<td>This disabled field indicates the quantity of the product (e.g. 1), as entered in the <em>Inventory Order</em> window's <em>Quantity</em> field. For information on the <em>Inventory Order</em> window, see <em>Inventory Order Window</em> on page 14. The second field is a disabled field, and indicates the unit type (e.g. crate) associated to the product displayed in the <em>Product Code</em> field. Products are associated to unit types in the <em>Inventory Product</em> window's <em>Product Details</em> section's <em>Unit</em> field. For information on the <em>Inventory Product</em> window's <em>Product Details</em> section, refer to the axiUm Reference Manual for Maintenance and see <em>Product Details Section</em> on page 398.</td>
</tr>
<tr>
<td>Description</td>
<td>This disabled field indicates the product name for the product code displayed in the <em>Product Code</em> field. The description for the selected product is defined in the <em>Inventory Product</em> window's <em>Product section's Description</em> field. For information on the <em>Inventory Product</em> window's <em>Product section</em>, refer to the axiUm Reference Manual for Maintenance and see <em>Product Section</em> on page 401.</td>
</tr>
<tr>
<td>Comment</td>
<td>This text box lets you enter free-form comments and instructions for the order.</td>
</tr>
<tr>
<td>Need by</td>
<td>This field indicates the date by which the ordered products are required.</td>
</tr>
<tr>
<td>Unit Cost</td>
<td>This field is displayed if the <em>Type</em> drop-down field displays an external-type order. This field indicates the per-unit cost of the product displayed in the <em>Product Code</em> field. The default per-unit costs are defined in the <em>Inventory Product</em> window's <em>Cost per unit</em> field. For information on the <em>Inventory Product</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Inventory Product Window</em> on page 396. Changing the per-unit cost here changes it for this order only, and does not update the <em>Inventory Product</em> window's <em>Cost per unit</em> field. This field is used to override the regular product price when discounts are applied, or fees are charged for a rush order.</td>
</tr>
<tr>
<td>Product Info...</td>
<td>This button is enabled if a record is selected in the list view. Clicking this button displays the <em>Inventory Product</em> window. For information on the <em>Inventory Product</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Inventory Product Window</em> on page 396.</td>
</tr>
<tr>
<td>Ordering Info...</td>
<td>This button is enabled if a record is selected in the list view. Clicking this button displays the <em>Product / Location Information</em> window. For information on the <em>Product / Location Information</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Product / Location Information Window</em> on page 383.</td>
</tr>
<tr>
<td>[list view]</td>
<td>This list view displays a list of inventory items on this order.</td>
</tr>
</tbody>
</table>
2 Edit Received Details Window

You can access this window by going to the Inventory window’s Received tab and selecting the Edit Received Details right-click option. For information on the Inventory window’s Received tab, see Inventory Window - Received Tab on page 27.

Use this window to modify the details of the received product such as product costs and product expiry dates.

EDIT RECEIVED DETAILS WINDOW

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back-order Item</td>
<td>Selecting this right-click option changes the status of the selected inventory order as back-ordered.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Selecting this right-click option cancels the selected inventory order.</td>
</tr>
<tr>
<td>Close</td>
<td>Selecting this right-click option closes the selected inventory order item.</td>
</tr>
<tr>
<td>Show Filling Details</td>
<td>This right-click option is enabled if the highlighted item in the list view is an inventory order that has been filled.</td>
</tr>
<tr>
<td></td>
<td>Selecting this right-click option displays the Filling Details window. For information on the Filling Details window, see Filling Details Window on page 8.</td>
</tr>
</tbody>
</table>

EDIT RECEIVED DETAILS WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Code</td>
<td>This disabled field indicates the product code of the product in this inventory order, as entered in the Inventory Order window’s Product Code field. For information on the Inventory Order window’s Product Code field, see Inventory Order Window on page 14.</td>
</tr>
<tr>
<td>Unit</td>
<td>This disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product Code field. Products are associated to unit types in the Inventory Product window's Product Details section’s Unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
</tbody>
</table>
**Edit Received Details Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>This disabled field indicates the product name for the product code displayed in the <strong>Product Code</strong> field.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>This disabled field indicates the location that received the inventory order, as entered in the <strong>Receipt of Goods</strong> window’s <strong>Location</strong> drop-down field. For information on the <strong>Receipt of Goods Window</strong> see page 37.</td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>This disabled field indicates the quantity of the product received, as entered in the <strong>Receipt of Goods</strong> window’s <strong>Quantity</strong> field. For information on the <strong>Receipt of Goods Window</strong> see page 37.</td>
</tr>
<tr>
<td><strong>Cost per unit</strong></td>
<td>This field indicates the per-unit cost, as defined in the <strong>Inventory Product</strong> window’s <strong>Product Details</strong> section’s <strong>Cost per unit</strong> field. For information on the <strong>Inventory Product</strong> window’s <strong>Product Details</strong> section, refer to the axiUm Reference Manual for Maintenance and see <strong>Product Details Section</strong> on page 398.</td>
</tr>
<tr>
<td><strong>Reference #</strong></td>
<td>This field indicates the reference number, as entered in the <strong>Receipt of Goods</strong> window’s <strong>Reference #</strong> field. For information on the <strong>Receipt of Goods Window</strong> see page 37.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>This disabled field indicates the date the inventory order was received, as entered in the <strong>Receipt of Goods</strong> window’s <strong>Received Date</strong> field. For information on the <strong>Receipt of Goods Window</strong> see page 37.</td>
</tr>
<tr>
<td><strong>Balance</strong></td>
<td>This disabled field indicates the number of items remaining from the original order. If the <strong>Quantity</strong> field displays 4 and the <strong>Balance</strong> field displays 3, this may indicate that one item was transferred to another location, was returned to the vendor, was damaged, or was lost or missing.</td>
</tr>
</tbody>
</table>

The cost method used by the selected product affects this field. For example, order1 received 10 items, and later, order2 received 10 more, and two of these items have been taken from inventory. If the product uses the cost method FIFO or average, this field displays 8 items remaining from order1 and 10 items remaining from order2. If the product uses the cost method LIFO, this field displays 10 items remaining from order1 and 8 items remaining from order2.

