JACKHAMMERSOFT

User's Manual

METAL®
Inventory

Creative ideas built for a competitive market.™

JackHammerSoft
METAL Inventory
Release 4.0

JHSINVUM0305 • Revision 0

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Chapter 1: About this Guide

Material Engineering Tool for Automated Logistics (METAL®) Inventory is an Inventory Management application created to assist small business in the large task of tracking their inventory. It works within a suite of products created by JackHammerSoft™ to provide a complete product management solution. Other products in the METAL suite are METAL Editor and METAL Plus.

METAL Editor is a material selection tool which allows you to select and enter specific materials to order. METAL Inventory allows you to track specific materials through transfer, storage, shipping, and distribution. METAL Plus is an add-on that allows you to create templates for large or complex orders that are often reordered, such as component parts for a large product.

Prior to using METAL Inventory, certain tasks must be executed in METAL Editor. These tasks include creating Purchase Orders and creating Projects. JackHammerSoft provides much of this setup.

In This Chapter

Intended Audience

This guide is intended for use by small business inventory managers. It is also intended to be used by order managers and accounts receivable personnel. Basic knowledge of the Microsoft Windows ® operating system is assumed.

Conventions

The following conventions are used in this guide.

Convention	Description
Bold	Actions you should take such as text or data to be typed exactly or items to click.
Italics	Arguments in which you must supply a value.

Getting Help

A complete help system is available in the METAL Inventory interface by selecting the Help item in the Menu bar.

If you need further assistance, please contact JackHammerSoft via e-mail at support@jackhammersoft.com.

Chapter 2: Understanding the Interface

METAL Inventory is a Microsoft Windows-style application that has been created to meet your inventory management needs. It is installed for you by JackHammerSoft. It is important to understand how the interface works and to perform proper setup prior to using the product.

In This Chapter

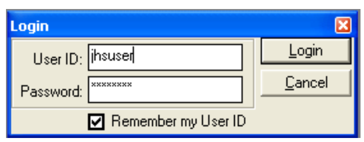
Opening the Application

METAL is a standard Windows application and can be opened in many ways, only one is described here.

To open the application:

1. Double click the **Metal Inventory** icon on your desktop.

   The application opens and a login screen appears.



Note: You may open the application using other Windows standard techniques.

2. Enter your **User ID** and **Password**.

   This information is supplied by your systems administrator. Passwords are case-sensitive. User IDs are not case-sensitive.

