

inFlow v2 Article Archives

Note from the inFlow team

Thank you for your interest in downloading the inFlow V2 Article Archives.

Please be aware that V2 has been discontinued since 2014, and as of July 2024, V2 resources will no longer be available on our website.

These resources include:

- Support from the inFlow team
- Knowledge base articles
- inFlow V2 installer files
- No options to purchase new licenses or license activations

We've compiled a document containing an archive of all the inFlow V2 Knowledge Base articles, which we hope you'll find helpful.

If you are considering switching to inFlow Cloud for the latest inventory management features, we encourage you to <u>reach out to the inFlow team</u>.



Searching the inFlow V2 Archives with Adobe Acrobat

We understand that finding the information you need can be challenging. To make your search easier, we've put together this guide to assist you in navigating the V2 archives.

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When done, you can return to the beginning of the document by entering the 1 into the page number field.



Keyword searching

If you're unsure of the title of an article, you can use Adobe's keyword search. This tool allows you to search the entire PDF document for specific words or phrases.

- 1. Look for a magnifying glass symbol for keyword searching.
- 2. Enter a search term/keyword into the field, then press enter on your keyboard.
- 3. Click on the arrow key to parse through the document using that keyword.



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Backing up and restoring data

Your database (i.e. your information) will backup automatically—each day that you use inFlow—to a local folder on your computer. That said, you can also back up your database manually through inFlow's main menu to save it elsewhere (like an external drive or other computer).

To Backup:

- 1. Click *Main Menu* > *General* > *Backup Data*.
- 2. Select the location you'd like to save the backup.
- 3. Click Next.

When you have a backup of your database it can be used to move your inFlow to another computer (if you have a replacement computer coming into the office) or you wish to re-arrange your set up. It can also be used to reverse import changes as discussed in the section about imports.

To Restore Data:

- 1. Click Main Menu > General > Restore Data.
- 2. Select your backup file.
- 3. Click Next.

Having trouble backing up/restoring? Please see this article on <u>troubleshooting backup/restore</u> <u>problems</u> for more help.

Brief overview of inFlow's database schema

This article is highly technical and intended for programmers, not the typical inFlow user.

Behind the scenes, inFlow uses a Microsoft SQL Server 2005 database to store its data. If you have the necessary programming skills available, it's possible to get access to this database and use it to show information on your website, more sophisticated integration with other programs, etc.

Please keep in mind that future versions of inFlow may change the way the data is stored. Also, we do not recommend attempting to make changes to the database directly (the inFlow client does a lot of sophisticated handling). Instead, you should be importing the data into inFlow.

That said, here are some of the major database tables that you may be interested in looking at:

-We use a convention where the table name starts with a loosely defined module. Most of the basic table names start with BASE_, Sales Order related tables start with SO_, Purchase Orders with PO_, and other inventory information in INV_ tables.

-For product information (name, description, etc.), look at the BASE_Product table. The primary key is ProdId, and this is used in many other tables to join to BASE_Product.

-For inventory, look in BASE_Inventory and BASE_InventoryQuantityTotal. BASE_Inventory stores the quantity on hand, broken down by location and sublocation. You may want to join with BASE_Location to convert LocationId into a human-readable form. Sublocations are stored directly as strings in the BASE_Inventory table and other places where they are used. Use BASE_InventoryQuantityTotal if you just want the total quantity on hand or the amounts that you're expecting to receive from vendors (QuantityOnOrder) or send to customers (QuantitySold). If nothing is set in these tables, assume that the inventory is 0.

-Use VIEW_InventoryCost.Cost to look up the unit cost of an item.

-BASE_Customer and BASE_Vendor respectively store the customer and vendor information.

-For Sales Order information, all the tables whose names start with SO_ may be relevant. SO_SalesOrder is the main table that contains the order number, customer information, and summary information like the amounts of tax and the total. inFlow can have different values in the Order tab, the Pick tab, the Invoice tab, etc. In most cases, it's easiest to get information from the Order tab; the summary fields are OrderSubtotal, OrderTax1, OrderExtra (freight) OrderTotal, etc.

-SO_SalesOrder_Line should be joined with SO_Order on SalesOrderId. This contains the information for each order of your order.

-PO_PurchaseOrder and PO_PurchaseOrder_Line store the purchase order information. These are organized similar to Sales Orders.

Let us know what you plan to work on; while we can't help you with the programming, and don't offer an API, we may be able to provide suggestions as you work out the specifics. Good luck!

Can I add information to the bottom of my invoices?

So you've got terms of use or a signature line that you need to add to your sales documents? Not a problem! inFlow can include both an "end-of-page footer" and/or an "end-of-doc footer" on your printed documents.

🚽 inFlow - Print Setti	ngs					
General	Common Hea	der			Sales Doc Foot	ter
General Templates	Common Hea Logo Company Name Address City Country Phone Frax Email Website Misc. Info	ABC Toys Ld. 38 Denny Steet. Sul Wonderland - USA - USA - 321-789-5578 321-789-5578 Tex 21 123 4567 89 Tex 21 123 4567 89	te 134 StateProvince ZipiPostal Cod	Browse Clear Logo CA • e 01678	Sales Doc Foot Perpage Footer End-of-doc Footer Purchasing Doc Perpage Footer End-of-doc Footer Inventory Doc 1 Perpage Footer End-of-doc Footer Reports Doc Footer End-of-doc Footer End-of-doc Footer End-of-doc Footer	Eer Paymert is due uoon moost. Returns or exchanges Paymert is due uoon moost. Returns or exchanges Footer Footer Conter
						Save & Close Cancel

To add footers to your documents:

- 1. Go to Main Menu > Settings > Print Settings.
- 2. Enter the text you'd like to add into the appropriate field (you can add text to Sales Docs, Purchasing Docs, Inventory Docs and/or Reports).
- 3. Click Save & Close.

You will now see the entered text on all documents in that module.

Can I change the auto-backup location or time? How do I set up off-site backups?

inFlow's auto backup procedure runs periodically based on what you've set in the Main Menu (the round button at the top left) \rightarrow Settings \rightarrow Auto Backup, but only when someone is running on inFlow. As such, you can specify how often you'd like to backup inFlow, but the timing might be a little harder to predict. Unfortunately, we don't currently offer the ability to **change** the auto-backup location, due to technical limitations. However, inFlow uses Microsoft SQL Server 2005 Express database, and it is possible to set up your own **autobackup** procedures on the server computer as well.

inFlow's automatic backups are created on your own computer (the server computer if in multi-user mode). It's a good idea to set up off-site backups so that you still have the backups if your computer is lost, stolen, or the hard-drive crashes.

Here's one tool that might help with this:

http://sqlbackupandftp.com/

It has a free version that allows you to schedule backups to Dropbox or an FTP server.

And here's information on how you can access inFlow's underlying database outside of inFlow: <u>https://onpremise.inflowinventory.com/software-support.aspx#/article?21218881</u>

Can I install inFlow to another drive?

By default, inFlow installs onto the main drive of your computer (the one that houses Windows), typically the C drive. The main reason we don't offer a choice is that SQL Server, which inFlow uses, must be on this drive. However, it is possible to move many of the parts of inFlow v2 to another drive.

If you are using inFlow v3 or the latest version of inFlow, the following steps are not possible to do at all.

This is quite complicated, so it's only recommended if absolutely necessary of if you're an IT professional administering a server. We'll be moving the program folder of inFlow to another drive, then detaching the database files from SQL Server, moving them, and re-attaching them there.

- 1. If you already have inFlow installed, make a backup of your database. If not, download and install inFlow onto your server. This will install inFlow onto the main drive. Shut down inFlow.
- 2. Move the directory 'inFlow Inventory' from your Program Files directory to your target program directory.
- 3. Download and install Microsoft SQL Server Management Studio Express (SSMSE)
- 4. <u>http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&displaylang=en</u>
- 5. Run SSMSE in Administrator mode. (You may need to right-click and select Run as administrator.)

- 6. In SSMSE, connect to server name .INFLOWSQL using Windows Authentication.
- 7. On the object explorer at the left side, expand the server INFLOWSQL, then Databases. Right click the inFlow database, then under Tasks, select Detach...
- 8. Click OK to confirm in the popup window.
- 9. Repeat step 7 to detach the inFlowMeta inFlowSample database.
- 10. In Windows Explorer, open the directory where inFlow's database files are stored. On Windows XP or Windows Server 2003, this is usually at C:\Documents and Settings\All Users\Application Data\inFlow Inventory On more recent operating systems, this is usually at C:\ProgramData\inFlow Inventory\Backup.
- 11. Move the following 6 data files to your target data directory: inFlow.mdf, inFlow_log.LDF, inFlowMeta_mdf, inFlowMeta_log.LDF, inFlowSample_log.LDF, inFlowSample.mdf
- 12. Open your target program directory, then edit attachDB.sql to search and replace the original data directory with your new data directory (it shows up 6 times, so you'll need to make sure you make 6 replacements total).
- 13. In the same directory, there is another file named "UpdateCLRObjects.sql". Open it and edit the original program directory to your target program directory. This should only show up once in the file at the very bottom.
- 14. Shut down SSMSE and any other programs that might be accessing your database. Then, run inFlow by double clicking on inFlow.exe. This should bring up the Troubleshoot Connection window.
- 15. Click the Fix the problem for me! button. This will reattach the inFlow databases using the attachDB.sql script we edited in step 10, then start inFlow. *If you have problems here, you can try detaching the databases once more steps 4-7 and then attach again in step 10. You can also try attaching the database by running the contents of the attachDB.sql script in SSMSE (click New Query after connecting).*
- 16. Turn off auto-backup (which currently can only backup onto the C drive) in inFlow by clicking Main Menu (round button at the top left) → Settings → General Settings → Auto Backup and setting it to "Backup every 0 days".
- 17. Update your inFlow shortcut to the new location by right-clicking it, opening the Properties, and modifying the paths there.

Can I make custom reports or access the database outside of inFlow?

We don't officially support this, but you can do this if you have the appropriate skills with databases and/or reports, or can find somebody to help you. Some more technical information is below.

inFlow uses a Microsoft SQL Server database as a back-end database. You can connect to this using Crystal Reports or some other reporting tool to create custom reports. It creates an SQL Server instance named INFLOWSQL on the server machine. You can log into this using the *sa* account. The password for the *sa*account is the Server Password, which you can find by switching inFlow to multi-user mode and selecting *Change Connection* from the File menu. You can also connect to this database using an ODBC connection. In fact, there may have been an ODBC connection called *local-sql* created for you after installing inFlow.

Some warnings about this – we don't officially support connecting to the database outside of inFlow, although we'll informally be glad to help you get started. Making changes to the database outside of inFlow may lead to unexpected problems. Also, many of the update patches for inFlow will update the database, so if you create some tools that rely on a particular database structure, you should be careful when choosing to update inFlow.

Here's how to create the ODBC connection if one wasn't created for you.

1. Open the ODBC window at Control Panel \rightarrow Administrative Tools \rightarrow Data Source (ODBC)

2. Create New Data Source, and select SQL Server

3. Give it any name and description. The server will be .inFlowSQL (you may also use SERVERNAME/inFlowSQL instead).

4. Use SQL Server authentication. The default login is "sa" and use inFlow's Server Password as the password

5. Change the default database to "inFlow".

For more detailed information please see this article on the database schema for inFlow.

Can I provide a list of back ordered items on an order?

You can certainly provide a list of items that are back ordered easily from the system using the *Split Order by Inventory Available* option within the sales order.

🚽 inFlow Inventory - Premium Edition								x
Sales Order	🛛 📝 Dashboard	+ × +						2 -
		1	1					
Search	🗋 New 🛃 Save 🗃 Pres	view 👻 📭 Copy 💌 🗋	Version 0 Att	achment 📃 Stic	ky 💌		X CI	lose
Order # -	Customer PedalCar.CO	м -	Sales Rep		•	Order #	SO-000009	
Status • Open •	Contact Doug		Location		•	Date	24/11/2009 -	•
Customer -	Phone 800-555-963	1				Status	Open	
Refresh	Address • 492 Third Str #123	eet						
Order # 👻	USA 60035	ς, ι ε					add shipping	
SO-000011 SO-000009	Item	Description		Quantity	Unit Price	Discount	Sub-Total	
SO-000004	▶ 12875	Mini-Truck Battery Powe	ered Red	15	\$23.99	0 %	\$359.8	85
	20101	1:24 California Highway	Patrol	15	\$30.00	0 %	\$450.0	00
	46101	Alabama 1957 Police Ci	s 🚽	Create P	urchase Order		\$31.9	92
	*			Split Ord	er by Inventory Ava	ilable		
	Click he	ere and choose Split						
	Order b	y Inventory Availabl	e,					
						Sub-Total	\$841.7	77
	Payment Method	•	Remarks			State Tax	\$42.0	09
	Taxing Scheme	IL Tax 🔹				City Tax	\$10.5	52
	Pricing / Currency	Wholesale Price -				Total	\$894.3	38
						Paid	\$0.0	30
			Cancel Ord	ler Com	plete & Pay	Balance	\$894.3	38
	🙁 Sales 🛛 Advan	ced						-
Finished loading Sales Order - Order # SO-000005)				Current User: D	efault User C	connected (Locally)	

To split by available you must:

- 1. Create your sales order
- 2. Right click on the exclamation mark
- 3. Choose Split Order by Inventory Available from the dropdown

This will create two orders with the same number, namely SO-XXXXX-1 and SO-XXXXX-2 so that you can proceed with order -1 and use -2 to create a purchase order to your vendor. This gives you two separate invoices as well so that you can indicate for your customer on the second invoice that those items are on backorder. You can make a note in the remarks field of the -2 order before you print, or you can simply print to a custom document like <u>this one</u>).

The second option would look like this:



Can I receive part of an order and leave the rest for later?

It's easy to receive part of an order! Each line of your order has its own receiving button so that you can receive the items you have gotten and leave the order open to receive the rest of your items later.

🛃 inFlow Inve	ntory - Premiur	n Edition														
	🕞 🛃 P	urchase Orde	er	×	1	Dashb	oard	×								(
Search		•) Ne	w 🔡	Save 付	Preview	r 🖹 Copy	🔹 🛄 Ve	rsion 🛛 🖉 Att	achment 🔙	Stick	/ -			🗙 Cla
Order # •				Vend	or	Richard	lson Quick Li	quidatior 👻	Lo	cation		-		Order	# PO	-000004
Status -		•		Cont	act	George	Richardson							Date	10	/4/2009 -
Vendor -		-		Phon	e	408-55	5-3951							Status	In	Progress
		Refresh		Vend	or •	141 La Unit 3	Campanella I	Road			Clic	k thes	e buttons to rece	ive each li	ne.	
Order # 💌	Status	Paid				Santa (USA 95054	Jara, CA									add obioping
PO-000013	Open	\$0.00				00004										adu snipping
PO-000012	Open	\$0.00			Item		Descrip	tion		Vendor	Quantit	v	Location	Receive		Received
PO-000011	Open	\$0.00								Product Code		ĥ		Date		
PO-000010	Fully Received	\$0.00		(00303A							case	Main Warehouse	1/31/201	2	
PO-000009	Fully Received	\$0.00		(090821	(20	Main Warehouse	1/31/201	2	
PO-000008	Paid	\$130.00		•	20101		Mark	order as F	ully Rece	ived?		40	Main Warehouse	1/31/201	2	Receive
PO-000007	In Progress	\$0.00		*				Yes		No		0				
PO-000006	Paid	\$7.87							_							
PO-000005	Paid	\$373.50							Choose	"no" to keep	your order op	en.				
PO-000004	In Progress	\$0.00						_				_				
PO-000003	Paid	\$1,925.00														
PO-000002	Paid	\$130.00							_							
PO-000001	Paid	\$200.00														
			111													
							Olivita	A 611						То	tal Orde	red 17
				F	Remar	ks	the tab	ple above.						То	tal Rece	ived 12
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To partially receive:

- 1. Open your order and move to the *Receive* tab.
- 2. Click *autofill* to automatically list the items on your order.
- 3. Make any changes to quantities required (for instance if you ordered 100 items and only received 50).
- 4. Click the *Receive* button next to each of the lines which needs to be received.
- 5. When you receive the last line, inFlow will ask if you would like to, "Mark the order as fully received?" for now, click *no*.
- 6. Save the order.

The order will remain open and you can return to it later to receive the rest of your items.

Can I track products with serial numbers using inFlow?

Serial number support is available in inFlow v3. Not sure which version you're on? Check by going to the Main Menu > Settings > About inFlow.

If you're on v3 please see this article for help with the new serial number feature.

If you're not on v3 and would like to use serial numbers, we have two workarounds you can choose from, outlined below:

Using Sublocations

If you're not already using sublocations, you could try using them to keep track of the serial numbers. This isn't exactly what it's designed for, but it's worked well for a number of people. This same trick will also work for lot numbers, batch numbers, expiry dates, and so on. We recommend you enter expiry dates in a yyyymmdd format so that they can be sorted properly.

To turn on sublocations, make sure the option "Show Sublocation" is on under *Company Settings > Company > Products & Inventory*.

To purchase/receive your products:

- 1. Open your purchase order.
- 2. Click *Advanced* to expand to advanced workflow.
- 3. Click the *Receive* tab and split your items out line by line (entering the serial number into the sublocation). This will allow you to stock each item to a separate sublocation which is named after that item's serial number.

To sell/ship the items:

- 1. Open your sales order.
- 2. Click *Advanced* to expand to advanced workflow.
- 3. Click the *Pick* tab and select your items from the correct sublocation (i.e. match the sublocation to the serial number you're selling)

If you want to find what happened with that serial number, you can:

- 1. View the *Movement History* from the Inventory module.
- 2. Click the *More* link to bring up the advanced search options.
- 3. In *From Sublocation*, type in the serial number that you want to look up.
- 4. Click Search.

From the History screen, you can also double click on the row to bring up any related orders. This will let you quickly look up who that particular item was sold to.

Setting up individual product records

If you are already using your sublocations, or you are in an industry where you need to track different costs etc. what you may try is setting up an individual item record for each serial number.

To create your product:

- 1. Go to Main Menu > Inventory > New Product
- 2. Enter all the relevant details for your product and be sure to use the serial number as the item code.
- 3. *Save* your product record.

TIP: You may try setting up a category named after the model number of your product so you can make searching on sales orders easier on yourself later. Have a look at the article on <u>How to</u> <u>categorize products</u> for more info.

To create another serial of the same product:

- 1. Open the product record for an item that is the same as the serialized item you'd like to create.
- 2. Click the *Copy* button at the top, this will replicate the record and simply ask you to enter a new item code.

3. Enter the serial number and click Save.

You can also set these items up ahead of time (let's say your vendor sends you a list of serial codes) by importing the information into the system. Simply match the serial number column to the Item Name/Code field in inFlow and be sure to include any relevant details such as product name or model category in separate columns within that spreadsheet. For more information on importing data please see our article on <u>How to Import Data into inFlow</u>.

Can I try the regular or premium editions before I buy?

The free edition is available on our main site for you to play around and get a feel for inFlow! If you'd like a look at the additional features that are available in our paid editions, you can test the Regular or Premium edition by requesting a 30 day trial within the free edition you picked up <u>here</u>.

To turn on the 30-day trial:

1. Go to the Main Menu (top left) > Settings > Upgrade and choose, "I would like a 30 day trial..."

2. Click "Next."

3. Select the edition you want to try and click. "Next" again.

Should you have any further questions or concerns while you're evaluating please do not hesitate to contact us! You may also want to watch the <u>overview video we've created</u> to get a better look at inFlow in action.

Can I use FIFO or LIFO for my inventory?

FIFO and LIFO costing is available in inFlow v3. Not sure which version you're on? Check by going to the Main Menu > Settings > About inFlow.

If you're on v3 please see this article for help with the new FIFO/LIFO costing feature.

If you're not on v3 and would like to use FIFO/LIFO costing, we have a workaround you can use, outlined below:

You can use sublocations to track your inventory with FIFO/LIFO costing. This isn't exactly what it's designed for, but it's worked well for a number of people. We recommend you enter receiving dates in a yyyymmdd format so that they can be sorted and used when completing orders.

To turn on sublocations, make sure the option "Show Sublocation" is on under *Company Settings > Company > Products & Inventory*.

To purchase/receive your products:

- 1. Open your purchase order.
- 2. Click *Advanced* to expand to advanced workflow.
- 3. Click the *Receive* tab and be sure to enter the date of your inventory into the sublocation column (or give it a batch number). This will allow you to stock each item to a separate sublocation which is named after that item's date of arrival or associated batch.

To sell/ship the items:

- 1. Open your sales order.
- 2. Click *Advanced* to expand to advanced workflow.
- 3. Click the *Pick* tab and select your items from the correct sublocation (i.e. match the sublocation to the correct batch based on whether you're using FIFO or LIFO).

From the movement history screen, you can also filter to show all the movements within a certain batch. Double click on the row to bring up any related orders.

Can I use inFlow to track items out on consignment?

There are a few ways you can handle consignment in inFlow and it all depends the structure and needs of

your business. There are two ways that we usually suggest handling this and the first is the one we suggest most often:

Using Multiple Locations to track consignment stock

Since inFlow is set up to handle multiple locations what you can actually do is set up locations within your warehouse for each of your consignment shops. This will allow you to use the transfer stock function to move stock over to that store and always have an accurate count of what each store has. When

a store reports a sale to you you would simply create a sales order and pick the item from that location

to reduce the store's stock. If you notice that a store is getting low, transfer more stock and send it out.

To create a consignment location:

- 1. Open the General Settings window.
- 2. Select the Products & Inventory tab.
- 3. Click the Edit Locations button.
- 4. In this window add your locations to the list (each on its own line) until you are satisfied.
- 5. Click Save & Close.

To transfer stock to a consignment location:

- 1. Go to Main Menu > Inventory > Transfer Stock
- 2. Select the items you'd like to transfer in the main table
- 3. Select the location you're transferring from (if the system has supplied a location other than the one
- 4. you're planning to use)

- 5. Select the location you're transferring to
- 6. Once you're satisfied—enter a remark if you would like to—click Transfer.

To sell from a consignment location:

- 1. Create a new sales order (Main Menu > Sales > New Sales Order)
- 2. Fill in your customer at the top and select the consignment location you'd like to sell from in the
- 3. dropdown Location field.
- 4. Fill in your items in the table below
- 5. Complete & Pay your order.

This method is good for users who want a listing for each of the stores and to be able to pull reports on

the sales at certain stores (i.e. whether their stock has a high turnover at one store over another).

Selling stock to the Consignment store and returning stock that doesn't sell

This method is also quite straightforward but results in more movement history than in the previous method. This does, however, allow you to reduce your inventory stock so that the reorder stock function

can be used as designed. When a store returns stock to you you simply scan the items that have been

returned and they will be placed back in your inventory.

To sell to a consigment store:

- 1. Create a new sales order (Main Menu > Sales > New Sales Order)
- 2. Select the consignment store you're selling to as your customer
- 3. Scan or select the items you're sending in the table below
- 4. Complete & Pay your order.

To return from a consignment store:

- 1. Navigate to the order on which you sent out the stock
- 2. Click the Advanced tab to expand and select the Return tab
- 3. Scan or select the items you're returning
- 4. Click Refund in Full and proceed to the Restock tab
- 5. Click Autofill and then Restock on this tab.

This method is good for users who have high turnover and need to be constantly reordering stock.

Looking for more info about consignment for your business?

Have a look at our blog on <u>Consignment Inventory Management: selling stock by contract agreements</u> for a closer look.

Can inFlow copy information from my custom fields into a sales order?

Yes, provided it's information that is captured in the Customer's custom fields (of which there are 10). When you select that Customer in the sales order, if the field in the sales order matches the field in your customer's record inFlow will copy the value from the customer record into the sales order.

For Example:

Serious Deals For You has a tax exempt # from the government which we keep in a custom field in their file. The government has decided that this number must be printed on all invoices going forward so we have to copy that number to the sales order. Since the custom fields can do this for us we've set up a matching custom field on the sales order.

To set up the custom fields:

1. Click the Add Custom Fields link in the custom record.

📌 inFlow Inventory - Premium Edition					
Customer	📕 📝 Dashboard	× +			2 -
Search	🗋 New 🛃 Save 🛛 🗟 Cop	ıy 👻 🗓 Version 🔴 Deactivate 🧃 At	tachment		🗙 Close
Name -					
Refresh	Basic		Addresses		
No. of Concession, Name	Name	Serious Deals For You	Business Address	•	
Name	Balance	\$0.00	P.O. Box 2103 Mountain View, CA		
Budget-Minding Collectibles			USA 94043		
Setous Deals For You					
Wall-Mart					
	Contact		Purchasing Info		
	Name	Debra Ignatieff	Pricing / Currency	Retail Price	
	Phone	310-555-4932	Discount	0 %	
	Fax	714-484-0740	Payment Terms	Net 15 -	
	Email	deb@inflowsampledata.com	Taxing Scheme	•	
	Website		Tax Exempt #		
	Remarks		Custom Info		
	Their credit check has a	cleared, go ahead and sell to this customer.	Tax Ex No.	8546888000256	
		Click to edit cu:	stom fields.	Add Custom Fields	
	Customer Info	Extra Info Order Hist	orv		
		Under Hist	517	A	
Finished loading Customer - Serious Deals For You				Current User: Default User Con	tected (Locally)

2. Make the necessary changes (in this case, be sure your field names match exactly)

🚽 inFlow - General Setting	15					×
	Inventory	Sales		Purchasi	ng	
Company Users References	Customer Main Tab - Field Nam Tax Ex No.	ne Show □ □ □ □ □ □ □ □	Extra Ta Origin Da Source	b - Field Nar te mes match	me Show	ב
Litt Custom Fields Rename Fields	Sales Order Field Name Tax Ex No.	Show Prir	it			
hato buckup			Save	& Close	Cance	

3. Click Save & Close.

To use this function:

1. Open a new sales order

2. Select that customer

(We've demonstrated how that would look here: http://screencast.com/t/2WR177gCk6J4)

Can inFlow handle services?

Absolutely. While inFlow does focus on inventory you can also add items to your product list which you identify as services (so that inFlow will not track inventory for those items). What this means is that you can set up products for service fees or labour charges you may have and add them to your sales. You can even track the profit on those by entering the cost of that service or labour into the product record.

🚽 inFlow Inventory	- Free Edition	- the processes	the second s		the second		
	Product	× 📝 Dashboard	×				? •
	_						
Search	▶	🗋 New 🛃 Save 🗟 Copy	y 🕦 Version 🛛 🔴 🛙	Deactivate 🧃 Attachi	ment		🗙 Close
Item Name/Code	•				_		
Description	•	Basic			Picture Ch	oose "Service"	
	Refresh	Item Name/Code	Labour		fre	om the dropdov	vn.
		Category	Services				
Category	Item 🔺	Type	Service				
Die-cast	00303A	Description					
Die-cast	04275	Description					
Die-cast	090821A						
Die-cast	10201					Browse	Clear
Battery-Powered	12875	Sales Info			Costing Info		
Battery-Powered	14232	Normal Price	\$15.00 =	39.53 % Markup	Costing Method	Manual	-
Close-out	20101	Potoil Prico	-	7 Madour			\$10.75
Close-out	46101	Retail Filce		/* Markup			
Misc	67817	Wholesale Price	=	% Markup			
Close-out	76289B		Add new	Pricing / Currency			
Die-cast	9400						
Die-cast	9500						
Misc	Catalog06						
MIBC	Catalog07				Custom Info		
Packing Materials	PM-PM/01				Year		
Packing Materials	PM-SR01				Model		
Packing Materials	PM-SB02						
Packing Materials	PM-SB03						
Services	S10001						
Services	S10002						
							Add Custom Fields
		Product Info	Extra Info	Product Ven	dors Order Hi	story	
Save successful					Curre	nt User: Default User	Connected (Locally) 🕘

To add an Item as a service:

- 1. Create a New Product by going to *Main Menu > Inventory > New Product*
- 2. Enter the name of the service or labour charge in the Item Name/Code field
- 3. Choose "Service" as your type from the dropdown and add any other details to the record you wish to include (such as the wage of the employee performing the labour).
- 4. Click Save.

Can inFlow work with mobile device &/or batch scanners?

Batch scanners

Some scanners (sometimes called batch scanners) may be wireless and designed for you to scan all your items' barcodes at once and then download your resulting spreadsheet. These are not the ideal scanner to use with inFlow however if you've already got one (or it serves your purpose) you may choose to import the resulting spreadsheet using the instructions in <u>How to Import Data into inFlow</u>.

iPad, smartphone, etc.

When it comes to mobile device scanners however, right now inFlow doesn't support these types of scanners. If you're able to download a spreadsheet from your app then the same rules apply as above (i.e. you can import after the fact) but for now direct scanning from mobile devices into inFlow is not possible, sorry!

Creating a customer record and new sales order

The quickest way to create a customer record is to do so during your sales order. *Sales orders* in inFlow allow you to sell items to your customers like a POS system (point of sale) and will automatically assign an order number the first time you save the order.

INCW D	save 🗃 Preview 🔹 😋 Copy		nent 💽 Sti
Custome	New Customer •	Terms	
Contact	Name 🔺	Contact	Details
Phone	Budget-Minding Collectibles	Bob Weiss	View
Billing	PedalCar.COM	Doug	View
Address	Serious Deals For You	Debra Ignatieff	View
	Wall-Mart	George Elliot	View
	_		
Item			
*			
	SEARCH: Name ·		Refresh
	ADD NEW: Name New C	ustomer	Add

To create a new sales order:

- 1. Click Main Menu > Sales > New Sales Order .
- 2. Begin typing into the *Customer* field; you should see your customer's name appear in the *add* new section below if they are not in the system.
- 3. Click Add to create a new record.
- 4. Continue filling in your customer's info, when you save this order you will be asked if you want to save those details back to this customer's record.

Continue on with your orders:

5. Click into first cell in the table and select an item from your list. Continue as necessary until you've selected all the items your customer wants to buy.

	Item		Description			Vendor Pr Code	oduct	Quant	ity	Unit Pric	е	Discount	Sub-Total
•*		-							0		\$0.00	0 %	\$0.00
	Category		Item		Description		Norr Price	nal H	Details	•			
	Close-out		76289B		Kung Fu Master Figure	r Action	\$6.99		View				
	Die-cast		9400		Police Basket		\$25.0	0	View				
	Die-cast		9500		Boat Basket		\$12.9	9	View				
	Services		cases				\$20.0	0	View	E			
	Misc		Catalog06		2006 Product C	atalog	\$0.00		View				
	Misc		Catalog07		2007 Product C	atalog	\$0.00		View				
				_	24" x 750' Shee	et of 3/16"				Ψ.		Cub Total	e0.00
Du	SEARCH:	ltern Des	Name/Code cription	• [• [-	Freight •	\$0.00
oa)		Cate	adory	• 1					Pofro	ah.		Total	\$0.00
ax			5)						Reffe	511		Paid	\$0.00
	ADD NEW:	Item	n Name/Code	76	289B							Balance	\$ 0.00
Jui								Re	ceive &	Pay	•		

6. Click Complete & Pay to complete the order and move your inventory out of stock.

Taxing Scheme	No Tax	•	Remarks		Sub-Total	\$0.00
Pricing / Currency	Normal Price	-			Total	\$0.00
					Paid *	\$0.00
					Balance	\$ 0.00
				Complete & Pay		
Sales Adv	anced					

When you save your order inFlow will ask you whether you'd like to save the additional information in your order (such as address, phone number etc.) to your records.

The dialogue will include a list of everything that was changed during your order.

- 1. Review the list and uncheck anything you don't want saved.
- 2. If you would like inFlow to remember your choices for future orders ensure the "Always do this" option is checked.
- 3. Click Save Selected.

	×
	Do you want to save these as the Customer defaults?
	Billing Address
?	 Contact Name
	Phone
Alv Chi	vays do this Save Selected Skip

Still unsure, or looking for more info?

Have a look at our <u>Sales tutorial video</u> for a closer look.

Creating a file for import

Getting your Data into CSV

An import can create records in inFlow from a list that you already have. But in order to use your file, you'll need to be sure it's in the right format. Here's an example of a Product file:

Name	UnitPrice	Cost
00303A	8.99	0
4275	8.99	0.5
090821A	3.99	0.336
10201	12.99	0

Based on this example inFlow will create four products, each including the corresponding price and cost from the adjacent columns.

Creating an import file in Excel

This is the easiest way to create your import file. Once you have your list open in excel you will resave it as a CSV. To do so:

- 1. Choose Save As from the drop down menu.
- 2. At the bottom of this window you'll see a field Save as Type, choose CSV (comma delimited) from the drop down.
- 3. Click Save.
- 4. Excel will warn you about the loss of formatting, this is not a problem, please click Yes to complete your save.

Tricks for Importing

If your first attempt to import didn't work or you're looking for a little guidance in terms of how to set up your file try exporting the type of information that you want to import. By exporting your "products" from the system you will end up with a CSV file that includes all the available columns of information. This can help you format your information and create and import file.

A few things to remember:

- 1. The required fields must be filled (Eg. a spreadsheet for products must include an item name/code on each line).
- 2. Any information going into one field must all be in the same column, inFlow can't import into one field from two columns.
- 3. Duplicate required values can be a problem, try to avoid them whenever possible.

Example Files available for download:

- Sales Order Example File
- Purchase Order Example File
- Products Example File
- Inventory Example File
- Bill of Materials Example File

Ready to import? Have a look at How To Import Data into inFlow.

Creating a New Purchase Order

To create a new Purchase Order.

- 1. Click *Main Menu > Purchasing > New Purchase Order*.
- 2. Begin typing into the Vendor field; you should see your vendor's name appear below if they are not in the system.
- 3. Click Add to create a new record.
- 4. Continue filling in your vendor's info, when you save this order you will be asked if you want to save those details back to this vendor's record.
- 5. Click into the item column and select an item from your list. Continue as necessary until you've selected all the items you would like to purchase.

	Item		Description			Vendor Pr Code	oduct	Quant	ity	Unit Pric	е	Discount	Sub-Total
▶*		•							0		\$0.00	0 %	\$0.00
	Category		Item	*	Description		Norr Price	nal 9	Details	-			
	Close-out		76289B		Kung Fu Master Figure	Action	\$6.99		View				
	Die-cast		9400		Police Basket		\$25.0	0	View				
	Die-cast		9500		Boat Basket		\$12.9	9	View				
	Services		cases				\$20.0	0	View	=			
	Misc		Catalog06		2006 Product C	atalog	\$0.00		View				
_	Misc		Catalog07		2007 Product C	atalog	\$0.00		View				
	SEADOLI:	Item	Name/Code	•	24" x 750' Shee	t of 3/16"				Ŧ		Sub-Total	\$0.00
Due	SEARCH.	Des	cription	•							-	Freight 🔹	
Pay		Cote							-			Total	\$0.00
Taxi		Galt	gory	•				•	Refres	sh		Paid	\$0.00
Nor	ADD NEW:	Item	Name/Code	762	89B				Add			Balance	\$0.00
oui								Re	ceive &	Pay	•		
• P	urchasing	Adva	inced										

6. Click Receive & Pay to complete the order and move the items you`ve received into your inventory.

Taxing Scheme	No Tax	•	Remarks		Sub-Total	\$0.00
Non-Vendor Costs		-			Total	\$0.00
Currency	 US Dollar (\$) 	-			Paid •	\$0.00
,					Balance	\$0.00
				Deschool Desc		

As with sales orders, when you save your order inFlow will ask you whether you'd like to save the additional information in your order (such as address, phone number etc.) to your records.

Creating a vendor record and a new purchase order

Creating a Vendor Record

As with your <u>Customer Record</u>, the quickest way to create a vendor record is to do so during your purchase order. The purchase order works in much the same way as the sales order described earlier however purchase orders are used to bring inventory into your warehouse rather than reduce it.

To create a new Purchase Order:

- 1. Click Main Menu > Purchasing > New Purchase Order.
- 2. Begin typing into the *Vendor* field; you should see your vendor's name appear below if they are not in the system.
- 3. Click *Add* to create a new record.
- 4. Continue filling in your vendor's info, when you save this order you will be asked if you want to save those details back to this vendor's record.
- 5. Click into the item column and select an item from your list. Continue as necessary until you've selected all the items you would like to purchase.