The cost method of a product is defined in the **Inventory Product** window’s **Product Details** section’s **Cost method** drop-down field. For information on the **Inventory Product** window’s **Product Details** section, refer to the axiUm Reference Manual for Maintenance and see **Product Details Section** on page 398.

**OK**

Clicking this button saves the entries and closes the **Edit Received Details Window**.

**Cancel**

Clicking this button cancels any entries and closes the **Edit Received Details Window**.
3 Filling Details Window

You can access this window by:

- Going to the Edit Inventory Order window and selecting the Show Filling Details right-click option. For information on the Edit Inventory Order window, see *Edit Inventory Order Window* on page 1.

- Going to the Inventory window’s Pending Orders tab and selecting the Show Filling Details right-click option. For information on the Inventory window’s Pending Orders tab, see *Inventory Window - Pending Orders Tab* on page 24.

- Going to the Inventory window’s Closed Orders tab and selecting the Show Filling Details right-click option. For information on the Inventory window’s Closed Orders tab, see *Inventory Window - Closed Orders Tab* on page 25.

Use this window to view details of items that have been filled for the selected internal order.
4 Inventory Adjustment Window

You can access this window by going to the Inventory window and clicking the Adjust button. For information on the Inventory window, see Inventory Window on page 19.
Use this window to record lost, damaged, missing, or returned items at a selected inventory location.

**INVENTORY ADJUSTMENT WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>This field indicates the inventory location from where the item was taken.</td>
</tr>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Inventory Location Codes window.</td>
</tr>
<tr>
<td></td>
<td>For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td></td>
<td>The default option is defined in the Inventory Setup window. For information on the Inventory Setup window, see Inventory Setup Window on page 18.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>This field indicates the adjustment code used for this adjustment.</td>
</tr>
<tr>
<td></td>
<td>Clicking  (ellips) opens the Inventory Adjustment Code window. For information on the Inventory Adjustment Code window, refer to the axiUm Reference Manual for Maintenance and see Inventory Adjustment Codes Window on page 377.</td>
</tr>
<tr>
<td>Input</td>
<td>This field indicates the product code of the product adjusted.</td>
</tr>
<tr>
<td></td>
<td>Clicking  (ellips) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.</td>
</tr>
<tr>
<td>Quantity</td>
<td>This disabled field indicates the number of inventory units adjusted in the selected location.</td>
</tr>
<tr>
<td></td>
<td>The number indicated here affects the Inventory window's Product Levels tab's Quantity column. For example, if this field displays 1, the Adjustment field indicates a credit-type adjustment code, and the Input field displays the product code for gauze, this indicates that one box of gauze was returned to the selected location, and the Inventory window's Product Levels tab's Quantity column increases by an increment of 1. For information on the Product Levels tab, see Inventory Window - Product Levels Tab on page 26.</td>
</tr>
</tbody>
</table>
INVENTORY ADJUSTMENT WINDOW

<table>
<thead>
<tr>
<th>Adjusted</th>
<th>The following disabled fields display values after selecting a product code in the Input field and pressing the ENTER key.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The first disabled field indicates the number of units adjusted (e.g., 1).</td>
</tr>
<tr>
<td></td>
<td>The second disabled field indicates the unit type (e.g., crate) associated to the product displayed in the Input field. Products are associated to unit types in the Inventory Product window's Product Details section's Unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
<tr>
<td></td>
<td>The third disabled field indicates the description of the product being adjusted (e.g., pens). The description for the selected product is defined in the Inventory Product window's Product section's Description field. For information on the Inventory Product window's Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
<tr>
<td></td>
<td>For example, these fields may indicate 1 crate of pens.</td>
</tr>
</tbody>
</table>

5 Inventory Count Window

You can access this window by going to the Inventory window and clicking the Count button. For information on the Inventory window, see Inventory Window on page 19.

Use this window to record the physical count of a location’s inventory.
### INVENTORY COUNT WINDOW

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search for Data" /></td>
<td>Clicking this icon starts the search process.</td>
</tr>
<tr>
<td><img src="image" alt="Clear Data" /></td>
<td>Clicking this icon clears the fields. By clearing the fields, axiUm allows you to enter a new record.</td>
</tr>
<tr>
<td><img src="image" alt="Add a new Record" /></td>
<td>Clicking this icon adds the new inventory count record you entered, and displays it in the list view.</td>
</tr>
<tr>
<td><img src="image" alt="Modify Record" /></td>
<td>Clicking this icon saves any modifications you made to the item selected from the list view.</td>
</tr>
<tr>
<td><img src="image" alt="Print Report" /></td>
<td>Clicking this icon prints the <em>Inventory Count</em> report to the default printer.</td>
</tr>
</tbody>
</table>
**INVENTORY COUNT WINDOW**

**For Location**

This drop-down field indicates the location where this inventory count was made.

The options in this drop-down field are defined in the *Inventory Location Codes* window. For information on the *Inventory Location Codes* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Location Codes Window* on page 379.

The default option is defined in the *Inventory Setup* window. For information on the *Inventory Setup* window, see *Inventory Setup Window* on page 18.

**Include inactive**

This checkbox, if selected, indicates to include inactive inventory products in the search.

Inactive products are those records in the *Inventory Products List* window with the *Include Inactive* checkbox selected. For information on the *Inventory Products List* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Products List Window* on page 393.

**Include products tracked in real time**

This checkbox, if selected, indicates to include products tracked in real-time in the search.

Products that are tracked in real-time are those records in the *Product / Location Information* window’s *Product Information* section with the *Real-time tracking* checkbox selected. For information on the *Product / Location Information* window’s *Product Information* section, refer to the axiUm Reference Manual for Maintenance and see *Product Information Section* on page 385.

**Input**

This field indicates the product code of the product counted.

Clicking (ellipsis) opens the *Inventory Products List* window to select from. For information on the *Inventory Products List* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Products List Window* on page 393.

**Quantity**

There are two *Quantity* fields in this window depending on the view mode.

The first field is a search field and is displayed when you are entering the search criteria in this window. This disabled field indicates the number of units counted (e.g., 1).

