Getting Started with EZOfficeInventory

Asset Tracking and Inventory Management

Done Right!

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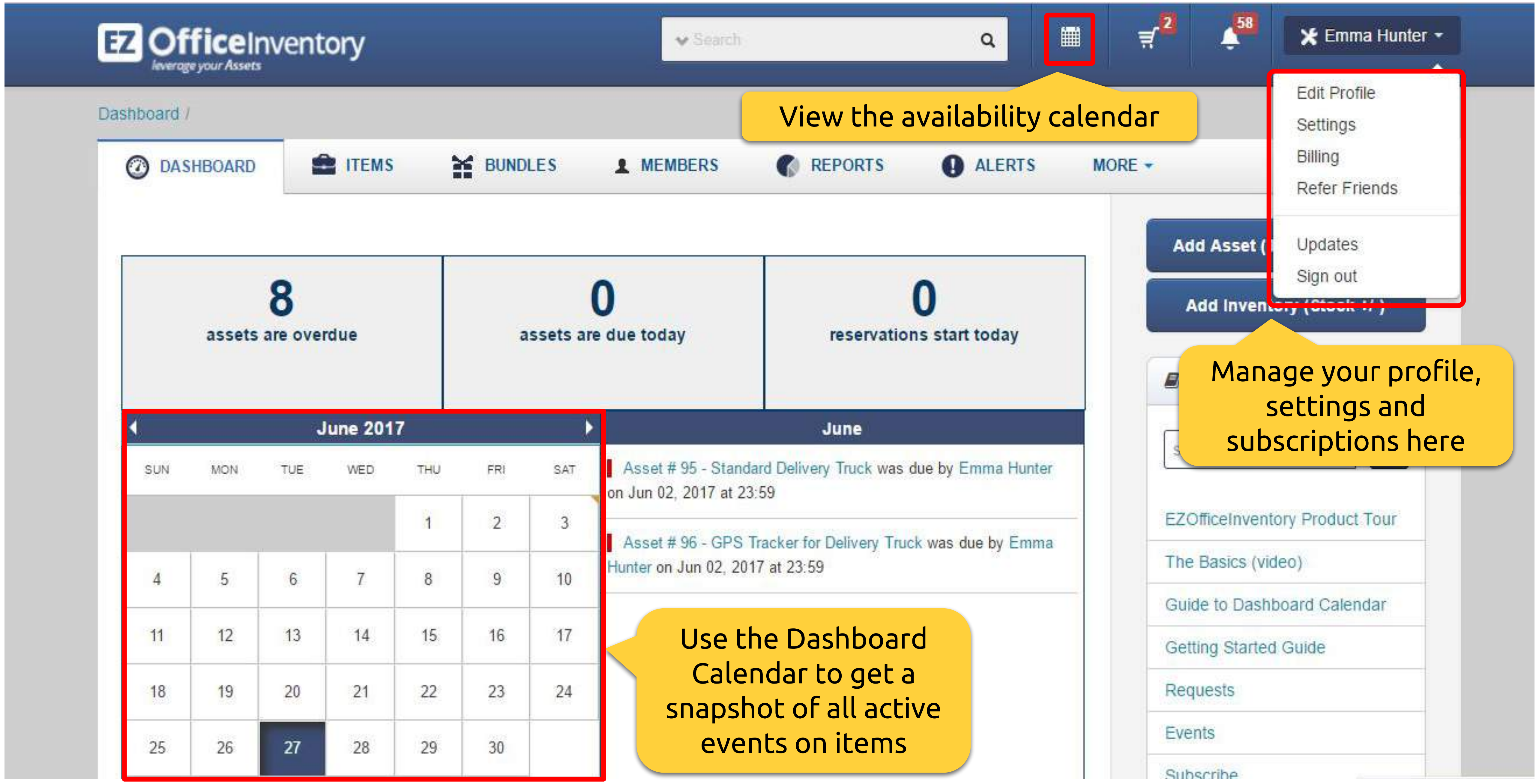
Version : 2019

First Look

Set a company logo, select your time zone, enable the [language translator](#) and configure a number of other **policy level** settings from *Settings → Company Settings.*

You can access **data overviews** and take **quick actions** straight from the dashboard. [Learn More about the Dashboard Calendar](#)



Step 1 – Identify your Items

Identify what type of items you will track. You can activate the Asset Stock and Inventory modules from *Settings* → *Add Ons*.

ITEMS TO KEEP		ITEMS TO CONSUME
Assets	**Asset Stock**	**Inventory**
Items that are used over time and tracked individually e.g. Forklift Trucks and Cars.	Items that are used over time but are NOT tracked individually e.g. nail bits, cables and chairs.	These are consumable items e.g. water bottles or fuel.
Assets are checked out to people, reserved, serviced or moved across locations.	Asset Stocks are checked out, reserved or moved across different locations.	You add or remove stock for inventory items.
If you have 10 similar trucks, add 10 assets for them. Use the clone functionality to do things quicker.	If you have 100 chairs, add an Asset Stock and add a stock of 100 to the record. You'll be checking out quantities.	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.

How do you calculate the Items' count as per your subscription?

Step 2 – Add Items

Now that you've identified your item types, let's go ahead and add a few items.

Add an Asset	Clone Similar Assets	Explore an Asset's Detail Page	Try out Some Actions
Start by adding an asset, say a MacBook Pro	If you've 10 MacBooks, you can make 9 more copies of the first MacBook (in a single action).	You can add images and documents, add comments, keep a log of services, and take a number of 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
Start by adding an asset stock record, say Chairs	Once the record is created, add stock to it e.g. 100 Chairs at Manhattan, 70 at Bronx.	You can add images and documents, add comments, and take a number of actions. There is also a list showing Current Checkouts.	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
Start by adding an inventory record, say Water Bottles	Once the record is created, add stock to it e.g. 100 Bottles at Manhattan, 30 at Brooklyn.	You can add images and documents, add comments, and take a number of actions. You can define low stock and location thresholds.	Try out the basic ones, for example add and remove stock.