	Item		Description			Vendor Pro Code	oduct	Quant	ity	Unit Pric	e	Discount	Sub-Total
▶*		•							0		\$0.00	0 %	\$0.00
	Category		Item		Description		Norr Price	mal e	Detail	s 1			
	Close-out		76289B		Kung Fu Master Figure	Action	\$6.99)	<u>View</u>				
	Die-cast		9400		Police Basket		\$25.0	0	View				
	Die-cast		9500		Boat Basket		\$12.9	9	View				
	Services		cases				\$20.0	0	View	=			
	Misc		Catalog06		2006 Product C	atalog	\$0.00)	View				
_	Misc		Catalog07		2007 Product C	atalog	\$0.00)	View				
					24" v 750' Shee	t of 3/16"				-			AD O
Due	SEARCH:	ltem Des	Name/Code	•							-	Freight •	\$0.00
Pay		Oat							-			Total	\$0.0
Тахі		Cale	egory	•				•	Refre	sh		Paid	\$0.00
Nor	ADD NEW:	Item	n Name/Code	762	289B					d		Balance	\$0.00
Cur								Re	ceive &	Pay	•		
• P	urchasing	Adva	anced										

6. Click *Receive & Pay* to complete the order and move the items you`ve received into your inventory.

As with sales orders, when you save your order inFlow will ask you whether you'd like to save the additional information in your order (such as address, phone number etc.) to your records.

Still unsure, or looking for more info?

Have a look at our Purchasing tutorial video for a closer look.

Creating Your Product

Products in inFlow are the different types of things you may buy, sell and track in your inventory.

To create a new product record:

1. Click the Main Menu > Inventory > New Product

First give your item a name, or code. You can use your product's actual name but it must be unique so you can also use a short code like "090821A" instead.

To enter the item's name or code:

- 1. Click into the Item Name/Code field at the top of the record.
- 2. Enter your product name or code.
- 3. Click Save in the top toolbar.

-			
	-	C 1	
		-	н.
-	-	~	

Item Name/Code	Ceramic Mug	
Category	Services	•
Туре	Stockable	•

Now you have a new product.

Still unsure, or looking for more info?

Have a look at our Inventory tutorial video for a closer look.

Dashboard

Much like reports, the *Dashboard* allows you to quickly see information about your sales, purchases and inventory. The main graph can provide visual representations of your sales totals, cost totals etc.



Using the dropdowns at the top of the screen you can choose to show different information and the graph type can be controlled using the buttons on the right. Items of interest will appear along the bottom of the dashboard so you can quickly see what requires your action.

Outstanding Sales and Purchase Orders as well as products to reorder and open work orders can easily be accessed in the bottom left hand corner of the screen.



While the "Top 5" list on the right can show you any number of statistics at a glance like the top five vendors your company purchases from, the products that sell the quickest, your most active customers or (as in the example above) the top five products in stock.

Do you have an API for integration?

Currently inFlow does not integrate directly with other software or have an API available. That said, inFlow does allow imports and exports so please have a look below for more information on how you can import use inFlow with some of the more popular ecommerce and accounting softwares.

Downloading and importing orders from Magento

Downloading and importing transactions from PayPal

Downloading and importing transactions from Ebay

Downloading and Importing orders from Shopify

Downloading transactions from Yahoo Stores

Download transactions from Etsy

How do I import inFlow information into Quickbooks?

How do I import transactions to MYOB?

Do you have versions of inFlow in languages other than English?

Yes!

In inFlow you can change your display language by accessing in the Personal Settings window:

- 1. Go to Main Menu > Settings > Personal Settings.
- 2. Click the Display Language drop down near the bottom of the window.
- 3. Choose the language you wish to use: English, Español, Français or 简体中文 (Chinese).

🚽 inFlow Inventory - Pr	emium Edition			
	🚹 Homepage 💦 🕺 📝	Dashboard × +		?
Using Sample Data Click here to switc	Homepage *	Dashboard * + Image: space state		 SHORTCUTS Dashboard Reports Settings Import Export
VENDOR You can create a	Purchase Order Sales Quote if your customers an	Preferences Default Location Default Sales Rep Display Language Control "Sa Allow Archon Systems to information for future imp Saw Français 简(中文	CUSTOMER	INSPIRATION The bad news is time flies. The good news is you're the pilot." -Michael Althsuler Employees at small businesses produce 13 to 14 times more patents than those employed by larger companies.
				Connected (Locally)
0				

*Right now the four languages listed above are the only ones included with inFlow, but users can choose to customize the program themselves using the rename fields option in the general settings

or by importing a new language using the import/export options described below.

Importing a language

inFlow can help you import your own language into the program but first, you need to translate the labels. To get a copy of the label file please:

- 1. Go to Main Menu > General > Export Data
- 2. Choose Language as your data type and click Next. The file will be exported to CSV.
- 3. Open this file in Microsoft Excel (or some other program if you prefer) and add the translations to your own language into the Custom Value column (column 2).

Once you are satisfied with the new language entries you can import the language back into the program in the same manner.

- 1. Go to Main Menu > General > Import Data
- 2. Choose language name to import.
- 3. Select the "Add new language..>" option and enter the name of the language you're importing into the field provided.
- 4. Click Save & Close then select your new language name from the updated drop down list and click Next to import the language.

🚽 inFlow - Import Data		
📀 Import Data - La	nguage	
Import Language	English	
Please choose the corresponding	Language English	blank.
Text & Labels	Español Français	
Default Text/Label	间14中又	
Custom Text/Label	CustomValue •	
	< Previous	Import Cancel

For more information on renaming fields in inFlow please click here:

https://onpremise.inflowinventory.com/software-support.aspx#/article/21466876/how-can-i-rename-fields

Please note that with older versions of Windows you will sometimes have to install the East Asian characters when attempting to switch to Chinese.

Some language packs from other users

These languages are not included in inFlow, but some users have generously contributed them. If you'd like to share your language pack with the inFlow community, please <u>email us</u>!

- <u>Hebrew</u>
- <u>Portuguese</u>
- <u>Arabic</u>

Does inFlow have Keyboard shortcuts?

Yes, inFlow has some shortcuts to help you accomplish your tasks more quickly. Certainly tabbing will allow you to jump between fields and the arrow keys will allow you to navigate within tables but these shortcuts are designed for things like jumping between tabs etc.

System Level Shortcuts

This would be general navigation around inFlow, switching tabs etc

Ctrl + T	Open new top level tab.		
Ctrl + Tab	Move to next top level tab (to the right)		
Ctrl + Shift + Tab	Move to previous top level tab (to the left)		
Ctrl + W OR Ctrl + F4 Close currently selected tab			

Record Level Shortcuts

This would be major functionality within the records like saving, creating a new record etc.

- Ctrl + N Create a new record
- Ctrl + S Save the current record
- Ctrl + P Print/Preview/Export documents related to this (when in order)
- Ctrl + D Create a copy of the current record (or order)
- Ctrl + V Open versions window to review changes
- Ctrl + I Deactivate the current record (when in product, vendor, or customer record
- Ctrl + M Add an attachment

Some other Time-Savers

This would be some small choices within different parts of the software

allowing you to increase efficiency.

Right-Click on	
"Refresh"	Clears out all your filters at once and lets you start over

(available in listing views and in the item dropdown on the order).

Right-Click on title line Gives you the option of "Export Contents to CSV", and creates a file for you.

(available on most tables, eg. Bill of Materials, or Purchase Order List).

Right-Click on title line of Order Listing View Gives you the option of exporting specific orders from the system (i.e. details such as what's on the order). This can be used to send recent transactions to other programs for invoicing etc.

(available only on Sales Order and Purchase Order listing views).

Does inFlow work on Mobile Devices, Apple Macintosh (Mac) or Linux computers?

inFlow only runs on Windows, but there are some ways to access a Windows environment from other machines. Please keep in mind that this will require you to have a copy of Windows for use on your device.

On a Mac: You may try using the <u>Bootcamp</u> tool included with Mac OS X Leopard to boot into Windows from your computer. You might also consider <u>Parallels</u> to run a virtual copy of Windows from within Mac OS. In both cases, you can then install and run inFlow in the Windows environment. Note that if you do use Parallels to run inFlow, and you would like to use multi-user mode, sometimes due to the way the Mac works the connection settings it uses may not allow the multi-user mode connection. Please see <u>this guide</u> for more information on how you can try to fix this.

On Linux: We suggest <u>dual-booting</u> Windows and Linux. You may also run a Windows Virtual Machine using software like <u>VMWare</u>. (We have not tested running inFlow using the Wine software on Linux.)

On iPad / Android Tablet: The new series of Pro tablets running full versions of Windows 8 can run inFlow and that's discussed in a little more detail <u>on our blog here</u>. It's also possible to run inFlow on a Windows PC where remote desktop has been enabled (steps can be found for <u>Windows XP</u>, <u>Vista</u>, <u>Win 7</u>, or <u>Win 8</u> by following these links), and then use an app like <u>PocketCloud</u>* to remotely control the PC from the tablet.

We have informally tested this on an iPad, and felt that inFlow worked surprisingly well. Having this mobility would let you take orders on the go, impress people in a meeting, or walk around a warehouse while checking the expected stock levels. However, there were some issues with text getting cut off and we felt that typing was less convenient than when using a keyboard and mouse. The performance was reasonably good under a WIFI LAN connection.

On **iPhone** / Android Smartphone: We have not yet tested this environment, but similar to the tablet section above, it should be possible to remotely control a PC running inFlow with your smartphone. We would not recommend this for day-to-day usage though as the screen on any smartphone is quite a bit smaller than would be ideal for accessing the program.

*Please note inFlow Inventory has no affiliation with PocketCloud or Wyse Technology, the suggestion is based on the app's usability and the fact that it is free to use.

Does inFlow work with Windows 8?

Absolutely! The newest version of inFlow includes support for Windows 8 and new inFlow users should feel free to download it from our site <u>here</u> and enjoy. If you have any trouble getting set up or any further questions or concerns please let us know.

A note for current inFlow users upgrading to Windows 8

It's important to note that if you are already running inFlow on a previous version of Windows (eg. Windows 7) and intend to upgrade to Windows 8, you'll need to take a few extra steps to ensure that all your data, and your copy of inFlow moves over correctly and that you're able to continue using it as you move forward.

Before Upgrading your copy of Windows:

- 1. Make a backup of your inFlow database via *Main Menu > General > Backup Data* and save it somewhere safe like an external drive (USB Key, another computer etc).
- 2. If applicable, make sure you still have your inFlow license key on hand. If you don't, please <u>drop us a line</u> and we can re-send that for you.
- 3. Uninstall your copy of inFlow by following *step 1* of <u>these instructions</u>.

After upgrading your computer to Windows 8

- 1. Reinstall inFlow by downloading it here and running the installer.
- 2. Once inFlow has loaded you'll want to restore your database via *Main Menu > General > Restore Data* and choose the backup file you made at the beginning of these steps.
- 3. When/if prompted, re-enter your license key to upgrade to your paid copy.

You should now have a fully working copy of SQL Server on your new Windows 8 operating system with all your old data present. If you run into any trouble or have any questions or concerns before getting started with your upgrade please do let us know! We're available via the <u>support centre</u>.

Does the Free Edition allow multi-user access?

The Free Edition of inFlow offers read-only access to inFlow when in multi-user mode. This means you'll be able to view customer information, generate reports on already existing data, etc., but not make any changes to the information in the system.

There's one exception aimed at letting you try out inFlow in multi-user mode with the Free Edition. A Free Edition copy of inFlow can act as the server hosting inFlow in multi-user mode, allowing other client installs to connect and view the same information. If you are running a trial version or licensed copy of inFlow on the computer that's connecting (the client) you will be able to make changes even though the server's a free copy. In this configuration, if you were to access inFlow on the server, it would be read-only.

Download transactions from Etsy

So you're an Etsy retailer and you want to download your transactions to inFlow? Not a problem, Etsy has plenty of documentation designed to support your aim! For more information on how to download your transactions from Etsy please see here:

Can I download a spreadsheet of my sold transactions for my records?

Once you have that CSV file available you can import your transactions into inFlow. It's important to ensure that your Etsy product codes match your inFlow product codes and that you've selected whether you want to import the sales as "open" (i.e. to be processed) or "closed" (ie. already completed so that your inventory is simply adjusted).

For more on importing data please see here: How to import data into inFlow.

Downloading orders from Magento and bringing them into inFlow

You can download CSV files from Magento once you've made your sales.

To export orders from Magento:

- 1. From the Admin panel, select System > Import/Export > Export.
- 2. Under Export Settings, set Entity Type to Orders.
- 3. In the Entity Attributes list, mark the checkbox of each attribute group you want to exclude from the export.

4. Click Continue to generate the CSV file. After Magento Go exports and generates the CSV file, you are asked to download it.

TIP: The Macintosh version of Microsoft Office supports multiple CSV file formats. When saving your CSV file, be sure to save it as a CSV (MS Windows) file type (source: http://www.magentocommerce.com/knowledge-base/entry/how-to-export-orders)

Importing the file to inFlow

Once you have a file from Magento you can import it into inFlow in the following manner:

- 1. Go to Main Menu > General > Import Data.
- 2. Choose *Sales Orders* as your data type.
- 3. Click *Browse* and select the file that you'd like to import (the one you made in step one).
- 4. Click Next.
- 5. Choose whether you want to import your orders as open or closed.
- 6. Match the columns within your Magento file to the columns in inFlow. We suggest the following matches:

inFlow Field

Magento Field

Customer Information

	_order_address_firstname
Customer	_order_address_lastname
	*These two fields have to be combined.
Phone	_order_address_telephone
Email	_order_address_email
Fax	_order_address_fax
Addresses (Billing Address)	

Billing Address 1	_order_address_street
City	_order_address_city
State/Province	_order_address_region

Country	_order_address_country
Zip/Postal Code	_order_address_postcode
Order Info	
Order Date	created_at
Order Number	increment_id
Order Remarks	shipping_description
Freight	shipping_amount
Amount Paid	total_paid
Location	store_name
Tax Rate 1	_order_item_tax_percentage
Item Info	
Item Name/Code	_order_item_name
Item Subtotal	subtotal
Item Quantity	_order_item_quantity_ordered
Item Discount	_order_item_discount_amount

7. Click Next to finish.

Downloading orders from Shopify and getting them into inFlow

So you use Shopify to sell your products and you'd like to use inFlow to track them for you without having to repeat your work. Well, you're in luck! There's an article on the Shopify website here: <u>How</u> <u>do I Export my orders...</u> Once you have the file, you will have to make minor changes to your file.

- remove the # before your order number, CSV format doesn't properly recognize this
- ensure that your "created at" column includes order dates only (times must be removed) and is formatted the same as your computer's date format.

Once you've made these changes, you're ready to import. We suggest making the following matches:

inFlow Field	Shopify Field				
Customer Information					
Customer	Billing Name				
Phone	Billing Phone				
Email	Email				
Addresses (Billing Address)					
Address Line 1	Billing Address Line 1				
Address Line 2	Billing Address Line 2				
City	Billing City				
State/Province	Billing Province				
Country	Billing Country				
Zip/Postal Code	Billing Zip				
Addresses (Shipping Info)					
Company Name	Shipping Name				
Address Line 1	Shipping Address 1				
Address Line 2	Shipping Address 2				
----------------	--------------------				
City	Shipping City				
State/Province	Shipping Province				
Country	Shipping Country				
Zip/Postal	Shipping Zip				
Currency Code	Currency				
Order Info					
Order Date	Created At				
Order Number	Name				
Freight	Shipping				
Amount Paid	Total				
Item Info					
Item Name/Code	Lineitem name				
Item Quantity	Lineitem quantity				
Unit Price	Lineitem price				
Item Subtotal	Subtotal				

If you have any questions or concerns with your imports please get in touch!

Downloading transactions from Ebay and bringing them into inFlow

If you're selling on Ebay you may want to import your transactions into inFlow in order to save you time and effort when it comes to your sales. The first step is to get your transactions from your eCommerce site and in the case of Ebay, they have documentation which can allow you to:

- Request a download of your sales records
- Set up a recurring download

These files will be what you will use to import your sales into inFlow and process them (and should save you time)!

Importing the file to inFlow

Once you have a file from eBay you can import it into inFlow in the following manner:

- 1. Go to *Main Menu > General > Import Data.*
- 2. Choose *Sales Orders* as your data type.
- 3. Click *Browse* and select the file that you'd like to import (the one you made in step one).
- 4. Click Next.
- 5. Choose whether you want to import your orders as open or closed.
- 6. Match the columns within your eBay file to the columns in inFlow. We suggest the following matches:

inFlow Field	eBay Field
Customer Informa	tion
Customer	User Id
Contact Name	Buyer Fullname
Phone	Buyer Phone Number
Email	Buyer Email
Addresses (Billing	Address)
Address Line 1	Buyer Address 1
Address Line 2	Buyer Address 2
City	Buyer City
State/Province	Buyer State

Country	Buyer Country
Zip/Postal Code	Buyer Zip
Order Info	
Order Date	Sale Date
Order Number	PayPal Transaction ID
Order Remarks	Feedback left
Freight	Shipping and Handling
Invoiced Date	Checkout Date
Date Paid	Paid on Date
Amount Paid	Total Price
Requested Ship Dat	eShipped on Date
Item Info	
Item Name/Code	Item Number
Item Subtotal	subtotal
Item Quantity	Quantity
Unit Price	Sale Price
Custom Fields	•
Custom 1	Sales Record Number
Custom 2	Transaction ID
Custom 3	Custom Label

7. Click Next to finish.

Some additional fields of note:

US Tax will not match to any fields in this import. You would set up your taxes ahead of time by following <u>this article</u> and inFlow should calculate the correct tax based on your rates.

Insurance. If this is present it would have to be added as a separate item with a unit price after the fact so that it will be included in your order total.

Cash on delivery fee. If this is present it would have to be added as a separate item with a unit price after the fact so that it will be included in your order total.

Downloading transactions from PayPal into inFlow

You can download CSV files from PayPal once you've made your sales. To do so:

- 1. Log into PayPal (be sure you're logging into an admin account).
- 2. Click the HISTORY link under the MY ACCOUNTS tab on your main vendor page (as soon as you log in).
- 3. If available be sure to choose to show your transactions in your home currency (there is a dropdown in the top right which allows you to choose).
- 4. Filter the list to show the orders you wish to download.
- 5. Click the DOWNLOAD: CSV link in the top right of the table
- 6. You will see a window pop up where you can choose which file you'd like to download (for example you can download only payment completed transactions or all transactions).
- 7. If your file is too large the system will email you a link once the file has been created. This link will log you back into PayPal and allow you to download the file. If it is reasonably small then the system will load you straight into the window where you can download the file.

Importing the file to inFlow

Once you have a file from PayPal you can import it into inFlow in the following manner:

- 1. Go to Main Menu > General > Import Data.
- 2. Choose Sales Orders as your data type.
- 3. Click *Browse* and select the file that you'd like to import (the one you made in step one).
- 4. Click Next.
- 5. Choose whether you want to import your orders as open or closed.
- 6. Match the columns within your PayPal file to the columns in inFlow. We suggest the following matches:

inFlow Field

PayPal Field

Customer Information

Customer	Name
Phone	Contact Phone Number
Email	From Email Address
Addresses (Billing Address)	
Address Line 1	Address Line 1
Address Line 2	Address Line 2/District/Neighborhood
City	Town/City
State/Province	Sate/Province/Region/Country
Country	Country
Zip/Postal Code	Zip/Postal Code
Order Info	
Order Date	Date
Order Number	Transaction ID
Order Remarks	Note
Freight	Fee
Amount Paid	Net
Item Info	
Item Name/Code	Item Title

Gross

Custom 1

Receipt ID

7. Click Next to finish.

If you are having trouble:

1. Check to be sure that your refunds haven't been imported as Fully Shipped orders. If so, cancel them.

Downloading transactions from Yahoo Stores

If you're using PayPal to process your Yahoo Stores purchases then you can export your transactions from PayPal as described in this article <u>Downloading and importing transactions from PayPal</u>. If you are not using the PayPal add on you can follow these instructions from the Yahoo! Website: <u>http://help.yahoo.com/l/us/yahoo/smallbusiness/store/order/retrieve/retrieve-11.html</u>.

Entering product costs

Costs in inFlow reflect what you've paid for an item (including shipping fees and any other tariffs etc). These will be updated based on your purchase orders and used to calculate profit.

To enter the cost of your item:

- 1. Click into the *cost* field in the Costing Info section of your product record.
- 2. Enter the cost.
- 3. Click Save in the top toolbar.

Costing Info		
Costing Method	Moving Average	-
Edit / History		

If the field is greyed out then you can adjust your cost by clicking the *Edit/History* link to the left and entering the new cost at the bottom of the window which appears. Once you've adjusted the cost it should show in the cost field as above.

Still unsure, or looking for more info?

Have a look at our <u>Costing tutorial video</u> for a closer look.

Entering product prices

inFlow has *Pricing/Currency* schemes which allow you to set up prices for your products. Your prices will appear in your Sales Orders.

To enter your price:

- 1. Click into the box to the left of the = sign, beside one of your schemes.
- 2. Entering the price.
- 3. Click Save.

Sales Info

Normal Price	\$45.00 =	200	% Markup
Retail Price	=		% Markup
Wholesale Price	=		% Markup
	Add nev	v Pricino	/ Currency

Still unsure, or looking for more info?

Have a look at our Pricing tutorial video for a closer look.

Error generating custom document

So you're getting a notification that inFlow is having trouble generating a custom document? First you'll want to have a look at your PROGRAM LOG which records some of the things that are going on in inFlow. When there's an error, often it will show us some information that can be helpful. You can grab your program log by: 1. Going to your Windows START menu > programs > inFlow inventory 2. Click the *Program Log* which should open a notepad with a lot of information (If you're using Windows 8, this program log can be found by going to C:\ProgramData\inFlow inventory\Logs\log.txt.) Once open, you'll want to press *Ctrl* + *F* and search for the errors below. Please note: the file path in Option 1 is different on each computer so it's best to only search, "Could not find a part of the path" **OPTION 1: Your program log says, "Could not find a part of the path**

'C:UsersUSERNAMEAppDataRoaminginFlow Inventory849b7623-8edb-439d-8c47-

720a00e5bbc1.doc'." or something similar. This means that a folder that inFlow needs in order to save those documents is missing as it was never created when you installed. If that's the case then you can correct the problem by: 1. Click Start, in the search bar type %appdata% and hit enter (in xp, hit run and type %appdata%). This should go to a folder that looks like "C:\Users\Your Name\AppData\Roaming" 2. Check to make sure there is a folder named "inFlow Inventory" in this location 3. If the folder does not exist, create it folder named "inFlow Inventory". 4. Try your custom document again to see if it works. **OPTION 2: Your program log says, "Word cannot start the converter mswrd632.**" To resolve this issue, an affected user can unregister the mswrd632 converter by editing the registry as follows: 1. Click Start, click Run, type regedit, and then click OK.

Locate and then click the following registry subkey: HKEY_LOCAL_MACHINE > SOFTWARE > Microsoft > Shared Tools > Text Converters > ImportMSWord6.wpc On the Edit menu, click Delete. Click Yes. Exit Registry Editor.

NOTE: For x64 systems above path is slightly changed: HKEY_LOCAL_MACHINE > Software > Wow6432Node > Microsoft > Windows > CurrentVersion > Applets > Wordpad

This change will effectively unregister the converter and disable it for third-party applications and for Microsoft Office. Microsoft Office will use its own text converters to open these kinds of files. 2. Give inFlow another try. **OPTION 3: You already have Word installed but you're getting an error that says, "You must have Word installed to use this feature."** Unfortunately inFlow doesn't support all versions of Microsoft Word and if you're using an unsupported version then you may run into this error. Currently we support Microsoft Word 2003, 2007, and 2010 however we do not support starter versions of any of these programs, only the full versions. You can check to see what version you're using by following the <u>instructions outlined by Microsoft</u>. If you are using a starter edition, upgrading to the full version may solve your problem but you might want to contact us before deciding to purchase just in case.

Get Started wizard



To make getting started even easier, inFlow features a *Get Started* page which includes the Setup Wizard. To access the wizard:

- 1. Click the Main Menu then go to > General > Get Started.
- 2. In the resulting window click Step 3, to Customize inFlow.

The Setup wizard will walk you through setting up your company information as well as a few decisions about taxes and products.

How can I automatically reorder when low in stock?

The Reorder Stock function can help you reorder your stock when you need more inventory, through it inFlow can suggest what may need to be re-ordered.

	Keordei	STOCK	Qtv Available +	Reorder	Reorder	
	item	Description	on Order	Point	Quantity	vendor
	20101	1:24 California Highway Patrol	-8	0	0	Protekt-Ship Inc.
	46101	Alabama 1957 Police Car	-8	0	0	Richardson Quick Liquidation
	67817	Chevy Series #12	0	200	100	
*						

To reorder:

- 1. Go to *Main Menu > Inventory > Reorder Stock*
- 2. Click Suggest Products to Reorder to see the list of items inFlow believe you should be ordering.
- 3. Review the list and when you're ready click *Reorder* to automatically generate your Purchase Orders (split by Vendor).

The program suggests stock to reorder based on the reorder points and reorder quantities that you've set up in your product record. You can also control the factors involved in suggesting products to reorder within this window.

To control what the system suggests you reorder:

- 1. Within the Reorder Stock window click the triangle to the right of the *Suggest Products to Reorder*
- 2. You will see two options that you can turn on or off:

include out of stock items: if this is checked then inFlow will also suggest you reorder products that are at a quantity of zero. Simply uncheck if you only want to be provided with items that are under their reorder points or have outstanding orders to be fulfilled.

include products assembled with a bill of materials: if this is checked, inFlow will also suggest you reorder assemblies that you build from other stock you purchase. This can be helpful if you need to have another manufacturer assemble some of your product for you due to time constraints.

To set up your reorder points/quantities:

1. Go to your product record.

- 2. Click the Extra Info tab.
- 3. Enter the point below which you'd like your stock to be reordered in the *Reorder Point* field.
- 4. Enter the minimum quantity required to be reordered in the *Reorder Quantity* field.
- 5. Click to Save your record.

For example:

If I have an item that I order in sets of 4, I'll want to order no less than 4 when creating a new PO. Let's say I want to go no lower than 25 of this item in my warehouse. So I would set up my reorder points and reorder quantities as:

🕫 inFlow Inventory	- Premium Edition							[
	Product	× 📝 Dashboard	×						?
Search	•	🗋 New 🛃 Save 🗈 Cop	y 🛄 Version 🔴 Deactiv	/ate 🔋 Attachm	nent				🗙 Clo
Item Name/Code	•								
Description	-	Storage Info			Bill	of Materials			
	Refresh	Barcode				Component	Description	Quantit	Cost
		Reorder Point		25		Item	Description	Quanut	COST
Category	Item 🔺	Reorder Quantity		4	*			0	
Die-cast	00303A	Default Location		•					
Die-cast	04275	Last Vendor							
Die-cast	090821A				Tete	10			50.00
Die-cast	10201				TOLS	II Cost			50.00
Services	12345678	Unit of Measure			Me	asurements			
Battery-Powered	12875	Standard UoM	•		Ler	igth			
Battery-Powered	14232	Sales UoM			Wie	th			
Close-out	20101	Durahasilasilasi			Hai	abt			
Llose-out	46101	Purchasing Com	•		1161	gin			
Misc Close-out	702000				we	ight			
Die cast	9400								
Die-cast	9500								
Misc	Catalog06	Remarks			Cu	stom Info			
Misc	Catalog07				Mar	udachurar			
Packing Materials	PM-BW01				Mdi	Iulacturei			
Packing Materials	PM-SB01				Mad	ae-in			
Packing Materials	PM-SB02								
Packing Materials	PM-SB03								
Services	S10001								
Services	S10002								
		Product Info	Extra Info	Product Vendo	ors	Movement	History	Order Histor	1
Guardado exitosamo	entel					Current	User: Default U	ser Connect	ed (Locally) 🧧

This way, the moment I go under the requisite 25 items the system will suggest that I reorder stock. It will ask me to reorder however many cases required to get back above 25 items. So for example if I was at 10 when pulled a reorder stock the system would look at the stock available and on order (10) and see what the difference was between that and your reorder point (15). However since we have a reorder quantity of 4 it must use multiples of 4 to get you back up to 15, therefore it orders 16 (i.e. 4×4).

How can I create a duplicate/copy of a Sales Order?

If you have already created a sales order that you need to duplicate (maybe your customer has a standing order, or you're selling the same package to 3 different people) you can duplicate the order very easily:

- 1. Click Copy and choose Copy SO.
- 2. Change the Customer name if necessary.
- 3. Click Save.

This will allow you to avoid having to repeat selection of many items or re-creating your order each month.

How can I create a Purchase Order from a Sales Order?

If you need to special order the items on a Sale for your customer and would like to create purchase order which duplicates their sale it's easily done:

- 1. Click Copy and choose Create PO.
- 2. Select the correct vendor.
- 3. Click Save.

You can also choose to create a Purchase Order if you do not have enough stock to cover the order. This is easily done by right-clicking on the exclamation mark which will appear to warn you of your stock levels.



How can I enter the cost myself? I don't need it calculated for me.

If you don't want inFlow calculating your cost for you than simply switch the costing method in the product record. To change the costing method:

- 1. Open the product record for that item
- 2. Click the Costing Method dropdown and change it to Manual.
- 3. Enter the cost of the item.

How can I insert lines or re-arrange my items (in an order)?

You can re-arrange, sort or insert lines into your order table using the new *Data Grid Toolbar* which will pop up along the bottom of your order table when you've selected a row you'd like to edit.

😴 inFlow Inventory - Premium Edition Trial	and the second of	Carlos and and	And Street		-		
Sales Order	Kustom	er × 📝	Dashboard	×			?
Search 📃	🗋 New 🛃 Save 🎯 P	review 👻 🝙 Copy	Version 🛛 At	tachment 📃 Stic	ky 🔻		🗙 Close
Order# -	Customer Budget-Mi	nding Collectibles •	Sales Rep		•	Order #	
Status •	Contact Bob Weiss	1	Location		-	Date	22/10/2012 •
Customer -	Phone 843-555-1	337				Status	Open
Refresh	Address - Box 491						
	Isle Of Pair USA	ms, SC					
Order #	29451						add shipping
SO-000012							
SO-000011	Item	 Description 		Quantity	Unit Price	Discount	Sub-Total
SO-000010	Catalon06	2006 Product Catale	ia	1	\$0.00	0%	\$0.00
50-000009	▶ PM-BW01	24" x 750' Sheet of	3/16" Bubble Wrap	1	\$0.00	0 %	\$0.00
S0-000007	PM-SB01	20" X 18" X 12" Sh	pping Boxes	1	\$5.00	0 %	\$5.00
SO-000006	PM-SB02	20" X 20" X 15" Shi	pping Boxes	1	\$0.00	0 %	\$0.00
SO-000005	*			0			
SO-000004							
SO-000003							
Data Grid Toolbar	- T - T V						
						Sub-Total	\$5.00
	Taxing Scheme	No Tax	 Remarks 			Total	\$5.00
	Pricing / Currency	Wholesale Price	•			Paid	\$0.00
						Balance	\$5.00
				Com	plete & Pay		
	Sales Adv.	anced					
	Ľ					Curr	ant User: Default User
						Curr	

To Insert a row:

- 1. Select a row in your order.
- 2. Click the "+" sign in the toolbar, or right click and choose "Insert Row"
- 3. A row will appear above where you have selected

To remove a row:

- 1. Select a row in your order
- 2. Click the "-" sign in the toolbar, hit the "Delete" button on your keyboard, or right-click and choose "Delete Selected Row"

To move a row:

- 1. Select a row in your order
- Click the "↑" or "↓" arrows to move your item as desired, or right-click and choose "Move Up" or "Move Down" as desired.

To sort a row:

1. Click on the title line of the column you'd like to sort them by.

Eg. Clicking on the Item column would sort them by item Alphabetically.

How can I opt into beta updates?

So you want to be notified about beta releases huh? Great! We love feedback and opting into the beta version means that you get new fixes and fun new features EVEN SOONER! So, if you'd like to be notified about beta releases be sure to turn that on in the *About inFlow* section.

To turn on beta updates go to:

- 1. Go to Main Menu > Settings > About inFlow
- 2. Click "Check for Updates"
- 3. You will see a little check box beside "Also check for beta (pre-release) updates," please check this box and click save.

Voila! You're all done so you can close the window and you will be notified whenever a beta or public version becomes available. Always remember to backup your database before completing any updates to inFlow just in case you decide you want to revert back to the previous version. This is especially true of beta versions as we're still in a testing stage and the release will not be in its final stage.

How can I print barcodes on my invoices?

Are you looking to print your barcodes straight onto your invoice? This can be helpful if you want to make picking items from your inventory even easier! As long as you install a barcode font on your computer, you can set up a Custom Doc template to print barcode labels for products listed in a sales order or purchase order!

You'll need to add the "ItemBarCode" field into the Custom Doc template, and set the template layout to fit your label papers. You can test how it works by opening the sample order template, and changing the Description column to show Barcode instead. Simply change the column heading and then right click on the "ItemDescription" field to select "Edit Field":



Then, change the Field name to ItemBarCode, and repeat this for each row of the template:

contact phone fax	«ContactName» «Phone» «Fax»	
po number	sales rep	Field
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ITEM	BARCODE	Categories: Field name: (Al) ItemBarCode Compti
elternName>	eltemBarCode.	Fil-in (none) GoToButton Uppercase Coretinal ine Lowercase
«ItemName»	«ItemBarCode»	Hyperlink First capital If Title case
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«itemName»	«ItemBarCode»	Keywords LastSavedBy Link
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«ItemName»	«ItemBarCode»	MergeRec MergeSeq Next *
«ItemName»	«ItemBarCode»	Description:
«ItemName»	«ItemBarCode»	Field Codes
«ItemName»	«ItemBarCode»	

Next, select and change the barcode fields to use the barcode font:



Once the template is saved and imported back into inFlow from the Print Settings, you can test it by generating this Custom Invoice with sales order items that have barcodes:



If you don't already have a barcode font installed on your computer, you can search and download a free barcode font from the Internet, for example the <u>Free Archon Code 39 Barcode Font available on</u> <u>Download.com</u>.

Please <u>check out our Custom Documents</u> article for more details on how to set up your documents and let us know if you're having trouble!

How can I re-open a sales order?

If you need to make changes to or fix an order you've already completed, never fear! You can easily re-open the order and make adjustments to the information.

To re-open an order:

- 1. Go to the order you want to change.
- 2. If you're in simple mode, click *Re-open Order*. If you're in advanced mode, go to the *Order* tab and click *Re-open Order*.

🚽 inFlow Inventory - Premium Edition							
Sales Order	📕 📝 Dashboa	ard × 🕂					?
		1	1.0				
Search	🗋 New 🛃 Save 🎯 P] New 🛃 Save 🎒 Preview 🔻 🖬 Copy 🔻 🕦 Version 🛛 🕕 Attachment 😠 Sticky 👻					× Close
Order # -	Customer Budget-Mi	nding Collectibles 🔹	Sales Rep		•	Order #	SO-000001
Status -	Contact Bob Weiss		Location		•	Date	04/09/2009 -
Customer -	Phone 843-555-13	337				Status	Paid
Refresh	Address - Box 491						
	USA	ns, SC					
Order#	29451						add shipping
SO-000001							
SO-000002	Item	Description		Quantity	Unit Price	Discount	Sub-Total
SO-000003	▶ 04275	4" Classic Airplane -	3 Piece Set	1 guad	\$8.99	0 %	\$8.99
SO-000004							
SO-000005							
SO-000007							
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SO-000011							
SO-000012							
SO-000014						Sub-Total	\$8.99
	Payment Method	•	Remarks			State Tax	\$0.54
	Taxing Scheme	SC Tax •				City Tax	\$0.09
	Pricing / Currency	Wholesale Price -				Total	\$9.62
						Paid	\$9.62
						Balance	\$0.00
			Re-open Ord	ier om			
	Sales Adva	anced					
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🚽 inFlow Inventory - Premium Edition									
🔎 🔽 ▷ 🛐 Sales Order	× 🗾	Dashboard	× +						?
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Order# •	Customer	Budget-Mindir	n Collectibles 🔹	Sales Ren		•	Order #	SO-000001	
Status -	Contact	Rob Weiss		Location		-	Date	04/09/2009	-
Customer -	Rhono	843-555-1337		Location			Status	Paid	
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Reliesi	Address	Isle Of Palms,	SC						
Order#		29451							
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SO-000002	Item		Description		Quantity	Unit Price	Discount	Sub-Total	
SO-000003	▶ 04275		4" Classic Airplane	3 Piece Set	1 quad	\$8.99	0 %		\$8.99
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	Order	O Dick		e Return	Restock	Simple			
	- Older	PICK		e e Ketum	- Restock	Simple			
Finished loading Sales Order - Order # SO-00000	1					Current User: E	Default User 0	Connected (Local	lly) 🗌

Any changes made by this order will now be reversed (i.e. items that shipped out will be back in your inventory. You will have to re-complete the order as you make your changes.

