Getting Started
with EZOfficeInventory

Asset Tracking and Inventory Management done right

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Step 1 – Identify your items

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

ITEMS TO KEEP

ASSETS

Items that are used over time and tracked individually e.g. Forklift Trucks and Cars.

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

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

ASSET STOCK

Items that are used over time but are NOT tracked individually e.g. nail bits, cables and chairs.

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

If you have 100 chairs, add an Asset Stock and add a stock of 100 to the record. You'll be checking out quantities.

ITEMS TO CONSUME

INVENTORY

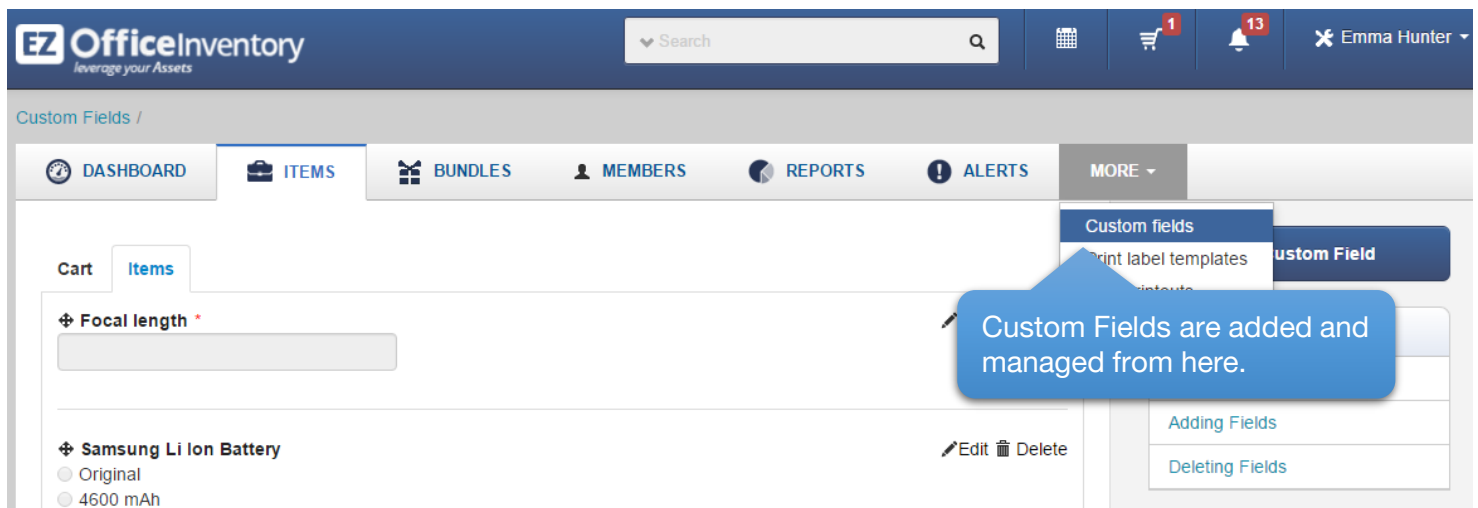These are consumable items e.g. water bottles or fuel.

You add or remove stock for inventory items.

If you have 300 water bottles, add an Inventory. Then add a stock of 300 to this inventory record. You'll be removing stock as it gets consumed or sold.

Asset Stock and Inventory modules can be turned on/off from the Add-ons. If you don't need any Item Type, it can be turned off. How do you calculate the Items' count as per your subscription?

Step 2 – See if you need Custom Fields

Items in EZOfficeInventory come with predefined set of fields. However, if they are not sufficient for your needs, you can add custom fields.

Different item groups can have different Custom Fields. Learn More

Asset #33: DSLR Camera with Lens

Focal Length	28 – 200 mm
Image Stabilization	Yes
Shutter Speed Step	1/2

Step 3 – Add Members

Members are individuals who checkout Assets or Asset Stocks, or use stock from Inventory.

Members can be Admins or Staff Users. **Admins** have full access and can add and update records. They can also take actions for Staff Users.

Staff Users cannot add or update items and don't see reports. They can only take actions for themselves. [Types of Alerts each user level get on different actions](#).