[How do I hide some item fields that came with EZOfficeInventory]()

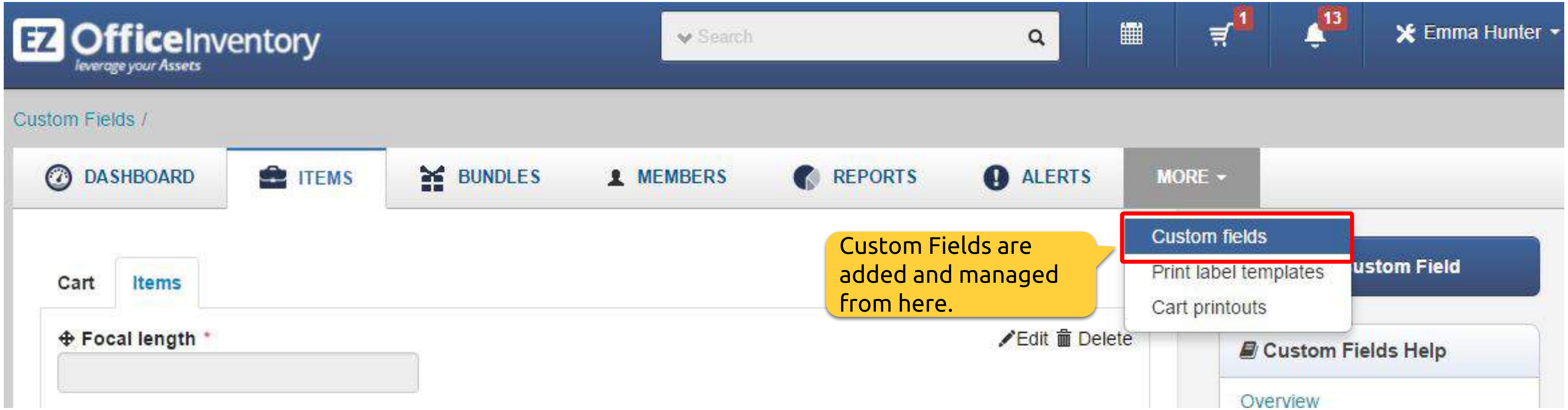
Step 3 – See if you need Custom Fields

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

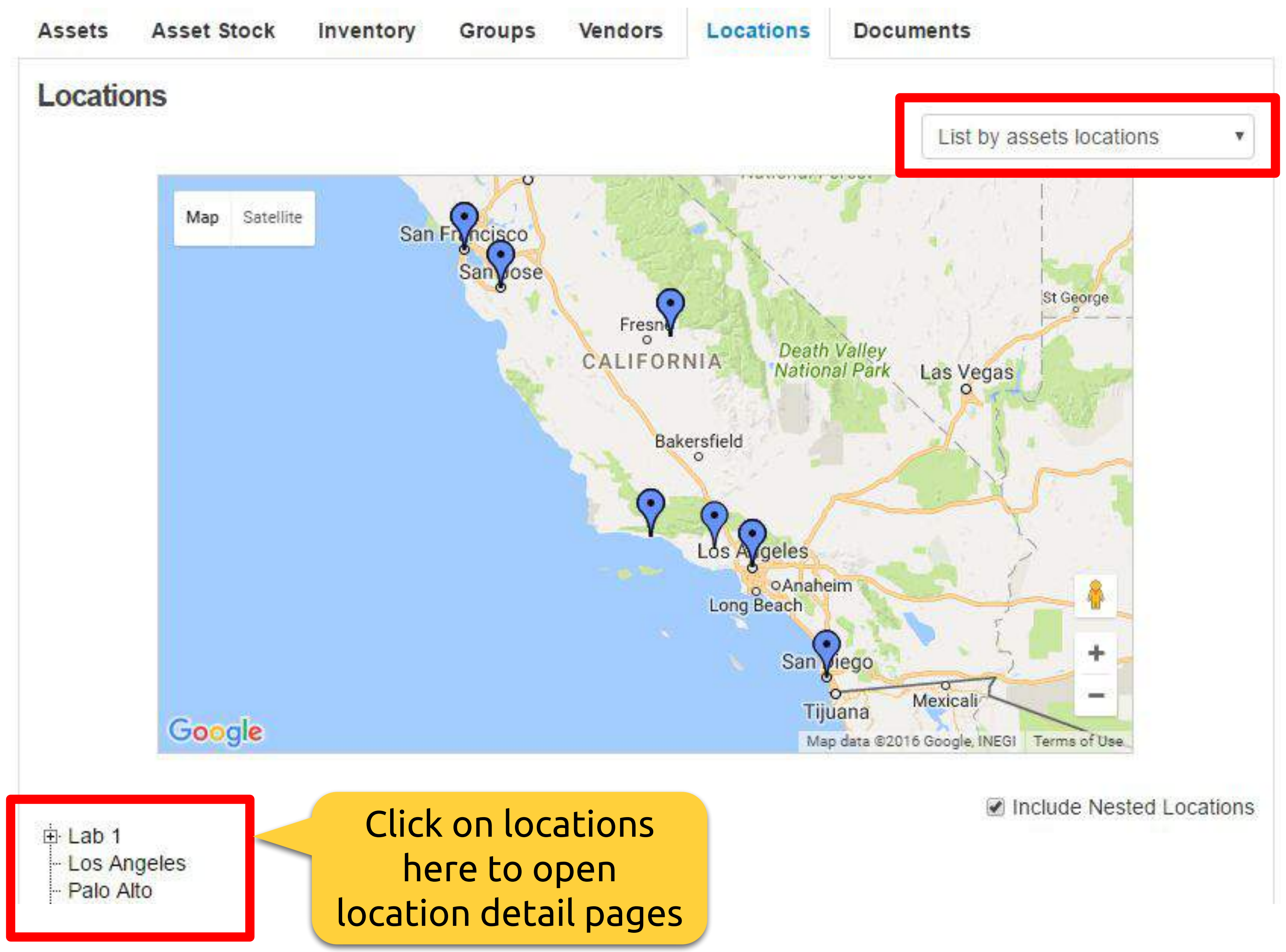
Different item groups can have different Custom Fields. [Learn More]