How can I reattach the database manually?

When inFlow starts **and** detects there's a connection issue with the database, it would try to reattach the database automatically. However, if it failed, you may see an error such as, "can't connect to inFlow database." You can reattach the database manually via the following steps: 1) Open a command prompt as an administrator. – on Windows XP, log in using an administrator account, and click Start \rightarrow Run \rightarrow type "cmd" \rightarrow press Enter. – on Windows Vista/ Windows 7, bring **up** the Start Menu \rightarrow type "cmd" \rightarrow right click on cmd.exe \rightarrow select Run as administrator. – on Windows 8, hit the Windows Key + X, hit A, and then click Yes to allow permission to run command prompt as an administator. 2) Copy the following line, then right click the command prompt (the black window that opened) and click Paste, then hit Enter: cd \Program Files\inFlow Inventory" *If you get an error saying "The system cannot find the path specified", you might be on a 64-bit version of Windows. In that case, please instead use:* cd \Program Files (x86)\inFlow Inventory 3) Copy the following line, and again paste it into the command prompt and hit Enter: sqlcmd -S .inFlowSQL -i attachDB.sql 4) Once the command completed successfully, you can restart inFlow.

How can I rename fields?

You can easily rename fields in inFlow however it's important to keep in mind that when a field is renamed it will be renamed throughout the program.

To rename a field:

1. Right Click the label you want to rename.

Basic Item Name code	Right click & choose customize.
Catego Customi Type	Ze Juo cast Juo cast
Description	4" Classic Airplane - 3 Piece S

- 2. Choose *Customize* from the drop down.
- 3. Enter the new label name into the *Custom Text* column.
- 4. Click Save & Close.

🚽 inFlow - General Setting	S					23
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Company	You can customize	e the text show	n on the s	creen and on printe	d documents.	
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Dename Fields	Check for &Update	es			Label	
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Auto Backup				Save & Close	Cance)

To reset to the default field names simply:

- 1. Go to Main Menu > Settings > General Settings.
- 2. Click Rename Fields on the left.
- 3. Click the Reset All button near the bottom
- 4. Click Save & Close.

How can I see inventory in a particular location?

To see your inventory level for a particular location:

- 1. Click the *Main Menu > Inventory > Current Stock*.
- 2. Click into the *Location* field at the top and type your location (or click the triangle on the right and select it from the dropdown.
- 3. Click Refresh.

How can I set reorder points separately for different locations?

Reorder points take all locations into account and there's currently no way to track them separately however what you may try is setting your points a little higher than you normally would so that the system will prompt you earlier. That way, when you are prompted you can check your current stock and decide whether you want to reorder or wait.

How can I use a barcode scanner?

Barcode scanners can be used in all editions of inFlow to scan your items during sales or purchase orders as well as selecting them in most product tables. To use the barcode scanner to select your products you must first save the barcodes in the corresponding product record.

To save your barcodes:

- 1. Open the product record.
- 2. Select the Extra Info tab.
- 3. Click into the barcode field at the top of the window.
- 4. Scan your item.
- 5. Click Save

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	Storage Info		
	Barcode		
	Reorder Point		100
	Reorder Quantity		50
	Default Location	Main Warehouse	-
	Last Vendor	Oh-Mega Toys	-

To select your product:

- 1. Open the sales order (purchase order, adjust stock window etc.)
- 2. Click into the first cell in the table.
- 3. Scan your item.
- 4. Scan your next item, and so on until you are finished.

If you're looking to know what scanners specifically work with inFlow, see here.

Still unsure, or looking for more info?

Have a look at our <u>Barcodes tutorial video</u> for a closer look. In addition, check out our free e-book on barcoding your business <u>here</u>!

How do I add a column to my orders?

You can't add columns to the order window but what you can do, is add them to the printed documents you're getting from that order. This is done by capturing the information you're looking to include in a custom field in the product's record and then pulling that into a custom document. In the example below we've used a sales order and a sales document however the process is the same for a purchasing document.

To add the custom field:

- 1. Go to Main Menu > Settings > General Settings.
- 2. Choose the *Custom Fields* icon on the left.
- 3. Select the inventory tab.
- 4. Enter your field name(s) under Products (eg. Manufacturer)
- 5. Click Save & Close.

You'll need to ensure that the information you want to have showing on your document is present in the corresponding product record before you create your order. For example if you wanted to include

manufacturer information you would add your custom field with the name "Manufacturer" and then include the manufacturer information in that field in the product record.

To begin creating your document you'll want to start with one of our sample documents (these are included with your installation).

To open a sample document:

- 1. Go to Main Menu > Settings > Print Settings
- 2. Choose Custom Docs from the icons on the left
- 3. Click the Add New Custom Doc button.
- 4. Choose one of four types of documents (eg. To create a Sales Order document choose *Sales Order, Header & Line* Items)
- 5. Click Open Sample.

Microsoft Word will open up the sample document so that you can edit it.

If you would like to add additional fields to the document you must first link it to one of the CSV documents provided (available in either C:Program FilesinFlow InventoryCustomDocument or on 64bit C:Program Files (x86)inFlow InventoryCustomDocument).

To link your sample document to the available order fields:

- 1. Open your sample document as described above.
- 2. Click the Mailings Ribbon and choose Start Mail Merge.
- 3. Choose *Directory* from the list.

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4. Click Select Recipients and choose Use Existing List ...



This will open a window in where you can browse to the correct CSV file. There are four available which can be found in C:Program FilesinFlow InventoryCustomDocument (on a 32-bit computer) or C:Program Files (x86)inFlow InventoryCustomDocument (if your computer is 64-bit).

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- PurchasingEnvelope	29/04/2010 4:08 PM	Microsoft Office Word 97 - 2003 Document	25 KB
SalesEnvelope	29/04/2010 4:08 PM	Microsoft Office Word 97 - 2003 Document	23 KB
SalesInvoice	29/04/2010 4:08 PM	Microsoft Office Word 97 - 2003 Document	165 KB
Sample_Purchasing_PurchaseOrderLines	07/05/2010 5:04 PM	Microsoft Office Excel Comma Separated	4 KB
Sample_Purchasing_SingleDocument	07/05/2010 5:04 PM	Microsoft Office Excel Comma Separated	2 KB
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Page: 1 of 1 Words: 0			······································

5. You can now insert a new column into the table of the document and then add the available fields via the *Insert Merge Field* button; there will be a dropdown list of available information. Simply click the field you want to add and a tag will appear in the document. The custom fields are called <>, <>, etc.

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1		BillingCountry	
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		BillingAddressType	1
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Page: 1 of 1 Words: 1 🧭 Englis	sh (Canada)	FormattedShippingAddress2	€

6. When you're finished adjusting the document save it to your desktop (or anywhere you can easily locate it).

Now that you've saved the document you can import it into the system. Here's an example of the <u>finished document with tags</u>.

How do I add a description?

When you start inFlow for the first time the Description field is hidden by default so if you'd like to use it, you'll have to turn it on. To do so simply:

- 1. Click the Main Menu and go to the Settings section; choose General Settings from the list
- 2. In the resulting window you'll want to pick the Products & Inventory tab
- 3. The first option in this window is to Show Product Description. Check it and click Save & Close.

How do I add attachments? (products, customers, vendors, orders)

You can add attachments to much of the data held in inFlow. For instance if you wanted to attach a warranty to a particular order, or certificates re: tax breaks to a customer record.

		—
🖨 Attachment	S	
None.		
	Click to add a n	ew file.
Add New	Save	Cancel

To do so in a product record:

- 1. Open the product record.
- 2. Click Attachment in the top toolbar.
- 3. Click Add New in the resulting window.
- 4. Choose the file you want to attach and then click Open.
- 5. Click Save in the attachment window and again in the top toolbar of your product.

To do so in a sales order:

- 1. Open the sales order.
- 2. Click Attachment in the top toolbar.
- 3. Click Add New in the resulting window.
- 4. Choose the file you want to attach and then click Open.
- 5. Click Save in the attachment window and again in the top toolbar of your order.

If you'd like to re-open the attachment down the road simply:

- 1. Navigate to the order, product or record that you wish to address.
- 2. Click Attachment in the top toolbar.
- 3. Click the name of the file you wish to open.

How do I add or remove my sales representatives?

You can assign orders to specific Sales Reps to make calculating commission even easier. You can choose your rep from the dropdown in the sales order or even add a new rep by simply typing into that field. inFlow will save the new Rep name and make it available when selecting a rep on your next order.

To change Sales Reps already in the system:

- 1. Click Main Menu > Settings > General Settings.
- 2. Choose References from the menus on the left.
- 3. Click the Sales Reps button.
- 4. In this window you can add or remove Sales Reps as you see fit.
- 5. When you're satisfied click Save & Close.

How do I add pictures to my products?

You can add pictures to an item within the product record using the *Browse* button just below the Picture field.

Picture



To add the picture:

- 1. Open the product record.
- 2. Click Browse
- 3. Choose the picture you want to use and then click Open.
- 4. Save your Product.

You can also import your pictures if you have a list of the location on your computer where inFlow can locate your pictures. Your file should be set up as below:

	А	В	С
1	Name	PicturePath	
2	00303A	c:\Users\Username\Pictures\00303A.jpg	
3	4275	c:\Users\Username\Pictures\4275.jpg	
4	090821A	c:\Users\Username\Pictures\090821A.jpg	
5	10201	c:\Users\Username\Pictures\10201.jpg	
6	12875	c:\Users\Username\Pictures\12875.jpg	
7			
8			

This allows you to set your pictures up using the import however please keep in mind that you cannot export the list of picture paths from inFlow.

How do I adjust my stock levels?

There are a number of ways you can adjust stock. inFlow will automatically adjust your stock when you complete a Sales or Purchase order however if you're going to manually update there are two ways to do so:

When adjusting one item:

- 1. Open the product record.
- 2. Click the quantity of stock in the Inventory section and enter the corrected number.
- 3. Hit the tab key.
- 4. Click Save.

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	Location		Sublocation	Quantity
•	Default Loo	cation	Aisle 64	20
*				
Qua	antity on	Click to	change Qty.	20

When adjusting multiple items:

- 1. Go to Main Menu > Inventory > Adjust Stock
- 2. Select the items you'd like to adjust in the main table
- 3. Enter the new stock level in the *New Quantity* column OR the difference (either positive or negative) in the *Difference* column for each item you've selected.
- 4. Once you're satisfied—enter a remark if you would like to—click Adjust.

	Item	Description	Location	Sublocation	Quantity	New Quantity	Difference
	00303A	Army Combat Helmet	Main Warehouse		50 ea	55 ea	5 ei
	12875	Mini-Truck Battery Powered Red	Default Location		15	10	-5
	46101	Alabama 1957 Police Car	Main Warehouse	B-2	0	10	10
►	9500	Boat Basket	Default Location		0	6	6
亦							

How do I apply partial payments or multiple payments to a sale?

So your customer needs to pay part of their order (let's say a deposit)? Or maybe they are paying off a few orders at once. inFlow can calculate the balance of an order or a payment for you if you follow the steps below.

To apply a partial payment:

- 1. Open your order and click the "Paid" label at the bottom
- 2. In the resulting window enter the payment method, amount and any other details you'd like to record.
- 3. Click Okay.

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Sub-Total : Taxing Scheme SC Tax Remarks State Tax Pricing / Currency Wholesele Price - City Tax Total Paid -											O-000001
Taxing Scheme SC Tax Remarks State Tax Pricing / Currency Wholesale Proce - City Tax Total Paid	\$490.86		Sub-Total								
Pilding / Currency Wholesile Proc City Tax Total Puld	\$29.45		State Tax			Remarks	SC Tax •	heme	Taxing Sch		
Total Paid	\$4.91		City Tax				Wholesale Price +	urrency	Pricing / Ca		
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	\$0.00		Paid								
	E3E 33		Balance								
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e Sales Advanced							nced	Adva	O Sales		

Date	Method	Ref#	Remarks	Amount	
01/01/2013	Cash		Deposit		\$100.0
23/01/2013	VISA	098459	Balance of order		\$425.2
*					
_					
_					
				Total Daid	AF.05
				Iolal Palo	\$5/5

You can also enter the cumulative amount in the "Paid" field and inFlow will calculate the difference since your last payment and record it in Payment Details window for you.

Applying a lump sum to a customer account (paying several invoices)

Batch payment is available in inFlow v3. Not sure which version you're on? Check by going to the Main Menu > Settings > About inFlow.

If you're on v3 please see this article for help with the new batch payment feature.

If you're not on v3 and would like to perform batch payments, we have a workaround you can use, outlined below:

In this workaround for batch payments, the amount is not applied all at once, but it can certainly help you apply the value to your customer's multiple open orders:

- 1. Go to your sales order list, filter to show only orders from the customer you're applying payment to and to only show orders which are not paid.
- 2. Sort the list by date, with the oldest invoices at the top of the list.
- 3. Begin with the oldest open invoice and enter the amount provided by your customer in the *Paid* field, then hit tab
- 4. inFlow will provide the balance of that amount below, please take note of it.
- 5. Click "complete and pay" (or "Paid in Full" if in advanced) to complete the order, save it and move on to the next in the list.
- 6. Enter the balance of the first order's payment, in the *Paid* field of the second order and hit tab.
- 7. inFlow will provide the balance of that amount below, please take note of it and continue this process until there is no more payment available to be applied to your orders.

🗧 inFlow Inver	ntory - Free Edi	ition	-	-	-	-			1	1111111	The p		a x
	🕑 🗿 s	ales Order		× 🗾	Dashboard	+ × +							?
Search		•	D	New 🛃 S	ave 🕣 Prei	riew 👻 🗈 Copy 👻	- 62	Version 🔋 🕼 Att	achment 📃 Stic	iky 👻			🗙 Close
Order# -			c	ustomer	Budget-Mindi	ng Collectibles 🔹		Sales Rep		•	Order #	SO-000001	
Status -	Open, In Prog	ress, Fully Sh •	Some Deb Weite			ſ	Filter the li	st to show c	only one		04/09/200	9 -	
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SO-000001 SO-000007	04/09/2009	In Progress Invoiced		Rom		Description			Quantity	Linit Price	Discount	Sub-Total	
SO-000010	19/11/2009	Open	Þ	04275		4" Classic Airplane - 3	3 Piec	e Set	1 quad	\$8.99	01	6	\$8.99
											Sub-Te	otal	\$8.99
			In D	woiced Dal ate Paid	e	•	1	Remarks			State T City Ta	ax x	\$0.54 \$0.09
			P	ayment Me	thod	Record this ba	lan	ce before c	licking "Paid	d in Full"	Total		\$9.62
											Paid	100 (\$4	\$500.00 90.38)
			A	uto Invoice	•					Paid in Full	Duru		
			•	Order	O Pick	Invoice		Return	Restock	Simple			

This same process can be followed for purchase orders that need to be partially paid or have larger payments applied to them.

How do I archive my database?

Is your database getting too big? Do you want to officially close out your year by starting afresh? If you've got SQL Server 2005 installed, the maximum space allowed is 4GB. If you've got SQL Server 2008 R2 installed, it's 10GB.

Checking the Size of your Database:

a) The inFlow v2 database files can be found on your computer in the locations listed below (based on your operating system):

Windows XP/Server 2003: C:\Documents and Settings\All Users\Application Data\inFlow Inventory Vista, Windows 7/Server 2008, or Windows 8: C:\ProgramData\inFlow Inventory

PLEASE NOTE: If you're not able to see the folders outlined below please follow these steps to show hidden files/folders: <u>Windows XP</u>, <u>Vista</u>, <u>Windows 7</u>, <u>Windows 8</u>.

b) Look for a file that says inFlow.mdf (or just inFlow). You should see its size next to it. (For reference, 1GB = 1024MB = 1,048,576 KB!) If you're running out of space, you may need to archive your database (or if you're using SQL Server 2005, simply reinstall inFlow and customize it so that you install SQL Server 2008 R2 instead. See here for more information:

https://onpremise.inflowinventory.com/software-support.aspx#/article/21567906/what-if-i-cant-install-sql-server-)

Creating your Archive and Starting Over

The steps to archive your database consist of storing your information in the form of CSV files and then doing a hard reset on all of your data. Keep in mind that due to the reset, all of your preferences

and settings, as well as company details and any customizations will need to be re-entered/reselected in your new database. 1. First you'll need to save all your current information to CSV files.

- a) Go to Main Menu > General > Export Data.
- b) Choose your data type (each will have to be exported separately)
- c) Click to export.

The data types you'll need to export are "Product", "Inventory", "Customer", "Vendor", even "Bill of Materials" if you use it. If you have any open/uncompleted orders, you'll want to export "Sales Orders" and "Purchase orders" too. 2. Note down any information you have saved such as user settings, company settings, custom fields. You may also want to export custom documents at this point if you've not retained copies elsewhere. To do so:

- a) Go to Main Menu > Settings > Print Settings
- b) Click the "Custom Docs" icon.

c) Choose the template to export and then click the "Export" button on the right and choose where to save it.

3. Make a backup of your current database. You might save it as Archive2011-2013.ifi or something similar, just so you know what it contains. 4. Go to Main Menu > General > Reset All Data. You've already made a backup so you can easily restore to this backup at any time if you like. 5. Once you've reset your database, you can import all your information back into inFlow from the files you exported earlier.

- a) Go to Main Menu > General > Import Data.
- b) Choose your data type (each will have to be imported separately)
- c) Click next and map the fields if need be (inFlow should do this automatically).
- d) Click to import.

For your sales and purchase orders (which is the bulk of your archives) you should delete any completed orders in the file itself so you don't import them in. Be sure to always import your inventory LAST as it is your current stock levels and importing it before orders and other information may cause changes to those levels. Also be sure to back up your database before each new import (so you can reverse any changes you do not wish to keep). Please contact us at support@inflowinventory if you have any questions about this process.

How do I cancel a purchase order?

If you need to cancel an order you can do it quite easily from the order itself.

Simply:

- 1. Go to the *Order* tab (if in advanced mode) or simply remain on the *Purchasing* tab (if in simple mode).
- 2. Click the *Cancel* button.

3. Click to Save in the top toolbar.

Please note: if you are processing your order in advanced mode and it is partially completed, you will have to click the *Re-Open Order* button first, which will then become your *Cancel* button.

How do I cancel a sales order or quote?

If you need to cancel an order you can do it quite easily from the order itself. Sales quotes must be converted to order before they can be cancelled. Once it has been converted simply:

- 1. Go to the Order tab (if in advanced mode) or simply remain on the Sales tab (if in simple mode).
- 2. Click the *Cancel* button.
- 3. Click to *Save* in the top toolbar.

Please note: If you are processing your order in advanced mode and it is partially completed, you will have to click the *Re-Open Order* button first, which will then become your *Cancel* button.

Still unsure, or looking for more info?

Have a look at our tutorial video on <u>Deactivating Products and Cancelling Orders</u> for a closer look.

How do I categorize my products?

You can organize your products by choosing the correct category from the dropdown in an item's Product Record. New categories can be added by selecting the option from the dropdown window. This will take you to the *Product Categories* window which is also accessible via:

🚽 inFlow Inventory - Premium Edition			
Product Cate	eg 🗙 📝 Dashboard 🛛 🗙	H	? -
Product Categories	Item	Description	Normal Price
Default Category	67817	Chevy Series #12	\$7.90
Die-cast (6)	Catalog06	2006 Product Catalog 2007 Product Catalog	\$0.00
Packing Materials (4)	Catalogu7	2007 Froduct Catalog	30.00
Services (2)			
Add Remove			
		c	urrent User: Default User

1. Click the Main Menu > Inventory > Product Categories.

2. Click the *Ada* button at the bottom of the page.

They can be rearranged by clicking and dragging them to the desired position.

Categories can be removed by highlight them and clicking the remove button at the bottom of the screen.

Creating Sub-Categories

You can create subcategories by dragging categories into others in the *Product Category* view. Once you've added a categories to another you should see a plus sign on the left to indicate that there is a subordinate item there (as pictured above). Subcategories can also be used to show product type (such as clothing vs. electronics etc.).

How do I change the currency of my order?

Pricing schemes in inFlow are currency specific. Your default *Pricing/Currency* Scheme will be your home currency but if you wanted to charge your customer in another currency it's easily done by choosing the correct scheme in the *Pricing/Currency* section at the bottom. If you don't have a pricing scheme for that currency set up you can create one from the sales order.

To do so:

							Su	b-Total	EUR 179.80
	Payment Method		-	Remarks			Sta	ate Tax	EUR 14.83
ŀ	Taxing Scheme	CA Tax	-		Click to s	select pricing scheme o	r add nev	v.	EUR 194.63
ŀ	Pricing / Currency	European Price	-						EUR 0.00
L	1 USD =	EUR	0.50				Ba	alance	EUR 194.63
				Cancel Ord	ler	Complete & Pay	•		
	🗢 Sales 🔋 Adva	nced							

- 1. Click the drop down beside Pricing/Currency
- 2. Choose <*Add new..*> from the list.
- 3. Within the resulting window you can add another pricing scheme and select the correct currency.
- 4. Click Save & Close
- 5. If it is not already included, enter the conversion from this currency to your home currency.
- 6. Re-select your scheme to convert your prices.

How do I change the look of my printed documents?

To change how your printed documents appear open the Print Settings Window:

🦑 inFlow - Print Setti	ngs					- • •
Custom Docs	ng	Templates Use any of our existing Pont Default Font Size Lighter Text Color Colored Text Color Colored Text Color Reset	Artal Unicode MS • 925 • • • • • • • • •	HE THE HE HAND THE HA	LANK VIET IN VIET IN V	INVOICE Name & Booto Market Ma
					Papet of Save & C	lose Cancel

- 1. Go to Main Menu > Settings > Print Settings.
- 2. Click Templates to see the three different templates available.
- 3. Choose the template like.
- 4. Make any changes to colour and font.
- 5. Click Save & Close

How do I change the size of columns on my invoice (receipt etc.)?

If you have very long item names or descriptions you might find that your information doesn't quite fit in your printed document. To fix this you can customize the widths of the columns. It's easily done by dragging the column dividers in your order screen as shown below.

	ltem 🕞	Description	Quantity
►	00264	3.5" Train Set - 6 pieces	2
	04275	4" Classic Airplane - 3 Piece Set	2
	12875	Mini-Truck Battery Powered Red	2
	12876	Mini-Truck Battery Powered Blue	2
	67817	Chevy Series #12	6

The width of your columns in the final document will follow the width you've set in the order screen.

To change the width of a column on your document:

- 1. Click and drag the divider until the column is the appropriate width.
- 2. Right click the column header and choose *Save column proportions* to make this the case for everyone in your company
- 3. Print your document!

To remove a column:

- 1. Click and drag the divider until the column is no longer visible.
- 2. Right click the column header and choose Save column proportions
- 3. Print your document!

If you decide that you want to change the proportions again simply right click the header and choose to *Clear column proportions*.

How do I charge tax on the freight/shipping costs?

E									
2	Taxing Schen	nes							
ixe	ng Schemes are differer	nt types of taxes ye	ou charge in differer	nt situations, e.g.	when shipping to	other locations	with different tax	ing schemes.	
	Taxing Scheme Name	Primary Tax Name	Primary Tax Rate	Secondary Tax Name	Secondary Tax Rate	Compound Secondary Tax On	Tax On Shipping	Preview	
	No Tax		0%		0%	Primary		Sub-Total	\$100.
	AR Tax	State Tax	6 %	City Tax	0.5 %			Freight	\$20.
ĸ								State Tax	\$7.
								City Tax	\$0.
								Total	\$127.8
							Show All		

To charge taxes on your freight/shipping costs:

- 1. Click the *Main Menu > Settings > General Settings*.
- 2. Select the Pricing & Tax tab.
- 3. Click the *Edit Taxing Schemes* button.
- 4. In this window make sure that *Tax on Shipping* is checked beside your taxing scheme.
- 5. Click Save & Close.

How do I choose my product type?

Product types in inFlow tell the system whether you need your inventory tracked to be tracked. You can change your product type easily in the product record, simply:

- 1. Open the product record.
- 2. Click the dropdown to the right of *Type* and select the correct product type.

How do I control what inFlow saves back to my records during an order?

inFlow can save changes made during your orders back to your records and these preferences can be controlled through the Personal Settings window.

Updating F	roduct, Cus	tomer,	and vendor inf	ormation from Order	S		
When you update the	customer, vendo	or, or prod	uct information from	a Sales or Purchase order,	inFlow can sav	e those v	alues as the
Sales Order	How would you	like inpic	w to nancie this?	Purchase Orders			
	Always Save	Ask	Always Skip		Always Save	Ask	Always Skip
AJI				All			
Product Description	0	۲	0	Product Description	0	۲	0
Product Price	0	۲	0	Vendor Price	0	۲	0
Billing Address	۲	0	0	Vendor Product Code	0	۲	0
Shipping Address	۲	0	0	Address	0	۲	0
Contact	۲	0	0	Contact	0	۲	0
Phone	۲	0	0	Phone	0	۲	0
Carrier	۲	0	0	Carrier	0	۲	0
Terms	۲	0	0	Terms	0	۲	0
Payment Method	۲	0	0	Currency	0	۲	0
Sales Rep	0	0	0				

To access it go to:

- 1. Click *Main Menu* > *Settings* > *Personal Settings*.
- 2. Click the *Control Save as Default Settings* button.
- 3. Within this window you can control which changes are "always" saved, which prompt you to choose ("ask") and which never save back to the record ("skip").
- 4. Once you're satisfied click Save & Close.

How do I copy my transactions to MYOB?

Once you've exported your transactions from inFlow you can import them into MYOB however this will need to be done in a few steps:

- 1. You must import your customers into MYOB so they're available when you import your sales.
- 2. Once you've imported the Customers you can import the sales however MYOB requires account numbers assigned your various transactions as well as EOR (end-of-record) and EOL (end-of-line) markers for each order.

To that end, what you may wish to do instead is simply run a Sales Report from inFlow to get your total revenue in the various payment methods and enter the sales amounts in as a journal entry (i.e. "Receive Money").

How do I create a custom document (word 2003)?

These instructions deal with how to create a Mail Merge Template using Microsoft Word 2003. There are a few Comma Separated Value files which have been included with your updated files and are available so that you may choose to link your Word document in order to create the custom fields you require.

In order to begin creating this custom document you will first have to create a word document and use the mail merge function to link it to one of our included templates. Please note that this version of the instructions is optimized for Microsoft Word 2003. To begin:

Open Microsoft Word and select the Main Menu button→New and choose "Blank Document".
 Under the "Tools" menu select the "Letters and Mailings" option and select "Mail Merge"



3. Select the type of document and click "Next" once you have done this.



4. Choose which document you're planning to use and then click "Next".



5. Click to browse, this will open a window in which you should choose one of the sample documents which have been provided with the program. The documents will be located in the directory to which inFlow has been saved, for instance:

32-bit computers: C:Program FilesinFlow InventoryCustomDocument

64-bit computers: C:Program Files (x86)inFlow InventoryCustomDocument
· Au Normal · Times New Roman · 12 · B / U 盲言書 書 言言:言:言:言:言:言:言:言:言:言:言:言:言:言:言:言:言:	
• • • • • • • • • • • • • • • • • • •	Mail Merge 🛛 🔻
	Select recipients
Select Data Source	Use an existing list
Look in: 📴 CustomDocument 🕑 🎯 🗸 🖄 📆 🛪 Tools 🗸	 Select from Outlook contacts
PurchaseOrder PurchaseOrder PurchaseOrder PurchaseOrder PurchaseOrder PurchaseOrder PurchaseOrder	Type a new list Use an existing list
Documents	Use names and addresses from a file or a database.
Banple_Purchasing_PurchaseOrder	Browse
Desktop Sample_Sales_SalesOrder	🗾 t recipient list
· My Documents	
Click to open window and browse for CSV fi Wy Computer	ile. wentory\Custom Documents
· · · · · · · · · · · · · · · · · · ·	
: File name: New Source Open	
Places Files of type: All Data Sources Cancel	
Core selected	Step 3 of 6
click next.	Next: Write your letter
	 Previous: starting document

Once you have chosen your file click okay. This will close the window you have open and open a subsequent window. Click Okay on this and the next window. This will bring you back to the document you're editing.

6. Click the "More Items" link on the right in order to open the window to "Insert Merge Field" button; there will be a list of available items in that window which you can use to insert into your file.



7. Once you're satisfied with the document you've created save it and take note of the name and where it is located.*

8. Return to the program Go to the Print Settings menu (via Main Menu \rightarrow General Settings \rightarrow Print Settings)

9. Choose Custom Docs icon from the list on the left.

10. Click the "Add New Custom Doc" button. This will open the Custom Document selection window which will allow you to choose from four types of custom documents.

11. Skip step 1 and click the "browse" button beside step 2.

- 12. Locate and select the document you wish to use and click "open".
- 13. Enter a name for the template you've just created.
- 14. Click the "OK"

15. You should now be looking at the Print Settings Window and if you are satisfied with your changes you may now click "Save and close".

Congratulations! You have imported your template into inFlow Inventory and are now ready to use it to create a document. This process is quite similar if you're looking to create a document of any kind by hand.

*Please note: If you're creating a custom document using this method you will need to be careful to tell the program where to look and when to stop. For instance, if you're including sales order information in a letter to your client you will need to tell the program to stop entering information if the next line is blank. If you take a look at our example templates you will find that we have added a rule to the document which states that if the next <> field is blank it should not continue and this can be done via the rules button in the mail merge tab (see below).

	- Andrewski -	SalesInvoice [Compatibility Mode] - Microsoft Wor	d		
Reference	es Mailings Re	eview View				۷
Edit Recipient List erge	Highlight Address Merge Fields Block	Greeting Insert Merge Line Field - Update	Fields E Labels Preview Results Preview Results	r Errors Finish & Finish & Finish		
	1 - 1 - 2 - 1 - 1 - 1 - 2 -	1 - 3 - 1 - 4 - 1 - 5 - 1 - 6 - 1 - 7 - 1 -	8 • • • 9 • • • 10 • • • 11 • • • 12 • • • 13 • •	14 - 15 - 16 - 17 - 18	· · · 19 · ½ 20 · · ·	ā
	Your Company N Company address Company address tel 555-027 fex 555-027 billing address	Ine 1 Ine 2 Idea 2 Idea Somerfame. -Formatis@BiingAddess1* -Formatis@BiingAddess2*	<u>shipping</u> address «For «For	crder # «Orde date «O stormerName. mattedShippingAddress1» mattedShippingAddress2»	This is a rule which should continue to information in that box is blank, the rul stop. This prevents the document with	states that the program the next record if there is first box. However if the e asks the program to the program from filling empty boxes. Rules can be
		«FormattedBillingAddress4»	«For	та	added via the "Rule	s" button indicated above.
	contact phone fax	«ContactName» «Phone» «Fax»		«Item	UnitPrice»	«ItemSubtotal
	po number	sales rep	due date			
	«PONumber»	«SalesRep»	«DueDate»			Webar Dente The
	ITEM	DESCRIPTION	QUANTITY	«Item	UnitPrice»	«ItemSubtotal
	«ItemName»	«ItemDescription»	«ItemQuantity»			State Reserve To
	«ItemName»	«ItemDescription»	«ItemQuantity»	«Item	UnitPrice	«ItemSubtotal
	eltemNames	eltemDescription»	eltemQuantitya	(interin		(inclined biotal
	«ItemName»	«ItemDescription»	«ItemQuantity»	«ItemUnitPrice» «Ite	emSubtotal	
	«ItemName»	«ItemDescription»	«ItemQuantity»	itemUnitPrice> 	emSubtotal	*
	«itemName»	«ItemDescription»	eltemQuantity>	«ItemUnitPrice» «Ite	emSubtotal	•
United States)					•	60 G 2 = 90% - U +

For information on troubleshooting please visit this article: <u>https://onpremise.inflowinventory.com/software-support.aspx#/article?21111338</u>

How do I create a new customer record directly?

Though you can certainly create a new customer record during your order, you may choose to create your customer record separately before that customer has ordered anything from you. To do so:

- 1. Click the Main Menu, then go to Sales > New Customer
- 2. Fill in the *Customer Name* and enter any other details you'd like to capture.
- 3. When you're satisfied with your entry click Save.

Details such as your customer's taxing scheme, payment terms, method or their specific pricing scheme (eg. if they are a wholesale customer you may want to make their default scheme the "Wholesale Prices" scheme) can be selected here.

How do I create a new vendor record directly?

Though you can certainly create a new vendor record during your order, you may choose to create your vendor record separately before that customer has ordered anything from you.

To do so:

- 1. Click the *Main Menu > Purchasing > New Vendor*.
- 2. Fill in the *Vendor Name* and enter any other details you'd like to capture.
- 3. When you're satisfied with your entry click Save.

How do I create a quote?

Sales quotes are just like a sales order however they don't count against your inventory (i.e. they don't affect your available stock) so this is often a good way to make placeholder orders for your customers. You can create a new Sales Quote by:

- 1. Going to Main Menu > Sales > Sales Quote
- 2. Filling in the Customer info
- 3. Selecting the items you'd like to quote
- 4. Clicking Save

Once you're ready to create a sale from this quote simply click the *convert to order* button at the bottom and you're done!

How do I create a work order directly from the sales order screen?

You will only be able to create work order directly if you don't have enough stock of this item to complete the sale so clients who make their products to order should ensure that they always stock their component items and not their finished product. So if you need to build a work order from the sales order:

- 1. Select the finished product as the item to be sold on the order.
- 2. Right click the red exclamation mark you'll see pop up.
- 3. Choose *Create Work Order* from the dropdown.
- 4. inFlow will open a new tab with a work order to be completed.
- 5. Complete the work order.
- 6. Complete your sale.

How do I create and complete a count sheet?

Sometimes, you'll want to do a physical count of the stock level in your warehouse to check it against the system's numbers. A count sheet can help you do this quickly and once you're done, stock adjustments can be made easily from the same screen to correct discrepancies found during the count.

Please note this is a Premium only feature. To count stock in the Regular or Free editions you'll want to pull an Inventory Summary Report and then use the Adjust Stock feature to adjust any discrepancies.

To Create a Count Sheet:

- 1. Go to Main Menu > Inventory > Count Sheet
- 2. Click the Add Items By... button and choose to add items by Products or by Location.

To add by Products:

vailable Products				Se	lected Products	
Name	Category	ŕ			Name	Category
04275	Die-cast			►	00303A	Die-cast
14232	Battery-Powere	d E	>>		090821A	Die-cast
20101	Close-out		~		12875	Battery-Powered
46101	Close-out	-			10201	Die-cast
67817	Misc		<			
76289B	Close-out					
9400	Die-cast		<<			
9500	Die-cast					
Catalon06	Misc	•	-			

- 1. Select the items on the left that you would like to include in your count and move them to the table on the right using the buttons in the centre
- 2. Once you're satisfied with the list on the right, click Select

To add by Location:

			.
d A	Add by Locatio	n	
Select inv products	entory locations to include i at this location will be added	n a physical/cycle cour I to your count sheet.	nt. All known
Name			Ŧ
Show Ro	om		
NY Ware	house		
Main Wa	rehouse		
Default L	ocation		
(Click to add items to	the count sheet.	
Show	/ All	Add	Cancel

- 1. Select the locations within the window that you'd like to add to the count sheet
- 2. Click Add

Once you have the items in the count sheet you can print it out in order to complete your count. When you're ready to start your count you must click the *Take Snapshot* button to record the inventory numbers you have right now. Keep in mind that this doesn't prevent you from continuing business but as a general best practice we'd recommend against that until you've finished your count.