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

From Settings, you can further configure the [Simple Access Control](#) for staff users as well [Advanced including Arbitration in a User Listing](#).
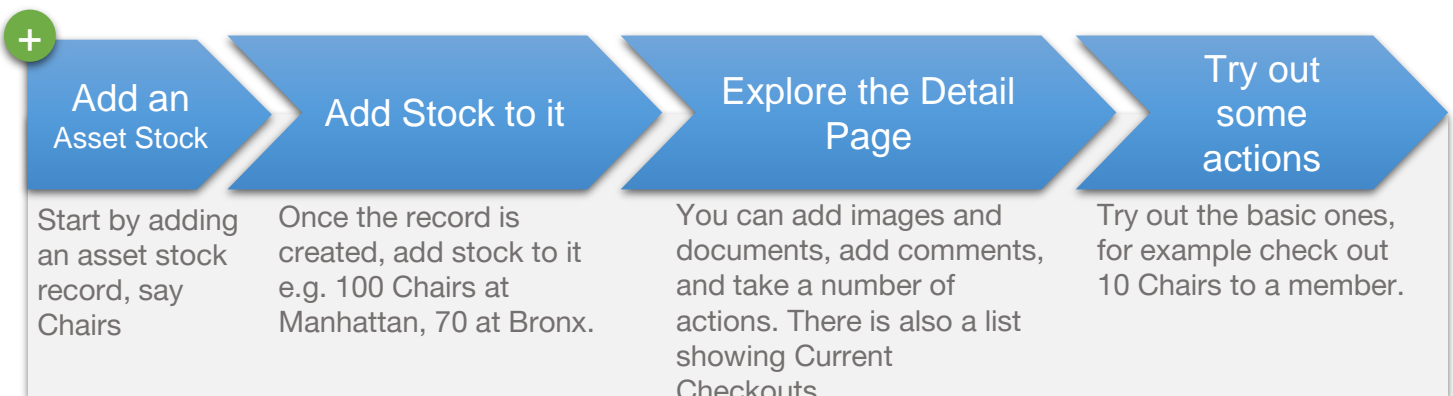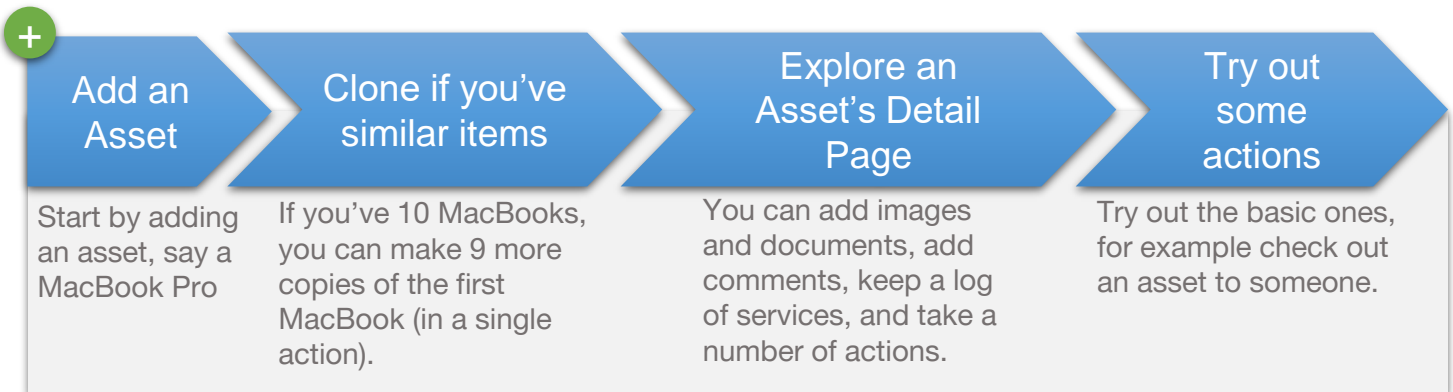

