**RedBeam Inventory Tracking™**

**SaaS Edition**

**User Guide**

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# **Overview**

RedBeam Inventory Tracking™ was designed to make the collection of inventory information faster and more reliable. This document is divided into several sections which explain the functions of RedBeam Inventory Tracking™.

The **SaaS and System Requirements** section explains how to access RedBeam Inventory Tracking™ software. The **Getting Started Using the Application** section outlines each function and advises on how to begin if looking at RedBeam Inventory Tracking™. The **Accessing the Application & Menu Overview** section walks through the layout of RedBeam Inventory Tracking™. The following sections of this document details how to use each page in the order of how they appear in the Menu Overview.

## ***SaaS & System Requirements***

RedBeam Inventory Tracking™ Software as Service (SaaS) Edition improves the collection of inventory information fast and more reliably.

This application is hosted in Google Cloud.

The software is accessed via a supported web browser and can be used on a PC, laptop or a handheld mobile computer.

Accessing the “full view” on a PC, laptop, or tablet, users can set up items and other related data in the system, as well as print labels and receive, issue, transfer, and adjust items and run reports.

Users can access the mobile view on a handheld computer or smartphone to find items, as well as receive, issue, transfer and adjust items. This data updates the reports seen in the full view on the PC or laptop.

RedBeam Inventory Tracking™ supports mobile readers from leading consumers and rugged mobile computer manufacturers.

System Requirements:

* Google Chrome on Windows, MacOS, or Android
* Safari on iOS
* Internet connection for data syncing

## ***Getting Started Using the Application***

If starting with a brand-new system, it is recommended to begin with the **Setup** section of this document which explains how to create items and their attributes such as location, type, unit of measure, manufacturer, model and vendor.

Once these attributes are created, users may want to add item information (detailed in the **Items** section of this document).

It is recommended to tag items with barcode labels printed with the **Item ID** in the barcode. Whether items have been previously labeled or are being labeled for the first time, it is important to make sure that the data entered in the **Item ID** field matches the value encoded in the barcode, so that when labeled items are scanned in the future, the system will recognize the **Item ID** and display the appropriate item details.

As item information is populated, detailed views of this data can be sorted in the Reports, which is detailed in the **Reports** section of this document.

It is typical for RedBeam Inventory Tracking™ users to add new items and update the data of pre-existing items on an ongoing basis in the **Items** tab.

Items can be **Received, Issued, Transferred and Adjusted**, updating the quantity of consumable inventory (items) per location.

Administrative functions like adding additional system **Users**, **Roles** or using **APIs** to integrate RedBeam Inventory Tracking™ to other software applications can be found in the **Access** and **Setup** sections of this document.

## ***Accessing the Application & Menu Overview***

Users can access the RedBeam Inventory Tracking™ application on a PC, laptop or tablet through a compatible web browser, navigating to app.redbeam.com.

On the Login screen, users can enter their login credentials. If forgotten, a user can click “Forgot Password?”, enter their email address and receive email instructions to reset their password.

 Users with**Administrator** rights have access to the following functions:

* Transactions
  + Receive
  + Issue
  + Transfer
  + Adjust
* Reports
  + Stock on Hand
  + Transactions
    - All
    - Receive
    - Issue
    - Transfer
    - Adjust
  + Item History
* SetUp
  + Items
  + Item Data
    - Item Types
    - Unit of Measure
    - Manufacturers
    - Models
    - Vendors
  + Locations
    - Company
    - Building
    - Room
  + Label Printing
    - Label Templates
    - Sequential Printing
  + Customization
    - Location Names
  + API
* Access
  + Users

# **Profile Menu**

The **Profile Menu**tab is accessed by clicking on the  icon located in the top right corner of the application, revealing a drop-down display:

* User Display Name
* Tenant Display Name
* Profile
* Help
  + Knowledge Base
  + Application Reset
* Logout
* Dark Mode
* Version Number

The **Profile**menu reveals the display name of the logged in user, the user’s email address and assigned user Role. The Contract ID is the unique ID assigned to your account. From here, a user can also reset his or her password.

The Help options reveal a link that will open in a separate tab to the Knowledge Base which includes the RedBeam Inventory Tracking™ User Guide, Release Notes, Support Chat, and the option to submit Support Tickets where an application specialist will be in touch with you.

Application Reset will force sync your account if there are network disturbances. Users are prompted with a notification prior to confirming the application reset, warning that any updates that have not yet been synced to the cloud will be lost by proceeding. This will mostly impact offline Users.