The second field is an inventory count field and is displayed when you highlight a record from the list view. The value displayed in this field indicates the physical inventory count for the product highlighted in the list view.
## Inventory Count Window

<table>
<thead>
<tr>
<th>Counted</th>
<th>The first disabled field indicates the physical inventory count entered for the record highlighted in the list view. The value displayed here was entered in the Quantity field during the physical count for this product.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Input field. Products are associated to unit types in the Inventory Product window's Product Details section's Unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
<tr>
<td></td>
<td>The third disabled field indicates the description (e.g. pens) of the product code selected in the Input field, and displays after selecting a product code in the Input field and pressing the ENTER key. The description for the selected product is defined in the Inventory Product window's Product section's Description field. For information on the Inventory Product window's Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
<tr>
<td></td>
<td>For example, these fields may indicate 1 crate of pens.</td>
</tr>
</tbody>
</table>

[**list view**] This list view displays the results of the search process.

### 6 Inventory Order Window

You can access this window by going to the Inventory window and clicking the Order button. For information on the Inventory window, see Inventory Window on page 19.

Use this window to submit inventory orders.
INVENTORY ORDER WINDOW

- **Clear Data**: Clicking this icon clears the entry fields. By clearing the fields, axiUm allows you to enter a new record.

- **Add a new Record**: Clicking this icon adds the new inventory order item you entered, and displays it in the list view.

- **Modify Record**: Clicking this icon saves any modifications you made to the item selected from the list view.

- **Delete Record**: Clicking this icon permanently deletes the item selected from the list view.

- **Preview Report**: Clicking this icon displays the *Inventory Order* report.

- **Print Report**: Clicking this icon prints the *Inventory Order* report to the default printer.
Requests for Vendor

Clicking this icon displays the Requests for Vendor window. For information on the Requests for Vendor window, see Requests for Vendor Window on page 42.

Inactive

This checkbox, if selected, indicates to make this order inactive.

Order #

This field indicates an axiUm-generated internal number that will be assigned when you click (Add a new Record). This number is used for tracking this inventory order.

Ordered by

This drop-down field indicates the location for which this order was made.

The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.

Type

This drop-down field indicates the order type used for this inventory order.

The options in this drop-down field are defined in the Inventory Order Types window and have the following behavior:

- Selecting an option that is an internal-type order displays the From drop-down field, and enables the Special order checkbox. Internal-type orders are those displayed in the Inventory Order Types window with the External Order checkbox deselected.

- Selecting an option that is an external-type order displays the From field, and enables the P.O. # field and the Unit Cost field. External-type orders are those displayed in the Inventory Order Types window with the External Order checkbox selected.

For information on the Inventory Order Types window, refer to the axiUm Reference Manual for Maintenance and see Inventory Order Types Window on page 386.

From

The From field is displayed if the Type drop-down field displays an external-type order, and indicates the vendor receiving this order.

Clicking (ellipsis) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see Vendors List Window on page 402.

Clicking (delete) removes the currently selected vendor name from the field.

The From drop-down field is displayed if the Type drop-down field displays an internal-type order, and indicates the inventory warehouse location receiving this inventory order.

The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.

Date

This field indicates the date of the inventory order.

This can be the current date or a past date. For example, if you create an inventory order on paper (e.g. by fax) and an inventory staff enters this data into axiUm at a later date, this field can reflect the actual date of the order (i.e. when the fax was sent to the vendor) not the date it was entered into axiUm.
**Inventory Order Window**

| **Special Order** | This checkbox is enabled if the Type drop-down field displays an internal-type order. This checkbox, if selected, indicates that this is an internal order (e.g. from the main warehouse to another location), but the item you want is not in the database, and the warehouse you are requesting from must order it from an external source. This is a situation where an internal inventory order ultimately results in an external inventory order. Selecting this checkbox displays the Vendor field. |
| **P.O.#** | This field is displayed if the Type drop-down field displays an external-type order. This is the purchase order number you received from the vendor. |
| **Vendor** | This field is displayed if the Special order checkbox is selected. This field indicates the vendor of choice for ordering items not in the database. Clicking (ellipsis) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see Vendors List Window on page 402. Clicking (delete) removes the currently selected vendor name from the field. |
| **Product Code** | This field indicates the product code of the product in this inventory order. Clicking (ellipsis) opens the Inventory Products List window. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393. When this field displays a product code, the Product Info button and the Ordering Info button are enabled. |
| **Quantity** | This field indicates the quantity of the product displayed in the Product Code field to order (e.g. 1). The second field is a disabled field, and indicates the unit type (e.g. crate) associated to the product displayed in the Product Code field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398. For example, these fields may indicate 1 crate. |
| **Description** | This disabled field indicates the product name for the product code displayed in the Product Code field. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401. |
| **Comment** | This text box lets you enter free-form comments and instructions for the order. |
| **Need by** | This field indicates the date by which the ordered products are required. |
7 Inventory Setup Window

You can access this window by going to the Inventory window and clicking the Setup button. For information on the Inventory window, see Inventory Window on page 19.

Use this window to set up your workstation’s inventory warehouse location.
### Inventory Window

You can access this window by:

- Clicking (Inventory) from the axiUm main screen icons.
- Clicking the Inventory option from the Actions menu.
- Clicking (Inventory) from the Desktop.

Use this window for all your daily inventory tasks.
INVENTORY WINDOW

**Product Type**

This drop-down field indicates the product type for the search criteria.

The options in this drop-down field are defined in the *Product Types* window. For information on the *Product Types* window, refer to the axiUm Reference Manual for Maintenance and see *Product Types Window* on page 390.

**Category**

This field indicates the product category for the search criteria.

Clicking **...** (ellipsis) opens the *Product Categories* window to select from. For information on the *Product Categories* window, refer to the axiUm Reference Manual for Maintenance and see *Product Categories Window* on page 391.

Clicking **X** (delete) removes the currently selected product category description from the field.

**Product**

This field indicates the product name for the search criteria.

Clicking **...** (ellipsis) opens the *Inventory Products List* window to select from. For information on the *Inventory Products List* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Products List Window* on page 393.

Clicking **X** (delete) removes the currently selected product name from the field.
### INVENTORY WINDOW

**Vendor**

This field is available if the Received tab is selected.

This field indicates the product vendor for the search criteria.

Clicking [](ellips) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see Vendors List Window on page 402.