Emma Robinson
emma@example.com
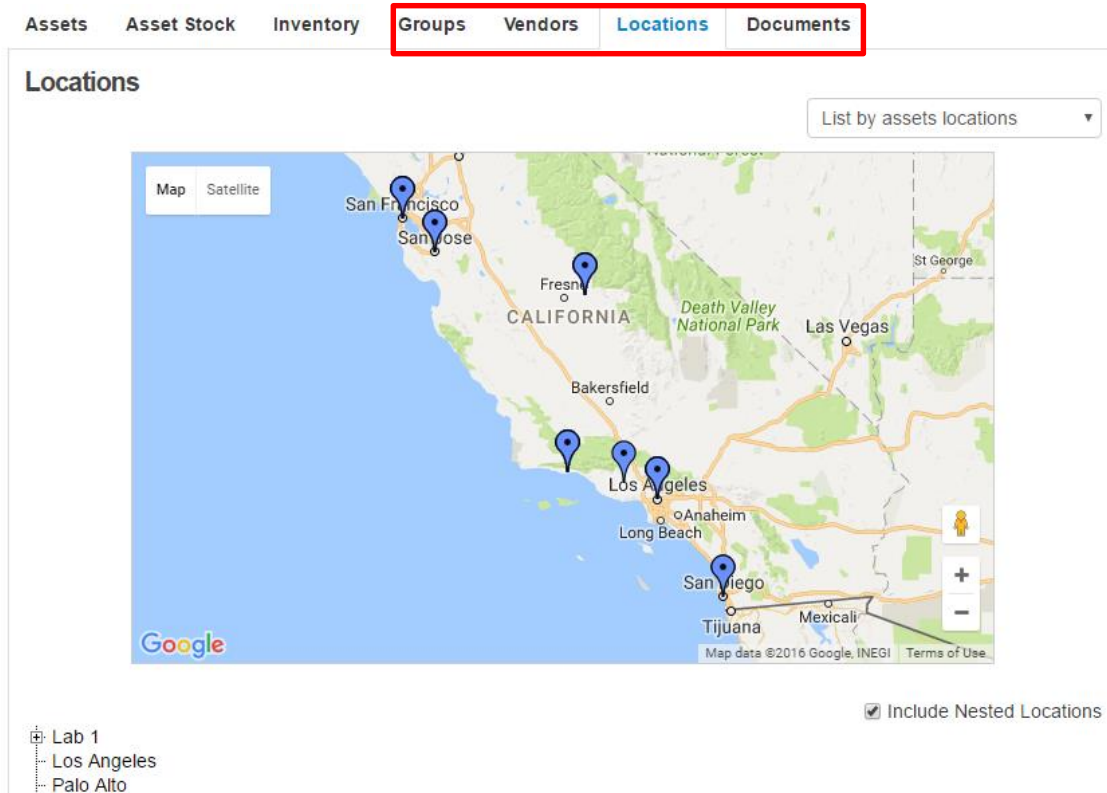
Marketing Department

Staff User

Has the DSLR Camera checked out

Step 4 – Add Items

Now that you've added some members, let's go ahead and create a few items.

Add an Asset → Clone if you've similar items → Explore an Asset's Detail Page → Try out some actions

Add an Asset
Start by adding an asset, say a MacBook Pro

Clone if you've similar items
If you've 10 MacBooks, you can make 9 more copies of the first MacBook (in a single action).

Explore an Asset's Detail Page
You can add images and documents, add comments, keep a log of services, and take a number of actions.

Try out some actions
Try out the basic ones, for example check out an asset to someone.

Add an Asset Stock → Add Stock to it → Explore the Detail Page → Try out some actions

Add an Asset Stock
Start by adding an asset stock record, say Chairs

Add Stock to it
Once the record is created, add stock to it e.g. 100 Chairs at Manhattan, 70 at Bronx.

Explore the Detail Page
You can add images and documents, add comments, and take a number of actions. There is also a list showing Current Checkouts.

Try out some actions
Try out the basic ones, for example check out 10 Chairs to a member.

Add an Inventory → Add Stock to it → Explore the Detail Page → Try out some actions

Add an Inventory
Start by adding an inventory record, say Water Bottles

Add Stock to it
Once the record is created, add stock to it e.g. 100 Bottles at Manhattan, 30 at Brooklyn.