Asset #33: DSLR Camera with Lens

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



Step 4 – Add Locations, Groups, Vendors and Documents



Click on locations here to open location detail pages

[Learn More about Location Barcode Management](#)

[Learn More on Importing Locations into EZOfficeInventory](#)

Groups

Use [groups and subgroups](#) to categorize your items. For example, all the Camera Lens and Tripods can go to the Camera Accessories group. You can also [restrict users to only 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

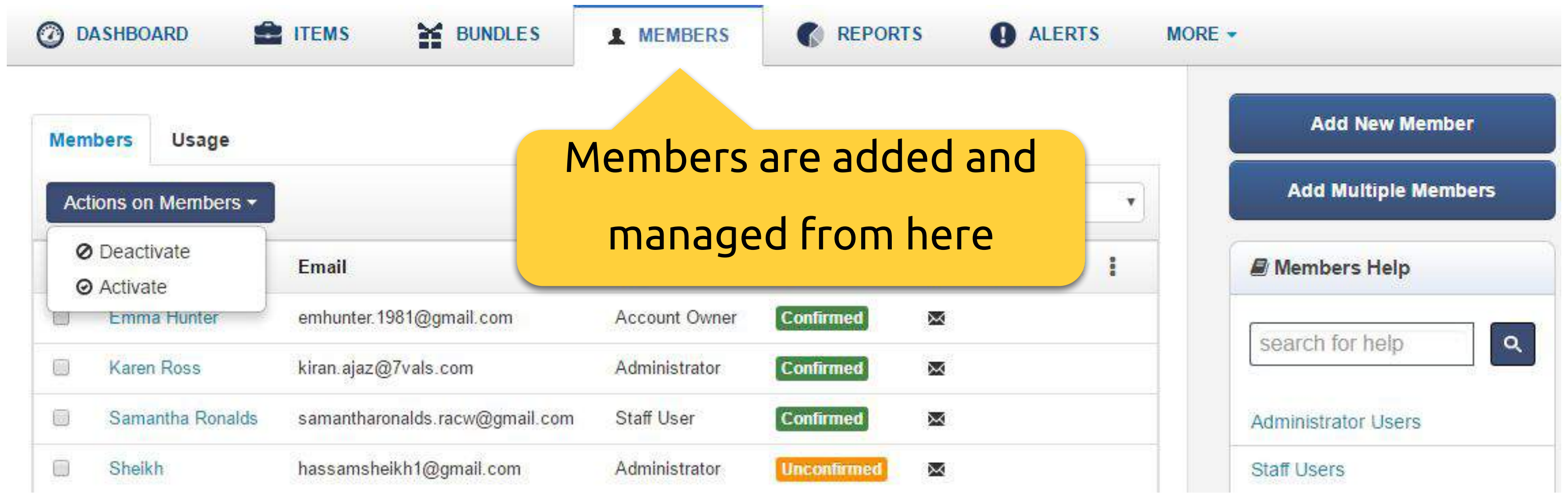
Assets & Stock Quantities can be tracked across different locations. If you provide the correct address when adding locations, we'll show your items on a map. These locations can also be building rooms, warehouses or cabinets. [Learn More](#)

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.](#)

Members are individuals who checkout Assets or Asset Stocks, or use stock from Inventory. They can be 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 members and their access rights]().



Emma Robinson

emma@example.com

Marketing Department

Staff User

Has the DSLR Camera checked out

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.

You can further configure asset visibility and usage rights of members from Settings. You can set up both [Simple Access Control]() for staff users as well as [Advanced including Arbitration in a User Listing]().

Step 6 – Take Actions on Items

Take actions like check items in/out, reserve items, add to cart, send items into maintenance and place audit requests.

ACTIONS ON ITEMS

Assets

- Check-in
- Checkout
- Extend Checkout
- Request Check-in
- Transfer Custody
- Request Audit
- Acknowledge Possession
- Reserve
- Add to Cart
- Start Service
- Extend Service
- End Service
- Retire
- Print Labels
- Add to Purchase Order

Asset Stock

- Check-in stock quantity
- Checkout stock quantity
- Extend Checkout
- Reserve
- Add to Cart
- Retire Stock
- Add Stock
- Transfer Stock Location
- Print Labels
- Add to Purchase Order