Clicking [X] (delete) removes the currently selected vendor name from the field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date From</strong></td>
<td>This search field indicates the starting date range for the search criteria.</td>
</tr>
<tr>
<td><strong>Date To</strong></td>
<td>This search field indicates the ending date range for the search criteria.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>This field indicates the location code of the inventory location for the search criteria. This is the location where the items originated (i.e. taken from).</td>
</tr>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td></td>
<td>The default option is defined in the Inventory Setup window. For information on the Inventory Setup window, see Inventory Setup Window on page 18.</td>
</tr>
<tr>
<td><strong>Ordered By</strong></td>
<td>This drop-down field is displayed if the Pending Orders tab or the Closed Orders tab is selected.</td>
</tr>
<tr>
<td></td>
<td>This field indicates the location code of the inventory location that ordered products (i.e. taken to).</td>
</tr>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td><strong>Include Inactive</strong></td>
<td>This checkbox is displayed if the Pending Orders tab, the Closed Orders tab, or the Product Levels tab is selected.</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if selected, indicates to search for discontinued products.</td>
</tr>
<tr>
<td><strong>Only orders on hand</strong></td>
<td>This checkbox is displayed if the Pending Orders tab is selected.</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if selected, indicates to search only for items currently in stock.</td>
</tr>
<tr>
<td><strong>Exclude items with zero balance</strong></td>
<td>This checkbox is displayed if the Product Levels tab is selected.</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if selected, indicates that products with a 0 balance are excluded from the search. Products with an undetermined or null value are still included.</td>
</tr>
<tr>
<td><strong>Include order quantities</strong></td>
<td>This checkbox is displayed if the Product Levels tab is selected.</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if selected, indicates to include order details in the search results. When you click the Search button, axiUm displays additional columns in the list view.</td>
</tr>
<tr>
<td></td>
<td>Selecting this checkbox enables the Show re-order items only checkbox and disables the Per Location checkbox.</td>
</tr>
</tbody>
</table>
INVENTORY WINDOW

**Show re-order items only**
This checkbox is displayed if the Product Levels tab is selected. This checkbox is enabled if the Include order quantities checkbox is selected. This checkbox, if selected, indicates to include items that need to be ordered for the location displayed in the Location drop-down field, including items ready for reorder.

**Per Location**
This checkbox is displayed if the following conditions are met:

- The Product Levels tab is selected.
- The Location drop-down field displays the ALL option.

This checkbox is enabled if the Include order quantities checkbox is deselected. Selecting this checkbox sorts the search results in the list view by location.

**Type**
This drop-down field is displayed if the Pending Orders tab, the Closed Orders tab, or the Received tab is selected.

If the Pending Orders tab or the Closed Orders tab is selected, this drop-down field indicates the type of inventory order created, and displays the following options:

- ALL INTERNAL
- ALL EXTERNAL
- The remaining options are defined in the Inventory Order Types window. For information on the Inventory Order Types window, refer to the axiUm Reference Manual for Maintenance and see Inventory Order Types Window on page 386.

If the Received tab is selected, this drop-down field indicates the type of inventory order received, and displays the following options:

- ALL
- Received
- Transferred
- Adjustment
- Repackaged

These options are hard-coded and are not user-defined.
INVENTORY WINDOW

Status
This drop-down field is displayed if the Pending Orders tab or the Closed Orders tab.

This drop-down field indicates the status of the inventory order for the search criteria, and displays the following options:

• ALL
• Requested
• Reviewed
• Ordered
• Purchased
• Picked
• Partial Fill
• Back-ordered

These options are hard-coded and are not user-defined.

Search
Clicking this button begins the search process.

Print
Clicking this button prints the current tab’s list view to the selected printer.

Order...
Clicking this button displays the Inventory Order window. For information on the Inventory Order window, see Inventory Order Window on page 14.

Usage...
Clicking this button displays the Inventory Usage window. For information on the Inventory Usage window, see Inventory Usage Window on page 29.

Receive...
Clicking this button displays the Receipt of Goods window. For information on the Receipt of Goods window, see Receipt of Goods Window on page 37.

Transfer...
Clicking this button displays the Transfer Products window. For information on the Transfer Products window, see Transfer Products Window on page 47.

Adjust...
Clicking this button displays the Inventory Adjustment window. For information on the Inventory Adjustment window, see Inventory Adjustment Window on page 9.

Pick List...
Clicking this button prints the Pick List report to the default printer.

Fill...
Clicking this button displays the Order Filling Selection window. For information on the Order Filling Selection window, see Order Filling Selection Window on page 30.

Count...
Clicking this button displays the Inventory Count window. For information on the Inventory Count window, see Inventory Count Window on page 11.

Setup...
Clicking this button displays the Inventory Setup window. For information on the Inventory Setup window, see Inventory Setup Window on page 18.

Pending Orders
For information on the Pending Orders tab, see Inventory Window - Pending Orders Tab on page 24.

Closed Orders
For information on the Closed Orders tab, see Inventory Window - Closed Orders Tab on page 25.

Product Levels
For Information on the Product Levels tab, see Inventory Window - Product Levels Tab on page 26.
INVENTORY WINDOW

<table>
<thead>
<tr>
<th>Received</th>
<th>For information on the Received tab, see Inventory Window - Received Tab on page 27.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage History</td>
<td>For information on the Usage History tab, see Inventory Window - Usage History Tab on page 29.</td>
</tr>
</tbody>
</table>

[Text colors & text weight] Records are displayed differently according to the type of record and its status:

- Black: Items reviewed or ordered.
- Gray: Inactive or cancelled orders.
- Blue: Requires approval.
- Red: On back-order by this location.
- Green: On back-order (other locations are waiting for your location to deliver).
- Bold: New request.
- Regular: Reviewed or ordered.