Explore the Detail Page
You can add images and documents, add comments, and take a number of actions.

Try out some actions
Try out the basic ones, for example add and remove stock.

Step 5 – Locations, Groups, Vendors and Documents

Groups	Use groups and subgroups to categorize your items. For example, all the Camera Lens and Tripods can go to Camera Accessories group. Restricting Users to View Asset Groups they have permission to!
Vendors	Vendors who provide services, or supply assets and inventory go here. For example you can record all services that Caterpillar provided for your cranes. Or all the Cranes that you got from Caterpillar. Learn More
Locations	Assets & Stock Quantities can be tracked across different locations. If you provide the correct address when adding locations, we'll show your items on a map. These locations can also be building rooms, warehouses or cabinets. Learn More
Documents	All images and documents in your account can be placed in a central location. Any file that you upload to an item or a group, even a user's signature gets added to the library. Importing Images and Documents from Excel to EZOfficeInventory.

Step 6 – Migrate existing data to EZOfficeInventory
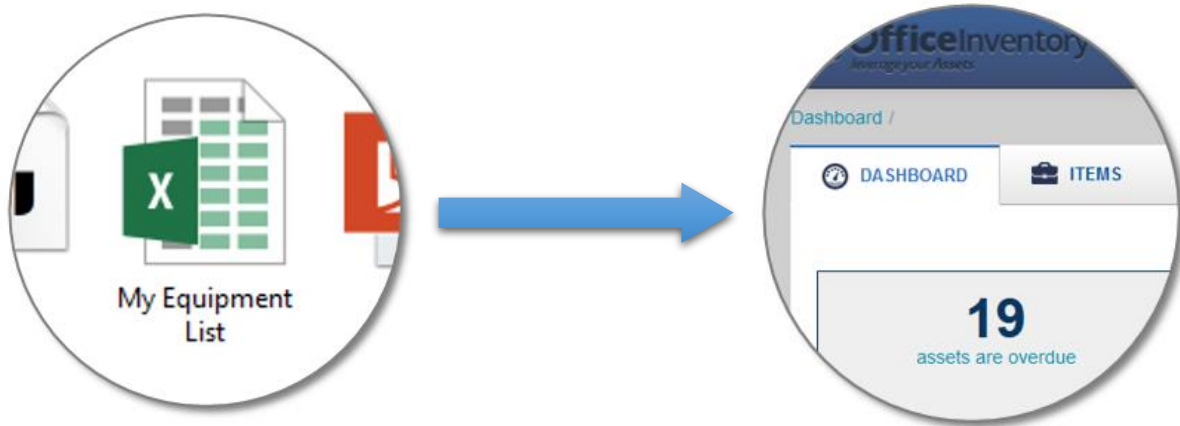
If you have data in Excel, import it directly to EZOfficeInventory. You can import:

- Assets, Asset Stock and Inventory
- Create Locations, Groups or Vendors while importing items
- Members
- Assignments of Assets to Members
- Custom Fields are also available for migration
- Images

[Learn More](#)

[Learn about the best practices for Excel Import](#)

[Information that can be exported from EZOfficeInventory](#)

Step 7 – Try out different listing views

Turn on Compact View in Assets to combine items with same names

Click to enlarge screen

Toggle to Thumbnails

Customize Filters

Take Mass Actions on Items

Customize Columns

Similar to Compact View on Assets, there's *Location Stock View* on Inventory and *Current Checkout View* on Asset Stock. Location Stock view shows stock quantities by location instead of showing one total quantity per item.