Learn More about Auditing Assets

Learn More about Service and Maintenance Events

Inventory

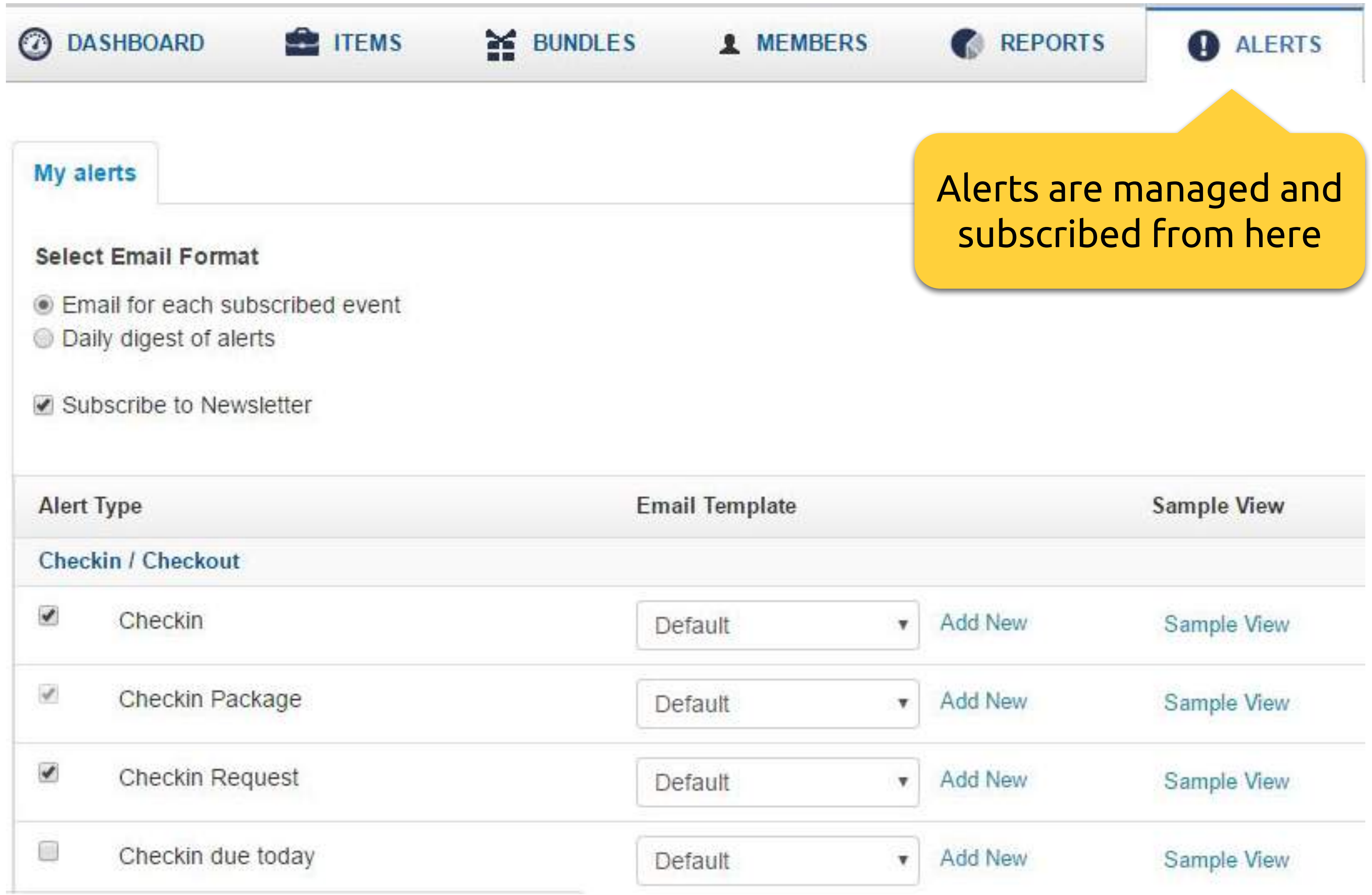
- Remove stock quantity
- Add Stock
- Transfer Stock Location
- Request Stock
- Reserve
- Add to Cart
- Retire Stock
- Print Labels
- Add to Purchase Order

Learn More about Carts

Learn More about Reservations

Learn More about Actions on Inventory Items

Step 7 – Subscribe to Email Alerts



All confirmed members receive emails based on their selected actions of interest, for example, checkout, check-in, etc.

Staff members receive emails they've subscribed to only when they're involved in the action, while administrators receive emails for all actions across the company.

You can also customize the emails you receive when an alert is triggered. Learn More

Learn More about Alerts in EZOfficeInventory

Learn More about the Types of Alerts each User Level gets on Different Actions.