8.1 Inventory Window - Pending Orders Tab

Use this tab to display a list orders waiting to be filled.
8.2 Inventory Window - Closed Orders Tab

Use this tab to display a list of orders that have been filled.
8.3 Inventory Window - Product Levels Tab

Use this tab to display the product levels for the selected location.
8.4 Inventory Window - Received Tab

Use this tab to display a list of products received. This helps you determine if the products received at one location can be used to fill internal orders, or transferred to other inventory locations.
**INVENTORY WINDOW - RECEIVED TAB**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Split Received Product...</strong></td>
<td>This right-click option is enabled if the record highlighted in the list view is in stock. In other words, the <em>Balance</em> column displays a value greater than 0. Selecting this right-click option displays the Split Received Product window. For information on the Split Received Product window, see <em>Split Received Product Window</em> on page 44.</td>
</tr>
</tbody>
</table>
| **Repackage Product...**   | This right-click option is enabled if all of the following conditions are met:  
  - The record highlighted in the list view is in stock. In other words, the *Balance* column displays a value greater than 0.  
  - The product can be split. In other words, the *Inventory Product* window’s *Product Details* section’s *Is dividable* checkbox is selected. For information on the *Inventory Product* window’s *Product Details* section, refer to the axiUm Reference Manual for Maintenance and see *Product Details Section* on page 398.  
  Selecting this right-click option displays the Repackage Product window. For information on the Repackage Product window, see *Repackage Product Window* on page 39.                                                                                                       |
| **Edit Received Details...** | Selecting this right-click option displays the *Edit Received Details* window. For information on the *Edit Received Details* window, see *Edit Received Details Window* on page 6.                                                                                                                                                                                                                                       |
8.5 Inventory Window - Usage History Tab

Use this tab to display product usages. Viewing a product’s consumption rate helps you determine the next date you need to order this product.

9 Inventory Usage Window

You can access this window by going to the Inventory window and clicking the Usage button. For information on the Inventory window, see *Inventory Window* on page 19.

Use this window to remove an item from inventory that was taken for internal use. For example, a roll of tape was taken from an inventory location for the warehouse staff’s use.
INVENTORY USAGE WINDOW

<table>
<thead>
<tr>
<th>Location</th>
<th>This field indicates the inventory location from where the item was taken.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td></td>
<td>The default option is defined in the Inventory Setup window. For information on the Inventory Setup window, see Inventory Setup Window on page 18.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Input</th>
<th>This field indicates the product code of the product taken from the selected location.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clicking  (ellipsis) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity</th>
<th>This disabled field indicates the number of inventory units taken from the selected location (e.g. 1).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The following disabled fields display values after selecting a product code in the Input field and pressing the ENTER key.</td>
</tr>
<tr>
<td></td>
<td>The first disabled field indicates the number of units used (e.g. 1).</td>
</tr>
<tr>
<td></td>
<td>The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Input field. Products are associated to unit types in the Inventory Product window's Product Details section’s Unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
<tr>
<td></td>
<td>The third disabled field indicates the description (e.g. pens) of the product code selected in the Input field, and displays after selecting a product code in the Input field and pressing the ENTER key. The description for the selected product is defined in the Inventory Product window's Product section’s Description field. For information on the Inventory Product window's Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
<tr>
<td></td>
<td>For example, these fields may indicate 1 crate of pens.</td>
</tr>
</tbody>
</table>

10 Order Filling Selection Window

You can access this window by going to the Inventory window and clicking the Fill button. For information on the Inventory window, see Inventory Window on page 19.

Use this window to determine the inventory order items to display in the Order Filling window. For information on the Order Filling window, see Order Filling Window on page 33.
11 Order Filling Substitution Window

You can access this window by going to the Order Filling window and selecting the Substitute right-click option. For information on the Order Filling window, see Order Filling Window on page 33.

Use this window to record product substitutions when filling physical orders for an inventory location.
ORDER FILLING SUBSTITUTION WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>The first disabled field indicates the product code of the product being substituted. The second disabled field indicates the number of items being substituted (e.g. 10). The third disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product field.</td>
</tr>
<tr>
<td>Description</td>
<td>This disabled field indicates the product name for the product code displayed in the Product Code field. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
<tr>
<td>Comment</td>
<td>This text box displays any comments about this substitution.</td>
</tr>
<tr>
<td>Input</td>
<td>This field indicates the product code of the substituted product type. Clicking (ellipsis) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.</td>
</tr>
<tr>
<td>Quantity</td>
<td>This field indicates the quantity of the product displayed in the Product Code field being substituted (e.g. 1).</td>
</tr>
</tbody>
</table>
ORDER FILLING SUBSTITUTION WINDOW

Substituted

The first disabled field indicates the number of substituted items.

The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.

The third disabled field indicates the description (e.g. pens) of the product code selected in the Input field, and displays after selecting a product code in the Input field and pressing the ENTER key. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.

For example, these fields may indicate 1 crate of pens.

12 Order Filling Window

You can access this window by going to the Order Filling Selection window and clicking the OK button. For information on the Order Filling Selection window, see Order Filling Selection Window on page 30.

Use this window to collect items for your inventory location using a printed pick list.
ORDER FILLING WINDOW

Clear Data: Clicking this icon clears the entry fields. By clearing the fields, axiUm allows you to enter a new record.

Add a new Record: Clicking this icon adds the order filling record you entered, and displays it in the list view.

Modify Record: Clicking this icon saves any modifications you made to the item selected from the list view.

Print Report: Clicking this icon prints the Orders Filled report to the default printer.

Ordered by: This disabled field indicates the location for which this order was made.

Pick List: This disabled field indicates an axiUm-generated number that was assigned when you printed the pick list, and is used to track the pick list printout. The number displayed in this field must match the pick list number displayed on the Pick List report title.
## ORDER FILLING WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filled By</td>
<td>This drop-down field indicates the location that filled the order. The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td>Transferred To</td>
<td>This drop-down field indicates the location where items have been transferred. The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379.</td>
</tr>
<tr>
<td>Input</td>
<td>This field indicates the product code of the product filled. Clicking … (ellipsis) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.</td>
</tr>
<tr>
<td>Quantity</td>
<td>There are two Quantity fields in this window depending on the view mode. The first field is a search field and is displayed for searching additional items that exist in the Pending Orders tab but you did not select to display in this window. The second field is an inventory count field and is displayed when you highlight a record from the list view. The value displayed in this field indicates the physical number of units filled for the product highlighted in the list view.</td>
</tr>
<tr>
<td>Filled</td>
<td>The first disabled field indicates the number of inventory units filled and entered into axiUm (e.g. 1). The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Input field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398. The third disabled field indicates the description (e.g. pens) of the product highlighted in the list view. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401. For example, these fields may indicate 1 crate of pens.</td>
</tr>
<tr>
<td>Auto Fill</td>
<td>Clicking this button completes the filling order, indicating that all items were in stock and the order was 100% fulfilled.</td>
</tr>
<tr>
<td>Substitute</td>
<td>Selecting this right-click option displays the Order Filling Substitution window. For information on the Order Filling Substitution window, see Order Filling Substitution Window on page 31.</td>
</tr>
<tr>
<td>Back-order Item</td>
<td>Selecting this right-click option changes the status of the selected inventory order as back-ordered.</td>
</tr>
</tbody>
</table>
ORDER FILLING WINDOW

Cancel
Selecting this right-click option cancels the selected inventory order. axiUm deletes the highlighted item from the Order Filling window’s list view.