You can increase the page size from Settings → My Settings

Step 8 – Print QR Code or Barcode Labels

Design and print professional grade QR Code or Barcode labels and tag your items.
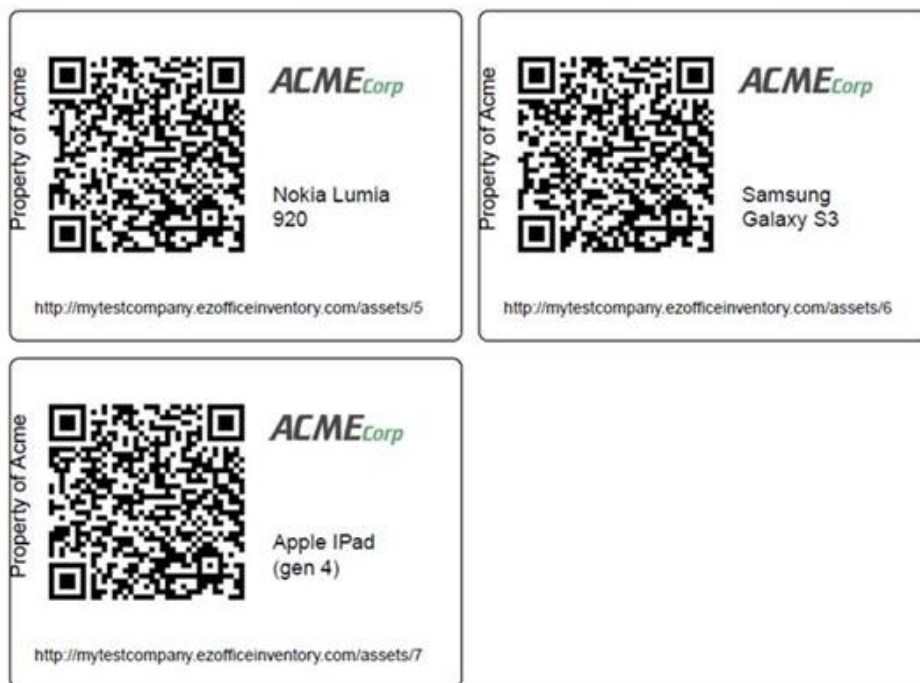
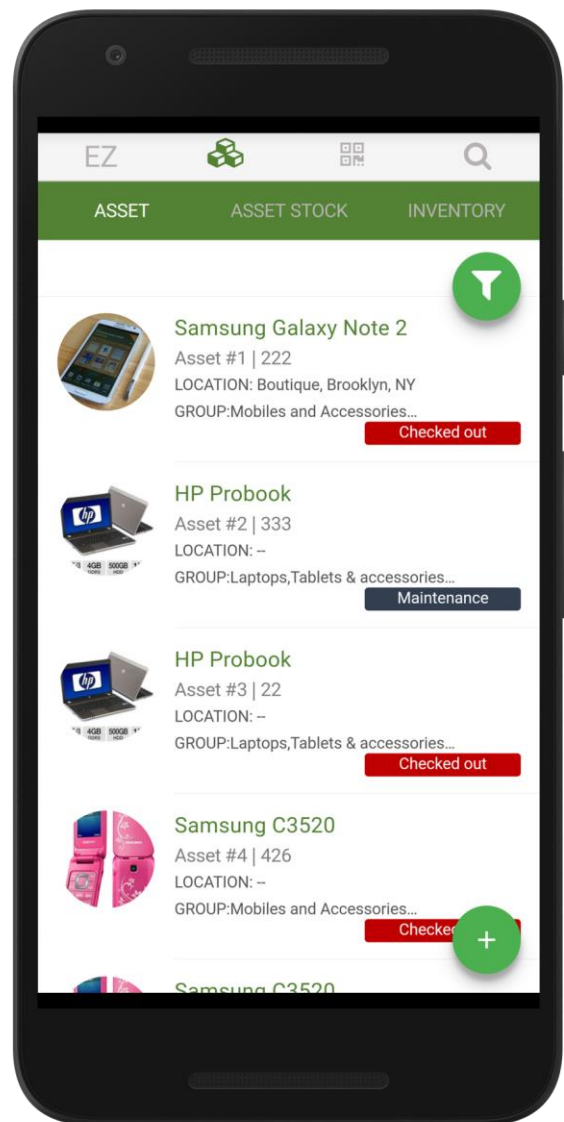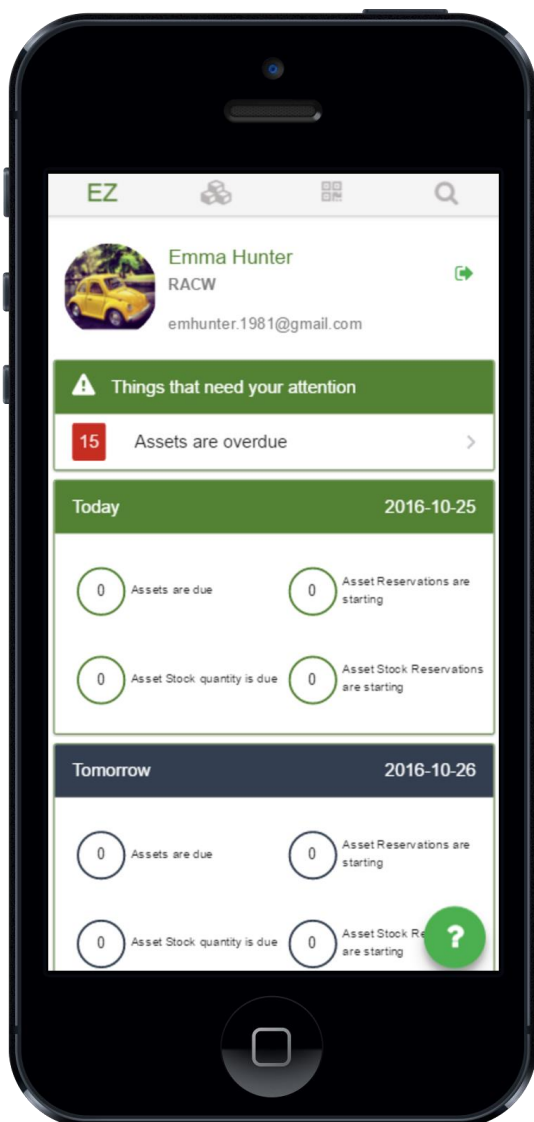[Learn more about Label Designing & Printing](#)