									7
, LID	🛗 Count Sheet		🛛 🛃 Dashbo	pard × +					
Search	•	D N	ew 🛃 Save 🗃	Preview 👻 🗈 Copy 🔝 Version 🛛 🖞 At	tachment 😠 Sticky 👻			×	С
Sheet# -									
Status -	-					Sheet #			
	Refresh					Started E	late	02/05/2012	
						Complete	ed Date		
heet # 📃 🔻	Status		Add Items By	-		Status		Open	
			Item	Description	Location	System Quantity	Cor Qu	unted antity	
		•	00303A	Army Combat Helmet	Main Warehouse				
			04275	4" Classic Airplane - 3 Piece Set	Main Warehouse				
			090821A	3.75" Military Classics Warship	Main Warehouse				
			10201	1:700 Die Cast Battleship	Default Location				
			12875	Mini-Truck Battery Powered Red	Default Location				
			14232	Mini-Sports Car Battery Powered Red	Default Location				
			20101	1:24 California Highway Patrol	Main Warehouse				
			46101	Alabama 1957 Police Car	Main Warehouse				
			67817	Chevy Series #12	Main Warehouse				
			76289B	Kung Fu Master Action Figure	NY Warehouse				
			9400	Police Basket	Default Location				
			9500	Boat Basket	Default Location				
			Catalog06	2006 Product Catalog	Show Room				
			Catalog07	2007 Product Catalog	Show Room				
		*							
		Cou	inted By	For a "blind count" print bef	ore you click		Take S	Snapshot	
		Rer	narks	this button to see your system	eni quanuty.			djustment	

Once you've finished entering the counted numbers you will see the ability to complete a *Stock Adjustment* based on your counted levels.

🚽 inFlow Inventory - Premium Edition						
Count Sheet	×	📝 Dashboa	rd × +			?
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Sheet # - Status - Refresh					Sheet # Started Date Completed Da	CS-000001 02/05/2012 • ite •
Sheet # 👻 Status		Add Items By	•		Status	In Progress
CS-000001 In Progress		Item	Description	Location	System Quantity	Counted Quantity
		00303A	Army Combat Helmet	Main Warehouse	50 ea	50 ea
		04275	4" Classic Airplane - 3 Piece Set	Main Warehouse	560	561
		090821A	3.75" Military Classics Warship	Main Warehouse	100	101
		10201	1:700 Die Cast Battleship	Default Location	-10	0
		12875	Mini-Truck Battery Powered Red	Default Location	15	14
		14232	Mini-Sports Car Battery Powered Red	Default Location	70	70
		20101	1:24 California Highway Patrol	Main Warehouse	7	7
		46101	Alabama 1957 Police Car	Main Warehouse	0	0
		67817	Chevy Series #12	Main Warehouse	0	0
		76289B	Kung Fu Master Action Figure	NY Warehouse	174	174
		9400	Police Basket	Default Location	-5	0
		9500	Boat Basket	Default Location	0	0
		Catalog06	2006 Product Catalog	Show Room	10	10
	•	Catalog07	2007 Product Catalog	Show Room	9	9
	*					
	Cou	nted By				
	Ren	narks	Click here to comp and make your adj	lete the count ustments.	Sto	ick Adjustment
Save successful				Curre	ent User: Default User	Connected (Locally)

When you've completed the count sheet a record of the change will be made and your count sheet will be saved for later.

Still unsure, or looking for more info?

Have a look at our <u>Count Stock tutorial video</u> for a closer look.

How do I create users in inFlow? Can I restrict what they see/do?

You can create a user ID for each person who will be logging into inFlow, and set their access rights appropriately. Please be aware that while you can add users in the *Regular Edition*, restricting access rights is only available in the *Premium Edition* of inFlow.

🦆 inFlow - General Setting	21	23
Company Users	Users Give multiple people accounts for inFlow and limit their access rights. Require Login every time?	
References		
Doc. Numbers		
<u>↓</u>]† Custom Fields		
Rename Fields	Show All Add Remov	/e
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To add a user:

- 1. Go to Main Menu > Settings > General Settings.
- 2. Click the Users Icon.
- 3. Click the Add button to create a new user
- 4. Enter their name and choose which options you'd like to restrict by un-checking the various modules.
- 5. Click to Save & Close, then again in the General Settings Window.

To adjust restrictions on a user:

- 1. Go to Main Menu > Settings > General Settings.
- 2. Click the Users Icon.
- 3. Double-click the user you want to edit.
- 4. Choose which options you'd like to restrict by un-checking the various modules.
- 5. Click to Save & Close, then again in the General Settings Window.

How do I create/edit a custom document

So you want to add a new type of document to inFlow? Maybe some documents you use are specific to your particular region or industry, or you just want to streamline your process. Good news: you can create a custom document using *Microsoft Words* Mail Merge feature to let you link that document directly to inFlow, though it's important to keep in mind that only purchase or sales related documents are possible. We'll cover three things in this article:

- Making Changes to a Sample Document
- Linking Your Document to a Data Source
- Adding Tags to your Document
- BONUS: some example documents

To begin you'll want to start with one of our sample documents (these are included with your installation). If you're looking for instructions for Word 2003 please see <u>here</u>.

Making Changes to a Sample Document

This is the easiest way to start using custom documents and lets you play with an existing template to see how it works. Remember you'll have to add your company name and details so that they are included on your printed document. **To open a sample document:** 1. Go to *Main Menu > Settings > Print Settings* 2. Choose *Custom Docs* from the icons on the left

Common Hea	der			Sales Doc Footer
Logo			Browse	Per-page Footer
			Clear Logo	End-of-doc Footer
Company Name	ABC Toys Ltd.			
Address	38 Dreamy Street, S	lute 134		Burchasing Das Easter
Cit-	Wendedand	Chailes Drow in a	CA	Purchasing Doc Pooter
Country	USA	 Zip/Postal Co 	de 01678	Per-page Footer
Phone	321-789-5678			End-of-doc Footer
Fax	321-789-5679			
Website				Inventory Doc Footer
Misc. Info	Tax # 123 4567 89			Per-page Footer
				End-of-doc Eacher
				Reports Doc Footer
				Per-page Footer
				End-of-doc Footer
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	Common Hea Logo Company Name Address Cliy Country Phone Fax Email Webaite Misc. Info	Common Header Lop Address Bi Desny Smc 1 Address Bi Desny Smc 1 Oly Wonderdon Outry USA Prone 3217/895/27 Enal Prot 217/895/27 Enal Westle Mack Hol Tar # 12245/7 (9)	Common Header Log Company Name ARC Top Ld. Address Bit Drevey Mere, Subs 134 City Woodewn Subs 134 City Woodewn Subs 134 Prane 227/78/95/79 Enail Westis Mark Into Train 226/78/9 Enail	Common Header Logo Centres Company Ham Ref Tops Ed. Adatas 31 Denay Set Constraints City Woodeed State Strokes Cony Woodeed State Strokes Cony Vity 2 polyheatal Cols Pane 22795477 Feat Enal Enal Enal Website Text 1245678 Enal

3. Click the Add New Custom Doc button.



4. Choose one of four types of documents (eg. To create a Sales Order document choose *sales Order, Header & Line* Items)



5. Click Open Sample.

📌 inFlow - C	ustom Document
Follow the	ustom Document steps below to load the custom document you've created in Word into inFlow.
Step 1:	Click below to custoraize comple document template in Word. Open Sample (See Help)
Step 2:	Save it somewhere, then load it here. Browse
Step 3:	Name your custom document
Once you added whe	finished the above 3 steps and click OK below, this custom document will be en you try to print from a Sales Orders.
	OK Cancel

Microsoft Word will open up the sample document so that you can make changes to the placement of certain items, or the information that's included.

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If you'd like inFlow to show additional information on this document (such as a custom field for example) you'll need to add tags as described in the *Adding Tags to your document* section below. In both cases, you'll need to follow the steps under *Linking your sample document* below.

Linking Your Document to a Data Source

Linking to your data source means you'll know what information inFlow can include on your document and where you want it to be. This is done by tagging once you've followed the steps below but more on that later! This step needs to be followed any time you're going to ADD tags to a document (whether new or one of our samples). If you're just removing tags then you can skip this step and just save your document.

To link your document: 1. Open your sample document as described above. 2. Click the *Mailings* Ribbon and choose *Start Mail Merge*. 3. Choose *Directory* from the list.

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4. Click Select Recipients and choose Use Existing List...

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This will open a window in where you can browse to the correct CSV file. There are four available which can be found in C:Program FilesinFlow InventoryCustomDocument (on a 32-bit computer) or C:Program Files (x86)inFlow InventoryCustomDocument (if your computer is 64-bit).

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SalesEnvelope	29/04/2010 4:08 PM	Microsoft Office Word	97 - 2003 Document	23 KB	
SalesInvoice	29/04/2010 4:08 PM	Microsoft Office Word	97 - 2003 Document		
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Page: 1 of 1 Words: 0				<u> </u>	=_++ .::

Depending on what information you want available you'll choose your file, please see below for a short description of each file, which should help give you an idea of which one you might want to link to:

-Sample_Purchasing_PurchaseOrderLines.CSV: all the available tags from a purchase order including items, pricing, order info etc. You would use this if you were creating your own purchasing invoice.

-Sample_Purchasing_SingleDocument.CSV: order level information like your vendor's address. You might use this if you wanted to have inFlow address your envelopes for sending out your purchase orders.

-Sample_Sales_SalesOrderLines.CSV: all the available tags from a sales order including items, pricing, order info etc. You would use this if you were creating your own sales invoice.

-Sample_Sales_SingleDocument.CSV: order level information like your customer's address. You might use this if you wanted to have inFlow address your envelopes for sending out your invoices.

Now that you've linked your document to that source file you can insert the available fields via the *Insert Merge Field* button. There will be a dropdown list of available tags to add.

Adding Tags to your document

Adding tags lets you choose where something should be placed on your document. Let's say your document is a letter to your customer and you want to call them by their name. In that case it might look something like this:

Sincerly,

Me

This lets inFlow know that you want the customer's name placed directly after the "Dear" within the letter. **To add your tag:** 1. Put your cursor where you'd like the new tag to appear 2. Click *Insert Merge Field*



3. Choose the tag you want from the resulting list. This will place your tag into the document so that inFlow knows where you want that information to be once printed. As an example, you might want to add the item barcode into your invoice as in the example above. When you're finished adjusting the document save it to your desktop (or anywhere you can easily locate it). Now that you've created your custom document you're ready to <u>Use Your Custom Document</u>.

Here are some other sample documents for you

These are document templates that you can import into inFlow. See instruction on <u>how to import</u> <u>custom document templates</u>.

- The inFlow in-program templates: Classic, Clean, Modern
- Documents with Barcodes: Invoice, Price labels
- Receipt (for POS / cash registry)
- Invoice with VAT tax

How do I customize document numbers?

You can control how your document numbers are formatted (and if you need to start from a certain number) by using the *Document Numbers* section of the General Settings window. These numbers will then be assigned to sales orders, purchase orders etc. as soon as you save the order for the first time.

To change your formatting simply:

1. Go to *Main Menu > Settings > General Settings.*

- 2. Choose the *Document Numbers* icon on the left.
- 3. Make your changes.
- 4. Click Save & Close.

How do I delete my product (customer, or vendor)?

You cannot delete products, customers or vendors in inFlow however you can deactivate them so they do not appear in your listing views (unless you're specifically looking for them).

- 1. Open the product record.
- 2. Click the *Deactivate* button in the top toolbar.
- 3. Click Save.

Still unsure, or looking for more info?

Have a look at our tutorial video on <u>Deactivating Products and Cancelling Orders</u> for a closer look.

How do I delete, rename, re-import and export custom documents?

Deleting your document

On occasion it becomes necessary to remove documents you have already imported into InFlow.

To delete a custom document:

- 1. Go to *Main Menu > Settings > Print Settings*.
- 2. Click the *Custom Docs* Icon.
- 3. Select the document you want to delete.
- 4. Click the *Delete* button.

General	Add New Custom Doc	Custom Do	CUMENTS m document or select an existing one	first. Then edit th	ne details of it here.	You can then prir	nt out the documen	nt for
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In this example, you will see that "Bob's Custom Invoice" is the document we wish to be removed. It has been selected above by clicking the icon and once you see the preview you can click "delete" to remove it.

Renaming your document

As with removing the template it sometimes becomes necessary to rename your documents to make them easier to identify within the program.

To rename the document:

- 1. Go to Main Menu > Settings > Print Settings.
- 2. Click the *Custom Docs* Icon.
- 3. Select the document you want to rename.
- 4. Change the name in the *Doc Name* field.
- 5. Click Save & Close.



As you can see in the figure above, we have chosen to rename this template "Wholesale Customer Invoice". Once you're satisfied click "save and close" at the bottom of the window to make the change. The window will close and the existing template which was previously imported will be renamed.

Re-importing your document

InFlow allows you to quickly and easily make changes and re-import the document so you don't have to start from scratch. In order to re-import a document you must first make your changes to that document in word. Open the file in Microsoft Word, make the necessary changes and re-save it.

Now re-import:

- 1. Go to Main Menu > Settings > Print Settings.
- 2. Click the Custom Docs Icon.
- 3. Select the document you want to rename.
- 4. Click the *Re-import* button and locate the document on your computer.
- 5. Click Save & Close.

Exporting your document

InFlow allows you to quickly and easily grab a copy of a previously imported custom document for further editing.

To do so:

- 1. Go to *Main Menu > Settings > Print Settings*.
- 2. Click the Custom Docs Icon.
- 3. Select the document you want to export.
- 4. Click the *Export* button and choose where to save it.
- 5. Click Save & Close.

How do I email a document?

To email a document make sure your regular email client is open. You'll want a PDF copy of your document so first you'll need to create one:

For Orders:

- 1. Open the order you'd like to send.
- 2. Click the Preview button and choose Export from the list.
- 3. You will see Export is now visible in the toolbar. Click the Export button and choose your document from the available list.
- 4. Choose where you'd like to save the PDF file and click Save.
- 5. Open your email client and attach the file you just created.

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For Reports:

- 1. Pull the report you'd like to send.
- 2. Click the Export button and choose what type of file you'd like to save (we recommend PDF).
- 3. Choose where you'd like to save the PDF file and click Save.
- 4. Open your email client and attach the file you just created.

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			SO-00002	Paid	Wall-Mart	11/1/2009

Still unsure, or looking for more info?

Have a look at our tutorial video on <u>Emailing Invoices</u> for a closer look.

How do I export transactions or other data from inFlow?

Exporting transactions from inFlow can be done easily from the Main Menu! Simply:

- 1. Go to Main Menu > General > Export Data
- 2. Choose the type of data you'd like to export (either Sales Orders or Purchase Orders)
- 3. Click *Browse* to choose where you'd like this file to be saved.
- 4. Click Next.

Now that you have an exported file of your transactions, you can import it into your accounting software to analyse it further. If you have exported another type of data it is now available for use elsewhere.

Exporting transactions for a certain time period

It's possible to export orders from a certain time period (for example, the past week) by doing so from the sales order listing view. To filter your orders simply choose the appropriate date range in the filters at the top Eg. Order Date: 6/01/14 - 6/06/14 then click refresh to filter your list. Once you're happy with the list as it appears below you can export using the following steps:

- 1. Right-click on the title line of the table (ie. above the first row of information)
- 2. Choose "Export these sales orders" from the list.
- 3. You will end up with a file that contains all the sales orders for the requested period.

How do I fix common problems with imports?

If your first attempt to import didn't work or you're looking for a little guidance try exporting the type of information that you want to import. To do go go to the Main Menu > General > Export Data and choose the type of data you're looking to import. This can get you a template to use for inputting your data! You can also have a look <u>here</u> for more information on creating your file. However if you've already created your file for import but you're still running into problems, we've collected some common (and easily fixed) problems that users have noticed with imports below. **1. When importing it looks like you have only one column/everything appears together** The result looks something like this and sometimes happens due to your file being saved in the wrong format. Common reasons for this are Excel's penchant for re-saving files as Unicode Text instead of CSV (comma delimited), and European (or French Canadian) operating systems where the delimiter is a semi-colon ";" and not comma ",". First try re-saving your file from Excel by using the "Save as..." option when saving and choosing "CSV (comma delimited)" as your file type at the bottom of the screen as in the example below:

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File name:	inFlow_Product.csv			Click here	e to choose y	our file type
File name: Save as type:	inFlow_Product.csv CSV (Comma delimited) (*.csv)		Click here	e to choose y	our file type

The problem is easily solved by correcting your Excel file.

1. In Excel, click the "Data" tab at the top. 2. Highlight the first column ("Column A") and click on "Text to Column". 3. It will ask you to choose the file type as "Delimited" or "Fixed Width". Choose "Delimited".

in the preview below	set the delimiters your data contains. You can see how your text is affect v.
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Name	
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090821A	
10201	-
40201	

4. On this next screen, check "TAB" and "COMMA" for delimiter types. Hit "Next", then hit "Finish".

5. Re-save your file as a .csv file, just in case... by going to "Save as".

2. I'm getting an error which says, "required fields missing" For every import there are several fields that are required while others are optional. If you're getting an error saying that required fields are missing, first check your required fields to be certain they're included in your file. There are different required fields for each type of data so please see the table below:

Data Type	Required Fields
Customer	Name
Vendor	Name
Product	Item Name/Code
Inventory	Item Name/Code, Location, Quantity
Sales Order	Customer Name, Order Date, Item Name/Code, Quantity
Purchase Order	Vendor Name, Order Date, Item Name/Code, Quantity
Bill of Materials	Finished Item, Componen tItem, Quantity
If you're sure that	at all your required fields are full you may try adding an additional column to

If you're sure that all your required fields are full you may try adding an additional column to your file in which you'll place 1's for each row that contains information. Since we're using CSV, empty cells at the end of a row can sometimes confuse the system so adding this column can correct that issue (you won't be importing it so it will not appear in your database). 3. **My barcode values have changed/rounded up after I saved!**

	Α	В	С	B	$I \equiv \partial \cdot \Delta \cdot \Box \cdot \delta$.00 💉
1	Ite	Cat	Barcode Number			→ .0 ▼
2	40	100	5.42159E+1		alabela anamal I	
3	40	100	5.42156E+1	00	Cu <u>t</u>	
4	40	100	5.42156E+1	Ē	<u>С</u> ору	
5	40	100	5.42156E+1	Ġ	Paste Options:	
6	40	100	5.42156E+1		n.	
7	40	100	5.42156E+1			
8	40	100	5.42156E+1		Paste <u>Special</u>	
9	40	100	5.42156E+1		Insert	
10	40	100	5.42156E+1		Delete	
11	40	100	5.42156E+1		Clear Contents	
12	40	100	5.42156E+1	(=		-
13	40	100	5.42156E+1	1	Quick Analysis	
14	40	100	5.42156E+1		Filt <u>e</u> r ▶	
15	40	100	5.42156E+1		S <u>o</u> rt ▶	
16	40	100	5.42156E+1	*7	Insert Comment	
17	40	100	5.42159E+ <mark>1</mark>		5	
18	40	100	5.42159E+ <mark>1</mark>	0-	Format Cells	
19	40	100	5.42159E+1		Pick From Drop-down List	

If you have long barcode values and they now show 4.12E+11 instead of 41234053958, this is because Excel likes to round your numbers to make them look nicer. To fix the issue, highlight the barcode column, right-click select "Format Cells" and go to "Number". Here, change the decimal from 2 places to 0 places. You should see the number change back to the correct format. Save it, and then do your import. If you re-open your .csv file again after this you'll see that Excel's changed it back to the "neat" version despite what you have saved before. This means unfortunately you'll need to reformat it each time you open your .csv file.

How do I get a copy of the user manual?

You can download a PDF copy of our user manual for inFlow v2.5.1 by clicking here.

How do I get my end-of-year inventory levels etc.?

The regular edition of inFlow inventory includes a Historical Inventory report that will allow you to pull the inventory levels on a selected date.

📌 inFlow Inventory - Premium Edition Trial	the dought to set of gas more on the line	1000			• X
Historical Inve >	Dashboard × +				?-
Filter By H Products - All Products -					^
Category -			D	sge 1/1	
Options Target Date 31/12/2009	Historical Inventory				
>> More Generate Report	ITEM	UNIT COST	QUANTITY	TOTAL COST VALUE	
	00303A Army Combat Helmet	\$0.00	50 ea.	\$0.00	
	04275 4" Classic Airplane - 3 Piece Set	\$2.00	560	\$1,120.00	=
	090821A 3.75" Military Classics Warship	\$0.99	100	\$99.00	
	10201 1:700 Die Cast Battleship	\$0.00	-10	\$0.00	
	12875 Mini-Truck Battery Powered Red	\$10.00	15	\$150.00	
	14232 Mini-Sports Car Battery Powered Red	\$12.00	70	\$840.00	
	20101 1:24 California Highway Patrol	\$15.00	7	\$105.00	
	46101 Alabama 1957 Police Car	\$0.00	0	\$0.00	
	67817 Chevy Series #12	\$0.00	0	\$0.00	
	76289B Kung Fu Master Action Figure	\$0.00	174	\$0.00	
	9400 Police Basket	\$1.50	-5	(\$7.50)	
	9500 Boat Basket	\$0.00	0	\$0.00	
	Catalog06 2006 Product Catalog	\$0.00	10	\$0.00	
	Catalog07 2007 Product Catalog	\$0.00	9	\$0.00	
			980.00	\$2,306.50	
					-
Finished generating report.				Current User: De	efault User

To access it:

- 1. Go to Main Menu > Reports > Report List
- 2. Click into the Inventory Reports section
- 3. Select the Historical Inventory report
- 4. Select the date that you would like to pull and click Generate Report

How do I get my inFlow information into Quickbooks?

Many of our users choose Quickbooks as their accounting program. To that end we often get questions about how to import customers, vendors, sales etc. into inFlow so we thought we'd take a moment to show you where to look for the information you're looking to grab. Quickbooks will also allow you to map the fields that are included in Excel files so that you can import information easily. This can be done for Customers, Vendors, Items and Accounts (the inFlow equivalent is Customers, Vendors, and Products, however please keep in mind that inFlow does not maintain accounts).

Before we start, if you're looking for information on the inFlow side of things (i.e. how to import and export from inFlow) please have a look at these articles: <u>"Import Data into inFlow"</u>, and <u>"Export Data from inFlow"</u>.

To import an Excel file for any of the above into Quickbooks first start the program then go to File > Utilities > Import > Excel (as below) and click "Advanced Import"



This will open a second window in which you may choose your file, the worksheet within that file and whether you're creating a new map or updating an existing one:



Now you can map the fields. You will see the Quickbooks field names on the left and you will be able to choose the correlated inFlow column header from the dropdown list at right:



When you're happy with the information you've selected simply click "save" to complete the import process.

How do I get started with inFlow?

The best way to learn within inFlow is by doing! We have created a <u>Quick Start Guide</u> which should walk you through a basic setup. There are also articles (as listed below) here in the knowledge base that can help you through those steps and in some cases provide further details.

In addition, the <u>inFlow YouTube Channel</u> includes tutorials that should help you get acquainted with the different parts of inFlow and how to use them. If ever you're lost, head to the Support Centre which allows you to search our knowledge base and forum all at once! Not finding what you're looking for? You'll be provided with links at the bottom of the results page to help you get in touch so we can help you solve the trouble you're having and get on with the business of running your business!

Welcome to the inFlow community!

Get Started with inFlow

Overview Get Started Wizard

Setting up your taxes

Creating Your Product

Entering product costs

Entering product prices

Setting up your stock level

Creating a file for import

How To Import Data into inFlow

Creating a customer record and new sales order

Creating a vendor record and a new purchase order

<u>Reports</u>

Dashboard

Backing up and restoring data

Can I try the regular or premium editions before I buy?

How do I give special pricing for wholesale, VIP etc.?

You can set up multiple schemes in inFlow either via the General Settings window (*Main Menu* > *Settings* > *General Settings*) by clicking the *Edit Pricing/Currency* button or via the product record itself.

Sales Info				
Normal Price	\$8.99	=	12.38	% Markup
Retail Price		=		% Markup
Wholesale Price		=		% Markup
Click to add.	Add I	new	Pricing	1 / Currency

From the product record:

- 1. Open the product record.
- 2. Click the Add new Pricing/Currency link in the Sales Info section
- 3. Click into the *Pricing/Currency Name* cell and enter a name for your scheme (eg. Wholesale) then choose the currency if other than your home currency.
- 4. Click Save & Close.

Now that you have a place for your special price you can enter it into the product record and capture a number of prices for the same item. These schemes can later be assigned to different customers so that the system will automatically use the Wholesale prices for wholesale customers etc.

How do I handle customer returns?

From time to time, Customers may need to return items to you. You can easily return these items from the original sales order by switching it to Advanced mode (if you're not already using advanced

mode). Please note: your order MUST be paid for you to be able to process a return.

🚽 inFlow Inventory - Premium Edition						- • ×
Sales Order	🛛 🖉 Dashboard	l 🛛 🗙 🧃 Purchase Order	× +			?
	D New D Save A Dree	ieur - 🕞 Conu - DOVersion I 🖉 M	tachmant 🥅 Stic	las =		¥ Class
Search	a New 🕞 Save 🕞 Prev		tachment 🔬 stic	ку		
Status - Oraș la Prema	Customer Serious Deals	s For You Sales Rep		•	Order#	SO-00004
Customer +	Contact Debra Ignatie	ff Location		•	Date	10/4/2009 -
	Phone 310-555-4932	2			Status	Paid
Refresh	Address + P.O. Box 210 Mountain Vier	w, CA				
Order List the items being returned here. SO-000 being returned, simply click "Autofill	If everything is I" at the bottom.					add shipping
	Item	Description	Quantity	Unit Price	Discount	Sub-Total
	▶ 00303A	Army Combat Helmet	10 set	\$8.99	0 %	\$89.90
	PM-BW01	24" x 750' Sheet of 3/16" Bubble Wrap	5	\$5.00	0 %	\$25.00
	PM-SB03	16" X 14" X 10" Shipping Boxes	1	\$0.50	0 %	\$0.50
	Catalog06	2006 Product Catalog	1	\$0.00	0 %	\$0.00
	*		0			
					Sub-Tot	al \$115.40
	Return Date 1/18/2012	2 • Remarks			State Ta	x \$9.52
					Total	\$124.92
					Fee	\$0.00
					Refunde	ed \$0.00
					Credit	\$124.92
	Auto Fill			Refund in Full		
	Order Oick	Invoice Return	Restock	Simple		
	Pick	Vetuin	Restock	Simple		
Order is shipped and paid!					Curre	nt User: Default User

- 1. If you're in simple mode (only two tabs at the bottom) click the *Advanced* tab to expand your order.
- 2. Click *Return* tab.
- 3. Click Autofill to copy the contents of the original order into this tab
- 4. Remove any items from the list which are not being returned. When you're finished only the items that are coming back to you should be in this table.
- 5. Click *Return in Full* and give your customer their refund.
- 6. Next move to the *Restock* tab and click *Autofill* again. This time the system will only carry over the items you've returned (not your whole order).
- 7. Click Restock.*
- 8. Click *Save* to save your changes.

If you like at this point you can print a credit note:

- 1. Click Preview.
- 2. Select Credit Note from the dropdown.
- 3. Click *Export* from the preview window.

*If the item that is being returned is damaged you can either choose not to restock it (i.e. you would skip step 7 above) or you can return and restock it and then return it to your vendor as outlined <u>here</u>.

How do I handle inventory in multiple locations?

You may have multiple locations where you house your inventory. On the *Products & Inventory* tab you will find (among other things) the *Edit Locations* button where you can set up those multiple locations. To set up a new location:

- 1. Open the General Settings window.
- 2. Select the Products & Inventory tab.
- 3. Click the *Edit Locations* button.
- 4. In this window add your locations to the list (each on its own line) until you are satisfied.
- 5. Click Save & Close.

To transfer items between locations:

- 1. Go to Main Menu > Inventory > Transfer Stock.
- 2. Select the items you'd like to transfer in the main table or by using the Add by Location button
- 3. Select the *To Location* for each item (hint: if they're going to the same place right click and select *Fill Down* to copy that location to each of the rows below).
- 4. Once you're satisfied—enter a Remark if you would like to—click *Transfer*.

There are several places where you may choose to set a default location. For instance if your sales are always fulfilled from your main warehouse, you may wish to set your "system default" to that warehouse. The system default is selected in the *General Settings* window by selecting the correct location from the dropdown beside *Default Location*. If you have activated sublocations, however, you will not be able to set a default sublocation, so please do bear that in mind.

Other ways to set default locations include:

- Setting a default location for a particular product. This will override the system default and mean that when receiving stock, your item will be automatically stocked to this location (if not otherwise specified on the order). The product's default location can be set on the *Extra Info* tab of its product record.
- Setting a default location for the user. This option allows you to set up a default location for your users so that (as an example) users who work out of your retail store have that location automatically chosen on any order they open where your warehouse staff might have the warehouse set as their default. The user default can be set in the *Personal Settings* window (*Main Menu > Settings > Personal Settings*).
- **Customers can also have default locations.** And that can be set in the customer's record. This serves to select that location automatically on the sale when you select that customer however it can certainly be changed during the order if need be.

How do I handle products with different sizes and colors?

We suggest setting up a different product record for each item with a different size and colour. You can use the *Copy* button to duplicate the record and simply change the details which are different (either size or colour). For example:

- 1. Open a new product record and enter the details for a Sm Black T-shirt (Eg. Item Code = SM-TShirt-BLK)
- 2. Click Save.
- 3. Click Copy.
- 4. Change the details in the Item Name and Description which are different for the medium sized shirt (Eg. MD-TShirt-BLK).

Continue this process until you have a different record for each shirt size.

How do I handle returns to vendors?

From time to time, you may need to return items to your vendors. You can easily return these items from the original purchase order by switching it to Advanced mode (if you're not already using advanced mode). **Please note:** your order MUST be Paid in order for you to be able to process returns.

🛃 inFlow Invento	ory - Premium Edition											
	🔰 🐻 Purchase Orc	ler	×		Dashbo	ard ×						(
U												
Search	•) N	ew 🛃 S	Save 🛃 F	Preview 👻 🛅 Co	py 🔻 🛄 Version	n 🔋 🗍 Attachmen	t 🔜 Sticky 🔻			🗙 Clo
Order # •			Ven	dor	Protekt-Sk	ip Inc.	- Locati	on	•		Order #	PO-00003
Status -	-		Cor	itact	Jim						Date	22/09/2009 -
Vendor •	•		Dho	ne	336-555-8	321					Status	Paid
List even If every simply	erythig being returned t (thing is being returned click "autofill" at the bo	nere. ttom.		lor • ess	1 Protekt / Greensbor USA 27408	Avenue o, NC						add shipping
PO-000016	Paid											
PO-000015	Paid			Iten		Description		Vendor Product Code	Quantity	Unit Price	Discount	Sub-Total
PO-000014	Open		Þ	12875		Mini-Truck Battery	Powered Red	0000	50	\$10.00	0%	\$500.0
-0-000013 -0-000012	Open			14232		Mini-Sports Car Bat	tery Powered Red		100	\$12.00	0 %	\$1,200.0
PO-000011	Open			20101		1:24 Calfornia High	way Patrol		15	\$15.00	0 %	\$225.0
PO-000010	Fully Received		*			_			0			
PO-000009	Fully Received											
PO-00008	Paid											
PO-000007	Open											
PO-000006	Paid											
0-000005	Paid											
O-000004	Open										Sub-Total	\$1,925.0
PO-000003	Paid		Ret	urn Date	25/04/2	012 -	Remarks				Total	\$1,925.0
20-000002	Paid										Fee	\$0.0
-0-000001	Paid										Refunded	s0.0
											Credit	\$1,925.0
				A 4 .	C 10				Defe	ad in Park	<u> </u>	
				Auto) HIII	_			Refu	na iñ Full		
			00)rder	O Re	eceive 😑 Pa	iyment 💛 R	leturn 🛛 🔴 Ur	nstock	Simple		

- 1. If you're in simple mode (only two tabs at the bottom) click the *Advanced* tab to expand your order.
- 2. Click Return tab.
- 3. Click Autofill to copy the contents of the original order into this tab

- 4. Remove any items from the list which are not being returned. When you're finished only the items that are coming back to you should be in this table.
- 5. Click Return in Full.
- 6. Next move to the *Unstock* tab and click *Autofill* again. This time the system will only carry over the items you've returned (not your whole order).
- 7. Click Unstock.
- 8. Click Save to save your changes.

If you like at this point you can print a purchase return:

- 1. Click Preview.
- 2. Select *Purchase Return* from the dropdown.
- 3. Click *Export* from the preview window.

How do I handle tariffs charged on my incoming shipments?

The reality of international shipping is that sometimes you will be charged a tariff. inFlow can include that amount in the total cost of your item (placing it in the product record for profit calculations later) if you enter it into the non-vendor costs field on your purchase order. The non-vendor costs field can be found in the bottom left hand corner of your purchase order screen.

In advanced mode it will be found on the *Order* tab, in simple mode it is found on the *Purchasing* tab (as below):

						Sub-Total	\$1,000.24
Due Date	24/01/12	•	Req. Ship Date		-	Freight *	
Payment Method		•	Remarks			Total	\$1,000.24
Taxing Scheme	No Tax	-				Paid	\$0.00
Non-Vendor Costs		-				Balance	\$1,000.24
Currency	US Dollar (\$)	•					
			Cancel Order	Receive & Pay	•		
O Purchasing Adva	nced						

How do I handle taxes on orders?

You can choose the taxing scheme you'd like to apply to your order at the bottom left hand corner of your sales order. To select a taxing scheme simply click into the drop down and choose the correct taxing scheme. If it does not appear in the list you can always add a new scheme by choosing from the drop down instead.

			Click here to choos This will populate t	se your tax from the list. he field at right.	Sub-Total	\$115.40
	Payment Method		temarks		State Tax	\$9.52
	Taxing Scheme Pricing / Currency	CA Tax < Add New > CA Tax No Tax Quebec			Total Paid Balance	\$124.92 \$0.00 \$124.92
	💛 Sales 🛛 Adv	anced	Cancel Order	Complete & Pay		
Finished loading Sales Order - Order # SO-000004					Current U	ser: Default User

To add a new taxing scheme:

- 1. Click the option in the dropdown as above.
- 2. Enter a name for your taxing scheme (something you will recognize as this will be what displays in the dropdown (eg. *CA Tax* as above).
- 3. Next, enter the tax name (eg. State Tax as above)
- 4. Enter the percentage to be charged, for example 7.5%
- 5. If you have a secondary tax rate to apply, repeat these steps for those columns.
- 6. Click Save & Close

How do I hide or show columns?