For example, if you ordered five boxes of printing paper and received none, you can cancel this order so that you can order from a different vendor. If the order filled one box, you can cancel this order so that you can return the one box to the original vendor and reorder from a different vendor.

Close
Selecting this right-click option closes the selected inventory order. axiUm deletes the highlighted item from the Order Filling window’s list view.

For example, if you ordered five boxes of printing paper but you received four boxes, and this is sufficient, you can close the remaining order (i.e. one box) with the original vendor.

13 Product Overview Window

You can access this window by going to the Inventory window’s Product Levels tab and selecting the Show Product Overview right-click option. For information on the Inventory window’s Product Levels tab, see Inventory Window - Product Levels Tab on page 26.

Use this window to define the Product Overview report.

PRODUCT OVERVIEW WINDOW

Report Start Date
This checkbox, if selected, indicates that a start date is defined for the Product Overview report.

Selecting this checkbox enables the field.

The field indicates the earliest date of all records displayed in the Product Overview report.

Show all Inventory Counts
This checkbox, if selected, indicates to include inventory count records in the Product Overview report.

OK
Clicking this button saves the selections, closes the Product Overview window, and displays the Product Overview report.

Cancel
Clicking this button cancels any selection and closes the Product Overview window.
14 Receipt of Goods Window

You can access this window by going to the Inventory window and clicking the Receive button. For information on the Inventory window, see Inventory Window on page 19.

Use this window to view a list of products received within a specific date range at a specific location.

 RECEIPT OF GOODS WINDOW

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clear Data" /></td>
<td>Clicking this icon clears the entry fields. By clearing the fields, axiUm allows you to enter a new record.</td>
</tr>
<tr>
<td><img src="image" alt="Add a new Record" /></td>
<td>Clicking this icon adds the received item you entered, and displays it in the list view.</td>
</tr>
<tr>
<td><img src="image" alt="Modify Record" /></td>
<td>Clicking this icon saves any modifications you made to the item selected from the list view.</td>
</tr>
<tr>
<td><img src="image" alt="Delete Record" /></td>
<td>Clicking this icon permanently deletes the item selected from the list view.</td>
</tr>
</tbody>
</table>
## RECEIPT OF GOODS WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Report</strong></td>
<td>Clicking this icon prints the Receipt of Goods report to the default printer.</td>
</tr>
<tr>
<td><strong>Auto Receive</strong></td>
<td>This button is used when the order is complete and has no problems. If the order is short or over, or needs other editing, this button is not used.</td>
</tr>
<tr>
<td><strong>New P.O.</strong></td>
<td>Clicking this button saves and clears all entries and moves the cursor to the P.O. Number field so you can enter additional items received under a different purchase order number.</td>
</tr>
<tr>
<td><strong>New Ref #</strong></td>
<td>Clicking this button saves any new records, clears the fields, and moves the cursor to the Reference # field so you can enter additional items received under a different reference number.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>This field indicates the inventory location receiving this order. The options in this drop-down field are defined in the Inventory Location Codes window. For information on the Inventory Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Inventory Location Codes Window on page 379. The default option is defined in the Inventory Setup window. For information on the Inventory Setup window, see Inventory Setup Window on page 18.</td>
</tr>
<tr>
<td><strong>P.O. Number</strong></td>
<td>This field indicates the purchase order number. Typically, the vendor assigns this number to your purchase order for tracking purposes.</td>
</tr>
<tr>
<td><strong>P.O. Date</strong></td>
<td>This field indicates the date the purchase order was issued.</td>
</tr>
<tr>
<td><strong>Vendor</strong></td>
<td>This field indicates the vendor from which the order was purchased. Clicking  (ellipsis) opens the Vendors List window to select from. For information on the Vendors List window, refer to the axiUm Reference Manual for Maintenance and see Vendors List Window on page 402.</td>
</tr>
<tr>
<td><strong>Reference #</strong></td>
<td>This field indicates the reference number used to track the received goods.</td>
</tr>
<tr>
<td><strong>Input</strong></td>
<td>This field indicates the product code of the product adjusted in the selected location. Clicking  (ellipsis) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.</td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>This disabled field indicates the total number of items ordered (e.g. 1).</td>
</tr>
</tbody>
</table>
Repackage Product Window

**RECEIPT OF GOODS WINDOW**

**Received**

The first disabled field indicates the number of inventory units received (e.g. 1).

The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Input field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.

The third disabled field indicates the description (pens) of the product highlighted in the list view. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.

For example, these fields may indicate 1 crate of pens.

**[list view]**  
This list view displays records of items received at this inventory location.

15 Repackage Product Window

You can access this window by going to the Inventory window’s Received tab and selecting the Repackage Product right-click option. For information on the Inventory window’s Received tab, see Inventory Window - Received Tab on page 27.

Use this window to repackage received products into different unit sizes.