Logout will return the user to the Login screen.

Toggling the System Display to Dark Mode will invert the system colors.

The Version Number is automatically updated depending on the software development of the application.

# **Transactions**

The **Transactions** tab allows the users to Receive, Issue, Transfer and Adjust items by quantity and location.

In RedBeam Inventory Tracking™, the user-defined locations can be created and edited via **Setup > Locations**.

There are three tiers of locations. By default, they are named: Company, Building, and Room. A Room belongs to a Building and a Building belongs to a Company. Users may create as many locations as needed in this three-tier hierarchal structure. Location names can by updated to a user-defined name via **Setup > Customization > Location Names.**

## ***Receive***

When attaining more of an item, the user can navigate to **Receive** and tell the system where the items will be going with the “To” dropdown.

The “To” dropdown pulls from a list of locations that can be created and updated via **Setup > Locations**.

Next, enter, scan or select the **Item ID** of the item from the dropdown. The Receive page shows how much of this item you already have in your specified location.

Type in the number of items received under Quantity Received and optionally enter a Reference Number for this transaction.

A screenshot of a computer

AI-generated content may be incorrect.

If desired, additional Notes about the transaction can be added in the **Details**tab.

Click the A green rectangle with white text

AI-generated content may be incorrect.button to confirm the transaction. Information about will be actively updated in **Reports**.

## ***Issue***

When an amount of an item is depleted, the user can navigate to **Issue** and specify where the items are being taken from with the “From” dropdown.

Like the “To” dropdown in **Receive,** the “From” dropdown pulls from a list of locations that can be created and updated via **Setup > Locations**.

Next, enter, scan or select the **Item ID** of the item from the dropdown. The **Issue** page shows how much of this item you currently have in your specified location.

Type in the number of items issues under Quantity Issued and optionally enter a Reference Number for this transaction.

A white rectangular object with a black border

AI-generated content may be incorrect.

If desired, additional Notes about the transaction can be added in the **Details**tab.

Click the  button to confirm the transaction. Information will actively updated in **Reports**.

## ***Transfer***

When an amount of an item is moved from one location to another, the user can navigate to **Transfer** and specify where the items are being taken from with the “From” dropdown, and where they are being moved to with the “To” dropdown.

The “To” and “From” dropdowns pull from a list of locations that can be created and updated via **Setup > Locations**.

Next, enter, scan or select the **Item ID** of the item from the dropdown. The **Transfer** page shows how much of this item you currently have in your specified locations.

Type in the number of items that are being moved under Quantity Received and optionally enter a Reference Number for this transaction.

A close-up of a computer screen

AI-generated content may be incorrect.

If desired, additional Notes about the transaction can be added in the **Details**tab.

Click the A green sign with white text

AI-generated content may be incorrect.button to confirm the transaction. Information will actively update in **Reports**.

## ***Adjust***

When an amount of an item is not formally received, issued, or transferred, but needs to be updated for any reason, the user can navigate to **Adjust** and specify where the items are location with the “To” dropdown.

The “To” dropdown pulls from a list of locations that can be created and updated via **Setup > Locations**.

Next, enter, scan or select the **Item ID** of the item from the dropdown. The **Adjust** page shows how much of this item you currently have in your specified locations.

Type in the number of items you should have under Adjust Quantity To and optionally enter a Reference Number for this transaction.

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AI-generated content may be incorrect.

If desired, additional Notes about the transaction can be added in the **Details**tab.

Click the A green sign with white text

AI-generated content may be incorrect.button to confirm the transaction. Information will actively update in **Reports**.

# **Reports**

All reports in RedBeam Inventory Tracking™ allow users to filter, save filters, customize column order and visibility and export reports.

If users repetitively select the same filtering criteria, users may save personal filters with the  icon. Admin users may save shared filters for all users in the account with the icon.

To save a personal or shared filter, select the filtering criteria on the **Filter By** pane, click the desired icon, and name the saved filter.

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AI-generated content may be incorrect.

Click the **Saved Filters** pane to access all personal and shared saved filters. Click on the saved filter to activate the saved filter criteria.

Delete a saved filter by selecting it and clicking the icon.

Users can edit the asset grid view with the  icon, allowing users to hide column visibility with the  icon, and adjust column order by dragging the field names up and down.

Editing column order and visibility is per-browser, so one user’s view will not affect that of another user.

A screenshot of a computer

AI-generated content may be incorrect.

Item data can be exported using the  icon.

Exported files will reflect the column order and column visibility as altered by the  icon.