[Learn how to setup a Barcode Scanner](#)

[Best Practices and Recommendations – QRCodes and Barcodes](#)

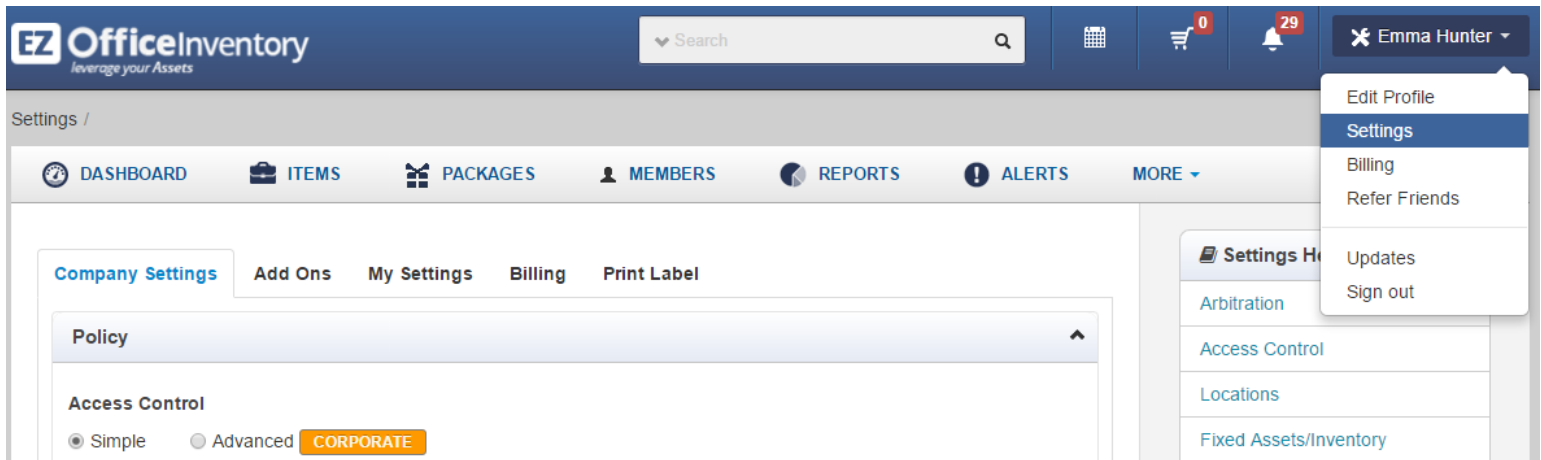# Step 9 – Use mobile apps to scan labels and take actions

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

Download: For iPhone/iPad | For Android Phones &Tablets

Step 10 – Explore Add Ons

Once you're done with the basics, try out Advanced Settings and Add Ons. There're over a dozen of them.