Step 8 – Run Reports

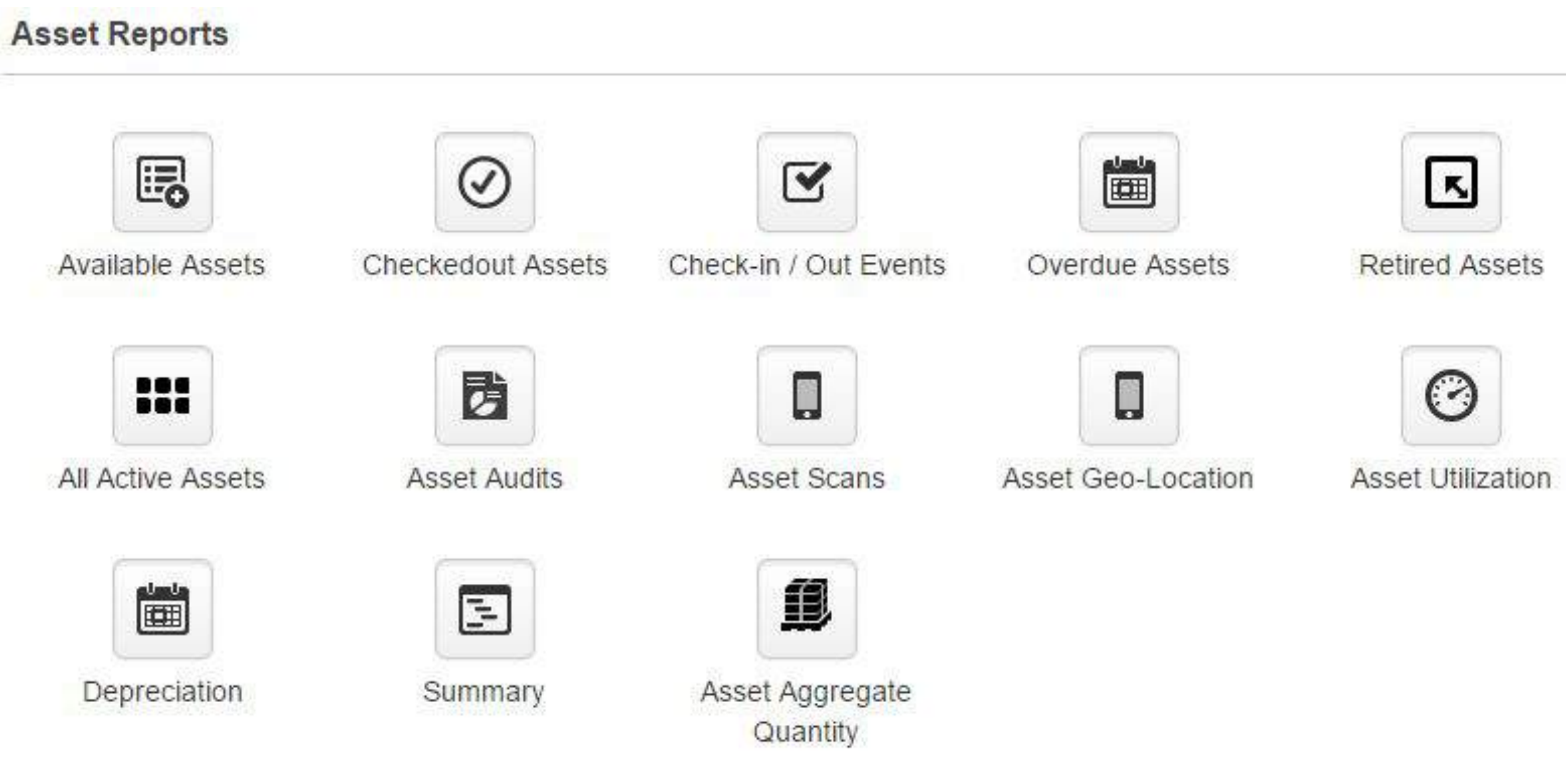
GET INSIGHTS FROM REPORTS ON

- Items
- Asset utilization
- Reservations

- Audits
- Check in/Checkout events
- Asset Depreciation

- Services & Maintenance
- Purchase Orders
- Vendors

- Members
- Work Orders
- Inventory and Stock levels



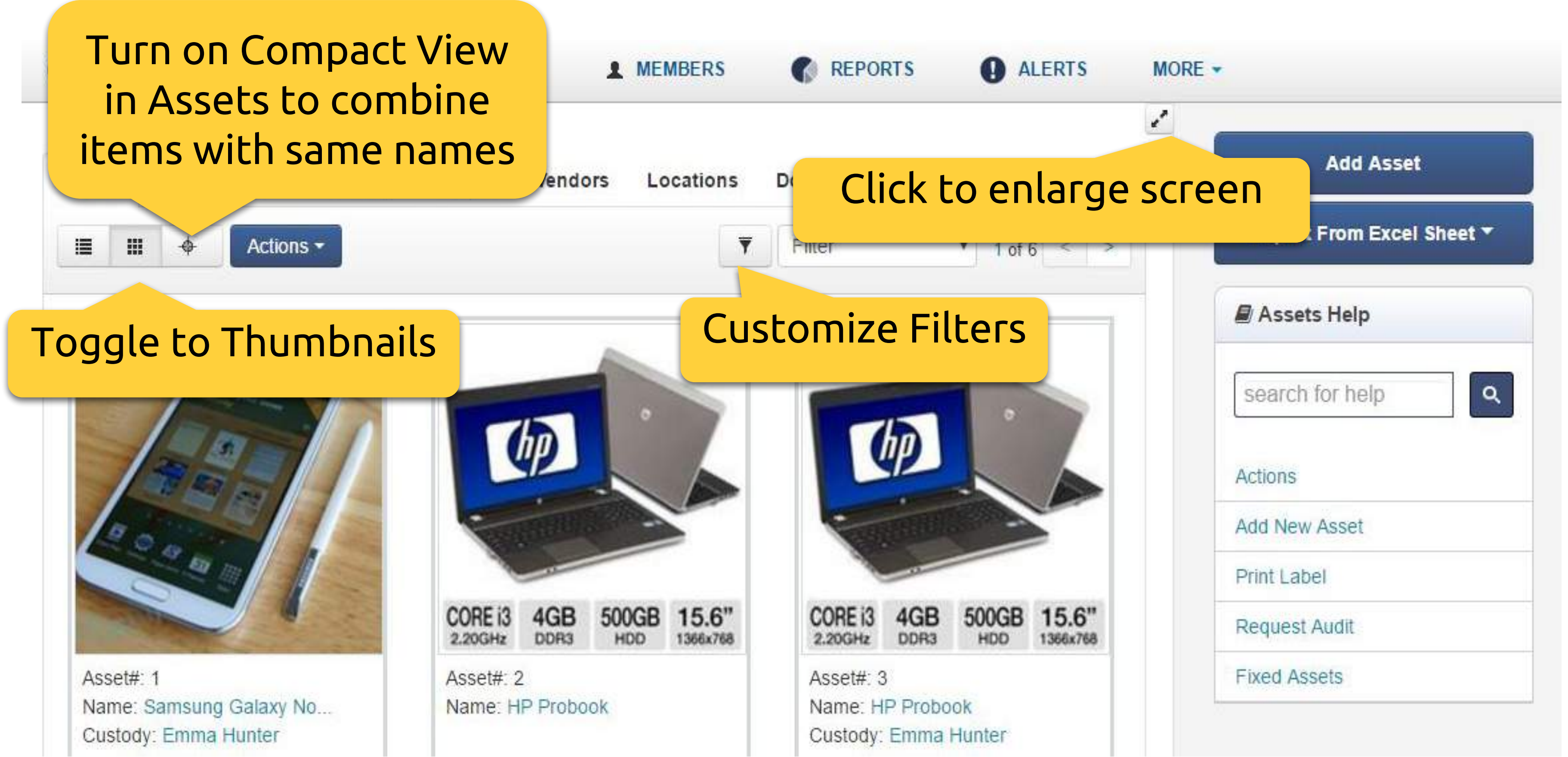
To get more specific information you can also create, save and schedule Custom Reports.