You can easily hide columns in the listing views (for example the product list or the sales order list).

inFlow	Inventory - Premiu	im Edition								
-			Dashboard							?
Search Item Nar Descript	ne/Code -									
							Right click	at the t	op.	Refresh
Туре	Category	ltem 🍝	Description	Normal Price	Last Vendor	4	Year Model	L.	Manufacturer	Made-in
Stockable	Die-cast	00303A	Army Combat Helmet	\$8.99			Columns Shown		Orca Innovation	Malaysia
Stockable	Die-cast	04275	4" Classic Airplane - 3 Piece Set	\$8.99	Oh-Mega Toy	*	Туре		Pacific Limited	Hong Kong
Stockable	Die-cast	090821A	3.75" Miltary Classics Warship	\$3.99	Oh-Mega Toy	×	Category			
Stockable	Die-cast	10201	1:700 Die Cast Battleship	\$12.99	Oh-Mega Toy	~	Item			
Stockable	Battery-Powered	12875	Mini-Truck Battery Powered Red	\$23.99	Protekt-Ship I	~	Description		Mattel	United States
Stockable	Battery-Powered	14232	Mini-Sports Car Battery Powered Red	\$18.99	Protekt-Ship I	~	Normal Price		Mattel	United States
Stockable	Close-out	20101	1:24 California Highway Patrol	\$30.00	Protekt-Ship I	~	Last Vendor			
Stockable	Close-out	46101	Alabama 1957 Police Car	\$3.99	Richardson G	5	Verr			
Stockable	Misc	67817	Chevy Series #12	\$7.90		Ĵ.	Model			
Stockable	Close-out	762898	Kung Fu Master Action Figure	\$6.99	Oh-Mega Toy	÷.	Manufacture			
Stockable	Die-cast	9400	Police Basket	\$25.00		Ť.,	Manufacturer			
Stockable	Die-cast	9500	Boat Basket	\$12.99		<u> </u>	Made-in			
Stockable	Mac	Catalog06	2006 Product Catalog	\$0.00	Protekt-Ship I		Export contents to CSV			
Stockable	Mac	Catalog07	2007 Product Catalog	\$0.00	Protekt-Ship I		Export these products			
Non-Sto	Packing Materials	PM-BW01	24" x 750" Sheet of 3/16" Bubble W	\$0.00		-		_		
Non-Sto	Packing Materials	PM-SB01	20" X 18" X 12" Shipping Boxes	\$0.00	Proteid-Ship In	IC.				
Non-Sto	Packing Materials	PM-SB02	20" X 20" X 15" Shipping Boxes	\$0.00	Protekt-Ship In	ю.				
Non-Sto	Packing Materials	PM-SB03	16" X 14" X 10" Shipping Boxes	\$0.00	Protekt-Ship In	ю.				
Service	Services	\$10001	Custom Die-Cast Engraving	\$5.00						
Service	Services	510002	Custom Package Printing	\$1.00						

🗧 inFlow Inventor	y - Premium Edition								- • *
	Product	* 🛃 Dashboard	× +	1					(]
Search Item Name/Code Description							Select t Eg. 1st	he column you v column, "Type"	vant to hide. Refresh
Category	ltern 🔺	Description	Normal Price	Last Vendor	Y	ear I	lodel	Manufacturer	Made-in
De-cast De-cast De-cast De-cast De-cast De-cast De-cast Cose-out One-out De-cast De-cast De-cast De-cast Mec Pacting Materials Pacting Materials Services	03303A 04275 04925 10201 12875 14232 20101 14242 20101 14451 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 20101 14452 2010 14452 1445	Any Costa Heint 4 Costa Aplene - Theor Set 3.75° Minor, Cassas: Wards 3.75° Minor, Cassas: Wards 1.70 Cost Cast Bellewine Mino Taok Batery Nevend Field 1.74 Cathron Hytiney Parel Addems 150° Aloca Minor Markon Mark Markon Mark Markon Mar	\$8.99 \$3.99 \$12.99 \$12.99 \$12.99 \$12.99 \$12.99 \$23.99 \$7.90 \$5.99 \$25.00 \$12.99 \$25.00 \$12.99 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$5.00 \$5.00 \$5.00 \$1.00	Oh-Mega Toya Oh-Mega Toya Oh-Mega Toya Noteis Ship Inc. Proteis Ship Inc. Robels Ship Inc. Oh-Mega Toya Proteis Ship Inc. Proteist Ship Inc.		Category Pape Category Jam Description Normal Price Last Vendor Year Modelin Export contents In Export contents In Export these prod	s CSV ucts	Oca Invoton Pedic Linted Matel Matel	Matyas Heng Kong Unted States Unted States
New Product							Current Use	r: Default User Cor	nected (Locally) 😑

To hide a column:

1. Navigate to the list you want to adjust.

- 2. Click the top row of the table and select the column you want to remove from the resulting list.
- 3. The column will now be hidden and there will no longer be a check mark next to the column name.

To show a column:

- 1. Navigate to the list you want to adjust.
- 2. Click the top row of the table and select the column you want to show in the resulting list.
- 3. The column will now be shown and there will now be a check mark next to the column name.

How do I import a vendor list?

First, have a look at the explanation of importing data here (<u>How do I import data into inFlow</u>). When you're ready:

- 1. Click Main Menu then choose > General > Import Data
- 2. Select the *Vendor* data type at the top of the screen.
- 3. Click the *Browse* button to select the file you'd like to import then click *Next*.
- 4. In this screen match the inFlow field name to the right column in your file by selecting it from the drop down list.
- 5. Once you're satisfied with your matches, click Next.
- 6. inFlow will import your Vendors and let you know what has been updated!

How do I import inventory into multiple locations?

The key to importing inventory into multiple locations at once is remembering that you must have a new line for each new location. Let's imagine I have one item (456826 Ceramic Mug) and it's housed in multiple locations. My import file would look like this:

Item Description Location Qty

456826 Ceramic Mug Main Warehouse 40

456826 Ceramic Mug Retail Location 15

456826 Ceramic Mug Overflow 10

The import itself is done the same as when you have only one location:

- 1. Backup your Database to the desktop as described on Pg. 7
- 2. Go to Main Menu > General > Import Data
- 3. Choose *Inventory* as your type of data.
- 4. Click *Browse* to locate the file you'll be using.
- 5. Click Next.

- 6. Select how you'd like inFlow to use the numbers in your file; Replace, Add or Subtract from current numbers.
- 7. Ensure that your columns are matched correctly.
- 8. Click Next.

The system should provide you with a rundown of what has been changed.

How do I import my customer list?

First, have a look at the explanation of importing data here (<u>How do I import data into inFlow</u>). When you're ready:

- 1. Click Main Menu then choose > General > Import Data.
- 2. Select the Customer data type at the top of the screen.
- 3. Click the Browse button to select the file you'd like to import then click Next.
- 4. In this screen match the inFlow field name to the right column in your file by selecting it from the drop down list.
- 5. Once you're satisfied with your matches, click Next.
- 6. inFlow will import your Customers and let you know what has been updated!

How do I import Sales Orders into inFlow?

First of all you will need to create an import file for your sales and if you're not importing from a platform which does that for you the easiest way is to export the data you're looking to import (in this case Sales Orders) from inFlow to use as a template:

Go to Main Menu > General > Export Data and choose "Sales Orders" as your data type.
 Click "Next."

Tada! Now you have a template you can use to create your import file! Simple fill in your order information, but there are a few things to keep in mind:

- Customer information MUST be included in the file and should appear on each line
- Any order information which appears should be on each line as well or inFlow will believe that this line is part of a new order
- Each product on the order should have its own line

You can get an example of an exported sales order file <u>here</u>.

And now it's time for How to import a data into inFlow.

How do I include a shipping address, freight or payment terms?

Shipping can be turned on by clicking the add shipping link in the top right hand corner of your order window (just below order and date).

🗋 New 🛃	Save 🎒 Preview 👻 🐚 Copy	▼ 🗋 Version 🛛 🔘 At	tachment <u> </u> Sticky 🔻)	🕻 Clos
Customer	Budget-Minding Collectibles 🔹	Sales Rep	•	Order #		
Contact	Bob Weiss	Location	-	Date	25/11/11	-
Phone	843-555-1337			Status	Open	
Address •	Box 491 Isle Of Palms, SC USA 29451		Click here to add ship	oping.	add ship	ping

Adding shipping also adds additional fields such as Payment Terms. Once you've added shipping you can control the shipping address as well:

🗋 New 📙	Save 🛃 Preview 👻	🗅 Сору	▼ 🗋 Version 🛛 🚺	Attachment 📐	Sticky 🖪				K Clos
Vendor	Oh-Mega Toys	•	Terms	Net 60	•		Order #		
Contact			V. Order #				Date	25/11/11	-
Phone			Location		•		Status	Open	
Vendor Address	 53 Lancaster Ave. Boston, MA 					Ship-To Address	ABC Toys L 38 Dreamy	d. Street, Suite 134	
	02111	Clic	chere to change sh	ipping address.		no shipping	USA 01678	, CA	

- 1. Click the *Shipping Address* field name.
- 2. Choose the correct address from the resulting drop down.

You will also see fields such as Freight or Requested Ship Dates appear at the bottom of the order and you can select the requested ship date from the drop down or enter your freight charges into the freight field as indicated.

					Sub-Total	\$45.96
Invoiced Date	•	Req. Ship Date	09/05/2012		Freight 🔹	\$4.95
Due Date	-	Reparks		-	Total	\$50.91
Payment Method	•				Paid	\$0.00
Taxing Sche Appear of	once you've added	shipping.			Balance	\$50.91
Pricing / Currency	VITOICEDIC FIEC	Cancel Ord	er Complet	e & Pay 🔹		
 Sales Advance 	ed					

You can also add shipping information on the "ship" tab if running in Advanced mode. There you can register the carrier and their tracking no. if provided.

How do I know how much profit I made for sales during a certain period?

You can find out what your profit was over a certain period by following the instructions for <u>Pulling an</u> <u>End of Day Profit Report</u>. In the case of the end of day report you would be pulling for "today" as indicated below:

rinFlow Inver	ntory - Premium Edition	r Pr ×	🛛 🗾 Dashl	ooard	× +				
Filter By		н	< 1 o	f1 }	🕅 🎒 Print 🔒	Export 🔑 Search 🔒 Zoom	ı ▼		
Customer •		•	_						
Order Date •	Today	-							
Clabus		_							age 1/ 1
Display	Pad	•	SALE Report Print	S OR ≝	DER PR March 06, 2	OFIT REPORT			
Columns	Order Number, Status, Paym	•	ORDER NUMBER	STATUS	PAYMENTMET	HOD CUSTOMER	INVOICE	DATE SALES AMOUNT	GROSS PROFIT
Orientation	Landscape		Orat						
	📀 Portrait		C-35/7	Paid	Carls	Rudget Mading Collection	Tatal	00.00	0.00
Group By	Premark Method		SO-000014	Paid	Cash	Wall-Mart	Cash	\$39.86	(\$9,64)
stoup By	Fayment Method	<u> </u>	SO-000015	Paid	Cash	PedalCar.COM	Sales	\$7 19.70	\$419.70
irst Sort By	Order Number		SO-000016	Paid	Cash	Serious Deals For You	Amount	\$115.40	\$115.40
nor oon by			SO-000017	Paid	Cash	PedalCar.COM	for	\$288.00	\$168.00
hen Sort By		*	SO-000023	Paid	Cash	Serious Deals For You	Today	\$179.80	\$179.80
hen Sort By			SO-000024	Paid	Cash	Budget-Minding Collectibles		\$1,069.35	\$609.35
								\$2,411.10	\$1,483.60
Report Title	SALES ORDER PROFIT RE	PO							
escription			Master Ca						
			\$0-000020	Paid	Master Card	PedalCar.COM	Each of these groupings	\$841.77	\$466.77
			50-000021	Paid	Master Card	Budget-Minding Collectors	serves to calculate the	\$490.88	\$458.88
Less	Add to My Reports		\$0-000022	Paid	Master Card	Budget-Minding Collectibles	total sales amount for	\$125.00	\$117.50
	Aug to my reporta						each type of payment	\$1,407.53	51,043.13
	Generate Report						so you ca check it		
			VISA				against the paperwork		
			SO-000018	Paid	VISA	Wall-Mart	and cash in your till at	\$39.86	(\$9.64)
			SO-000019	Paid	VISA	Wall-Mart	the end of the day.	\$39.86	(\$9.64)
								\$79.72	(\$19.28)
								to on ar	
								\$3,948.45	\$2,507.45
Finished genera	ting report.						Current	User: Default User	Connected (Locally)

If you wanted to pull a report for another period you would change the period from "today" to whatever time period you wanted using the filters indicated at the top of the menu above.

How do I know which of my licenses this computer is using?

So you have a few licenses and can't remember which one is on which computer? To check out which license key is on your computer do as follows:

1. Click START and type "regedit" and hit enter.

2. In the resulting window please go to HKEY_CURRENT_USER > Software > inFlow Inventory.

3. In the right-hand window pane you're looking for the "LicenseKey" and that will tell you the license key you're using on this computer.

Repeat the process on each computer whose license key you need to check.

How do I make my own barcodes?

inFlow doesn't make barcodes but you have a few options for making your own outside of the program. If you would like to create your barcodes from scratch and simple print them on labels yourself you can use something like <u>IDAutomation</u>. For more complex barcoding you may look into one of these options:

- IDAutomation Barcode Label Printing Software
- NiceLabel Express
- Teklynx Label Matrix

How do I make products (or kits) out of raw materials?

You may use the *Bill of Materials* and *Work Orders* to create kits from raw materials. Be sure to have all of your raw materials created as Products within inFlow! Before you can create a kit, you must first set up a bill of materials.

	Component Item	Description	Quantiț	Cost
١.	20101	1:24 California H	2	\$30.00
	46101	Alabama 1957 P	1	\$0.00
*			0	
Tota	al Cost 🔹			\$30.00

To set up your Bill of Materials:

- 1. Open product record for finished/assembled product.
- 2. Click Extra Info tab.
- 3. Select the various components of this item and their quantities in the *Bill of Materials* section in the top right hand corner.

New 🛃 Save 📑 Preview 🔻	ua Copy 🛄 Ve	rsion (Uj A	ttachment 🔙 Sticky 🔻			×	Clo
ssembled By						Order#	WO-000003	
ocation Other Costs						Completed Date	2/28/2012	
						Status	Open	
Components Structure								
ianta 9400 (qty: 1) 								
46101 (qty: 1)		Item		*				
	Q	uantity		*				
				Item	Description	n Quai	ntity	
			•	9400	Police Baske	t		
	Fini	shed	不					
	Pro	ducts						
Add • F	emove							
Remarks						C	ancel Order	
							Complete!	

Once you've set up your BOM you may move on to creating a work order.

- 1. Go to Main Menu > Inventory > Work Order
- 2. Click Add below the Components Structure section
- 3. Choose your finished product and how many of that product you need to create then click OK.
- 4. Once you've added your items click *Complete!*

By completing the Work Order the system will reduce your components and stock to your finished product.

Still unsure, or looking for more info?

Have a look at our Bill of Materials and Work Orders tutorial video for a closer look.

How do I manage rental sales in inFlow?

Some companies provide rental or borrowing services to their clients and like to track the movement of their equipment as well as the rental purchase. To do so you can set up products for your equipment as well as a service item for your rental fee. The process goes a little something like this:

Set up equipment record for each of your items:

- 1. Go to Main Menu > Inventory > New Product.
- 2. Enter the serial or unit number as your item code (eg. Jumping Castle #3).
- 3. Set the inventory level to 1.
- 4. Save the record.



Set up rental fee record for your item:

- 1. Create new Product and enter "Rental Fee" as item code (eg. Jumping Castle Rental Fee)
- 2. Set the product up as a service (so it does not track inventory).
- 3. Save the record.

🚽 inFlow Inventory	/ - Premium Edition						
	Product	Ð					? -
Search Item Name/Code	•	🗋 New 🛃 Save 🖹 Cop	oy 🗋 Version 🛑 Deactiv	rate 🔋 Attachment			🗙 Close
Description Category	Children's Parties	Basic Item Name/Code	Jumping Castle Rental Fee	Pictu	re		
	Refresh	Category	Children's Parties	-			
Category	Item 🔺	Description	Service				
Orlden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties Oxiden's Parties	Craft Table KR #1 Craft Table KR #2 Craft Table KR #3 Craft Table KR #3 Craft Table Rental Fee Jumping Castle #1 Jumping Castle #3 Jumping Castle #5 Jumping Castle Rental	Sales Info Normal Price Retail Price Wholesale Price	Add new Pricing	Costi Costin / Currency / Currency Year Model	ng Info Method	Browse	Clear ventory.
		Product Info	Extra Info	Product Vendors	Order History		
Finished loading Pro	duct - Jumping Castle Rental	Fee				c	Current User: Default User

When you make a sale you would add both items to the invoice- the item as well as the fee- so that when the item comes back to you you can return it without the system trying to have you repay your fee.

🚽 inFlow Inventory - Premium Edition		
Sales Order		?-
Search	🗋 New 🛃 Save 🎒 Preview 🔻 🔄 Copy 💌 🛄 Version 🛛 🖞 Attachment 🔜 Sticky 💌	× Close
Order # •	Customer Jane Doe Sales Ren	Order # SO-000013
Status -	Contact Jane Doe	Date 17/07/2012 -
Customer -	Phone 555-555-5555	Status Paid
Refresh	Address - 15 Main Lane Small Town, ON	
Order #	Canada	add shipping
SO-000001		
SO-000007	Item Description Quantity Unit Price	ce Discount Sub-Total
SO-000010	Jumping Castle #3 1	\$0.00 0 % \$0.00
SO-000012 SO-000013	Jumping Castle Rental	\$250.00 0.% \$250.00
SO-000003	Fee	
SO-000005		
SO-000009		
SO-000004		
SO-000011		
SO-000002		
SO-00008		
00 00000		Sub-Total \$250.00
	Payment Method Remarks	Total \$250.00
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	Pricing / Currency Normal Price -	Balance \$0.00
	Re-open Order Complete & P	ay
	Sales Advanced	
Order is shipped and paid		Current User: Default User
oroon a amppoo uno pálo:		Garrelit User, Delauk User

루 inFlow Inventory - Premium Edition								5	
Sales Order								?	
Search	🗋 New 🛃 Sa	ve 🎯 Preview 👻	🗅 Copy 🔻 🛄 Versi	ion 🔋 🗍 Att	achment 🔜 Stie	:ky 🔻		🗙 Clos	
Order # -	Customer	lane Doe	• Sale	s Ren		•	Order #	SO-000013	
Status -	Contact	lane Doe	Loci	ation		•	Date	17/07/2012 •	
Customer •	Phone	555-555-5555					Status	Paid	
Refresh	Address •	15 Main Lane Small Town, ON							
Order #	l l	Janada							
SQ-000001	L L							add shipping	
SO-000007	Itom	Deperi	otion		Quantity	Lipit Price	Discount	Pub Total	
SO-000010	Item	Descri	Juon		Quantity	OnitPrice	Discount	Sub-Total	
SO-000012	Jumping C	astle #3			1	\$0.00	0 %	\$0.00	
SO-000013	*				0				
SO-000003									
SO-000005									
SO-000009									
SO-000004									
50-000011									
50-000002									
SO-00008	Sub-Total \$0.00								
	Return Date 17/07/2012 • Remarks						Total	\$0.00	
							Fee	\$0.00	
							Refund	ed \$0.00	
							Credit	\$0.00	
	Auto F	Fill							
	Auto I	Fill Pick		Return	Restork	Refund in Full			

This allows you to see who has rented this unit, when it left your inventory and went it was returned (directly from the product record by clicking the movement history tab).

How do I partially ship an order?

So you only have some of the things you need to ship to your client in stock and you'd like to ship them as they come in. Not a problem! If you want to invoice as you ship then you will want to <u>take a</u> <u>look here</u>. But if you plan to invoice once all items have been shipped you'll want to follow the steps below:

1. Create your Sales Order and select the items your customer has ordered.

2. If not already in advanced mode click the *Advanced* tab and then select the *Pick* tab to proceed.

3. Add the items being shipped to your pick list.

4. Move on to the *Pack* tab and click *Autofill*. Only items which have been picked will appear and you can record which box each item has been packed into.

5. Move on to the *Ship* tab and click *Autofill* again. The system should supply a shipping line that includes the boxes you've packed thus far.

6. Click the *Ship* button on that line to ship those items out and when prompted to, "Mark Order Fully Shipped?" click *No*

7. Save your order.

This order will now appear as *In Progress* and when you're ready to ship out another batch of items simply go back to the pick tab and repeat steps 3-7 as many times as necessary to ship all items out. When all the items have been shipped you can either click the *Complete* button on the *Ship* tab to mark the order fully shipped or say *Yes* when prompted by the system. This will move the order to the *Invoiced* stage and you can process payment accordingly!

How do I print a document?

To print a document you will need to:

- 1. Open the order you'd like to print.
- 2. Click the Preview button and choose the document you'd like to preview.
- 3. You will see an example of the document which has been created from the order you've opened (in this care an invoice).
- 4. Click the print button along the top of the preview window.



To print directly from the sales order window simply:

- 1. Open the order you'd like to send.
- 2. Click the *Preview* button and choose *Print* from the list.
- 3. You will see *Print* is now visible in the toolbar.
- 4. Click the now visible *Print* button and choose your document from the available list (in this example invoice).

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rder	* 🗷	Dashboard	* (+			
•	🗋 New 🛃 S	Save 🛃 Prev	iew 🖓 📄 Copy	🕶 🕦 Version 🛛 🖉 A	ttachment 📐	
	Customer	PedaS	ales Order	Sales Ren		
•	Contact	Doug	ick List	Click here	ick here and oose "Print" om the list	
•	Phone	800- In	voice	choose "F		
fresh	Address -	492 R #12	eceipt		ют.	
.		High USA 🖌 P	review			
		6003 P	rint			
		E	xport			
	Item		Description		Quantity	
	▶ 12875		Mini-Truck Battery			
Going forward the print button will remain available for you to use until you switch it again (to Preview or Export).

There are many documents you can print, here's a quick list of where to look:

- From Sales Orders: Sales Orders, Pick Lists, Invoices, Receipts, (when shipping is activated) Box Content Lists, Packing Slips.
- From Purchase Orders: Purchase Orders, Receiving Notes, Purchase Invoices.

How do I print to my custom template?

To print a custom document you will need to:

- 1. Open the order you'd like to print.
- 2. Click the *Print/Preview/Export* button and choose the custom document you'd like to print (it should be listed below your other docs).
- 3. You will see an example of the merged document in a newly opened Microsoft Word window.
- 4. Click to print from here.

How do I re-activate products?

To reactivate a product that you previously deactivated:

🚽 inFlow	Inventory - Premium Edition								
	< ▷ 📋 Product Cus	sto ×	🗾 Dashboard 🛛 🗙	🐒 Sales	Order	× 📕 Produ	ict ¹	Ð	? •
Searc	h								•
Item Na	ame/Code -								
Catego	rv -								
Show	· Januation								
GHOW	Chow								•
	 Show Nome/Code 								Refresh
Active	T Description	•	Description	Normal Price	Last Vendor	Year	Model	Manufacturer	Made-in
	St Type		Mini-Truck Battery Powered Blue	\$23.99	Oh-Mega Toys				
	Category								
	Price From								
	Price To								
	Barcode								
	Vendor								
	rear								
	Model								
	Manufacturer Mado in								
	Add								
	Remove	J							
Finished	loading Product - 12876							Conne	cted (Locally) 🛑

- 1. From the Inventory module, choose the product list.
- 2. Click one of the filter items with your left mouse button and choose "show" from the drop down list.

- 3. Choose to "Inactive" (to see all products regardless of if they're active or inactive, choose "Show All" instead)
- 4. Double click the product to be reactivated.
- 5. Click the Activate button in the toolbar to reactivate it.

Reactivating customers and vendors also works in the same fashion from their respective lists.

How do I re-open a Purchase Order?

If you need to make changes to or fix an order you've already completed, never fear! You can easily re-open the order and make adjustments to the information.

To re-open an order:

- 1. Go to the order you want to change.
- 2. If you're in simple mode, click *Re-open Order*. If you're in advanced mode, go to the *Order* tab and click *Re-open Order*.

Any changes made by this order will now be reversed (i.e. items that you've received will be removed from your inventory. You will have to re-complete the order as you make your changes.

How do I recover my inFlow data from a computer that's crashed?

If your computer that was previously running inFlow stopped working for some reason, but you still have access to the hard drive, you might be able to recover your inFlow data, even if you didn't explicitly make a backup beforehand, by looking to see if inFlow automatically made a backup file. PLEASE NOTE: If you're not able to see the folders outlined below please follow these steps to show hidden files/folders: Windows XP, Vista, Windows 7, Windows 8. Here's how: Option 1: Try Using Auto-Backups Look for automatically created backup files. Browse to the following directory: Windows XP or Server 2003: C:\Documents and Settings\All Users\Application Data\inFlow Inventory **Vista**, **Windows 7**, **Server 2008 R2 or Windows 8**: C:\ProgramData\inFlow Inventory There you may see some files that are named something like inFlow_autobak_yyyy_mm_dd_hh_mm.ifi These are automatically created backup files, tagged with the date of the backup. You can copy these files to a safe location and then use Restore Data on a new installation of inFlow to revert to this database. Please note that any information entered since that last backup will be lost. Option 2: Try using the database files directly If option 1 didn't work, there is one more possibility. Please make a copy of the following 2 files: Database File: Windows XP or Server 2003: C: \Documents and Settings\All Users\Application Data\inFlow Inventory\inFlow.mdf Vista, Windows 7, Server 2008 R2 or Windows 8: C:\ProgramData\inFlow Inventory\inFlow.mdf Database Log File Windows XP or Server 2003: C:\Documents and Settings\All Users\Application Data\inFlow Inventory\inFlow_log.ldf Vista, Windows 7, Server 2008 R2 or Windows 8: C:\ProgramData\inFlow Inventory\inFlow log.ldf If you're reinstalling inFlow, you can uninstall/reinstall it. After that, try loading inFlow; if you still see your data there, then you're done!

Otherwise, continue on with restoring the data. To restore your old data, start by stopping the SQL Server service, as follows: 1) Open the Services window. Windows XP, click Start \rightarrow Run \rightarrow type services.msc Vista or Windows 7, click Start \rightarrow type services Windows 8, hit Windows Key + R \rightarrow type services 2) Scroll to SQL Server (INFLOWSQL) and click Stop to stop the service. (Leave this window open for now.) 3) Copy the two files that you made a backup of into the corresponding folder on the new machine: **Windows XP or Server 2003:** C:\Documents and Settings\All Users\Application Data\inFlow Inventory **Vista, Windows 7, Server 2008 R2 or Windows 8:** C:\ProgramData\inFlow Inventory 4) Restart the service by going back to the Services window you opened and click Start. Now your data should be restored. Open up inFlow on the new machine and take a look!

How do I save my report settings?

You can save changes you've made to certain reports by clicking the *More* link within that report and choosing to *Save to My Reports*. This will allow you to go back later and re-use these settings later when you need to make changes.

How do I search for something?

inFlow's listing views will help you find the order, product etc. that you're looking for. There are many different types of lists and the one you'd like to choose will depend on what you're looking for. For instance, if you're looking for a certain product you'd want to have a look at the "product list" (via *Main Menu > Inventory > Product List*).

Vou can control what you can in the list using the Conroh contian at the to	
YOU CAN CONTROL WHAT YOU SEE IN THE JIST USING THE SEATCH SECTION AT THE TO	nn.
Tod our control what you see in the list doing the bearen section at the to	υp.

🛃 inFlow Inver	ntory - Premium Edition				
-	🕑 📕 Product	* 🗾 Dashb	oard × +		
Search					
Item Name/C	ode .				
Description	•				
Category	-				
					Ref
Туре	Category	Item	Description	Normal Price	Last Vendor
Stockable	Die-cast	00303A	Army Combat Helmet	\$8.99	
Stockable	Die-cast	04275	4" Classic Airplane - 3 Piece Set	\$8.99	Oh-Mega Toys
Stockable	Die-cast	090821A	3.75" Military Classics Warship	\$3.99	Oh-Mega Toys
Stockable	Die-cast	10201	1:700 Die Cast Battleship	\$12.99	Oh-Mega Toys
Stockable	Battery-Powered	12875	Mini-Truck Battery Powered Red	\$23.99	Protekt-Ship Inc.
Stockable	Battery-Powered	14232	Mini-Sports Car Battery Powered Red	\$18.99	Protekt-Ship Inc.
Stockable	Close-out	20101	1:24 California Highway Patrol	\$30.00	Protekt-Ship Inc.
Stockable	Services	23988432099	Here is another description	\$0.00	
Stockable	Services	39459028742	This is my description	\$0.00	
Stockable	Services	4275		\$8.99	
Stockable	Close-out	46101	Alabama 1957 Police Car	\$3.99	Richardson Quick Liquidation
Stockable	Misc	67817	Chevy Series #12	\$7.90	
Stockable	Close-out	76289B	Kung Fu Master Action Figure	\$6.99	Oh-Mega Toys
Stockable	Die-cast	9400	Police Basket	\$25.00	
Stockable	Die-cast	9500	Boat Basket	\$12.99	
Stockable	Services	cases		\$20.00	Protekt-Ship Inc.
Stockable	Misc	Catalog06	2006 Product Catalog	\$0.00	Protekt-Ship Inc.
Stockable	Misc	Catalog07	2007 Product Catalog	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-BW01	24" x 750' Sheet of 3/16" Bubble Wrap	\$0.00	
Non-Stocked	Packing Materials	PM-SB01	20" X 18" X 12" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-SB02	20" X 20" X 15" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-SB03	16" X 14" X 10" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Contine	Consistent	C10001	Custom Dis Cost Economica	e5.00	

Changing what appears in the listing views

The filters at the top control what you see in your list below.

To change what is in the list simply:

- 1. Click into a filter box at the top
- 2. Enter the value you want to use to filter your items (eg. select a category from the dropdown).
- 3. Click Refresh.

Now your list will consist only of items which meet the criteria in your filters.

To change the filters you're using:

- 1. Click the filter title; you should see a dropdown appear.
- 2. Select the replacement filter from the list

To add or remove a filters:

- 1. Click the filter title; you should see a dropdown appear.
- 2. Select add or remove (whichever you would like to accomplish) from the dropdown.

You can quickly clear all your filters to start over by right clicking the *Refresh* button. Yes, it's that simple!

How do I see the movement or transaction history?

inFlow automatically tracks any changes to your stock, both within the product record itself and for the purpose of reports and historical data. There are a number of ways you can see movements within your system but the most common are for a particular product, or for the system as a whole.

To see the movement history of a single product:

- 1. Go to Main Menu > Inventory > Product List.
- 2. Double click to open the item you want to check.
- 3. Click the *Movement History* tab and you will see the most recent changes to that item and which actions they are tied to (i.e. sales order, shipping etc.).

To see only orders for that product click the Order History tab instead.

To see the movement history of all items in your system:

1. Go to Main Menu > Inventory > Movement History.

In this window you can filter to show a particular location or item, even to only see certain transaction types.

How do I set up custom fields?

These can be used to capture information that the system doesn't natively track which you may wish to keep in your records for analysis or later reference.

To use custom fields simply:

- 1. Go to Main Menu > Settings > General Settings.
- 2. Choose the *Custom Fields* icon on the left.
- 3. Select the correct tab (i.e. Sales = Customers, Sales Orders) according to where your custom fields should be.
- 4. Enter your field names.
- 5. Click Save & Close.

How do I set up included sales tax (included tax price in body of receipt)?

You may need to show your product price (including tax) in the body of the invoice but show the taxes applied at the bottom. We're aware that inFlow currently doesn't have great support for this, and offering a built-in solution is on our wishlist. In the meantime, here's a suggestion that you might be able to use to set up the taxes included.

Let's look at a pair of shoes which are priced at \$50.00 AUD but to show what tax is included you will apply a negative tax as well as a positive tax (so that your total isn't ultimately affected).

To do so:

- 1. Go to *Main Menu > Settings > General Settings* in the *Pricing & Tax* tab.
- 2. To edit your taxes click the Edit Taxing Schemes button
- 3. In this window you will set up a taxing scheme where the first tax is a negative and the second is a positive percentage (as indicated below).*

J	Tavias Calus									
Taxi	I axing Schem ing Schemes are differen	TES It types of taxes you	charge in differen	t situations, e.g.	when shipping to	other locations v	vith different tax	ing schemes.		
	Taxing Scheme Name	Primary Tax Name	Primary Tax Rate	Secondary Tax Name	Secondary Tax Rate	Compound Secondary Tax On Primary	Tax On Shipping	Preview		
►	No Tax		0 %		0 %			Sub-Total	\$100.00	
	Australian Tax	Tax Included	9.0909 %	Tax 2	-9.0909 %			Freight	\$20.0	
*								Total	\$120.00	
	Show All									
							S	ave & Close	Cancel	

*There, however, a trick to setting this up since in the case of this percentage, the math works out such that it is not the same as the sales tax you will be charging. To that end you will need to enter 9.0909% instead of 10% as shown above.

The second stage of set up involves setting up a custom document and you can create a custom document that shows only the positive tax next to "Tax Included". This way, your final invoice shows the tax included prices and the amount of tax included, as below:



In this case, as above, you can see that there was \$5.00 of tax included in the posted retail price of the shoes but the price is not reduced in the body of the invoice. By using this method you can show your customer the price they were quoted while still including the necessary tax notation below. Keep in mind that you WILL see the second tax within the program and on the in-program documents so it's important to use a custom document to remove this additional info.

We've prepared a sample custom document that works this way. You can download it at http://www.archonsystems.com/support/tax_included_receipt.doc

You can import this as a custom document into inFlow and try it out. More info on how to set up custom documents:

https://onpremise.inflowinventory.com/software-support.aspx#/article/21093266/how-do-i-create-acustom-document

Were you looking for a way to include the pre-tax price on your order? If so please see here: <u>https://onpremise.inflowinventory.com/software-support.aspx#/article/20992106/how-do-i-set-up-included-sales-tax-pre-tax-price-in-body-of-receipt</u>

How do I set up multi-user mode manually?

If you run into a problem when running the switch to multi-user mode wizard, then it's still possible to switch to multi-user mode manually without running this wizard successfully. Here's how.

1. Ensure that SQL Server is set to allow remote connections and the services are configured properly.

a) Run SQL Server Configuration Manager. On Windows XP, click Start, Run, and type sqlservermanager.msc. On Vista/Windows 7, click Start and type sqlservermanager.msc. On Windows 8, hit the Windows Key + R, type sqlservermanager.msc.

b) Open up SQL Server 2005 Network Configuration, Protocols for INFLOWSQL. Ensure that Named Pipes and TCP/IP are enabled.

c) Open up SQL Server 2005 Services. Right click SQL Server (INFLOWSQL) and select Restart.

d) Ensure that the SQL Server Browser service is listed and is Running. If not, right click it and select Start.

e) Ensure that both the SQL Server (INFLOWSQL) and SQL Server Browser services are set to start mode Automatic. If not, right click, select Properties, and under the Service tab, set Start Mode to Automatic.

2. Set your server computer firewall to allow incoming connections to SQL Server (INFLOWSQL) and SQL Server Browser from other computers.

The instructions below are for Windows Firewall. If you are using another program as a firewall, you will need to adapt these instructions.

a) On Windows XP, click Start, Settings, Control Panel, then select Windows Firewall. Click the Exceptions tab.

On Windows Vista/ Windows 7, click Start, then type and select Windows Firewall. Then click Allow a program through Windows Firewall.

On Windows 8, hit the Windows key + X, and then hit P to bring up the Control Panel. Select System and Security, and then Windows Firewall > Allow an App or Feature through Windows Firewall.

b) Run SQL Server Configuration Manager. On Windows XP, click Start, Run, and type sqlservermanager.msc. On Vista, click Start and type sqlservermanager.msc. On Windows 8, hit the Windows Key + R, type sqlservermanager.msc.

c) In SQL Server Configuration Manager, under SQL Server 2005 Services, right click SQL Server (INFLOWSQL) and select Properties. In the Service tab, look at the value under Binary Path, not including the part at the end: -sINFLOWSQL.

d) From Windows Firewall, click Add Program, Browse, and select the program you found in step 2c.

e) Repeat steps 2c and 2d, except select the service SQL Server Browser this time.

3. Set your firewall to allow outgoing connections from inFlow.

If you're using Windows Firewall (the default firewall that comes with Windows XP SP2 and Windows Vista) or no firewall program, you shouldn't need to do anything. If you're using some other program as a firewall, you may need to set it to enable outgoing connections from inFlow on each computer with inFlow installed.

4. Look up the Server Password in the server computer's registry

a) Go onto the server computer. On Windows XP, click Start, Run, and then type regedit. On Vista/Windows 7, click Start, type and select regedit. On Windows 8, hit the Windows Key + R, and then type regedit.

b) Browse to the following registry key: HKEY_LOCAL_MACHINESOFTWAREinFlow Inventory

c) Look up the password in the value of SQLPwd. (Note that if you have previously changed the

database password, this may be inaccurate.) Go back to inFlow, and try again with the new password.

5. Determine the Server Name

This should be the hostname of the server computer. If you don't already know this, here's how you can look it up:

a) Go onto the server computer and open a command prompt. On Windows XP, click Start, Run, and then type cmd. On Vista, click Start, type "command" and then select Command Prompt. On Windows XP, hit Windows Key + X, hit A, and then click Yes for permission to run command prompt.

b) In the black command prompt window that pops up, type hostname. It will then give you the name you should use for the Server Name.

6. Try using the other client computers to connect to the server computer.

Note: You don't need to run Switch to Multi-User mode on the Server again if you've done all the steps above. Try going onto a client computer, loading inFlow, and connecting into the server by selecting Main Menu (round button at the top left) \rightarrow Settings \rightarrow Multi-User Mode \rightarrow Client.

Use the following information:

Server Name: The hostname of the server computer that you looked up in step 5. Server Password: The password you looked up in step 4

How do I set up my prices based on markup?

inFlow can calculate your prices for you based on your cost information. Once your item has a cost entered (either calculated by inFlow or entered manually into the cost field) you can enter your markup percentage in the *Sales Info* section on the left.

Sales Info				
Normal Price	\$12.99	=	333	% Markup
Retail Price		=		% Markup
Wholesale Price		=		% Markup
	Add r	iew	Pricing	/ Currency

To do so:

- 1. Open the product record.
- 2. Click into the *Markup* field in the *Sales Info* section and enter your markup percentage.
- 3. Hit tab. inFlow should calculate your new price.