![Repackage Product Window](image)

**REPACKAGE PRODUCT WINDOW**

**Total Items**  
This disabled field indicates the total number of items available for repackaging.

\[ \text{Total Items field} = \text{Quantity field} \times \text{Items / Unit field} \]
15.1 Product Info Section

**REPACKAGE PRODUCT WINDOW - PRODUCT INFO SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>This disabled field indicates the product code of the product being repackaged.</td>
</tr>
<tr>
<td>Description</td>
<td>This disabled field indicates the product name for the product code displayed in the Product field. The description for the selected product is defined in the Inventory Product window's Product section's Description field. For information on the Inventory Product window's Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
<tr>
<td>Quantity</td>
<td>This field indicates the number of units received for the product type displayed in the Product field (e.g. 1). The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product field. Products are associated to unit types in the Inventory Product window's Product Details section's Unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398. For example, these fields may indicate 1 crate.</td>
</tr>
<tr>
<td>Items / Unit</td>
<td>The first disabled field indicates the total number of items in a unit (e.g. 1000). The second disabled field indicates the description of the product (e.g. pens) selected in the Product field. The description for the selected product is defined in the Inventory Product window's Product section's Description field. For information on the Inventory Product window's Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401. For example, these fields may indicate 1,000 pens (in an order quantity of 1 crate).</td>
</tr>
<tr>
<td>Cost per unit</td>
<td>This field indicates the per-unit cost, as defined in the Inventory Product window's Product Details section's Cost per unit field. For information on the Inventory Product window's Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
</tbody>
</table>
15.2 Repackaged Product Section

### REPACKAGE PRODUCT WINDOW - PRODUCT INFO SECTION

**Total Cost**
This disabled field indicates the total cost of this product.

\[ \text{Total Cost field} = \text{Quantity field} \times \text{Cost per unit field} \]

### REPACKAGE PRODUCT WINDOW - REPACKAGED PRODUCT SECTION

**Product**
This field indicates the product code of the repackaged product.

Clicking (ellipsis) opens the Inventory Products List window to select from. For information on the Inventory Products List window, refer to the axiUm Reference Manual for Maintenance and see Inventory Products List Window on page 393.

**Description**
This disabled field indicates the product name for the product code displayed in the Product field. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.

**Quantity**
This field indicates the number of units to be repackaged for the product type displayed in the Product field (e.g. 1).

The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.

For example, these fields may indicate 1 crate.

**Items / Unit**
The first disabled field indicates the total number of units (e.g. 1000) for the repackaged product.

The second disabled field indicates the description of the repackaged product (e.g. pens) selected in the Product field. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.

For example, these fields may indicate 1,000 pens (in an order quantity of 1 crate).
Requests for Vendor Window

You can access this window by:

- Going to the Inventory Order window and clicking (Requests for Vendor). For information on the Inventory Order window, see Inventory Order Window on page 14.

- Going to the Edit Inventory Order window and clicking (Requests for Vendor). For information on the Edit Inventory Order window, see Edit Inventory Order Window on page 1.

Use this window to notify warehouse staff that the item you want is currently not in axiUm for selection. You can use this window to suggest a vendor to contact.
17 Show Back-Ordered Locations Window

You can access this window by going to the Inventory window’s Product Levels tab, selecting a record for a product waiting on back-order from another inventory location, and selecting the Show Back-ordered Locations right-click option. For information on the Inventory window’s Product Levels tab, see Inventory Window - Product Levels Tab on page 26.

Use this window to view the inventory location for which your location is waiting on back-order.
Show Back-Ordered Locations Window

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>This disabled field indicates the product code of the product in this inventory order, as entered in the Inventory Order window’s Product Code field. For information on the Inventory Order window’s Product Code field, see Inventory Order Window on page 14.</td>
</tr>
<tr>
<td>Unit</td>
<td>This disabled field indicates the unit type (e.g. crate) associated to the product displayed in the Product Code field. Products are associated to unit types in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
<tr>
<td>Description</td>
<td>This disabled field indicates the product name for the product code displayed in the Product Code field. The description for the selected product is defined in the Inventory Product window’s Product section’s Description field. For information on the Inventory Product window’s Product section, refer to the axiUm Reference Manual for Maintenance and see Product Section on page 401.</td>
</tr>
</tbody>
</table>

18 Split Received Product Window

You can access this window by going to the Inventory window’s Received tab and selecting the Split Received Product right-click option. For information on the Inventory window’s Received tab, see Inventory Window - Received Tab on page 27.

Use this window to split large shipments (e.g. bulk packages) into smaller quantities for distribution to smaller inventory locations. This is typically done if the contents cannot be used at one location within a reasonable amount of time.

Split Received Product Window

Clicking this button saves the entries and closes the Split Received Product window.
**Split Received Product Window**

**Cancel**

Clicking this button cancels any entries and closes the *Split Received Product* window.

### 18.1 Original Receipt Section

![Example Original Receipt Section](image)

**Product**

This disabled field indicates the product code of the product being repackaged.

**Description**

This disabled field indicates the product name for the product code displayed in the *Product Code* field. The description for the selected product is defined in the *Inventory Product* window's *Product* section's *Description* field. For information on the *Inventory Product* window's *Product* section, refer to the axiUm Reference Manual for Maintenance and see *Product Section* on page 401.

**Quantity**

This field indicates the number of items received for the product type displayed in the *Product* field (e.g. 1).

The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the *Product* field. Products are associated to unit types in the *Inventory Product* window's *Product Details* section's *Unit* field. For information on the *Inventory Product* window's *Product Details* section, refer to the axiUm Reference Manual for Maintenance and see *Product Details Section* on page 398.

For example, these fields may indicate 1 crate.

**Balance**

This disabled field indicates the number of items remaining from the original order. If the *Quantity* field displays 4 and the *Balance* field displays 3, this may indicate that one item was transferred to another location, or was lost, or has been returned to the vendor.

The cost method used by the selected product affects this field. For example, order1 received 10 items, and later, order2 received 10 more, and two of these items have been taken from inventory. If the product uses the cost method FIFO or average, this field displays 8 items remaining from order1 and 10 items remaining from order2. If the product uses the cost method LIFO, this field displays 10 items remaining from order1 and 8 items remaining from order2.