Users can export files in the following formats.

Graphical user interface, text

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Choose the desired file format to export the data.

## ***Stock on Hand***

The **Stock on Hand** report allows users to filter and export data that reflects the current live quantities of items.

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Filters include:

* Item ID
* Current Quantity
* Company
* Building
* Room
* Item Type
* Unit of Measure
* Manufacturer
* Model
* Custom Date
* Custom Toggle 1
* Custom Toggle 2

## ***Transactions***

### ***All***

The **All Transactions** report contains a full history of all Receiving, Issuing, Transferring and Adjusting that has occurred in the account.

A screenshot of a computer

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Filtering options include:

* Item ID
* Reference Number
* Transaction Time
* Entered By
* Item Type
* From Company
* From Building
* From Room
* To Company
* To Building
* To Room

### ***Receive, Issue, Transfer, Adjust***

The **Receive, Issue, Transfer** and **Adjust** Reports offer the same filtering credentials as the **Stock on Hand** report, but variate based on each transaction.

**Receive** includes filters:

* To Company
* To Building
* To Room

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**Issue** includes:

* From Company
* From Building
* From Room

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**Transfer** includes both To and From Company, Building and Room.

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**Adjust** includes:

* For Company
* For Building
* For Room

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## ***Item History***

**Item History** displays all changes made to items themselves. For more information on how to update items, see the **Items** section of this document. This report will display who updated the item, when the update occurred, and what the update was, disclosing the old and new value if applicable.

Users can filter based on:

* Item ID
* Company
* Building
* Room
* User who made the change
* Window of time

A screenshot of a computer

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# **Setup**

**Setup** enables users to create **Items** as well as populate dropdown information for item metadata dropdown fields such as **Item Data** and **Locations**.

The **Setup** section of this document and the **Setup** menu in RedBeam Inventory Tracking™ additionally includes **Label Printing, Customization** and **APIs**.

## ***Items***

The **Items** tab contains all items in your database. Users can create new items as well as edit existing item descriptions manually and/or batch-style via importing a spreadsheet or csv file.

Prior to creating items manually, it is recommended to create the item attribute data that will display in the drop-down fields within each item record. For instructions, see the **Item Data** tab section of this document.

Users can edit the item grid view with the A blue circle with white stripes

AI-generated content may be incorrect. icon, allowing users to hide column visibility with the A blue and white eye in a circle

AI-generated content may be incorrect. icon, and adjust column order by dragging the field names up and down.

Editing column order and visibility is per-browser, so one user’s view will not affect that of another user.

**Creating, Deleting and Editing Items**

To create an item manually, click the button. The only required field to create an item is its **Item ID**, the unique identifier tied to each item in the system. It can be alphanumeric with up to 100 characters, but most organizations opt for short numeric values.

When done entering item information, click the **Save** button to create the item.

A copy of an existing item’s metadata can be made by clicking the **Copy** button.

To delete the item, click the **Delete** button. A warning message will be displayed prior to deletion.

To edit an existing item, click the item record in the grid. Items in the grid can be searched using the  icon.

Users can batch import items with a spreadsheet or csv file by selecting the A blue circle with a white cloud and arrow

AI-generated content may be incorrect. icon.

A screenshot of a computer

AI-generated content may be incorrect.

Once the user selects the desired file for import, the import tool will map the column headings of the file with the column headings in RedBeam Inventory Tracking™. If anything does not align, the user receives the red error message above, and has the option to exclude the column or match the column to a field using the edit icon:

A black pencil with a cap

AI-generated content may be incorrect.

Once all columns are mapped, and the user selects “IMPORT,” RedBeam Inventory Tracking™ takes things a step further by letting the user know if records failed to import and why.

A screenshot of a computer

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This option allows the user to download a file with information of which items failed along with a clear error message as to why they failed.

Users can batch update items by importing a spreadsheet or csv file. Importing will never duplicate or delete information. It will only create or update.

**Details**

A screenshot of a computer

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Enter item information under the **Details** tab including:

* **Item ID**– This is the number used to uniquely identify the item. For barcode scanning to work properly, this complete number (including any leading zeros) should be encoded in printed barcodes used to tag the assets.
* **Description**– This is a description of the item.
* **Item Type**– This is the item category that generally describes the item.
* **Manufacturer**– This is the company that manufactures the item.
* **Model**– This is the model number of the item, cascading dependent on the manufacturer.
* **Notes**– This is a free text field for additional information about the item.
* **Active**– This is a Yes/No field. Items marked as inactive will not be able to be transacted.