How do I set up secondary taxes?

You may have more than one applicable tax (federal and provincial taxes for example) so you'll need to set up a secondary tax in the system.

🚽 inFlow - General Setting	IS					×
	Company Info	Products 8	Inventory	Pricing &	Тах	
Company						1
<u>A</u>	Pricing					
<u></u> ۲	Currency		US Dollar (\$))	-	
Users	Currency Exchange R	ates	Edit Currer	ncy Conversi	on	
	Default Pricing / Curre	ency	Normal Price		-	
Deferences	Pricing / Currency		Edit Prici	ng/Currenc	4	
- The second sec	Use Current Cost		Click here to edit taxing schemes.			
29	Tax					-
Doc. Numbers	Show Taxes		✓			
1t+	Default Taxing Schem	e	No Tax		•	
Custom Fields	Taxing Scheme		Edit Taxi	ing Schemes	;	
Ba	Default Product Tax C	ode	Taxable		•	
APC	Product Tax Codes		Edit Prod	uct Tax Code	s	
Rename Fields	Show Product Tax					
\odot	Show Secondary Tax		~			
Auto Backup				_		
			Save &	Close	Cancel	

To make secondary taxes available:

- 1. Click the *Main Menu > Settings > General Settings*.
- 2. Select the Pricing & Tax tab.
- 3. Check the *Show Secondary Tax* option.
- 4. Click the *Edit Taxing Schemes* button.
- 5. In this window you can add your secondary tax
- 6. Click Save & Close.
- 7. Click Save & Close in the General Settings window.

How do I tax some things on my order and not others?

You can charge tax on some items and not others by using your Product Tax Codes to show which items should be taxed. By turning on your product tax codes you will see an extra column in the sales order window that shows which items on your order are being taxed.

To turn on Product Tax Codes:

- 1. Click the *Main Menu > Settings > General Settings*.
- 2. Select the Pricing & Tax tab.
- 3. Check the Show Product Tax option.

🤞 in	Flow - General Setting	gs								
		Company Info	Products 8	k Inventory	Pricing & Tax					
	Company									
Product Tax Codes										
Proc	duct Tax Codes are cod mpt.	es for showing which product	s are taxable a	nd why, e.g. som	e products may be tax					
	Name	C	Code	Primary Tax Applicable	Secondary Tax Applicable					
•	Taxable	Ti	axable	V						
	Non-Taxable	N	on-Taxable							
*										
					Show All					
				Save & Clos	e Cancel					
	Auto Backup									
· · ·	aco bacitap			Save & C	lose Cancel					

To edit your Product Tax Codes:

- 1. Click the *Main Menu > Settings > General Settings*.
- 2. Select the *Pricing & Tax* tab.
- 3. Click the *Edit Product Tax Codes* button.
- 4. In this window you can set up different types of products (i.e. non-taxable vs. taxable etc.)
- 5. Click Save & Close.
- 6. Click *Save & Close* in the *General Settings* window.

In the product record you can set the items tax code to indicate which tax to apply to it when adding it to an order. In the example below we've included one of all four ways that you can set up the product tax codes:

📌 inFlow Inventory - Premium Edition									
Sales Order	×	🗾 Dasl	hboard × +						?
Search	New	🛃 Save	🛃 Preview 👻 🖬 Copy	- D Ver	sion 🛛 🖉 Att	tachment 👿 S	ticky 👻		🗙 Close
Order # - Status - Open, in Progress - Customer - Refresh	Custor Contac Phone Addres	mer Peda t Doug 800-5 is • 492 1 #123	ICar.COM	Sa	les Rep		•	Order# Date Status	S0-000013 22/05/2012 • Open
Order# -		Highl USA 6003	and Park, IL 5						add shipping
SO-000013 SO-000011 SO-000009	Ite	əm	Description		Quantity	Unit Price	Discount	Тах	Sub-Total
SO-000004	00	1303A	Army Combat Helmet		1 set	\$8.99	0 %	Non-Taxable	\$8.99
	04	275	4" Classic Airplane - 3 Pier	e Set	1 quad	\$8.99	0 %	GST only	\$8.99
	09	0821A	3.75" Miltary Classics Wa	ship	1	\$3.99	0 %	PST only	\$3.99
	▶ 12	875	Mini-Truck Battery Powere	d Red	1	\$23.99	0 %	Taxable	\$23.99
	*				0			T	
	Payme	ent Method Scheme	No Tax	•	Remarks	Her can OS PS Tax	re we see an exa apply the tax: n-Taxable (i.e. n T only (primary 1 T only (seconda iable (i.e. both ta	ample of all for o tax) tax only) ry tax only) ixes)	ur ways we 6
	Pricing) / Currency	Wholesale Price	•	Cancel Orc	ler Ci	omplete & Pay	Balance	\$45.96
	O Sale	s	Advanced						
Save successful								Curr	ent User: Default User

How do I track multiple companies in inFlow?

Single-User Mode

Here's how we recommend you go about it if you're just using inFlow on one computer. Use the Backup and Restore features to Save and Load multiple databases, each one corresponding to a separate company:

To set up Company 1:

- 1. Enter your information into the brand new database (company info, products, vendors, customers etc.) Once your setup is done...
- 2. Go to Main Menu > General > Backup Data
- 3. Save this Database with the name of the company in a safe location on your computer (take note of where).
- 4. Click Main Menu > General > Reset All Data to create a new database.

Setting up Company 2:

- 1. Enter your information for your second company into the brand new database (company info, products, vendors, customers etc.). Once your setup is done...
- 2. Go to Main Menu > General > Backup Data
- 3. Save this Database with the name of the company in a safe location on your computer (take note of where).

To return to your Company 1 information:

- 1. Go to Main Menu > General > Restore Data
- 2. Select the "Company1.ifi" file you created earler.

When you're done you'll want to remember to backup as you did above. Once again you want to pay special attention to where this database is saved and its name.

Essentially what this process does is make sure that InFlow is looking in the right place for the data it needs to use. For example, if Company 1 is attempting to sell a bicycle to your customer, it wouldn't make sense to access Company 2's records in order to do so. You will need to be sure that you are accessing the correct database each time you enter the program. Backing up your data is also important as you will likely be switching back and forth quite often.

Multi-User Mode

If you're using inFlow in multi-user mode and have multiple computers, the above approach isn't ideal since backup & restore affects all users. A better solution in this case is to set up multiple computers as inFlow servers; one for each company.

To set up Company 1:

- 1. Install inFlow on the computer.
- 2. Go to Main Menu > Settings > Multi-user Mode

- 3. Click the "Server" button to set this computer up as a server
- 4. When it's done the program will give you the connection info you'll need to hook up your other computers. You can click the save this file for use on other computers and please save it using the name for Company 1

To set up Company 2:

1. As above, and please save the connection settings file as Company 2.

To have your clients connect to the system:

- 1. Each of the client computers must set up multi-user mode (as a client)
- 2. Copy the connection settings files you've created to the desktops of each of your client computers.
- 3. From the client computer select the correct connection file from their desktop and double click it.

inFlow should load with the connection to the appropriate database made.

How do I track my sales profits?

When completing a sales order, inFlow records not only the price your customer is paying but the cost listed in your product record at the time of the order. This allows the system to provide you with accurate profit levels when you pull a report or look at the dashboard.

To pull a report:

- 1. Click the *Main Menu*, then go to *Reports > Report List*
- 2. In the Sales Reports section click Sales Order Profit Report
- 3. Click Generate Report.

To set the dashboard to show your profit:

- 1. Click the Main Menu, then to General > Dashboard
- 2. Within the Dashboard click the *Lines* drop down and ensure that *Sales Profit* is selected.

How do I track specific locations like aisle numbers, bin numbers, etc.?

Sublocations will allow you to specify a specific aisle number or bin number and give you more specific control over where your products can be found. To set up sublocations:

- 1. Go to *Main Menu > Settings > General Settings*.
- 2. Choose the Products & Inventory tab.
- 3. Check the *Show Sublocations* option.
- 4. Click Save & Close.

Inventory

	Location	Sublocation	Quantity
►	Default Location	Aisle 64	20
*			
Qua	antity on Hand		20

Now you will see sublocations as an additional column anywhere you can specify location (product records, receiving, picking etc.). To specify a sublocation simply click into the sublocation cell and type its name (eg. Aisle 64).

How do I transfer my database to another computer?

There are five major steps to transferring your database:

- 1. backing up your data
- 2. identifying your license key so you can transfer it
- 3. downgrading your old computer (removing the license key)
- 4. activating your new computer
- 5. restoring your data

Backing up your Data

- 1. On your old computer (current) open inFlow
- 2. Go to the Main Menu > General > Backup Data
- 3. This will make a copy of your database which can be saved to an external drive or USB key.

Identifying your license key

- 1. Click Start, type in "regedit" and press Enter. (on Windows XP, you'll need to go to Start > Run before you can type)
- 2. Scroll to HKEY_CURRENT_USER > Software > inFlow inventory
- 3. In the right-hand window pane look for the item that says License Key. That will tell you the license key that is being used on this computer. Copy and paste it or write it down.

Downgrade your old computer (remove the license key)

- 1. On your old computer (current) go back to inFlow and go to *Main Menu > Settings > Downgrade to Free.*
- 2. Click Okay.

Activate your new computer

- 1. On your new computer install inFlow.
- 2. Open inFlow and go to Main Menu > Settings > Upgrade.
- 3. Choose "I already have a license key..."
- 4. Enter the license key from when you copied it down before.
- 5. Click Next.

Restore your Data

- 1. On your new computer go to Main Menu > General > Restore Data
- 2. You will be warned that your current database will be cleared. Click , Proceed.
- 3. Select the backup you made during the first stage of these instructions
- 4. Click Next.
- 5. inFlow will reload and once it comes back you should see your information appear in this copy.

How do I transfer my stock?

Transferring stock is quite simple and can be managed from the *Transfer Stock* window in the system.

To transfer your stock from one location to another:

- 1. Go to Main Menu > Inventory > Transfer Stock
- 2. Select the items you'd like to transfer in the main table
- 3. Select the location you're transferring from (if the system has supplied a location other than the one you're planning to use)
- 4. Select the location you're transferring to
- 5. Once you're satisfied—enter a remark if you would like to—click *Transfer*.

	ltom	Description	From Location	To Location	Quantity
1	llem	Description	From Location	To Location	Quantity
0	04275	4" Classic Airplane - 3 Piece Set	Main Warehouse	Default Location	
▶ 1	10201	1:700 Die Cast Battleship	Default Location	Show Room	
*					
	1				

How many customers and products can I store in my database?

The Free Edition allows you to track a combined total of up to 100 customers and products (eg. 40 products and 60 customers, or 50 of each). The Regular and Premium Editions allow you to keep an

unlimited number of products and customers. All three editions allow you to have an unlimited number of other entities like Sales Orders.

How To Import Data into inFlow

Importing

Now that you have your import file you're ready to go ahead with your import. But first, it's important to backup your database. This is done so that you can restore to your backup after the import (thereby wiping the changes you made) if you need to.

To Backup:

- 1. Click Main Menu then choose > General > Backup Data
- 2. Select the location you'd like to save the backup.
- 3. Click Next.

To import:

- 1. Click Main Menu then choose > General > Import Data
- 2. Select the Products data type at the top of the screen.
- 3. Click the Browse button to select the file you'd like to import then click Next.
- 4. In this screen match the inFlow field name to the right column in your file by selecting it from the drop down list.
- 5. Once you're satisfied with your matches, click Next.

🚽 inFlow - Import Data		- • •
📀 Import Data -	Product	
Please choose the correspo	nding column for each field, or leave it blank.	
Basic		<u> </u>
Item Name/Code	Name -	
Category	Name	
Туре	UnitPrice	=
Description	Cost	
Default Location Qty	•	
Tax Code	•	
Default Unit Price	UnitPrice -	
— Purchasing Into		
Costing Method	-	
Manual Cost	-	
Moving Average Cost	Cost -	
Last Purchase Cost	-	
Last Vendor	•	
Vendor Product Code	•	
V I D:		•
	< Previous Next	> Cancel

inFlow will import your products and let you know what has been updated! If your update didn't go according to plan and you'd like to reverse it please use the backup you made before your import.

To Restore Data:

- 1. Click the Main Menu button > General > Restore Data.
- 2. Select your backup file.
- 3. Click Next.

Now that you've restored your pre-import backup you can try the import again.

Still having trouble? Have a look at <u>How to create your file for import (+ tips and tricks)</u>. Looking to import a different type of data? Simply choose the correct data type from the drop down in step 2 of the import process and then proceed as described!

```
How to pull a few common reports
(end-of-day profit, inventory
summary, shipping report)
```

So you've entered all your data into the system and now you want to see some reporting figures! Well here are a few common scenarios to help you understand reports in inFlow.

Pulling an End of Day Profit Report

Which could include information like how many sales you have made for the day (sales totals), in what amounts and the total cost of goods sold (COGS) that day.

- 1. Go to *Main Menu > Reports > Report List.*
- 2. Choose the Sales Order Profit Report
- 3. Ensure that you've filtered to show only orders that are *Paid* and which are from today.
- 4. We suggest clicking the *More* link and choosing to group your orders by *Payment Method* (so you know how much cash etc. you should have on hand).
- 5. Click Generate Report.
- 6. Print or Export the report from here.

Pulling an Inventory Summary Report

Which shows information on the current stock such as its current quantity and the total cost value of what you have in your warehouse.

- 1. Go to Main Menu > Reports > Report List.
- 2. Choose the Inventory Summary Report.
- 3. We suggest clicking the *More* link and choosing how you'd like to sort your items.
- 4. Click Generate Report.
- 5. Print or Export the report from here.

Pulling a Report on what needs to be shipped out

Which gets you information on what orders need to be shipped out and their requested ship dates.

- 1. Go to *Main Menu > Reports > Report List.*
- 2. Choose the Sales Order Operational Report
- 3. Ensure that you've filtered to show only orders that are *Open* and *In Progress*
- 4. Click Generate Report.
- 5. *Print* or *Export* the report from here.

How to use your custom document

Now that you've created a custom document (or downloaded one of our <u>pre-created custom</u> <u>documents</u>) you can import it into inFlow so it can be printed to from your sales orders.

To import a custom document:

- 1. Go to Main Menu > Settings > Print Settings
- 2. Choose Custom Docs from the icons on the left
- 3. Click the Add New Custom Doc button.
- 4. Choose one of four types of documents (eg. To create a Sales Order document choose *Sales Order, Header & Line* Items)
- 5. Click *Browse* and choose the custom document you've created.
- 6. Enter a name for your custom document in Step 3.

7. Click OK.

Now that you've imported your document it will be available from the dropdown in your sales order.



I can't install or launch inFlow, what should I do?

If you already use inFlow and have some problems running it, please backup your data before proceeding by following step 1 below. Before you begin, if you're not sure which version of Windows you're using please follow these steps from Microsoft to find out: http://windows.microsoft.com/en-CA/windows/which-operating-system Please note: Before you begin please make sure that your Windows profile (i.e. your User login for Windows) is not the same name as your computer. For example, George's PC uses the name "George," as does his login. To solve this issue re-name the computer to something like "George-PC" instead of "George" and try running the installer again. Step 1: Clean Up 1) If you've already started using inFlow there may be important data on your computer you'll want to save, if you don't have any data in the program yet you can skip this step and step 2. First open the Services window, complete the following based on your version of windows: Windows XP or Server 2003: click Start > Run > type services.msc Vista, Windows 7 or Server 2008 R2: click Start > type services Windows 8: Windows Key + R > type services.msc Scroll to SQL Server (INFLOWSQL), right click, and select Stop service. If not there, please move on to step (2). 2) Now we'll need to backup your data from outside the program, open this folder (see instructions below according to your operating system): Windows XP or Server 2003: C: \Documents and Settings \All Users\Application Data\inFlow Inventory Vista, Windows 7, Server 2008 R2 or Windows 8: C:\ProgramData\inFlow Inventory And copy the following two files to your desktop: inFlow.mdf and inFlow_log.LDF. Once copied, delete everything in this folder EXCEPT the "Backup" folder (as it contains your automated backups from inFlow with all your information). If you're not able to see the folders in question please follow these steps to show hidden files/folders: Windows XP (or Windows Server 2003), Vista, Windows 7 (or Windows Server 2008 R2), Windows 8. 3) To uninstall inFlow Inventory from the control panel, complete the following based on your version of windows: Windows XP or Server 2003: click Start > Control Panel > Uninstall (or Add/Remove Programs). Vista, Windows 7 or Server 2008 R2: click Start > Control Panel > Uninstall (or Programs and Features). Windows 8: Windows Key > type Control Panel > Uninstall (or Programs and Features). If inFlow

Inventory is not listed there, please move on to step 4). 4) To uninstall anything that starts with "Microsoft SQL Server" from the control panel, complete the following based on your version of windows: Windows XP or Server 2003: click Start > Control Panel > Uninstall (or Add/Remove Programs). Vista, Windows 7 or Server 2008 R2: click Start > Control Panel > Uninstall (or Programs and Features). Windows 8: Windows Key > type Control Panel > Uninstall (or Programs and Features). (examples include: Microsoft SQL Server, Microsoft SQL Server VSS Writer, Microsoft SQL Server Native Client, Microsoft SQL Server Setup Support Files etc.). If none of these are listed there, please move on to step 5). 5) Next, please go to the directories below: C:\Program Files\Microsoft SQL Server C:\Program Files (x86)\Microsoft SQL Server If there are any folders in here named "MSSQL10_50.INFLOWSQL", delete it. If there are MSSQL.1 AND MSSQL.2 (or more), skip to next step. If there's only one called MSSQL1, and no MSSQL2, etc., then delete the files in these two folders: 32-bit Windows: C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Template Data 64-bit Windows: C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Data C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Template Data If you don't see any of those folders, skip this step and move on to the next part. Step 2: Reinstall inFlow There are 2 options. We recommend trying option 1 first. If option 1 was unsuccessful you'll have to repeat the steps above before trying option 2 below. Option 1 (if you were previously using inFlow): Download and install inFlow v2.5.1 from here. Option 2 (if you are new to inFlow and just installing the download from our website didn't work): Install inFlow and Microsoft SQL Server (backend database for inFlow) manually via these steps. PLEASE NOTE: if you're installing SQL Server separately on a Windows 8 computer please use these steps instead. If you are successful go ahead and delete those files you copied in step 5) from your desktop.

I have a list of prices for my items, how do I quickly set them up in inFlow?

You can import multiple pricing schemes into inFlow and to do so there are a couple things you need to know:

- 1. You will need to import them one at a time
- 2. You will need to ensure that whichever pricing scheme you're importing is set as the default before you start the import

Before you start importing your information it's important to ensure that you're fully prepared. Have a look at your import file. You will need to ensure that your product codes match what is in the system already (if you have products in the system, if you don't then they will be created when you import). The easiest way to set up your spreadsheet is as follows:

ITEM NAME/CODE	NORMAL	RETAIL	WHOLESALE	RESELLER	DISCOUNT
845879	\$4.99	\$6.99	\$4.00	\$3.50	\$2.99
943047	\$10.99	\$12.99	\$8.00	\$6.50	\$4.99

In this configuration you have five pricing schemes that can be imported. Each one will need to be imported one at a time.

Before beginning your imports it's a good idea to set up a pricing scheme for each of the columns you're going to be importing. To do so, go to the Main Menu and under the Settings sub-menu click to

enter the General Settings window. Once open, select the "Pricing & Tax" tab and click "Edit Pricing/Currency". This will allow you to create a pricing scheme for each of the prices you're about to import.

	Pricing / C	urrency			
Prici Who	ing Schemes are dif blesale price, Retail p	ferent types of price), and in w	f prices /hat cur	you char rency.	ge (e.g.
	Pricing / Current Name	су	Curre	ncy	
	Normal Price		Canadi	an Dollar	(\$)
	Discount Price		Canadi	an Dollar	(\$)
	Retail Price		Canadi	an Dollar	(\$)
	Wholesale Price		Canadi	an Dollar	(S)
١.	Reseller Price		Canadi	an Dollar	(\$)
*					
				Shov	All
		Save & Clo	ose	Ca	ncel

Once set up you will need to verify which of the pricing schemes is set as the default. Once you've verified that you know which of the columns should be imported first.



In this case we're starting with the Wholesale Pricing scheme and after that initial setup it's simply a matter of running through an import.

- 1. Go to Main Menu > General > Import Data
- 2. Select "Product" as your data type, select the file you've created and click next.

Import Data	- Product		
Please choose the corresp	oonding column for each field	l, or leave it blank.	
— Basic —			^
Item Name/Code	ITEM NAME/CODE	•	
Category		-	
Туре		*	=
Description		•	
— Sales Info —			
Tax Code		-	
Default Unit Price	WHOLESALE	•	
— Purchasing Info)		
Costing Method		•	
Manual Cost		•	
		-	
Moving Average Cost			
Moving Average Cost Last Purchase Cost		-	
Moving Average Cost Last Purchase Cost Last Vendor		•	
Moving Average Cost Last Purchase Cost Last Vendor Vendor Product Code		•	

- 4. Select the columns of information that should be imported as below
- 5. Once this has been completed re-open the General Settings window and select one of the other pricing schemes as the default scheme then repeat your import with the same file but selecting another column of information.

When you're finished with the imports the product record will reflect all the pricing schemes that you've imported.

🦑 inFlow Inventory - Premium Edition		
Product	a 🛛 Dashboard 🛛 🗶 🗭	• 🕥
Search	🗋 New 🛃 Save 🖾 Copy 🛄 Version 🔴 Deactivate 🔋 Attachment	🗙 Close
Category •	Basic Picture	
Product Group 🔹	Item Name/Code 845879	
Refresh	Category Misc •	
Category Item	Type Stockable - Description	
Misc 845879		
	Browse Costing Info	Clear
	Tax Code Taxable • Costing Method	•
	Normal Price \$4.99	
	Reseller Price \$3.50	
	Retail Price \$6.99	
	Wholesale Price	
	Inventory Custom Info	
	Location Sublocation Quantity Product Group	
	Default Location	
	*	
	Quantity on Hand 0	
	Adi	1 Custom Fields
	Product Info Extra Info Product Vendors Order History Moveme	nt History
Finished loading Product - 845879	Current 1	Jser: Default User

I have been told that my database is corrupt, what do I do now?

Your database getting corrupted is a rare circumstance that does not happen very often. Most commonly, it's a result of hardware failure on your computer, like a bad hard drive. Before proceeding, please be sure that an inFlow representative has confirmed with you that the problem is in fact database corruption, and not, for example, incorrect products or prices entered into the system. Unfortunately database corruption is bad news, it means that there is a serious problem with your inFlow database, and that you may lose some or all of what you've entered into inFlow. Behind the

scenes, inFlow relies on a Microsoft SQL Server database to store its data, like your products and orders. If SQL Server is reporting that the database is corrupted in some way, then this is beyond our expertise to solve. We recommend that you hire a local database administrator (DBA) with expertise in data recovery in SQL Server to take a look at the issue and maximize the chance that your data can be recovered. Here is some technical information that may be useful: inFlow installs a separate instance of SQL Server called *INFLOWSQL*. By default, inFlow uses SQL Server 2008 R2 on Windows 8 and SQL Server 2005 on other operating systems. The *inFlow* database contains all of the important data (the product list, etc.). The *inFlowMeta* and *inFlowSample* databases are not important — if only these databases are corrupted it can be corrected by making a backup of the *inFlow* database, then uninstalling and reinstalling the inFlow program, then restoring the backup. inFlow creates some automatic backup files in C:\ProgramData\inFlow Inventory\Backup on older versions of Windows) and the database files are stored in C:\ProgramData\inFlow Inventory. Here are some troubleshooting routines that you may want to run. These can be done with the assistance of a DBA or possibly on your own.

Search your inFlow backups for the last good one

Start by finding the backup files that inFlow created automatically for you. The backup files are in C:\ProgramData\inFlow Inventory\Backup (or C:\Documents and Settings\All Users\Application Data\inFlow Inventory\Backup on older versions of Windows). If you have created your own backups, include those too. The basic procedure we will do is start with the newest backup and try to restore it and see if there are any problems. If that fails, try the next newest backup until we either run out of backups or find one that works. You will still need to re-enter any data entered since the last successful backup, but this approach may save most of your data.

- Open a command prompt as an administrator. On Windows XP as an administrator, click Start, Run, then type in "cmd" and press enter. On Vista or 7, click Start, type in "cmd" then right click cmd.exe and select Run as administrator. On Windows 8, hit the Windows Key + X, hit A, and then select Yes to allow permission to run as an administrator.
- 2. Copy the line below: sqlcmd -S .INFLOWSQL then right click the command prompt window, hit Paste, then hit Enter in the command prompt.
- 3. It should show you a prompt that looks like 1>. Enter the following command RESTORE DATABASE
 [inFlow] FROM DISK = N'C:\ProgramData\inFlow
 Inventory\Backup\inFlow_autobak_2013_01_01_12_00.ifi' WITH RECOVERY, FILE = 1
 replacing the filename with the correct one, and press Enter.
- 4. It should show you a prompt that looks like 2>. Enter the following command G0 then press Enter. It should show you some text with a successful message including "RESTORE DATABASE successfully processed" and then the 1> prompt again. If there are errors shown, double check that you've entered the command correctly. If you entered the filename incorrectly, the error message will include something like "The system cannot find the file specified". If you entered the command incorrectly, it will typically say something like "Incorrect syntax near...". Otherwise, for any other errors, this backup file may still have problems, so you may want to try restoring the next oldest backup file.
- 5. If the previous step worked properly, you should check that the restored database has no errors. Copy the line below: DBCC CHECKDB([inFlow]) WITH NO_INFOMSGS, ALL_ERRORMSGS then right click the command prompt window, hit Paste, then hit Enter in the command prompt.

6. It should show you a prompt that looks like 2>. Enter the following command GO then press enter. If the database is fine, then it should just show you the 1> prompt again. Otherwise, error messages will be printed. If there are error messages, try the above steps with the next oldest database file.

If inFlow is still partially usable, export and re-import your data

If the database is corrupted but still usable (i.e. you can still run inFlow and perform most operations), you may want to consider exporting your data out of inFlow into CSV format (Main Menu \rightarrow General \rightarrow Export Data), reinstalling inFlow, and then importing the data back. This is an imperfect option since much of your information will be lost (e.g. full transaction history, company settings, picking or shipping data, etc.).

Other Recovery Procedures

There are other recovery procedures that are beyond our expertise but that you may attempt with the aid of a database administrator. Here are some links to suggestions that may be useful starting points: <u>http://stackoverflow.com/questions/2470692/recovering-transaction-log-from-corrupt-sql-database http://www.sql-server-pro.com/dbcc-checkdb.html</u>

I only want to see the last cost of this item, how?

This is easily done by switching the costing method of the item in question. To do so:

- 1. Open the product record for that item.
- 2. Click the Costing Method dropdown and change it to Last Purchase

This will show you the last cost for purchasing this item. You can also pull a purchase report if you choose.

I tried to update inFlow, but it fails to update my database, what can I do?

If you're getting this problem with "Error updating inFlow database" and you're in multi-user mode, please try running the update from the server computer first. If the problem persists, please send us an email to support@inflowinventory.com and attach a backup of your database. It's probably too large to email, so try putting it into a ZIP file (by right clicking it and selecting Send To Compressed ZIP folder or using a program like WinRAR). If it's still too large to email, please use a file transfer service like <u>yousendit.com</u> or <u>sendspace.com</u>. In the mean time you can revert to the previous version of the program by following the <u>instructions found here</u> for the version of inFlow that your database is currently stuck in (i.e. when you start inFlow and you see the prompt to update the

system will give you the "software version" and the "database version"; you want to pick the installer for the database version from the list in the article above and re-install using that). Thank you in advance!

I want to go back to an older version of inFlow, can I?

The short answer is yes. It's definitely possible and we have the installers for our older versions available for download. The longer answer is that in order to go back to a previous version you must have the database from BEFORE you updated since a database cannot be reverted to an older version. Whenever you update to a newer version of inFlow the system should prompt you to save and it will save your backup with the version number it's in. That is the file you must use in order to restore your data so if you updated to a newer version and entered information, you will have to reenter it once you've reverted.

To revert to a previous version of inFlow please:

- 1. Backup your database! Go to Main Menu > General > Backup Data.
- 2. Uninstall inFlow by going to your Windows START menu and clicking *Control Panel* (on Windows XP go to *Add/Remove Programs* in the panel, for Vista or Windows 7 go to *Programs and Features,* for Windows 8 hit your Windows Key + X, then P to bring up the *Control Panel*, and then *Uninstall a program*). Find inFlow in the list and choose to "uninstall."
- 3. Download the appropriate installer from the list below and run the installer to install your preferred version of inFlow.
- 4. Once the program's back up and running go to Main Menu > General > Restore Data and choose the file reverenced above (the backup from before you updated).

Voila! You're back in the older version of inFlow.

List of available installers for download:

inFlow v2.4.0.4 (Dec 10th, 2011)

inFlow v2.4.0.3 (Sept 28th, 2011)

inFlow v2.3.2.1 (March 14th, 2011)

inFlow v2.2.3.1 (Sept 18th, 2010)

inFlow v2.1.1.6 (June 10th, 2010)

inFlow v2.0.1.0 (February 7, 2010)

I'm getting an error, "Oops we ran into a problem..."

If you're seeing an error like "Oops we ran into a problem..." **while installing**, please follow <u>these</u> <u>instructions here</u> to clean up and do a fresh install of inFlow. However, if you see this error **while uninstalling** then please attempt the following: 1. Go to your **c:Documents and SettingsAll Users** (or on a Vista or Win 7, or Windows 8 computer, just the **c:** drive) 2. In this folder look for *Application Data* (or on a Vista or Win 7, Windows 8 computer *Program Data*). If you do not see the folder listed above you will first need to "show hidden files and folders" by: **On XP, Vista, or Windows 7:**

a) Please go to START > *Control Panel* and choose to view by icons (top right hand corner of window) you should then be able to select *Folder Options*

b) Click the "view" tab and then choose to "show hidden files and folders"

c) Click okay and you should now be able to proceed with the Application DataPackage Cache folders.

On Windows 8:

a) From your homescreen, go to the Windows Explorer app b) Click the "View" tab, you should see different options below c) Please check the item labelled "File name extensions" and "Hidden items"

Once you've found the *Application Data* (or *Program Data*) folder please double click and proceed to the *Package Cache* folder.

3. Once you're in the *Package Cache* folder you'll want to look into each of the sub-folders in here (unfortunately the folder names will be different on each computer so you'll have to look through them all) for the following file: "inFlowSetup_x64.msi" or "inFlowSetup_x86.msi" (depending on your computer). 4. Once located right click and choose "Uninstall". Please note: you may get an error stating that, "This action is only valid for products that are installed." That's not a problem, simply click okay and proceed. You should now be able to proceed with your uninstallation from the control panel.

I'm having problems downloading inFlow...

We're so sorry to hear it but not to worry! Here are a few alternate download locations:

Quick Installer Links (will download some more components while running)

http://www.archonsystems.com/Download/V2/inFlowInstaller.exe http://download.cnet.com/inFlow-Inventory-Free-Edition/3000-2067_4-10772674.html

Full Installer Links (larger, but doesn't need internet access while running) <u>http://www.archonsystems.com/Download/V2/inFlowInstaller_Offline.exe</u> <u>https://cdn2.inflowinventory.com/Download/Installer/2.5.1/inFlowInstaller_Offline.exe</u>

You can also try downloading using a download manager like: <u>http://www.freedownloadmanager.org/</u>

I'm having problems installing SQL Server 2005, how can I fix that?

When you install inFlow, Microsoft **SQL Server** 2005 (backend database for inFlow) is installed during the process. If you're having trouble installing you can solve the problem in one of two ways (as below) but first you should uninstall inFlow to ensure a clean, fresh installation. To do that, please follow the <u>Clean Up guide here</u>. **OPTION 1: Try installing SQL Server 2008 R2 instead** You may do so by: 1) Clicking *Customize your installation* 2) Checking to install SQL Server 2008 3) Choose *Typical* installation

WELCOME INSTALLING DONE	- X
P inFlow	
To install inFlow, simply accept the license agreement ☑ I accept!	
Customize your installation	
🖲 Install	
english français español 简件中文	
	- X
Install using SQL Server 2008 R2	
Typical Choose this if you plan to use inflow alone or as a server	
Choose this only if you already have an inflow server set up	
back	

OPTION 2: Run through the steps below to try to install SQL Server separately Note: If you are running WINDOWS 8, please use <u>these steps</u> instead because SQL Server 2005 is not compatible with Windows 8. 1) <u>Download SQL Server Express</u> (with the language for your Windows) from Microsoft. [If you're not sure which version it's best to choose SQLEXPR.EXE from the list). 2) Install the downloaded file. 2a) Accept the licensing terms and then click next past the System Configuration Check (you can ignore any warnings here):



Next >

Cancel



🛃 Mic	rosoft SQL Server 2005 Setup			×
Sys V P	tem Configuration Check Vait while the system is checked for poter roblems.	ntial installation		1
	Success	13 Total 12 Success	0 Error 1 Warning	
Deta	ails:			
	Action	Status	Message	•
	WMI Service Requirement	Success		
	MSXML Requirement	Success		
	Operating System Minimum Level Req	Success		=
	Operating System Service Pack Level	Success		
	SQL Server Edition Operating System	Success		
	Minimum Hardware Requirement	Success		
	Pending Reboot Requirement	Success		
	Default Installation Path Permission Re	Success		
	Internet Explorer Requirement	Success		Ŧ
	Filter •	Stop	Report	•
	Help		Next	>

2b) Uncheck Hide advanced configuration options:

Hicrosoft SQL Server 2005 Express Edition Setup
Registration Information The following information will personalize your installation.
The Name field must be filled in prior to proceeding. The Company field is optional.
N <u>a</u> me: Your Name
C <u>o</u> mpany: Your Company
Uncheck this option
Hide advanced configuration options
Help < Back Next > Cancel

2c) Include the Connectivity Components in the database installation. Select Will be installed on local hard drive:

😸 Microsoft SQL Server 2005 Express Edition Setup
Feature Selection Select the program features you want installed.
Click an icon in the following list to change how a feature is installed.
Peature description Feature description Installs components for communication between clients and servers, including network libraries for ODBC and OLE Will be installed on local hard drive Entire feature will be installed on local hard drive Entire feature will be unsupilable
This feature requires 19 MB on your hard drive.
install connectivity components
Installation path Browse Browse
Disk Cost
Help < Back Next > Cancel

2d) For Instance Name, select Named instance, and specify the name (all capitals): INFLOWSQL

😸 Microsoft SQL Server 2005 Express Edition Setup
Instance Name You can install a default instance or you can specify a named instance.
Provide a name for the instance. For a default installation, click Default instance and click Next. To upgrade an existing default instance, click Default instance. To upgrade an existing named instance select Named instance and specify the instance name.
set the name to INFLOWSQL
Default instance
Named instance INFLOWSQL
To view a list of existing instances and components click on Installed instances.
Installed instances
Help Cancel

Click next through the defaults for Service Account:

😸 Microsoft SQL Server 2005 Express Edit	tion Setup
Service Account Service accounts define which accounts t	to log in.
Service:	SQL Server
Output Use the built-in System account	Network service
Use a domain user account	
Username:	
Password:	
Domain:	
Start services at the end of setup	
Help	< Back Next > Cancel

2e) For Authentication Mode, choose Mixed Authentication (or SQL Server Authentication). For password, choose any password and write it down.

Hicrosoft SQL Server 2005 Express Edition Setup	X
Authentication Mode The authentication mode specifies the security used connecting to SQL Server.	when
Select the authentication mode to use for this installa	ation.
 Window Authentication Mode Mixed Mode (Windows Authentication and SQL S 	Enter a password & write it down.
Specify the sa logon password below: Enter password: Confirm password:	
Help Sack	Next > Cancel

Click next to use the defaults through the Collation Settings, Configuration Options, and Error and Usage Report Settings, then click Install.