The cost method of a product is defined in the *Inventory Product* window's *Product Details* section's *Cost method* drop-down field. For information on the *Inventory Product* window's *Product Details* section, refer to the axiUm Reference Manual for Maintenance and see *Product Details Section* on page 398.
**SPLIT RECEIVED PRODUCT WINDOW - ORIGINAL RECEIPT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiry Date</td>
<td>This field indicates the expiry date of the product being split. For example, if you are splitting a large can of instant coffee, the expiry date on the container must be entered here.</td>
</tr>
<tr>
<td>Cost per unit</td>
<td>This field indicates the per-unit cost, as defined in the Inventory Product window’s Product Details section’s Cost per unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398.</td>
</tr>
<tr>
<td>Total Cost</td>
<td>This disabled field indicates the total cost of the product. Total Cost field = Quantity field x Cost per unit field.</td>
</tr>
</tbody>
</table>

**18.2 Split Receipt Section**

**SPLIT RECEIVED PRODUCT WINDOW - SPLIT RECEIPT SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>This field indicates the number of items received for the product type displayed in the Product field (e.g. 1). The second disabled field indicates the unit type transferred (e.g. box). The unit type for the selected product is defined in the Inventory Product window’s Product Details section’s Unit field. For information on the Inventory Product window’s Product Details section, refer to the axiUm Reference Manual for Maintenance and see Product Details Section on page 398. For example, these fields may indicate 1 box.</td>
</tr>
<tr>
<td>Expiry Date</td>
<td>This field indicates the expiry date of the product being split. For example, if you are splitting a large can of instant coffee, the expiry date on the container must be entered here.</td>
</tr>
</tbody>
</table>
**Transfer Products Window**

You can access this window by going to the Inventory window and clicking the Transfer button. For information on the Inventory window, see *Inventory Window* on page 19.

Use this window to transfer products from one location to another.
TRANSFER PRODUCTS WINDOW

**Clear Data**
Clicking this icon clears the entry fields. By clearing the fields, axiUm allows you to enter a new record.

**Add a new Record**
Clicking this icon adds the new inventory transfer item you entered, and displays it in the list view.

**Modify Record**
Clicking this icon saves any modifications you made to the item selected from the list view.

**Print Report**
Clicking this icon prints the *Transfer* report to the default printer.

**Transfer From**
This drop-down field indicates the location from where the products are transferred.

The options in this drop-down field are defined in the *Inventory Location Codes* window. For information on the *Inventory Location Codes* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Location Codes Window* on page 379.

The default option is defined in the *Inventory Setup* window. For information on the *Inventory Setup* window, see *Inventory Setup Window* on page 18.
**Transfer Products Window**

**Transfer To**
This drop-down field indicates the location to where the products are transferred.

The options in this drop-down field are defined in the *Inventory Location Codes* window. For information on the *Inventory Location Codes* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Location Codes Window* on page 379.

**Individual Products**
This option, if selected, indicates that only a few items are being transferred from the location displayed in the *Transfer From* drop-down to the location displayed in the *Transferred To* drop-down field.

For example, if you are transferring select items from the main warehouse and hand-carrying them to your inventory location, you are transferring individual products from the originating location (i.e. main warehouse) to the destination location.

**All Products From Location**
This option is enabled if the *Transfer From* drop-down displays a cart type location.

Locations defined as a cart are those records in the *Inventory Location Codes* window with the *Type* drop-down field displaying the *Cart* option. For information on the *Inventory Location Codes* window, refer to the axiUm Reference Manual for Maintenance and see *Inventory Location Codes Window* on page 379.

For example, if you are transferring items from a cart used to transport products going specifically to your inventory location, you are transferring all products from that location (i.e. cart) to the destination location.

**Selected items in the Received tab**
This option is enabled if there are items displayed in the *Inventory window's Received tab*’s list view. For information on the *Inventory window's Received tab*, see *Inventory Window - Received Tab* on page 27.

**Input**
This field is displayed during order-entry and hidden when a record is highlighted in the list view.

**Quantity**
There are two *Quantity* fields in this window depending on the view mode.

The first field is a disabled field and indicates the number of units counted (e.g. 1).

The second field is a product count field and is displayed when you highlight a record from the list view. The value displayed in this field indicates the number of items transferred for the product highlighted in the list view.
**TRANSFER PRODUCTS WINDOW**

The first disabled field indicates the number of items transferred for the record highlighted in the list view. The value displayed here was entered in the *Quantity* field during the physical count for this product.

The second disabled field indicates the unit type (e.g. crate) associated to the product displayed in the *Input* field. Products are associated to unit types in the *Inventory Product window*’s *Product Details* section’s *Unit* field. For information on the *Inventory Product window*’s *Product Details* section, refer to the axiUm Reference Manual for Maintenance and see *Product Details Section* on page 398.

The third disabled field indicates the description (e.g. pens) of the product code selected in the *Input* field, and displays after selecting a product code in the *Input* field and pressing the ENTER key. The description for the selected product is defined in the *Inventory Product window*’s *Product section*’s *Description* field. For information on the *Inventory Product window*’s *Product section*, refer to the axiUm Reference Manual for Maintenance and see *Product Section* on page 401.

For example, these fields may indicate 1 crate of pens.

---

**20 View Product Locations Window**

You can access this window by going to the Inventory window’s Product Levels tab and selecting the Show Product Locations right-click option. For information on the Inventory window’s Product Levels tab, see *Inventory Window - Product Levels Tab* on page 26.

Use this window to view all the locations that carries the selected product. This window shows the balance and last count of a selected product at a location.
**View Product Locations Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>This disabled field indicates the product code for the product type selected. The product code is entered in the <em>Inventory Product window’s Product section’s Product Code field</em>. For information on the <em>Inventory Product window’s Product section</em>, refer to the axiUm Reference Manual for Maintenance and see <em>Product Section</em> on page 401.</td>
</tr>
<tr>
<td>Description</td>
<td>This disabled field indicates the description of the product selected. The description for the selected product is defined in the <em>Inventory Product window’s Product section’s Description field</em>. For information on the <em>Inventory Product window’s Product section</em>, refer to the axiUm Reference Manual for Maintenance and see <em>Product Section</em> on page 401.</td>
</tr>
<tr>
<td>Unit</td>
<td>This disabled field indicates the unit type (e.g. crate) associated to the product selected. Products are associated to unit types in the <em>Inventory Product window’s Product Details section’s Unit field</em>. For information on the <em>Inventory Product window’s Product Details section</em>, refer to the axiUm Reference Manual for Maintenance and see <em>Product Details Section</em> on page 398.</td>
</tr>
</tbody>
</table>