**Attachments**

Items can retain file attachments including but not limited to Excel files, Word documents and Images. Users may connect with the device camera to take photos in real time by selecting the  icon.

To attach a file from the computer, select the file and save the item.

**History**

A full history of changes to an item are displayed in the **History** tab. This tab captures what change occurred to the item, when the change occurred and who made the change dependent on the logged in user.

**Export**

Item data can be exported using the A blue circle with a white cloud and arrow

AI-generated content may be incorrect. icon. Exported files will reflect the column order and visibility as specified by the user, which can be altered using the  icon.

Users can export files in the following formats.

A screenshot of a computer

AI-generated content may be incorrect.

Choose the desired file format to export the data.

**Printing Labels**

If using a supported barcode label printer, item labels can be printed from the **Item** screen.

To print labels, check the boxes next to the desired items or select all by checking the black box outlined in white in the header.

A screenshot of a computer

AI-generated content may be incorrect.

Then click the  icon and select the desired **Printer** and **Label Template**. See the **Setup > Label Printing** section of this document for more information on label template creation and printing sequential labels.

A preview of the labels will be displayed in addition to a count of the total number of labels that will be printed.

Click **Print** to print the labels.

A screenshot of a qr code

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## ***Item Data***

The **Item Data** tab allows users to create the dropdown options for asset metadata dropdown fields.

Users may create metadata dropdown options manually with the A green circle with a white cross

Description automatically generated button, may batch create by importing using the icon, or may use APIs for more advanced integration. See the **API** section of this document for more details.

Users may export the list of dropdown options from each section with the  icon.

Admin users can delete one or multiple metadata dropdown options with the icon.

To edit or delete one dropdown option, click on it in the grid and make the desired changes.

### ***Item Types***

**Item Types** are categories that generally describe an item.

A screenshot of a computer

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### ***Units of Measure***

**Units of Measure** are commonly “Each”, “Roll”, “Foot,” “Box”, “Case,” etc.

A screenshot of a computer

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### ***Manufacturers***

**Manufacturers** are companies who produce items. Manufacturer details include:

* Manufacturer
* Address 1
* Address 2
* City
* State
* Country
* Zip Code
* Phone
* Fax

A screenshot of a computer

AI-generated content may be incorrect.

### ***Models***

A **Model** is a name given by a manufacturer to a type of product to help identify it. Models are nested from Manufacturers.

A screenshot of a computer

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## ***Locations***

The location of an item is the physical place where an item can be received to, issued from, transferred to/from or adjusted to. RedBeam Inventory Tracking™ has a three-tier nested hierarchy system of locations, **Company**, **Building** and **Room** where a Room must belong to a Building which must belong to a Company. Users may update the titles of these locations in **Setup > Customization.**

### ***Company***

Companies are the highest tier in the location hierarchy. Company details may include:

* Company Name (required and immutable)
* Address 1
* Address 2
* City
* Zip Code
* Country
* State
* Phone
* Fax

A screenshot of a computer

AI-generated content may be incorrect.

### ***Building***

Buildings are assigned to companies and are the second tier in the location hierarchy. Building details may include:

* Building Name (required and immutable)
* Company
* Address 1
* Address 2
* City
* State
* Country
* Zip Code
* Phone
* Fax



### ***Room***

Rooms are assigned to buildings and are the third and lowest tier in the location hierarchy.

Room details may include:

* Room ID (required and immutable)
* Room Name
* Building
* Phone

## ***Label Printing***

***Printer Setup Instructions***

Before labels can be printed from RedBeam Inventory Tracking™, the printer must be connected to a network and the IP address will need to be configured within RedBeam.

1. Once you have tags loaded into your printer, connect a network cable to the rear of the printer.

2. Connect the other end of the network cable into an available port on your network.

3. Plug your power adapter into the rear of the tag printer and plug the power cable into an available AC outlet.

4. Power the tag printer on by pressing and holding the power button for about 5 seconds and then release the power button.

5. Once the tag printer has finished powering on, press and hold the Feed and Cancel buttons for two seconds and then release.  This will print out a configuration page as shown below.  Please note that by default, a new tag printer will obtain an IP address via DHCP.

A screen shot of a computer

Description automatically generated

6. Download the Zebra print utility [here](https://20597294.fs1.hubspotusercontent-na1.net/hubfs/20597294/zebra-browser-print-windows-v132489%20(1).exe).

7. Right click on that downloaded file name zebra-browser-print-windows-v132489(.exe) and select Properties > Compatibility > Change high DPI settings.