📸 Microsoft SQL Server 2005 Express Edition Setup
Collation Settings Collation settings define the sorting behavior for your server.
Collation settings for service: SQL Server
Collation designator and sort order:
Latin 1_General 👻
Binary Code point
Case - sensitive Kana - sensitive
✓ Accent - sensitive Width - sensitive
SQL collations (used for compatibility with previous versions of SQL Server) Binary order based on code point comparison, for use with the 850 (Multilingual Strict compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-sensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, unnercase reference for use with 1252 Ch III
Help < Back Next > Cancel





If you get any error messages when running this Microsoft SQL Server installer, try searching for solutions online. 3) If there are no errors or you've fixed them, the Microsoft SQL Server install is complete. You should be able to continue to installing inFlow. <u>Download inFlow from our website</u> and install it. Now that you've re-installed SQL Server you can run inFlow to re-attach the database OR if you're installing for the first time then simply run the inFlow installer and it should recognize that you've already installed SQL Server and skip that step. Once the installation has been completed, or you've run the program it should prompt you to reset the database password, and in that case just set it to the one you used in Step 2e.

I'm having trouble installing inFlow on Windows 8, what can I do?

One of the more common problems with installing inFlow on Windows 8 seems to be related to having the same windows profile name as your computer. So for instance if John's computer is called "John" and his windows id is also "John", this may cause a problem installing SQL Server (a component we use for inFlow).

The quickest way to correct this issue is:

- 1. Press the *Windows Key* + *X* to open the power user menu
- 2. Choose System from the list
- 3. In this window under "Computer name, domain and workgroup settings" please click the *Change Settings* option on the right.
- 4. Click the Change button near the bottom of this window.
- 5. Enter a new computer name here, for example "John-PC"
- 6. Click okay

You will have to restart your computer for the changes to take effect but once you have please try installing inFlow again. If you're still having trouble please have a look at this article on <u>what to do if</u>

I'm having trouble installing SQL Server 2008 R2, what do I do?

When you install inFlow, Microsoft **SQL Server** 2005 (backend database for inFlow) is installed during the process. In some cases, a computer does not wish to install SQL Server 2005 and in these very rare cases we suggest attempting to install SQL Server 2008 R2. If you have not already please try installing 2008 by <u>following the steps in Option 1 here</u>. If that didn't work, please follow the steps below:

0) You should uninstall inFlow first and more specifically, any remaining SQL Server parts. Follow the <u>Clean Up guide here</u>.

1) <u>Download SQL Server Express</u> (with the language for your Windows) from Microsoft. Be sure to choose the correct installer for your bit type.

Microsoft Edition	ft® SQL Server® 2008 R2 SP2 -	· Express	
Quick links + Overview + System requirements + Instructions	Microsoft SQL Server 2008 R2 Express with S database for developing and deploying SQL Quick details	ervice Pack 2 is a free and featu Server 2008 R2.	ıre-rich
	Version: 10.50.4000.0 Change Language: English 💌	Date Published: 2012-07-26	
Looking for support?	KB Articles: KB2630458		
Support site now >	Files in this download The links in this section correspond to files available for this do	wnload. Download the files appropriate for you	u.
For 64-bit computers	File Name	Size	
Start with	SQLEXPR_x64_ENU.exe	122.4 MB DOW	NLOAD
For 32-bit computers	SQLEXPR_x86_ENU.exe	110.4 MB DOW	NLOAD
Learn more	SQLEXPR32_x86_ENU.exe	97.4 MB DOW	NLOAD
	SQLEXPRADV_>64_ENU.exe	1,008.6 MB DOW	NLOAD

2) Install the downloaded file.

2a) Choose New Installation or add features to an existing installation.



2b) Accept the license terms and click Next.

SQL Server 2008 R2 Setup	R2, you must accept the Microsoft Software License Terms.
License Terms Setup Support Files	MICROSOFT SOFTWARE LICENSE TERMS MICROSOFT SQL SERVER 2008 R2 EXPRESS These license terms are an agreement between Microsoft Corporation (or based on where you live, one of its affiliates) and you. Please read them. They apply to the software named above, which includes the media on which you received it, if any. The terms also apply to any Microsoft • updates, • supplements, • Internet-based services, and • support services
	Copy Print I accept the license terms. See the SQL Server 2008 R2 Privacy Statement for more information. C Back Next > Cancel

2c) For Instance Name, select Named instance, and specify the name (all capitals): INFLOWSQL

Specify the name and instance ID for the instance of SQL Server. Instance ID becomes part of Setup Support Rules Feature Selection Installation Rules Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error Reporting Installation Configuration Rules Installation Progress Complete Installed instances: Installed instance ID Features Installed instance ID Features Instance Instance ID Features Instance Instan	
Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Instance root directory: C:\Program Files\Microsoft SQL Installation Configuration Rules Installation Progress Complete Installed instances: Installed instance ID Instance ID Features	f the installation path.
Instance Name Instance ID Features	IL Server\
	Edition Version

2d) Click next through Server Configuration

Server Configuration					
Specify the service accounts and	d collation configuration.				
etup Support Rules	Service Accounts Collation				
eature Selection	Microsoft recommends that you	Microsoft recommends that you use a separate account for each SOL Server service			
installation Rules	Service	Account Name	Password	Startun Tyne	
Disk Space Requirements	SQL Server Database Engine	NT AUTHORITY\NETW		Automatic	
Server Configuration	SQL Server Browser	NT AUTHORITY\LOCA		Disabled	
nstallation Progress Complete					
		\mathbf{N}			

2e) For *Database Engine Configuration*, choose Mixed Authentication (or SQL Server Authentication). For password, choose any password and write it down.

SQL Server 2008 R2 Setup Database Engine Config	uration		
Specify Database Engine authent Setup Support Rules Feature Selection Installation Rules Instance Configuration	Account Provisioning Data Directories User Instances FILESTREAM Specify the authentication mode and administrators for the Database Engine. Authentication Mode		
Disk Space Requirements Server Configuration Database Engine Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Windows authentication mode Windows authentication and Windows authentication) Specify the password for the SQL Server system administrator (sa) account. Enter password: Confirm password: Specify SQL Server administrators		
	Add Current User Add Reim .	server inistrators have stricted access to Database Engine.	
	< Back Next > Cance	el Help	

2f) Click Next through Error Reporting


3) If there are no errors or you've fixed them, the Microsoft SQL Server install is complete.

You should be able to continue to installing inFlow. <u>Download inFlow from our website</u> and install it. It might prompt you to reset the database password, and in that case just set it to the one you used in Step 2e.

If you still have problem launching inFlow, please search or ask for a solution from our online forum.

I'm having trouble with my custom documents, what do I do?

If you are having trouble using your **custom documents**, most likely it's a problem with one of the following:

1. The custom document template has no mail merge fields.

inFlow's custom documents use Microsoft Word's Mail Merge feature to put the data from your invoices, etc., into the actual document. When you are creating or modifying the document template to use for the custom documents, make sure you insert some mail merge fields. Go back to Print Settings and investigate.

2. The custom document template was created in another version of Word.

For example, if you uploaded the custom document template as a .DOCX file from Microsoft Word 2007 and then tried to use it with an older version of Microsoft Word on another computer, this would cause problems. Please take a look at Microsoft's Office Compatibility Pack for Word here: <u>http://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-</u> <u>C6BB74CD1466&displaylang=en</u>

3. The custom document template was incorrectly uploaded.

Please double check the type of document that was uploaded to ensure it was a .DOC or .DOCX file with mail merge fields set appropriately.

4. Custom Fields are not pulling information into the template correctly

This can happen if you add another column to your invoice table in which you'd like to include the information from a custom field, you will find that the program skips to the next line before populating the information. Pay special attention to the final note in the Advanced instructions for creating a template

(https://onpremise.inflowinventory.com/KnowledgeBase/questions/194/Custom+Documents+-

<u>+Advanced</u>). The key to ensuring that your information appears correctly is being certain that all items you wish to include are being addressed in the correct order by the program. In this case, the template would tell inFlow to move to the next line of information before it reached the custom field we wanted to include. By moving the <> statement to after the last column we've added we're able to ensure that inFlow grabs that custom information before moving on to the next line.

5. I have tried to create a text box (I want a column header) but it doesn't seem to work.

There seems to be a problem with Microsoft Word where Text Boxes aren't preserved through a mail merge. (Reference: <u>http://support.microsoft.com/kb/286841</u>) However you can convert your textbox into a frame, which does seem to work, you can find more info

here:<u>http://word.tips.net/Pages/T001823_Converting_a_Text_Box_to_a_Frame.html</u>. Another neat trick is to simply copy, paste and move existing titles in the template you're adjusting then use them to create your new header.

6. My order remarks aren't being populated into my document, why is that?

There are two possibilities:

a. Your custom document tries to show the "Order Remarks". If you're in the advanced workflow, you'll need to make sure that you're entering the intended remarks into the Order tab (e.g. not the Invoice tab).

b. It seems that the remarks aren't updated in the printed document until you click out of the remarks field; the program just doesn't recognize the change. This is on our list of updates, but in the meantime, please try clicking into another field and then previewing the custom document once more.

I've lost my password for inFlow, what do I do?

Lost your password? We can help if you get in touch! But we need to know what type of password we're helping you with so please see below to determine which type of password you need help with:

User Passwords:

inFlow passwords are locally managed (meaning we don't have access to them directly, they're managed by the user) but if you've lost yours or are having trouble getting into inFlow, please contact inFlow Support so we can help you reset your password.

🦆 inFlow - Login	×
	Flow
* 'IN	FIOW
User Name	Warehouse Clerk -
User Password	
	Log in automatically next time
Lost?	
	Log in Exit
	Login

inFlow License Keys and Web Account passwords:

If you have lost your license keys or your web account information (and password) please contact us at support@inflowinventory.com and let us know the email under which you purchased your keys so we can re-send your license key information and get you back up and running!

🗜 inFlow - Upgrade Software	
Software Activation - Start	
Thank you for choosing inFlow Inventory. To upgrade the software, please enter in your web account or the license key given to you when you purchas Lost? If you don't have a license key, the software to obtain the license key http://www.inflowingentory.com/software.editions.asny	
 Activate with web account (Recommended) 	
Web Account E-mail	
Web Account Password	
Activate with License Key	
If you have any problems during the purchasing or activation process, please email support@inflowinventory.com and we'll be happy to help!	
< Previous Next > Cancel	

Server Password:

If you are using multi-user mode and you aren't able to log into inFlow anymore, you may need to check that your server password/connection information hasn't changed. The easiest way to do this would be to go to your server computer and open inFlow then: 1. Go to Main Menu > Settings > Connection Settings. 2. Click *Save Connection Settings*. 3. Save that file to a USB key or drive and take it to your other computer. 4. Use the connection file to re-connect to your server.

🚽 inFlow - Connect to Server	×
Connect To Server	<u>(See help)</u>
Connect from Connection Settings File	
Fill in Server Info	
Server Name or IP Address Server Password	
Lost?	Connect

inFlow shuts down automatically when I try to run it, what do I do?

We see this periodically when the instance of the program is not properly shut down after the last session or there is a bad installation of crystal reports. To correct the problem please attempt the following: **Option 1 – Last instance of inFlow wasn't shut down properly**

- 1. Right click your windows taskbar and select "Start Task Manager" option from the resulting menu.
- 2. Once the Task Manager is started please click the "Processes" tab and scroll through the list to see if you can located inflow.exe.
- 3. If you're able to find it please select it by clicking and then choose the "End Task" button at the bottom. This should stop the instance of inFlow. Once it has disappeared from the list try running the program again, this time it should run without issue.

If you're not able to find inFlow in the list above, chances are it is indeed an issue with crystal reports. **Option 2 – problems with crystal reports**

1. To correct the issue please try uninstalling Crystal Reports Basic Runtime for Visual Studio by going to the START menu and choosing "Control Panel" (for Windows 8, hit the Windows Key + X

and then hit P)

- 2. Now open Add/Remove Programs (XP, Vista) or Programs and Features (Windows 7/Windows 8) and find Crystal Reports Basic Runtime for Visual Studio in the list.
- 3. If you find it, click on it and then on the "uninstall" button at the top.
- 4. Try downloading <u>http://www.archonsystems.com/Download/CRRedist2008_x32.msi</u> (for 32-bit version of Windows, if you're unsure it's likely this one) or for 64-bit versions of Windows<u>http://www.archonsystems.com/Download/CRRedist2008_x64.msi</u>.
- 5. Restart inFlow and try again.

Is there a faster way to set product prices based on cost/other prices etc.?

Absolutely! You can set up a whole scheme of prices all at once using the Product Pricing Window. To set up Wholesale prices at 10% less than your Retail prices for instance you can:

1. Go to Main Menu > Inventory > Product Pricing

2. Click *Add Products* to add items to the list in this window. You can search based on Categories etc. or simply add everything.

3. Once your table is full you can set the prices by completing the sentence at the bottom of the screen:

- a) Choose your Pricing/Currency scheme (Eg. Wholesale)
- b) Choose your Base Price (Eg. Retail Price)
- c) Choose your Adjustment Type (Eg. Minus)
- d) Choose your Amount (Eg. 10%)

4. Once you`re satisfied with the adjustment click Adjust.

This window can also help you set up product prices according to markup (provided you have your cost information already in the system) or based on another scheme (such as if your wholesale prices are 10% lower than your retail prices). Or set your **cost to match your prices** by completing the sentence at the bottom as follows:

Set [Normal Price] to [Cost] [Plus] [0%]

Keep in mind that your sales price will need to be updated each time the cost changes since the system does not automatically adjust prices. All that aside, it may make more sense to simply not

My computer isn't prompting me to update inFlow, can I force it to?

So you heard there's a newer version of inFlow and you want to update? That's great! inFlow should let you know automatically but if it hasn't notified you yet (or you're super eager) here's how to do it:



To force an update:

- 1. Go to Main Menu > Settings > About inFlow.
- 2. Click the Check for Updates button
- 3. When prompted as to whether you'd like to install the update when you shut down inFlow please click Okay.
- 4. Restart the program, which should begin the update.

This method will also allow you to force an update on your server computer when you're receiving the, "inFlow need to be updated to work properly." error message which indicates you have updated your client computer and the server is still in need of being updated.

My profit report shows no cost of goods sold, how do I fix that?

In order to provide accurate profit reporting (since how much you pay for certain items might change over time) inFlow captures the cost from your product record at the time that you ship out your order. What this means is that if last week you sold *Item A* and shipped it out, and at that time it cost you \$5.00 to buy that item, that's the number that inFlow will use to calculate your profit. If the cost of that item goes up this week when you buy from your vendor, then subsequent purchases will use the new cost instead. It's important to know this information as it is a basic part of understanding where inFlow gets your profit and what may have gone wrong.

Keeping in mind what we talked about above, one of the most common things to affect the cost reporting is not putting the cost value into your product record before you complete your sales. In the article about <u>Entering Product Costs</u> we talk about how and where to enter your costing. It's very important to ensure you're putting your cost information into the correct field since that's where inFlow will look in order to provide profit reporting.

🚽 inFlow Inventory	- Premium Edition) x
	Product	Dashboard	×					? -
Search	▶	🗋 New 🛃 Save 🗈 Copy	/ 🛄 Version 🛛 🔴 Deactiv	/ate 🔋 Attachm	ent		:	Close
Item Name/Code	•							
Description		Basic			Picture			
Туре		Item Name/Code	00303A					
	Defeat	Category	Die-cast	-		1000		
	Refresh	Time	Stockable			C.A		
Category	Item 🔺	1100					0.4-1	
Description	002024	Description	Printy Combat Helmet			100	-	
Die-cast	04375					m.		
Die-cast	04275 090821A					Br	owse Clear	
Die-cast	10201	Sales Info			Costing Info			
Battery-Powered	12875	Tax Code	Taxable •		Costing Method	Moving Ave	erage	-
Battery-Powered	14232	Normal Price	\$8.99 - 79.8	7 Madour	Edit / History		\$2.5	50
Close-out	20101	Date Dates		* Markup				
Close-out	46101	Retail Price		4 Markup				
Misc	67817	Wholesale Price		No ma	ttor which cost	ing motho	duqu	
Close-out	762898		Add new Pricing		cter which cost	ing metrio	u you	
Die-cast	9400			use, th	is field should :	snow your	cost or	
Die-cast Miec	Catalon06	Inventory		it will n	not be recorded	at time of	rsale.	
Misc	Catalog00			_	Year			
Kumar's Stuff	Item A	Location	Quanti	ity	Model			
Packing Materials	PM-BW01	Main Warehouse		10 ea	moder			
Packing Materials	PM-SB01	*						
Packing Materials	PM-SB02							
Packing Materials	PM-SB03	Quantity on Hand		10 ea.				
Services	Product 1						Add Custom Fie	<u>ids</u>
Services	\$10001							
Jervices	310002	Product Info	Extra Info	Product Vendo	ors Moverne	nt History	Order History	
Finished loading Proc	luct - 00303A						Current User: Defa	ult User

Unfortunately, if you didn't have your cost information in the system at the time of you sale inFlow doesn't have the necessary information to get you profit numbers. That said, there are two ways to correct this:

- 1. Re-open and re-complete your orders once you've updated your cost information. Certainly this can be cumbersome, depending on how many orders you've worked through however re-completing these means that going forward you will always be able to pull the accurate profit info.
- 2. Alternately you can temporarily turn on the "Use Current Cost" option in the *General Settings* window to tell inFlow to look to the product record RIGHT NOW instead of using the information from the time of the sale. That can allow you to update your cost information and then quickly pull a profit report without having to re-complete all your sales orders. It isn't a permanent solution however so once you've pulled that report you should turn it back off.

To Turn on Use Current Cost:

- 1. Go to *Main Menu > Settings > General Settings* and click the Pricing & Tax tab.
- 2. Check the "Use Current Cost" option in the centre of the window.
- 3. Check *Save & Close* to complete the change.
- 4. Pull your profit report again.
- 5. Go back into the *General Settings* window and uncheck "Use Current Cost" as above.

My vendor charges me in a different currency, what do I do?

You can set up a default currency for your vendor ahead of time by selecting the corresponding currency in that vendor's record. By selecting a default currency for that vendor it will override your system default.

🚽 inFlow Inventory - Premium Edition						• · · · · · · · · · · · · · · · · ·
Vendor	* 📝 Dashboard	× +				? •
Search	🗋 New 🛃 Save 🗎 Co	py 🔻 🛄 Version 📔 🔴 Deactiv	ate 🎚 Attaci	hment		× Close
Contact -	Basic			Addresses		
Phone -	Name	Protekt-Ship Inc.		Business Address		•
Refresh	Balance	\$0.00		1 Protekt Avenue Greensboro, NC		
Name 🔺				USA 27408		
Oh-Mega Toys						
Protekt-Ship Inc.						
Richardson Quick Equidation	Contact			Purchasing Info		
	Name	Jim		Payment Terms	Net 30	•
	Phone	336-555-8321		Taxing Scheme		•
	Fax			Carrier		•
	Email	im@protektship.com		Currency	EU Euro (€)	-
	Website	www.protektship.com				
	Remarks			Custom Info		
	Jim from Protekt-Ship p	romised us our money back if we e	ver find more	Alternate Contact		
		or around popped again.		Alternate Contact 2		
				Alternate Contact 3		
				Emergency Phone		
					ł	Add Custom Fields
	Vendor Info	Extra Info	/endor Produ	order Histor	γ	
Save successful					Curr	ent User: Default User

The easiest way to manage this however, is to change the currency during your purchase order and save it back to the vendor record. To do this:

- 1. Click into the *Currency* drop down (in the bottom left hand corner of your screen).
- 2. Choose the correct currency from the drop down then hit tab.
- 3. Enter the correct conversion rate in the field that now appears below.
- 4. When you save your order you will be asked if you'd like to make this your vendor's default; say *yes*.

Overview

The Homepage

The inFlow *Homepage* includes inFlow's most popular features and provides quick access to different stages of your inventory's journey. You can hover over any of the icons to see more options related to that module and clicking the icon itself will open a blank record for you to use (eg. click VENDOR for a new vendor record).



The Main Menu



For access to even more features click the *Main Menu* button in the top left hand corner of your screen. The menu is broken down into modules as well, but will give you access to all the available features in each module rather than only the most popular ones.

Toolbar



The toolbar appears in various areas of the program (such as Vendors, Purchases, Inventory, Sales, and Customers) and will look a little different depending on where you are. It includes actions for the record as a whole, rather than individual details (eg. click *Save* to save the record you're working on).

Tabs



Tabs allow you to work within two or more modules at once by clicking them to switch between two open modules. New tabs can be opened using the grey plus sign to the right and a tab can be closed using the X in its right hand corner.

Navigation Buttons



The navigation buttons allow you to jump back and forth through the screens you've visited during your session. Click the *back* button to return to a previous screen that you were working on, or the *forward* button if you'd like to move forward again.

Listing Views

inFlow uses Listing Views to show you what products you have in inventory, sales orders you have on the go etc. You can control what you see in the list using the *Search* section at the top.

🛃 inFlow Inver	ntory - Premium Edition				
	Droduct	X 📝 Dach	hoard X		0
	Fioduce	Z Dash			
					4
Search					1
item Name/C	ode •				
Description	-				
Category	•				•
					Refresh
Туре	Category	Item	 Description 	Normal Price	Last Vendor
Stockable	Die-cast	00303A	Army Combat Helmet	\$8.99	
Stockable	Die-cast	04275	4" Classic Airplane - 3 Piece Set	\$8.99	Oh-Mega Toys
Stockable	Die-cast	090821A	3.75" Military Classics Warship	\$3.99	Oh-Mega Toys
Stockable	Die-cast	10201	1:700 Die Cast Battleship	\$12.99	Oh-Mega Toys
Stockable	Battery-Powered	12875	Mini-Truck Battery Powered Red	\$23.99	Protekt-Ship Inc.
Stockable	Battery-Powered	14232	Mini-Sports Car Battery Powered Red	\$18.99	Protekt-Ship Inc.
Stockable	Close-out	20101	1:24 California Highway Patrol	\$30.00	Protekt-Ship Inc.
Stockable	Services	23988432099	Here is another description	\$0.00	
Stockable	Services	39459028742	This is my description	\$0.00	
Stockable	Services	4275		\$8.99	E
Stockable	Close-out	46101	Alabama 1957 Police Car	\$3.99	Richardson Quick Liquidation
Stockable	Misc	67817	Chevy Series #12	\$7.90	
Stockable	Close-out	76289B	Kung Fu Master Action Figure	\$6.99	Oh-Mega Toys
Stockable	Die-cast	9400	Police Basket	\$25.00	
Stockable	Die-cast	9500	Boat Basket	\$12.99	
Stockable	Services	cases		\$20.00	Protekt-Ship Inc.
Stockable	Misc	Catalog06	2006 Product Catalog	\$0.00	Protekt-Ship Inc.
Stockable	Misc	Catalog07	2007 Product Catalog	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-BW01	24" x 750' Sheet of 3/16" Bubble Wrap	\$0.00	
Non-Stocked	Packing Materials	PM-SB01	20" X 18" X 12" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-SB02	20" X 20" X 15" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Non-Stocked	Packing Materials	PM-SB03	16" X 14" X 10" Shipping Boxes	\$0.00	Protekt-Ship Inc.
Contine	Convince	C10001	Custom Dia Cast Energyina	e5.00	•

Changing what appears in the listing views

The filters at the top control what you see in your list below. To change what is in the list simply:

- 1. Click into a filter box at the top
- 2. Enter the value you want to use to filter your items (eg. select a category from the dropdown).
- 3. Click Refresh.

Now your list will consist only of items which meet the criteria in your filters.

To change the filters you're using:

- 1. Click the filter title; you should see a dropdown appear.
- 2. Select the replacement filter from the list

Filters can also be added or removed in this list by choosing *add* or *remove* at the bottom.

You can quickly clear all your filters to start over by right clicking the *Refresh* button. Yes, it's that simple!

Still unsure, or looking for more info about getting started?

Have a look at our <u>Get started with inFlow video</u> for a closer look.

Problems with Printing or Reports

A few users have trouble printing Invoices and Reports. If you're having trouble *finding* a report please <u>have a look at this article on reporting</u>. If inFlow otherwise functions fine, and you only have problems

with printing order documents or with the reports, here is something to try: 1. Try delete the company logo in Settings (top toolbar) \rightarrow Company Settings. Now generate a report to see if it works. If it doesn't, then continue to the next step – it's most likely a problem with the installation of Crystal Reports – a component that we use for printed documents & reports. 2. Ensure that you've verified the printer settings on your default printer. This will be the printer that inFlow uses to print and in order for it to re-adjust to your paper size, the default printer must have the correct settings. On your computer go to START > Control Panel > Printers and check to see which printer is selected as the default. If the correct printer is selected, right click and choose properties from the dropdown list to examine its settings. If you have to correct anything here be sure to restart inFlow before you try again. 3. If that wasn't successful:

a) Uninstall Crystal Reports Basic Runtime for Visual Studio from your control panel (START > Control Panel > Uninstall a Program/Programs and Features).

b) Download the Crystal Reports installer file:

For 32-bit: http://www.archonsystems.com/Download/CRRedist2008_x32.msi

For 64-bit: http://www.archonsystems.com/Download/CRRedist2008_x64.msi.

(If you're not sure which version of windows you have check your c drive, if you have more than one program files folder you're on a 64-bit and should download the second file, otherwise download and install the 32-bit).

c) Restart inFlow and try again.

4. If you're still having problems: a) Try uninstalling Crystal Reports again from the Control Panel. b) Go to Windows Start Menu \rightarrow Run \rightarrow type in "regedit" to open up the editor for your Windows Registry c) Open up the folder My Computer \rightarrow HKEY_LOCAL_MACHINE \rightarrow SOFTWARE \rightarrow Classes d) Right click on that Classes folder and choose Permissions ... to open up the Permission dialog. e) Select all users one by one and choose Allow Full Control, then OK button. f) Reinstall Crystal Reports as before, g) Restart inFlow and try again. 5. Finally, if you're having problems and none of the suggestions above have worked it may be that your reporting files (program files that control how reports are pulled) have gotten corrupted. Once you're ready to proceed: a) Use Main Menu > General > Backup Data to make a backup of your database (save it externally or to your desktop) b) Uninstall and reinstall inFlow. c) Use Main Menu > General > Restore Data to load the backup file and then try your report again. If you're not using a C drive, please see the following: You will probably have problem printing the documents or reports, because the reporting engine that inFlow uses have registry values that point to the C drive. To resolve this: 1. Go to Windows Start Menu \rightarrow Run \rightarrow type in "regedit" to open up the editor for your Windows Registry 2. In the Registry Editor browse to the following subkey: HKEY_LOCAL_MACHINESOFTWARECrystal Decisions10.2Report Application ServerInprocServerLocalConnectionMqr OR HKEY_LOCAL_MACHINESOFTWAREBusiness objects10.5Report Application ServerInprocServerLocalConnectionMgr 3. Double click on the 'ConnectionDirectoryPath' string value on the right. 4. In the 'Value data' text box, change 'c:' to the drive letter where inFlow is installed (i.e. and also where the following directory exists): Program FilesCommon FilesCrystal Decisions2.5bin Click 'OK'. 5. Right click on the 'LocalConnectionMgr' subkey, click 'New' and then click 'String Value'. 6. Name this String Value 'ReportDirectoryPath'. 7. Double click on the 'ReportDirectoryPath' string value. 8. In the 'Value data' text box, type the same drive letter as you typed in step 4. 9. Restart inFlow and try again.

Reports

Reports allow you to see trends and analyse information that you've been capturing in inFlow. For example, you might want to know what your profit levels were this month and you can pull a Sales Profit Report to tell you.

To access the reports list:

1. Click the *Main Menu > Reports > Report List* from the options (for <u>visual reference see here</u>)

In this window you'll see the different categories of reports, Sales, Purchasing and Inventory and each section includes reports which relate to that part of your business.

To pull a report:

- 1. Go to the *Report List* as above and click on the name of the report you'd like to pull. This will open the menu for that report (as pictured here).
- 2. As with the *Listing Views* we talked about earlier you can use the filters here to control what appears in the final report. The filters here can be swapped out and added or removed as necessary.
- Click the >>More link to the left of the generate report button (not pictured) to expand the menu so you can see the Display section (as pictured here).
- 4. Choose which columns you want to include in your report by checking them off in the *Columns* dropdown.
- 5. Next, choose how you'd like to group your order
- 6. Choose the info you'd like to use to sort your data in the Sort By fields.
- 7. When you're ready, click the *Generate Report* button to pull your data.

From here you can print or export your report using the toolbar along the top of your screen. This allows you to customize the report that you're pulling.

Still unsure, or looking for more info?

Have a look at our Reports tutorial video for a closer look.

Required information to file returns

As a small business your time is at a premium so the last thing you need is to scramble around at tax time trying to find the numbers you need to file your returns. If you're using inFlow to track your sales and purchases it can make it easier to get a good portion of your business numbers for that return.¹

Filter By		
Customer 🔸		•
Order Date 🔸	All	•
Status -	Open, In Progress, Fully Shi	-
Display		
Columns	Order Number, Status, Paym	•
Orientation	 Landscape Portrait 	
Group By	Location	•
First Sort By	Order Number	•
Then Sort By		•
Then Sort By		•
Report Title	SALES ORDER PROFIT RE	PO
Description		
<< Less	Add to My Reports	
	Generate Report	

It is important to note that the key to this reporting is ensuring that you're entering your orders in real time (i.e. on the date of sale).

Total Sales & Taxes Charged for your filing year can be pulled via the *Sales Tax Summary* report. Simply change the Order Date filter to "Last Year" and write down the total Sales Amount (as noted on the last line of the last page of your report). inFlow can also break these amounts down by state by state if necessary.



Opening & Closing Value of Inventory that was in stock on a certain date can be pulled using the *Historical Inventory Report*. You will have to pull this report twice: once by setting the *Target Date* for the first of the year (Jan 1) and once by setting it for the last day of the year (Dec 31).

<u>Please note:</u> orders that are partially completed will not be counted as moved so if you had a partially completed purchase order, that stock will not be counted towards your current inventory on the target date. The same is true of partially completed sales orders as that stock will not be considered to have been shipped out if it's partially shipped as of the target date.

Purchases during the year (not expenses) should be the total paid for goods you've re-distributed or used to manufacture something you distributed. The *Product Cost Report* should provide the necessary information if you change the *PO Date* to filter for Last Year.



Other Costs would be any costs that would be associated with your inventory but haven't been covered by the item above such as non-vendor costs. You can pull the non-vendor costs using the *Product Cost Report* as well but ensure that you've included "Partial Non-Vendor Costs" (not pictured) so that it will total the amount on the report.

Doubtful Accounts

Total payable for all customers to whom you've ade a sale but don't anticipate being able to recoup their payment should be included here. The *Customer Payment Details* report should allow you to identify this by pulling for all orders for which the date is Last Year but which are currently "fully shipped" or "invoiced."

<u>Please note:</u> If the item has been shipped out but not paid and you're considering it a part of your doubtful accounts, you will want to apply a 100% discount on the invoice tab and complete the order. You may with to otherwise identify it in a custom field as well so that you can pull a report detailing which orders are included in this list.



¹. These instructions are based on documented requirements of the <u>Canadian Revenue Agency</u> and the <u>Internal Revenue Service</u>

Setting up your stock level

inFlow allows you to record how much stock you have in one or multiple locations:

- 1. Click into the first cell in the location column and choose from the list. If the location isn't listed click *Add/New* to add it.
- 2. Click into the quantity column and type the stock level.
- 3. Hit Tab.
- 4. Click Save.

Inventory



Setting up your taxes

Taxing schemes calculate your taxes when completing Sales and Purchase orders. In the *General* Settings window, on the *Pricing & Tax* tab you will find the *Edit Taxing Schemes* button which will let you set up your taxes.

Taxi	Taxing Schemes	xes you charge in different situation:	s, e.g. when shipping to other	locations with different to	axing schemes.	
	Taxing Scheme Name	Primary Tax Name	Primary Tax Rate	Tax On Shipping	Preview	
	No Tax		0 %	[]]	Sub-Total	\$100.0
Þ	Ontario Sales Tax	HST	13 %		Freight	\$20.0
*					HST	\$15.6
					Total	\$135.60
				Show All		
					Save & Close	Cancel

To set up a new tax:

- 1. Click the *Main Menu* > *Settings* > *General Settings*.
- 2. Select the Pricing & Tax tab.
- 3. Click the *Edit Taxing Schemes* button.
- 4. Give your Taxing scheme a name, provide your tax name(s) and percentage(s).
- 5. Click Save & Close.

You may want to select your tax as the default scheme. This tells the program to charge that tax on all new orders going forward (unless the vendor or customer has their own default scheme).

To do so (in the *Pricing & Tax* tab):

- 1. Click the dropdown next to Default Taxing Scheme.
- 2. Select the appropriate scheme.
- 3. Click Save & Close.

Inventory	
Default Location	Default Location -
Locations	Edit Locations
Receiving Addresses	Edit Receiving Addresses
Warn About Negative Inventory	✓
Show Sublocation	

SQL Server Browser Service cannot start (when switching to multi-user mode)

If you're getting the error mentioned above it's likely there is a problem with SQL Server Browser Service, a component which helps inFlow communicate with the database. It may not have been installed properly and as a result cannot restart itself.

OPTION 1: Restart your computer

Before trying anything else please restart your computer and attempt the switch to Multi-User Mode again. Sometimes the simple act of restarting the computer will help to correct the trouble you're having. If that does not work please move on to option 2 (as below).

OPTION 2: Attempt re-installing SQL Server

To correct the issue please attempt the following:

1. Uninstall SQL Server via the Windows Control Panel. From the program list, uninstall everything start with Microsoft SQL Server > then Restart your computer.

2. Go to this directory:
 32-bit Windows: C:Program FilesMicrosoft SQL Server
 64-bit Windows: C:Program Files (x86)Microsoft SQL Server

If this directory doesn't exist, skip to the next step. If there are MSSQL1 AND MSSQL2 (or more), skip to next step.

If there's only one called MSSQL.1, and no MSSQL.2, etc., then delete the files in these two folders: 32-bit Windows: C:Program FilesMicrosoft SQL ServerMSSQL.1MSSQLData C:Program FilesMicrosoft SQL ServerMSSQL.1MSSQLTemplate Data 64-bit Windows: C:Program Files (x86)Microsoft SQL ServerMSSQL.1MSSQLData C:Program Files (x86)Microsoft SQL ServerMSSQL.1MSSQLTemplate Data

3. Go the start menu and type "regedit", hit enter (this will open the registry editor). Go to: HKEY_LOCAL_MACHINE/Software/Microsoft/MSSQLServer Rename this folder by right clicking and add "backup" to the end, then close the registry.

4. Follow these steps to install SQL Server separately (please skip step 0) then restart inFlow: <u>https://onpremise.inflowinventory.com/software-support.aspx#/article/21247283</u>

5. When you restart the program you will be prompted to click the "Fix the Problem for me" button. Please do and when prompted enter a new password for the database (123456 should be fine).

6. Once the program has reloaded try switching to Multi-user mode again.

If you're still having trouble please do let us know (support@inflowinventory.com) and any screenshots of error messages you can provide would also be helpful!

Support Hours – where to reach us

Having trouble and looking for answers? Never fear, we're here to help!

Using the search box on our support page (https://onpremise.inflowinventory.com/softwaresupport.aspx) will provide you with helpful answers to all your questions. If you don't find the answer you're looking for, you'll see a series of contact options displayed below the results, right on that page!

We are available Monday-Friday between 10am and 6pm (UTC/GMT -4 hours) to offer support and guidance on matters related to the program. Please have a look at the <u>Contact Info</u> page for more information on how to contact us.

The cost is wrong, how do I change it?

To change the cost which appears in your product record simply:

Туре -									-
Cost Changed 🔸									-
								F	Refresh
Date	Transaction Type	Quantity	Qty Before	Qty After	Cost Before	Cost After	User	Remarks	-
12/5/2009 9:26 PM	Shipping	-20	580	560	\$0.50	\$0.50	Default User	SO-000012	
12/5/2009 9:25 PM	Shipping	20	560	580	\$0.50	\$0.50	Default User	SO-000012	
12/5/2009 9:24 PM	Cost Adjustment	0	560	560	\$0.50	\$0.50	Default User		
12/5/2009 9:16 PM	Shipping	-20	580	560	\$0.50	\$0.50	Default User	SO-000012	
11/19/2009 3:15 PM	Shipping	-16	596	580	\$0.50	\$0.50	Default User	SO-000009	E
11/19/2009 11:57 AM	Purchasing Costs	200	396	596	\$0.50	\$0.50	Default User	PO-000006	
11/19/2009 11:56 AM	Purchasing Costs	200	19	Entering			Default User	PO-000005	
11/19/2009 11:28 AM	Cost Adjustment	0	12	Enteryou	If new co	ost nere.	Default User		
11/1/2009 2:21 PM	Shipping	-4	200	196	\$0.50	\$0.50	Default User	SO-000001	
11/1/2009 2:15 PM	Purchasing Costs	1	0	200	\$0.00	\$0.50	Default User	PO-000001	
10/31/2009 9:55 AM	Cost Adjustment	0	0	0	\$0.00	\$0.00	Default User	Product Import	
10/31/2009 9:55 AM	Cost Adjustment		0	0	\$0.00	\$0.00	Default User	Product Import	

- 1. Open the product record for that item
- 2. Click the text link *Edit/History* next to the cost of your item.
- 3. Enter the new cost into the *New Unit Cost* value at the bottom along with any notes about why the cost is changing in the remarks field.
- 4. Click Adjust.