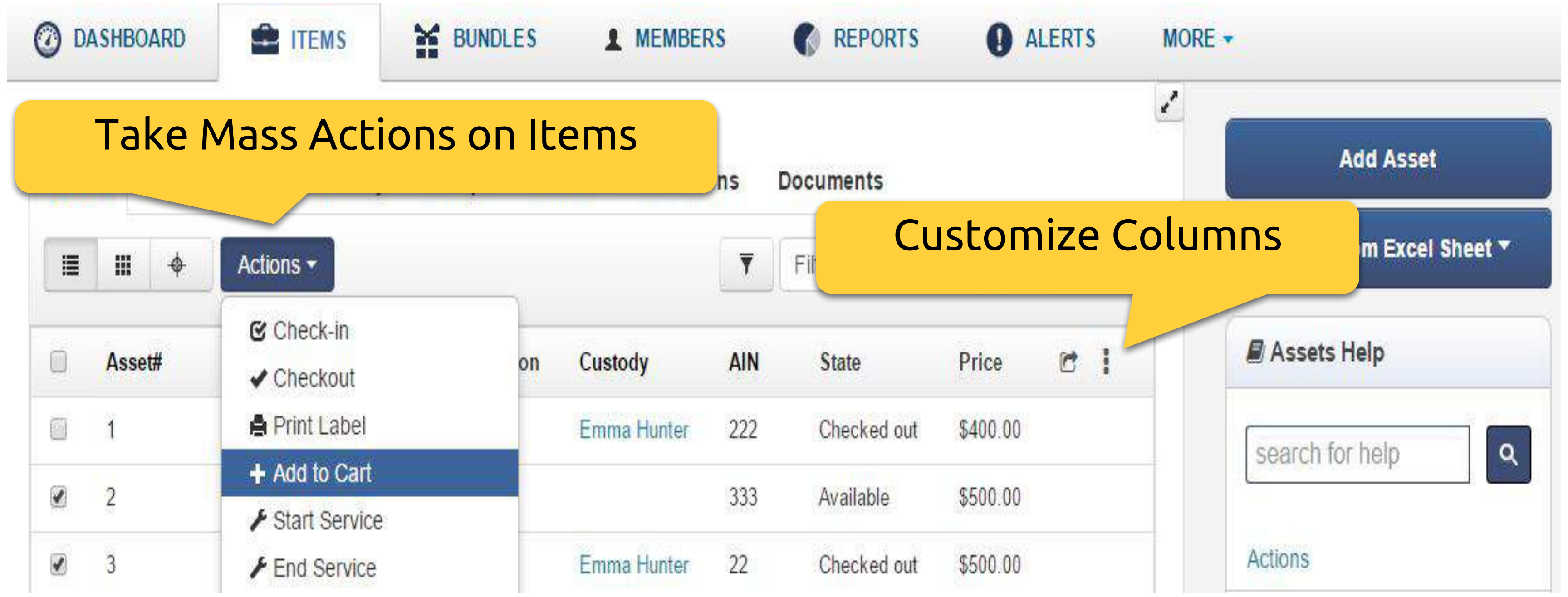
You can also filter reports as per your requirements. For example, for asset reports you can filter by group, location, date, members and vendors.

You can also export your reports to CSV or PDF.

Learn More About Reports on Items

Step 9 – Try out Different Listing Views





Similar to Compact View on Assets, there's *Location Stock View* on Inventory and *Current Checkout View* on Asset Stock. [Learn More]

[Learn how to filter items by specific attributes using Custom Filters]

[Learn how to customize columns for your item listing page]

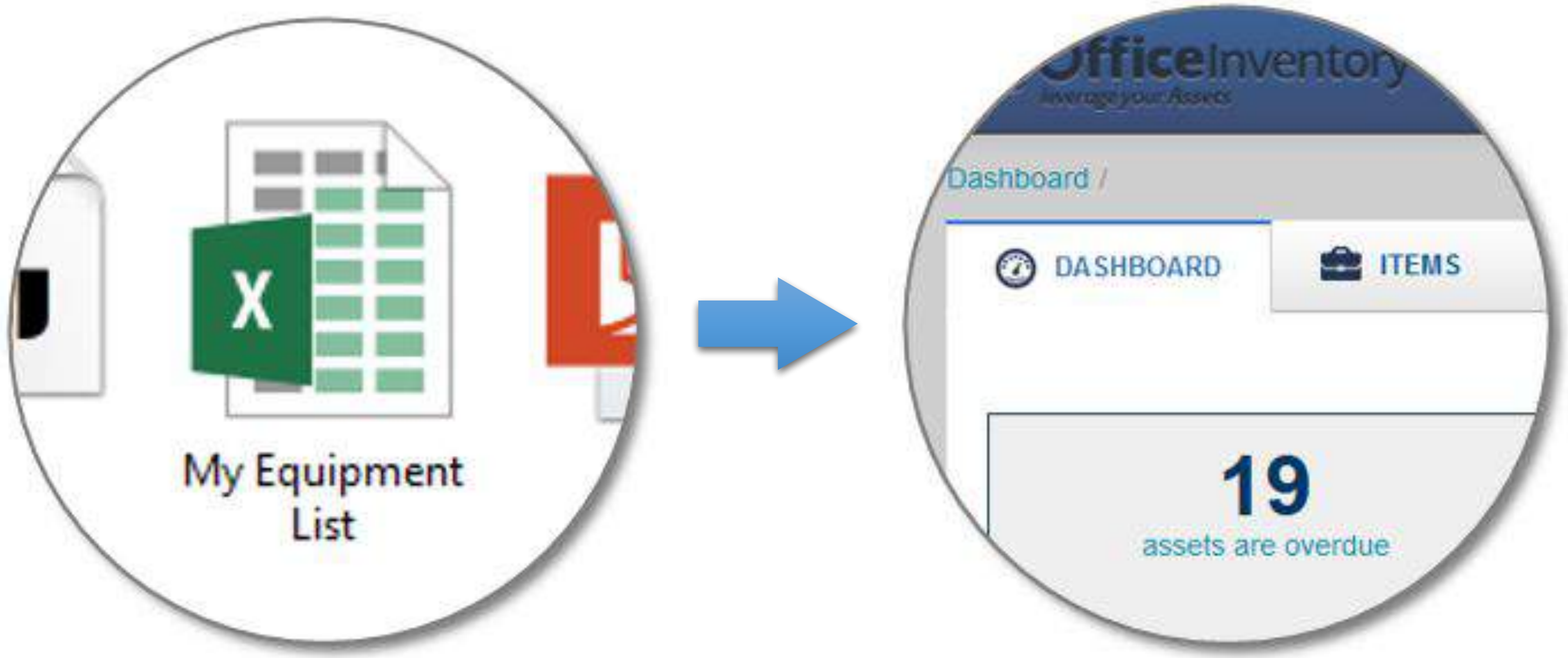
[Learn how to increase the number of items displayed on a page]