A screenshot of a computer program

Description automatically generated

8. Check both boxes and select “System” from the dropdown. Then click Ok, and Ok again.

A screenshot of a computer program

Description automatically generated

9. Double click the file zebra-browser-print-windows-v132489(.exe) to start the installation and click Next until you get to install. Then click Install. Make sure to keep the box checked forLaunch Zebra Browser Print before clicking Finish.

A screen shot of a computer

Description automatically generated

10. You will receive a message that security needs to be accepted. Click OK.

A screenshot of a computer error message

Description automatically generated

11. Then you will see a webpage showing your connection isn't private. Click Advanced and click Continue to localhost.

A screenshot of a computer error message

Description automatically generated

12. Select Yes to give your computer access to the Zebra printer.

A computer screen shot of a computer error

Description automatically generated

13. Open your task tray at the bottom right and select Browser Print.

A screenshot of a computer

Description automatically generated

14. Under Added Devices, select Manage.

A screenshot of a computer

Description automatically generated

12. Enter any printer name as you would like it to appear. Then enter the printer's IP address (from step 5) for Device Address and click Add.

A screenshot of a computer

Description automatically generated

13. Login to your RedBeam Inventory Tracking™ account and go to the Items page.

14. Check the box for any asset and click the Printer   icon.

15. Select the printer from the dropdown.

16. Click Yes to allow RedBeam Inventory Tracking™ access to your Zebra printer.

A screen shot of a computer

Description automatically generated

Your printer is now configured to print barcode labels from RedBeam Inventory Tracking™.

### ***Label Templates***

To create a **Label Templates**, click the A picture containing text, first-aid kit, ball

Description automatically generated button and enter a **Template Name** that is representative of the type of label being created (i.e. My Company Item Label).

To add content to the label, click the A picture containing text, first-aid kit, ball

Description automatically generated button in the Label Content section and choose from **Fixed Text**, **From Field** or **Barcode**.

Choosing **Fixed Text** allows the user to enter a line of text that will always appear on the label.

Choosing **From Field** allows the user to choose a data field that will be populated on the label based on information in the **Item** record selected to print.

Choosing **Barcode** allows the user to populate the label with a 1D barcode and its corresponding human readable value. Choosing **QR Code** populates the label with a 2D barcode.

Click **Save** to save the label format.

A screenshot of a qr code

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### ***Sequential Printing***

To print sequential labels from the **Sequential Printing** screen, enter the starting number (i.e. 100) in the **Start** field and the ending number (i.e. 199) in the **End** field. Then select a **Printer** and a **Label Template**. A preview of the labels will be displayed. Click **Print** to print the labels.

There are several other options to choose from when printing sequentially.

To add a prefix to all the labels being printed (i.e. ABC), enter the prefix in the **Prefix** field. Labels starting at 100 will print as ABC100, ABC101 and so on.

The increment can be changed to something other than 1 by changing the value in the **Update** field. When this value is 1, labels starting at 100 will increment one at a time (i.e. 100, 101, etc.). If this value is changed to 2, as an example, the labels will increment 2 at a time (i.e. 100, 102, etc.).

To keep Item labels all the same number of digits, enter the number of digits desired in the **Pad to Maximum Length of** field. If this value is 4, as an example, labels starting at 100 will print as 0100, 0101, etc.

A screenshot of a computer

AI-generated content may be incorrect.

## ***Customization***

The customization tab contains the option to add **Location Names**.

### ***Location Names***

**Location Names** allows Admin users to configure the titles of Building, Company and Room to any locations of preference.

Type the desired title in the desired position and click SAVE.

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## ***API***

RedBeam Inventory Tracking™ provides RESTful API’s that can be used to integrate with other systems.

API’s can be accessed under the **API** tab. This *swagger documentation* will update in real time if application update deployments alter the layout of the software.

# **Access**

The **Access** tab contains the option to add users.

## ***Users***

Users may be added to the system up to the number of licenses purchased.

To create a **User**, click the A green circle with a white cross

AI-generated content may be incorrect. button and enter:

* First Name
* Last Name
* Email
* Role

Users assigned the “**Administrator**” role have full access to the system features.

Users assigned the “**User**” role will not have access to **Setup**.

Graphical user interface

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Click **Save** to create the User. Once saved, the new user will receive an email with a 48-hour link that will allow them to create their password and log in to the system.

To edit or delete a User, select the User by clicking on it in the grid and make the desired changes.

Deleting a user will prevent the deleted user from accessing the system and free up a user license.