Troubleshooting Multi-User Mode Connections

This article is to help you if you are having problems connecting to the inFlow database. Typically, you are likely to receive one of the two common errors received when setting up a connection to the inFlow server in the Server Connection screen. a) "The Password was not entered correctly." In which case you should double check the password you are using the connect to the system. b) "There was an error trying to connect to the database." In which case you should please proceed with the troubleshooting article below.

A few things to try:

A) Check that network sharing is on, or that you're on the same network First, navigate to the "Network and Sharing Center" screen depending on your operating system:

WINDOWS XP / SERVER 2003: not applicable. WINDOWS VISTA: Go to START > Control Panel > and open the Network and Sharing Center WINDOWS 7 / SERVER 2008 R2: Go to START > Control Panel and open the Network and Sharing Center. WINDOWS 8 / 8.1: Hit the Windows key on your keyboard and type in "Control Panel" anywhere on the screen. Click on it, then go to "Network and Sharing Center".

1. In this screen, the network name listed here must be the same for all computers you're trying to connect together. The network is the middle icon connecting your computer to the internet (e.g "Network 3" or "WirelessNetwork1"). If it's not the same, inFlow won't be able to connect, so you'll

need to change it and reconnect to the same network. 2. Ensure that your network sharing is on on both the SERVER and CLIENT computers. This can be done by following the steps below according to your operating system.

WINDOWS XP / SERVER 2003: Go to START > Control Panel and choose Folder Options (you may have to switch to classic view to locate this icon). In this window click the View tab and make sure that "Use simple file sharing," is checked. WINDOWS VISTA: In the Network and Sharing Center and ensure that Network Sharing and discovery is on as well as file sharing. WINDOWS 7 / SERVER 2008 R2: In the Network and Sharing Center click the Change advanced sharing settings option and ensure that network discovery as well as file and printer sharing are both on. WINDOWS 8 / 8.1: Hit Windows Key + C to bring up the Charms Bar on the right hand side of your screen. Click the Settings icon and then click your network icon (it should appear at the bottom of the bar now). Once in the "Network" section right-click your network and choose, "Turn Network Sharing On or Off." You will want to choose, "Yes, turn on sharing and connect to devices."

3. Windows blocks connections, including inFlow's, when you're on a public networks which may be untrustworthy. If this screen is saying your network type is "Public Network", see below for how to change from public network to "Private network" depending on your operating system:

WINDOWS VISTA/ SERVER 2003: In the network and sharing center screen, click the "customize" link on the right (about midway down the window) and make this connection a Private). WINDOWS 7 / WINDOWS SERVER 2008 R2: In the network you'll click the network type to change it to "Home" or "Work" if it says public. WINDOWS 8 / 8.1: Hit Windows Key + C to bring up the Charms Bar on the right hand side of your screen. Click the Settings icon and then click your network icon (it should appear at the bottom of the bar now). Once in the "Network" section right-click your network and choose, "Turn Network Sharing On or Off." You will want to choose, "Yes, turn on sharing and connect to devices."

B) Re-set up multi-user mode, or try a different method of connecting: 1. Try switching your SERVER back to single-user mode. This can be done by going to Main Menu > Settings > Connection Settings and clicking the link at the bottom of the window to "Stop sharing". Once your copy of inFlow has completed the switch back to single-user mode, try enabling multi-user mode again (Main Menu > Settings > Multi-User Mode). 2. Verify that the inFlow Server Name is correct when entering it on your CLIENT computer. The easiest way to get this information is to log into inFlow from the server computer and select Main Menu > Settings > Connection Settings. The program should show you the server name and password as well as the IP address. Please double check the server name. 3. Try using the IP address instead of the server name when entering it on your CLIENT computer. (as described in the previous step you can get your IP address via inFlow SERVER computer). 4. Make a new connection settings file in case your server's connection info has changed. To do so, go to the SERVER computer and: a) Go to Main Menu (top left hand corner) > Settings > Connection Settings. b) Click to Save Connection Settings and save that file to a flash drive or shared network folder. c) Return to your client computer and use the connection settings file you've created to try and connect to the server. C) Check the firewall settings or disable antivirus/other connections temporarily 1. If you find that you are unable to change your network type from private to public, access the Windows Firewall screen from your control panel and set the program to be allowed on public networks on your SERVER. This only applies to versions later than Windows XP. a) Go to Start > Control Panel > Windows Firewall > Allow a program through Windows firewall. b) Scroll until you see "inFlow inventory - SQL Browser". There may be multiple instances of this. c) Ensure that all instances of inFlow inventory are set to "Allow" on "Public"

Allowed programs and features:

Name	Home/Work (Private)	Public
☑ Google Talk	\checkmark	
🗹 Google Talk Plugin		
🗹 Google Talk Plugin		✓
✓ HomeGroup		
🗹 inFlow Inventory - SQL Browser		
☑ inFlow Inventory - SQL Server		✓
✓ inFlow Inventory - SQL Server		

2. Temporarily shut down any 3rd party networking, file synchronization or database software on both the SERVER and CLIENT computers. Some programs will unexpectedly interfere with inFlow's communications. In addition to your firewall and anti-virus programs, temporarily shut down any software which fits this criteria on both the server and the client computer. 3. Try temporarily disabling any firewall programs on both the SERVER and CLIENT computers. Your Windows firewall can be found via START > Control Panel > Windows Firewall (in Windows 8, hit the Windows Key + X, and then hit P to bring up the Control Panel). Please also look at the programs you have running in the system tray at the bottom right (near where your date and time are displayed) for other programs to shut down. 4. Try temporarily disabling any anti-virus software on both the SERVER and CLIENT computers. If you are using Microsoft Security Essentials you should find it in your icon tray (bottom right). Double click to open the program and choose the "Settings" tab. Uncheck the first option ("Turn on real-time protection (recommended)") to turn off the program temporarily. For instance we've found that if you have the ESET protection system installed on your computer it is guite resilient in interfering with inFlow connections. To test, try turning it off as above and if that IS the case, please add inFlow as an exception via these instructions. D) Other Advanced things to try: 1. Manually try restarting SQL Server (INFLOWSQL) and SQL Server Browser services and ensure they're set to Automatic on the SERVER computer. This can be done by searching "services.msc" in the start menu and running the resulting program. In this window (which is ordered alphabetically) please scroll down until you file the two services mentioned above. One at a time right-click and restart them. They should be listed as "Automatic" but if not please right click and select properties, then change the startup type to "automatic" and click okay. 2. Manually switch SQL Server to allow remote connections by TCP/IP on the SERVER computer. This can be done by completing the following steps first running SQL Server Configuration Manager:

On Windows XP, click Start, Run, and type sqlservermanager.msc. On Vista or 7, click Start and type sqlservermanager.msc. On Windows 8, hit the Windows key + R and then type sqlservermanager.msc

b) Then, open up SQL Server 2005 Network Configuration, Protocols for INFLOWSQL. Ensure that Named Pipes and TCP/IP are enabled. c) Open up SQL Server 2005 Services. Right click SQL Server (INFLOWSQL) and select Restart. d) Ensure that the SQL Server Browser service is listed and is Running. If not, right click it and select Start. e) Ensure that both the SQL Server (INFLOWSQL) and SQL Server Browser services are set to start mode Automatic. If not, right click, select Properties, and under the Service tab, set Start Mode to Automatic. 3. Can you see the SERVER computer on the network? Test if you can reach the SERVER computer from the CLIENT computer by pinging it. To do this open a command prompt.

On Windows XP, click Start \rightarrow Run \rightarrow type "cmd" On Windows Vista or Win 7 bring up the Start Menu \rightarrow type "cmd" \rightarrow right click on cmd.exe \rightarrow select Run as administrator. On Windows 8, hit the Windows Key + R, hit A, and then say Yes to the User Account Control prompting your for permission. Type ping or ping (swapping those placeholders for your actual server name and IP address). If it can't even resolve it based on the hostname or IP address, then you have a problem with your network setup. (i.e. you get an error message "Ping request could not find host . Please check the name and try again.") If you get the error message "Request timed out." then it may still be possible that inFlow can connect. If you get a response that says "Reply from..." then your network is working. 4. Finally, if you're still having trouble with your connection and you are within the same network, you may still try using Hamachi to accomplish your connection as described in this article: <u>Setting up a VPN to connect inFlow between multiple locations.</u>

Troubleshooting Problems with Backup and Restore Data

FIRST TRY: If you are getting an error message when you try to backup or restore your inFlow data please try the following solutions sequentially.

Try doing the backup/restore from the server computer If you are in multi-user mode, please try it from the server computer. Sometimes, particularly for large databases, the backup will fail when going across a network.

Try running inFlow as an administrator If you're on Windows Vista, Windows 7 or Windows 8, please try closing inFlow and starting it by right clicking the icon and selecting Run as administrator, then try running the backup again. If you're on Windows XP, please ensure that you're logged in as an administrator. If that works, you should not need to continue running inFlow as an administrator each time.

Check your SQL Server version on both computers

If you get an error during restoring that says "Error: Failed to restore data. Check that the file is admissible." This happens when the two computers have different version of SQL Server installed. Please check both computer's list of installed programs:

Windows XP or Server 2003: click Start > Control Panel > Uninstall (or Add/Remove Programs). **Vista, Windows 7 or Server 2008 R2:** click Start > Control Panel > Uninstall (or Programs and Features).

Windows 8: Windows Key > type Control Panel > Uninstall (or Programs and Features).

Look at this list for anything that says, "Microsoft SQL Server", you will either have SQL Server 2005 or 2008 R2 installed. If the computer you're transferring TO has Microsoft SQL Server 2005 installed, please uninstall inFlow and reinstall <u>using the steps in OPTION 1 here</u>.

If you are getting this error but both your computers are on the same version of SQL Server, please have a look here, as that may indicate a problem with the backup file.

MANUAL PROCEDURES (If you're still unable to backup/restore) If none of the above steps worked, then please email us the contents of the log file in the Start Menu \rightarrow inFlow Inventory \rightarrow "Program Log" so we can look into the problem. In the meantime, you can also manually do a backup as follows: **Manual Backup Procedure** 1) Open a command prompt as an administrator. – on Windows XP, click Start \rightarrow Run \rightarrow type "cmd" – on Windows Vista or Win 7 bring up the Start Menu \rightarrow type "cmd" \rightarrow right click on cmd.exe \rightarrow select Run as administrator. – on Windows 8, hit the Windows Key + R, hit A, and then say Yes to the User Account Control prompting your for permission.

2) Copy the following line sqlcmd -S .\INFLOWSQL then right click the command prompt, select paste, and press enter.

3) At the 1> prompt, copy the following line BACKUP DATABASE inFlow TO DISK = 'C:\inFlowBackup.ifi' WITH FORMAT then right click the command prompt, select paste, and press enter. then press enter. It should change to a 2> prompt. then type or copy the following line GO then press enter. It should change back to a 1> prompt and the backup should be made. Exit the window.

Manual Restore Procedure

1) Open a command prompt as an administrator. – on Windows XP, click Start \rightarrow Run \rightarrow type "cmd" – on Windows Vista or Win 7 bring up the Start Menu \rightarrow type "cmd" \rightarrow right click on cmd.exe \rightarrow select Run as administrator. – on Windows 8, hit the Windows Key + R, hit A, and then say Yes to the User Account Control prompting your for permission.

2) Copy the following line:

sqlcmd -S .\INFLOWSQL

then right click the command prompt, select paste, and press enter.

3) At the 1> prompt, copy the following line

```
RESTORE DATABASE [inFlow] FROM DISK = N'C:\inFlow_Backup.ifi' WITH FILE = 1
```

then right click the command prompt, select paste, and press enter. then press enter. It should change to a 2> prompt. then type or copy the following line:

GO

then press enter. It should change back to a 1> prompt and the backup should be made. Exit the window.

Note that C:\inFlow_Backup.ifi is where your backup is. If it is at a different location or with a different file name, change it accordingly.

What are the minimum requirements of inFlow v2?

inFlow has fairly minimal requirements. Pretty much any reasonable desktop or laptop computer running Windows would be fine however **inFlow v2 is not compatible with Windows 10 or higher** (to

run inFlow on Windows 10 or up please head back to our main site to <u>download the current version</u>). To run inFlow v2 you'd need:

- CPU Pentium III 600 MHz or better
- 512 MB of RAM
- 700 MB of disk space
- 1024 × 768 screen resolution
- Windows XP (sp3), Vista, Windows 7, Windows 8, Windows 8.1, or Windows Server 2003 2008, Server 2008 R2. Some other versions of Windows may also work but are not officially supported.
- Both x86 and x64 operating systems are supported.

What if a customer orders something I don't have in stock?

inFlow will notify you when you're customer is ordering that you do not have enough stock to fulfill it by placing a red exclamation mark beside each item you don't have enough to fulfill. You can create a purchase order directly from this order.

N	ew 📙	Save 🛃 Pro	eview 🔻 🖻 Cop	y 🔻 🗋 Version 🛛 🕖 Att	achment 📃 Stic	ky 🔻		🗙 Close
Cus	stomer	PedalCar.CO	om 🔹	Sales Rep		•	Order #	SO-00009
Cor	ntact	Doug		Location		-	Date	11/24/2009 -
Pho	ne	800-555-963	31				Status	Open
Add	Iress •	492 Third St #123 Highland Pa USA 60035	treet ark, IL		F	light click here to c	reate a PO.	add shipping
	Item		Description		Quantity	Unit Price	Discount	Sub-Total
•	12875		Mini-Truck Batter	y Powered Red	15	\$23.99	0 %	\$359.85
	20101		1:24 California Hi	ghway Patrol	15	\$30.00	0 %	\$450.00
	46101		Alabama 1957 Po	olice Car	Orente P	en no	<u>^</u> %	\$31.92
*					Split Ord	ar by Inventory Ave	ilabla	
					Spintord	er by inventory Ava	liable	
							Sub-Total	\$841.77
Pay	ment M	ethod		 Remarks 			State Tax	\$42.09
Тах	ing Sche	eme	IL Tax	•			City Tax	\$10.52
Pric	cing / Cu	irrency	Wholesale Price	•			Total	\$894.38
							Paid	\$0.00
				Cancel Ord	er Con	nplete & Pay	Balance	\$ 894.38
0 9	Sales	Advar	nced					
							Curr	ant llear: Dafault llaar

To do so:

- 1. Right click the exclamation mark and choosing Create Purchase Order
- 2. Select the correct vendor
- 3. Click Save.

When the items come in:

- 1. Go to the purchase order and click Receive & Pay.
- 2. Return to the sales order and complete it.

If you see a yellow exclamation mark it means that you do not have enough stock to fulfil all open orders but do have enough to fulfil this order if you so choose. You can also use the methods above to reorder if you see a yellow exclamation mark. If, however, you see a clock icon on the order screen that means that this item is already "on order" from your vendor and that while you don't have enough stock, you do not need to re-order at this time.

What if I have many different tax rates that are applied to different things?

So you've got multiple tax rates do you? For your situation you will have to use both the taxing schemes AND product tax codes. For example, let's pretend that we're trying to set up inFlow to work with HST in Ontario (13%), just GST (5%) and no tax (0%). Because HST in Ontario is one tax you will want to set up your taxing scheme with a "primary" tax of 13% (HST) and a "secondary" tax of 5% (just GST) like so:

size Tabanas are differen	nineo	an alterna in differen	d allocations as a	udan abiasian ba	all as in a stimula	and the second large		
oring Schemes are differe	nt types of taxes y	ou charge in differen	t seuations, e.g.	when shipping to	other locations v	with different tax	ing schemes.	
Taxing Scheme Name	Primary Tax Name	Primary Tax Rate	Secondary Tax Name	Secondary Tax Rate	Compound Secondary Tax On Reimany	Tax On Shipping	Preview	
No. Tax		0.5		0.7	Printary	11	Sub-Total	\$100.0
Ortario Tax	HST	13 %	GST	5%		×.	Freight	\$20.0
							HST	\$15.6
							GST	\$6.0
							Total	A141.00

To reach this window go to:

- 1. Main Menu > Settings > General Settings
- 2. Click Pricing & Tax tab
- 3. Click Edit Taxing Schemes button
- 4. Enter your primary and secondary tax rates (in this example: HST 13% and GST 5%)
- 5. Click to Save & Close.

Then you'll set your product tax codes up so that you can identify your items as being taxable via only

your primary tax (HST), only your secondary tax (GST) or not taxable at all. It looks like this:

Pro	duct Tax Codes are codes for sho	wing which products are taxable	and why, e.g. some	products may be tax
	Name	Code	Primary Tax Applicable	Secondary Tax Applicable
	Taxable - HST	HST	V	
ļ	Taxable - GST	GST	F	
	Non-Taxable	Non-Taxable		
*				

To access your product tax codes:

- 1. Main Menu > Settings > General Settings
- 2. Click Pricing & Tax tab
- 3. Click Edit Product Tax Codes button
- 4. Create Tax codes for HST, GST and no Tax. (in this example: Taxable HST; Taxable GST and Non-Taxable)
- 5. Click to Save & Close.

To set the applicable tax code for your products:

- 1. Go to Main Menu > Inventory > Product List
- 2. Double click to open your product record and select the applicable tax code
- 3. Click Save.

This means that once you mark your various products (via their product records) so that the system knows which tax to apply you can simply run your order and have both taxes applied. The final result looks like this:

		thread and						a
Sales	Order Das	hboard ×	3					U)
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irder# -	Customer Ped	Car COM	Sales Rep				Order#	
tatus • Open, in Progress	Contact Day	1	Location				Date	05/11/2012 .
ustomer +	 Phone 800 	555-9631					Status	Open
	Refresh Address • 492	Third Street						
	#12 Hgh	iand Park, IL						
rder#	- USA 6000	5						add.shipping
>000011								
-000009	Item	Description		Quantity	Unit Price	Discoun	Tax	lub-Total
-000004	00303A	Army Combat Helm	4	1 1	et \$8.99	01	HST	\$8.9
	04275	4" Cassic Aiplane	- 3 Piece Set	1 qu	d \$1.99	01	GST	\$1.9
	▶ 090821A	3.75" Millary Clas	ics Waship		1 \$3.99	01	GST	\$3.9
	10201	1:700 Die Cast Ba	tleship	1	1 \$12.99	01	HST	\$12.9
	•				0			
								-
								-
							Sub-Total	\$34.9
	Payment Method		Bema	84			HST	\$2.0
	Taxing Scheme	Ordario Tax					GST	\$0.65
	Pricing / Currenc	Wholesale Price				_	Total	\$38.4
							Paid	\$0.00
							Balance	\$38.47
					Complete &	Pay -		
	a Calus	Advanced						

What if I sell my items in a different unit than I purchase?

If you buy an item in cases but sell them individually, you can tell inFlow how many individual items are in that case. That way, when you purchase this item the system will stock the individual items into your inventory (rather than the case). A good example of this would be purchasing a case of soda pop.

We might set that product record up like so:

Unit of Measure					
Standard UoM	ea.	•			
Sales UoM		•			
Purchasing UoM	cases	•			
Conversion	1		cases	=	24 ea.

There are 24 individual cans in that case and we're going to be selling them separately so we want inFlow to know that when we buy a case, we'll actually be receiving 24 individual cans as above. This means if we received 3 cases (for example) with the set up we've chosen above, the system would stock 72 ea. to your inventory (or 24 * 3).

This method to convert can be used to break down all sorts of different combinations if you remember that:

- Standard UoM should always be the unit you stock in and that you use for your Bill of Materials (if applicable).
- Sales UoM should always be the unit you sell in (if different than your standard).
- **Purchasing UoM** should always be the unit you purchase from your vendor.

To set up your units of measure:

1. Open the product record for that item (*Main Menu > Inventory > Product List >* double click the item you want)

2. Go to the Extra Info tab.

3. Enter the unit of measure into the field beside *Purchase UoM* (in the example above we chose "case", but you can type in anything you want)

4. You will see a conversion ratio pop up beneath for you to enter your details (in the example above that's 1 case = 24 ea.)

5. Enter the unit of measure into the field beside *Standard UoM* (in this case that will be "ea" as in the example above).

You should not have to set up your sales unit of measure unless you're breaking your items down

even further or grouping them for sale so in this example we haven't bothered, any sales for this item would automatically choose ea. as their unit.

Still unsure, or looking for more info?

Have a look at our Units of Measure tutorial video for a closer look.

What if I want my vendor to ship straight to my customer?

In some cases, your vendor will be shipping directly to your customer so you want to include your customer information on the purchase order and not have to manually enter all that information twice. Well, inFlow has a solution for that and it's called a Dropship PO. Essentially what you can do is create a purchase order directly from your sales order which includes your customer's information.

To create a dropship PO:

- 1. Create a sales order (Main Menu > Sales > New Sales Order)
- 2. Fill in your customer details and ordered items.
- 3. Click the Copy button in the top toolbar and from the drop down choose Dropship PO.

Yes, it's that simple. inFlow will duplicate your sales order as a purchase order and slot your customer's shipping information into the shipping information on the purchase order. Simply save and send it off to your vendor for fulfillment. At this stage you can choose to complete both orders or save and leave them open until you've been notified that the shipment has been sent out and received.

What if I want my vendor to ship to a specific warehouse?

You can set up multiple addresses where your vendors can ship to you, directly from the *Purchase Order* using the *Ship-To Address* drop down.

ion 🛛 🖉	Attachment	t <u> </u> Sticky 🔻			X Close
ns	Net 60	•		Order #	PO-000012
rder #				Date	11/20/2009 -
ation		•		Status	Open
			Ship-To		
			ess	Company	Address
			no ebiopin	2550 Cele	este Ave
Click I	nere to sele	ct the correct ac	Idress	1234 Mair	n Street
from t	he dropdow	n or add a new	one.	Add New/	Address
		5 case	\$20.00	0 %	\$100.00
		0			

To access it simply:

- 1. Click the Add Shipping link in the top right hand corner of your purchase order.
- 2. Next, click the *Ship-To Address* and choose the correct location from the drop down
- 3. If you need to add another address simply choose the *Add New Address* option from the list instead.

You can also control your receiving addresses via the *General Settings Window* under *Products & Inventory > Edit Receiving Addresses*.

What if I want to start over/delete my database?

So you've been evaluating or you've decided that you don't want to keep the data you have? No problem, you can reset your database and start over with a new blank one. First though, it's a good idea to <u>backup your database</u> since you'll be wiping everything clean and if you don't, it will be lost.

To reset all data:

- 1. Go to Main Menu > General > Reset All Data
- 2. Click Proceea.
- 3. You will be prompted to save a back up file if you haven't already, choose a safe place to save it then click *Save*.
- 4. inFlow will reload with a blank database.

What if my computer display is set to something other than 100% display?

What are DPI settings you may ask? DPI settings are a quick way to increase or decrease the size of text and icons on your computer screen, but they may have some drawbacks when using certain programs that aren't compatible with non-standard DPI settings.

inFlow is designed to work with 100% DPI settings.

			- 0 %
🕽 🔵 🗢 🖳 🕨 Control Panel 🕨	All Control Panel Items Display	✓ 4y Search Control Panel	,
Control Panel Home Adjust resolution	Make it easier to read what's on you You can change the size of text and other item: temporarily enlarge just part of the screen, use	ir screen son your screen by choosing the Magnifier tool.	(
Adjust brightness Calibrate color Change display settings	 Smaller - 100% (default) 	Preview	
Connect to a projector Adjust ClearType text Set custom text size (DPI)	Medium - 125%		
	Larger - 150%		
		Apply	
See also			
Personalization			
Devices and Printers			

It's important to take this into consideration when setting up your computer since, in some cases the display may appear re-arranged such that an option here or there is difficult to see or hard to use. Anything other than the 100% size has the potential to cause this issue and some systems with larger screens may be set this way by default so if you're seeing some minor display issues this could be the case with your system.

The following is a list of suggested DPI settings for computers using inFlow.

Windows XP: Should be set to 100% DPI (as above)

Windows Vista, Windows 7 & Windows 8: The best option: set to 100% DPI but for large monitors, you can set to 150% DPI. Ensure the option "Use Windows XP style DPI scaling" is OFF. This will enable DPI virtualization, where inFlow will be stretched out a bit. It'll be usable but may look a little bit blurry.

Windows 8.1 & 10: Best to leave the option "Let me choose one scaling level for all my displays" off. Then Windows 8.1 should automatically handle this. If the option is on, then the user should specify either 100%, 150%, or 200% DPI. (125% won't work quite properly).

What if my vendors have different codes for the products I buy?

Sometimes, while you buy the same item from several vendors, they may not all use the same name. That's where vendor codes come in. You can record the code that your vendor uses for that item in the product record, meaning that when you create a purchase order for that item, the vendor's code AND your code appear on the invoice. To set up a vendor code:

- 1. Open the Product Record for your item (Main Menu > Inventory > Product List).
- 2. Click the *Product Vendors* tab.
- 3. Select your vendor from the list and enter the price they charge you (if you like) and the product code they use.
- 4. Click Save

Voila! Now you should see your vendor's code on the purchase order as well as the name you've assigned this item.

What is multi-user mode? How do I set it up?

inFlow has what we call *Multi-user Mode* which means that multiple computers (running multiple licenses) can connect together and share the same data. In this situation your data is housed on one computer and the others connect to and edit that information (so that all computers in your network can see changes as they happen). Please keep in mind that each individual computer that requires edit rights must have its own license.

For more information and guidance regarding choosing licenses please see our article on licensing <u>here</u>.

When you want to use inFlow in multi-user mode, you will need to **choose one computer as your server. The server will host the inFlow data**, whilst other computers (called clients) will connect to the server in order to get their information. The server computer should typically be:

- Powered on most of the time, allowing clients to connect
- One of the fastest computers you have available

To set up inFlow in multi-user mode, you will first have to decide which computer will be your main computer and house the database. We call this a "server."

To set up the main (or "server") computer:

- 1. Install inFlow on the server computer.
- 2. From the inFlow menu, choose Multi-User Mode under Settings.
- 3. Click the "Server" button to set this computer up as a server
- 4. When it's done the program will give you the connection info you'll need to hook up your other computers. You can click the save this file for use on other computers or simply write it down (this is always accessible through the change connection option when logged into an admin account as well).

To set up the other computers (or "clients") with inFlow:

- 1. Install inFlow on the computer you've chosen. When installing, click the "customize" link that will appear above the install button (Immediately after you've accepted the license agreement) and be sure to select "client".
- 2. Once it is complete you will be prompted to connect using the settings file you saved when setting up your server of by filling in those details manually below.

3. Once they've been entered click "Connect."

If you are conneccting from a computer that was previously running a standalone copy of inFlow simply click the "Multi-user mode" option under Main Menu > Settings and choose "client" instead of "server", then proceed with steps 2 and 3 of the client instructions above.

The multi-user mode of inFlow is designed primarily within a local area network (LAN) environment. Click here to see information on <u>connecting inFlow over the Internet.</u>

What reports are included in inFlow?

To see a list of reports, click Report List from the Reports menu in the inFlow menu.



Sales Reports

The following reports are available under the Sales Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

😴 inFlow Inventory - Premium Edition Trial		- • •
Reports List	H	? •
Sales Reports	Salas by Product Summary	
Sales by Product Summary	A list of products showing a summary of how much has been sold and ourchased.	
Sales by Product Details	, , , , , ,	
Sales Order Summary	page 1/2	
Sales Order Profit Report	SALES BY PRODUCT SUMMARY	
Sales Order Operational Report	ITEM SOLD TOTAL SALES COST OF SALES PROFIT QUINTITY 000005 SOLD	
Sales Tax Report	Builders-Provened 12875 – Min-Tinuk Bulky Provend Red 35 \$838.65 \$580.00 \$709.85	
Customer Payment Summary	14/32 - Mix-Quote Car (adary) Yoweed (left SAMP) 660 81/323 84/30 81/40.26	
Customer Payment Details	Cilose-Cat 20101 - 124 Califonia Hghway Fatol 48(6) - Juagana 1907 Poles Car	
Customer Order History	762808 - Kung Pu Master Action Pigure 28 8102.57 80.00 81432.57 80.00 81432.57	
Product Customer Report	Dio cast 0000A - Amy Conta Hoinet	
Back Order Report	00/27 - 1000 Static Vaganta - 2000 Static Vaganta - 2000 Static Vaganta 00/27 - 377 Millarg/ Static Vaganta 100 - 6100 Static Vaganta - 6200 Static Vaganta 00/07 - 1700 Diago Card Statis value 100 - 6100 Static Vaganta - 6100 Static Vaganta 00/07 - 1700 Diago Card Statis value 10 - 6100 Static Vaganta - 6100 Static Vaganta	
Sales Representative Report	PRGI - YSIGR Haland D 872/0.00 873/0 877/0 877/0 5500 - Rost Raskel 2005.00 8446.56 8306.60 8140.06	
	Allisc 8787 - Chavy Satiss #12	
Purchasing Reports	CanalogN - 2007 Product Catalog CanalogN - 2007 Product Catalog 1 80.00 \$0.00	
Inventory Reports		
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- Sales by Product Summary A list of products showing a summary of how much has been sold and purchased.
- Sales by Product Details (Regular) A report which breaks down the products and sales orders to show you how well a product has been selling.
- Sales Order Summary Shows a summary of financial information for a number of sales orders.
- Sales Order Profit Report A list of Sales Orders with the estimated profit of each.
- Sales Order Operational Report (Regular) A list of Sales Orders with their statuses and requested ship dates.
- Sales Tax Report (Regular) Shows the total amount of Sales Tax that you have collected from customers.
- Customer Payment Summary A list of your customers along with their balance and last order date.
- Customer Payment Details A list of Sales Orders for which you still need to receive payment.
- **Customer Order History** The detailed contents of the orders that your customers have made in the past.
- Product Customer Report Shows you all the customers that have ordered a product.
- Back Order Report (Premium) Shows you the remaining products that you need to ship out to satisfy your customers' orders.
- Sales Representative Report (Premium) Shows you the Sales Orders that each sales representative was responsible for.
- **Customer List** Shows you your customers and their information. This report can be organized to select customers from a certain region or using various other criteria.

Purchasing Reports

The following reports are available under the Purchasing Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

😴 inFlow Inventory - Premium Edition		
Reports List	E	? •
Contemports List Contemports Contemports List Sales Reports Select Reports Purchase Order Summary Purchase Order Details Purchase Order Details Purchase Order Status Purchasing Tax Report Product Cost Report Vendor Product List Vendor List Vendor List Inventory Reports My Reports My Reports	<section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header>	
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- Purchase Order Summary (Regular) Shows a summary of a number of Purchase Orders.
- Purchase Order Details (Regular) Shows you the items you've purchased from vendors.
- **Purchase Order Status (Regular)** Shows the Purchase Orders from vendors for different products
- **Purchasing Tax Report (Regular)** Shows the total amount of Sales Tax that you have paid to vendors.
- Product Cost Report Shows you the costs at which you purchase products and average cost.
- Vendor Product List (Regular) A list of products with their related info from Vendors.
- **Vendor List** Shows you your vendors and their information. This report can be organized to select vendors from a certain region or using various other criteria.

Inventory Reports

The following reports are available under the Inventory Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

🚽 inFlow Inventory - Premium Edition		
Reports List	H	? -
Sales Reports	Historical Inventory	
Durah saisa Danarta		
Purchasing Reports	Snows the inventory count and amount as or a particular date, e.g. the start of your liscal year.	
Inventory Reports		
Inventory Summary	Historical Inventory	
Inventory Details Report	Inventory as of 10/2/2012 Report Printed: October 02, 2012	
Inventory by Location	ITEM UNIT COST QUANTITY TOTAL COST VALUE	
Historical Inventory		
Inventory Movement Summary	14232 – Mini Sports Car Battery Powered Red 312.00 880.00 850.00 \$990.00	
Inventory Movement Details	Close-out	
Estimated Inventory Duration	20101 – 124 California Highway Patrol \$15.00 7 \$105.00 46101 – Alabama 1957 Police Car \$0.00 0 \$0.00	
Stock Reordering Report	762896 - Kung Fu Master Action Figure \$0.00 174 \$0.00 181.00 \$105.00	
Product Price List	Die-cast	
Count Sheet Report	00303A - Army Combat Heimet \$0.00 48 ea. \$0.00 04275 - 4* Classic Airdane - 3 Piece Set \$2.00 550 \$1.100.00	
My Reports	090821A - 3.75* Millary Classics Warship \$0.99 103 \$101.97 10201 - 1.700 Die Cast Battleship \$0.00 -10 \$0.00	
iviy itepoits	0400 Police Basket \$1.50 -5 (\$7.50)	
	9500 - Boat Basket \$0.00 0 \$0.00	
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- Inventory Summary The total quantities of product inventory levels per product.
- **Inventory Details Report** A detailed list of inventory, including the product, location, and quantity.
- Inventory by Location (Regular) Shows the total amount of each product in a location (adding up over sublocations)
- **Historical Inventory (Regular)** Shows you the Inventory level and cost information as it was on a selected date.
- **Inventory Movement Summary (Regular)** Shows the amount of stock that has moved in and out of each location over time.
- Inventory Movement Details (Premium) Shows a full log of how the inventory has been moved around.
- Estimated Inventory Duration (Premium) Estimates how long your current inventory stock will last based on how fast each product has been selling recently.
- **Stock Reordering Report (Regular)** Shows total quantities of stock available along with reordering information.
- **Product Price List** A list of products along with their prices.
- **Count Sheet Report (Premium)** Will pull a list of work orders that you have completed with various details.

Keep in mind that any report which is available in Regular edition will also be available in the Premium edition.

My Reports

You can save reports under My Reports for quick reference. To add a report to My Reports:

- 1. Open up a standard report.
- 2. Click the "> More" link.
- 3. Click Add to My Reports button.

To view My Reports, click My Reports in the left Report List panel. Move the mouse pointer over each report to preview it.

What scanner do I use?

There are a few scanners which we've tried or been told users have and they are listed below:

- Metrologic (Eclipse) MK5145
- <u>Symbol LS 2208</u>
- <u>Symbol LS 4278 (wireless)</u> (note that this model has been replaced by the <u>Motorola LI4278</u>, however we have not tested this)

This is by no means a comprehensive list and users should feel free to test their own scanners with the free edition. Please note that some of the above scanners have been discontinued and replaced and we have not tested those out yet. As a general rule of thumb most "plug and play" scanners should be fine (i.e. USB connector, plug it in, installs itself).

What's the difference between Free, Regular and Premium edition?

For a full list of the features available in inflow please visit our Features Page here: <u>https://onpremise.inflowinventory.com/software-features.aspx</u>. But if you're looking for a quick and easy comparison of the different versions please check out the table below:

FEATURE	FREE	REGULAR	PREMIUM
# of Products and Customers	100	Unlimited	Unlimited
Custom Fields	Yes	Yes	Yes
Barcodes	Yes	Yes	Yes
<u>Units of Measure (i.e. conversions)</u>	Yes	Yes	Yes
Locations & Sublocations	Yes	Yes	Yes
<u>Full Movement History</u>	Yes	Yes	Yes
Simple & Advanced Workflow	Yes	Yes	Yes
Reorder Stock	Yes	Yes	Yes
Product Cost Tracking	Yes	Yes	Yes
Custom Documents	-	Yes	Yes
Print Settings	-	Yes	Yes
Count Sheets	-	-	Yes
Control User Access Rights	-	-	Yes
Work Orders and Bill of Materials	-	-	Yes
<u># of Reports</u>	13	25	30
<u># of computers that can use license key</u>	n/a	1/key	1/key

Max # of license type allowed on one network Unlimited 5

Unlimited

Should you have any further questions or concerns please feel free to get in touch with <u>info@inflowinventory.com</u>.