Step 10 – 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
- Member Details
- Assignments of Assets to Members
- Add Stock to existing Asset Stock or Inventory
- Custom Fields are also available for migration
- Images and Documents

Learn More



Learn About the Best Practices for Excel Import

How do I Import Documents and Images?

What Information can be Exported from EZOfficeInventory?

How do I Migrate Data From Other Asset Tracking Software into EZOfficeInventory?

Step 11 – Print QR Code or Barcode Labels

Design and print professional grade QR Code or Barcode labels and tag your items.

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With EZOfficeInventory, you can print new Barcode labels or use your existing Barcodes. When using Barcodes it is necessary to enter the 'Identification Number' or Barcode number for your items.

Learn how to setup an external Barcode | QR Code Scanner | RFID

Here's a Knowledge Base on Print Labels

Learn more about Label Designing & Printing

Best Practices and Recommendations - QRCodes & Barcodes

Which Label Printers does EZOfficeInventory Recommend

How to Export Label Data to Excel for Commercial Printing

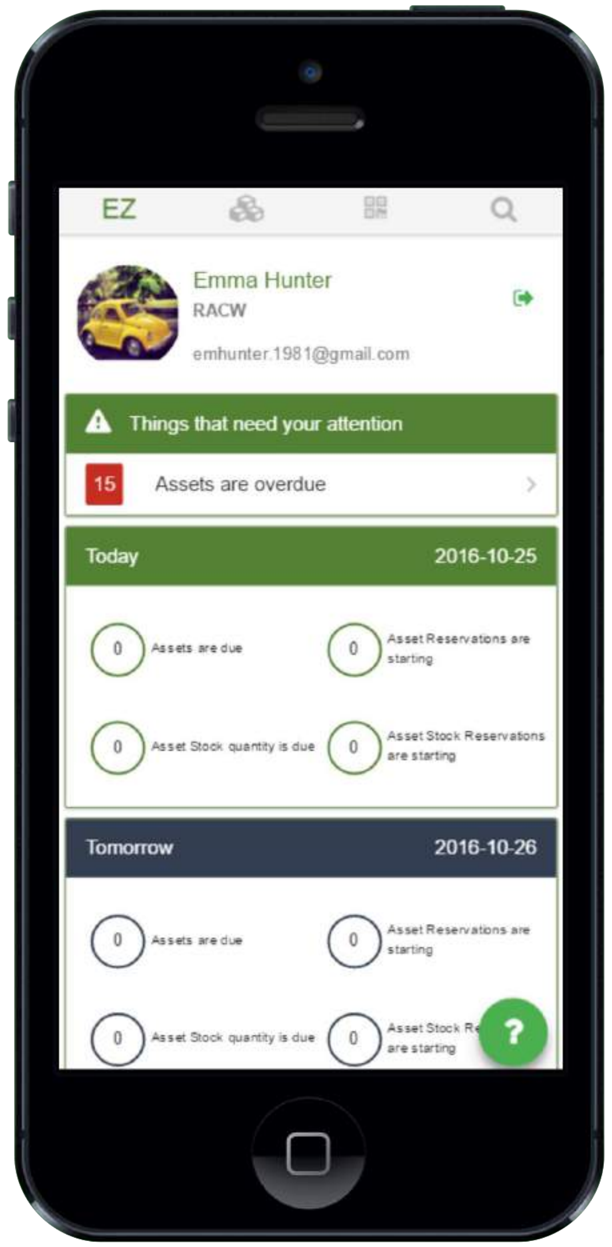
How can I print Multiple Item Labels on the Same Page