In Settings, you can choose company logo, select your time zone and configure a number of other policy level settings.

Some of the popular advanced features include:
- Cart – To collect items in a cart before taking actions. [Learn More](#)
- Reservations – To have conflict free reservations of items
- Maintenance – To run service and maintenance events. [Learn More](#)
- Advance Service and Maintenance – To run recurring maintenance and service triage on items. [Learn More](#)
- Custom Reports – To run customized reports
- Bundles – To checkout or reserve items together. [Learn More](#)
- Email Templates – To customize and design emails alerts. [Learn More](#)
- Purchase Orders – To manage purchase orders seamlessly. [Learn More](#)
- Multiple Login Options – To login using [LDAP Server](#) and [SAML Integration](#)
- More - [Zendesk](#) and [API Integration](#)

Demo Videos

Learn more about EZOfficeInventory through the demo videos.
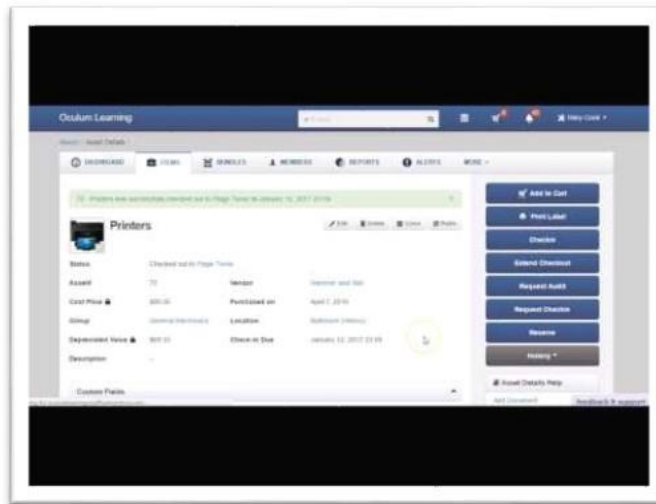
[The Basics](#)
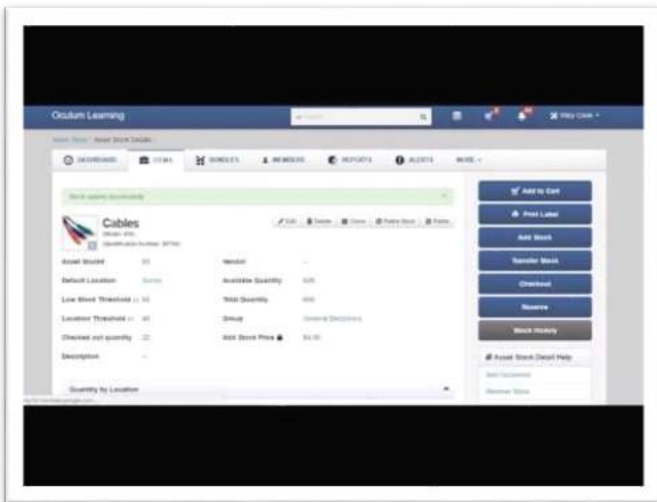
[Supported Item Types and Customization](#)

[Member Types and Access Control using User Listings](#)

For more demo videos, click [here](#)

We're here to help!

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

Have questions?
Email: support@ezofficeinventory.com
Online Help: EZO's Knowledge Base | Blog | FAQs
YouTube Channel: Demo Videos

Stay Updated: Monthly Feature Releases

Find us at:
@OfficeInventory and EZOfficeInventory to see what we're up to.

EZ Office Inventory