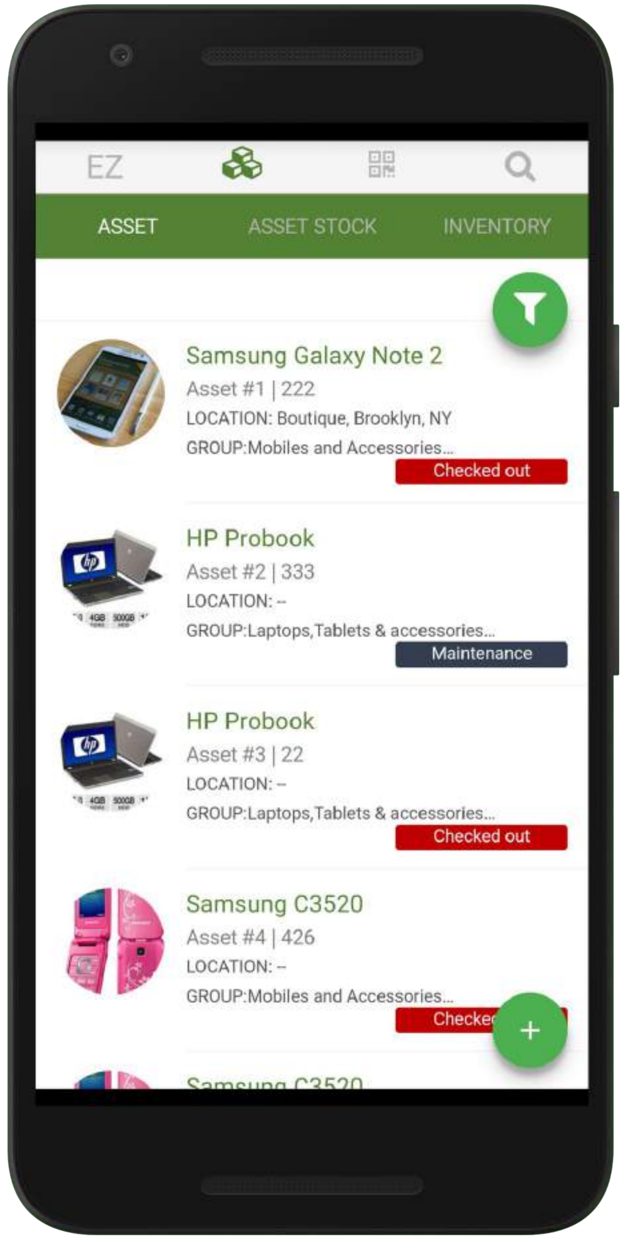
EZOfficeInventory's Recommended Hardware List

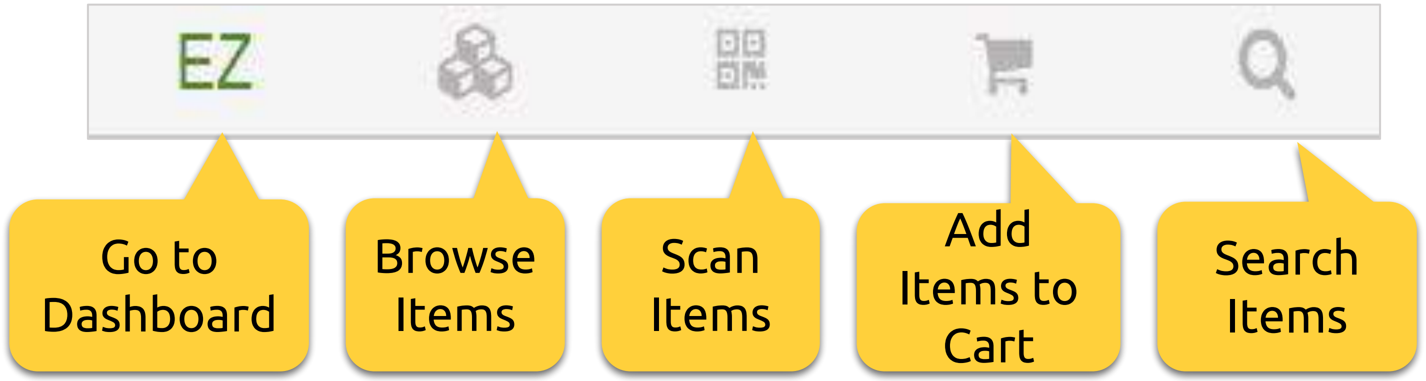
Step 12 – Use the Mobile App to Scan Labels and Take Actions

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

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







[Watch the Mobile App in Action]

[How to set up and use an external Barcode scanner in the Mobile App]

Step 13 – Explore Add Ons

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

Some of the popular advanced features include:

CARTS

- Add items to carts for faster checkouts of items for jobs and events.
- Create custom fields for carts.
- Reserve carts. Learn More

WORK ORDERS

- Create work orders & associate items.
- Assign work orders to Members.
- Track work order progress.
- Get email alerts. Learn more

PURCHASE ORDERS

- Create purchase orders and add items to them.
- Send emails and invoices to vendors.
- Track purchase orders. Learn More

SERVICE TRIAGE

- Automatically send assets into maintenance for a specified duration after an item is checked in. Learn More

RECURRING SERVICE

- Define how often maintenance events need to be repeated.
- Track to see if a service is pending, started, overdue or completed. Learn More

DEPRECIATION

- Use straight-line depreciation method to assess asset value over time. Learn More
- Define percentage depreciation for assets at the group level.

Step 13 – Explore Add Ons (II)

BUNDLES

- Create bundles, a flexible combination of items, to checkout or reserve items together. Learn More

PACKAGES

- Use packages to clamp assets together such that they are always checked out and checked-in together. Learn More

AVAILABILITY CALENDAR

- View items by availability using the availability calendar. Learn More

ZENDESK

- Connect Zendesk with EZOfficeInventory to link items and members with service desk tickets, end users and agents Learn More

MULTIPLE LOGIN OPTIONS

- Integrate with SAML to sign in via a unified URL. Learn More
- Use LDAP credentials to access EZOfficeInventory. Learn More

API

- Use our REST based APIs to access your assets. Learn More

Step 13 – Explore Add Ons (III)

DATA BACKUP

- Take automatic, periodic data backups using EZOfficeInventory.
- Sync your DropBox or OneDrive account with EZOfficeInventory to backup your data.

FUZZY LISTS

- Create Fuzzy Lists to streamline equipment management.
- Use these lists as dynamic reference points when reserving or checking out carts. Learn More

OVERDUE ITEM AVAILABILITY

- View items as 'available' even when they are not checked back in. Simplify item reservation regardless of an item's actual return status. Learn More

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:

Facebook, Twitter and LinkedIn to see what we’re up to.