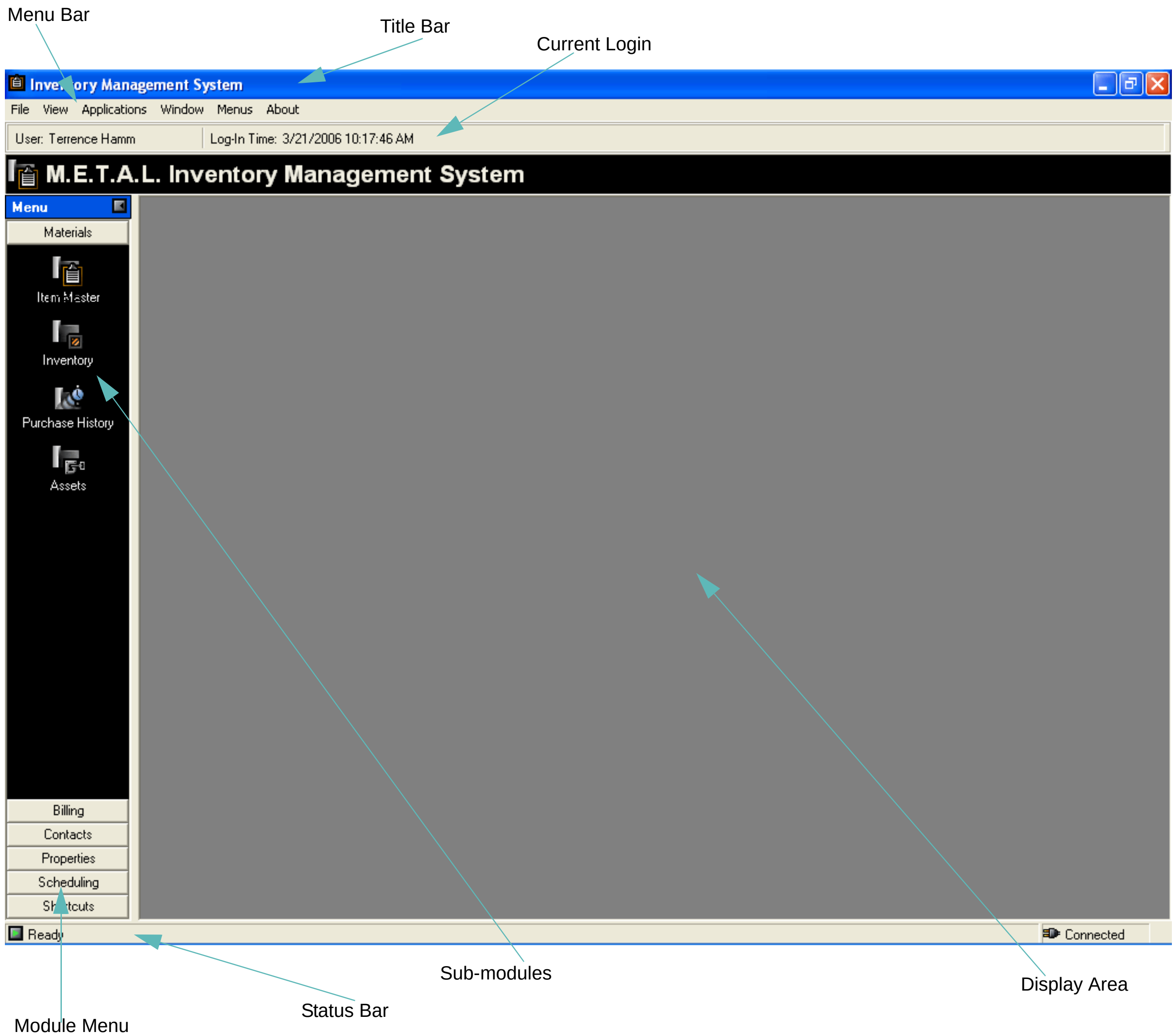
Note: Take care to remember your password. The system administrator does not know it after you change it.

The Main window appears. If there are outstanding items, their windows are displayed in the display area; otherwise, the display area is empty.

Understanding the Interface

The Main Window

The Main Window is the primary point of entry for all tasks.

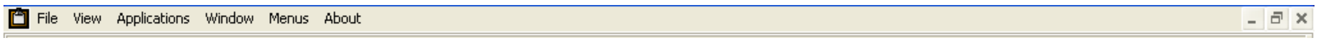


Title Bar

The Title bar displays the name of the program, a minimize button, a maximize/restore button, and a close button.

Menu Bar

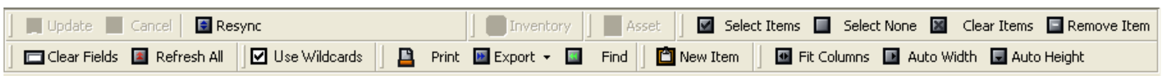
This standard Windows feature contains pulldown menus to select functions. Functions which cannot be used appear dimmed (gray).



Most functions in this application are performed via the Module menu.

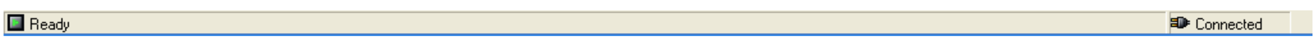
Toolbar

The Toolbar contains rows of iconic buttons that provide additional functions applicable to the displayed window. The toolbar is different for each window displayed.



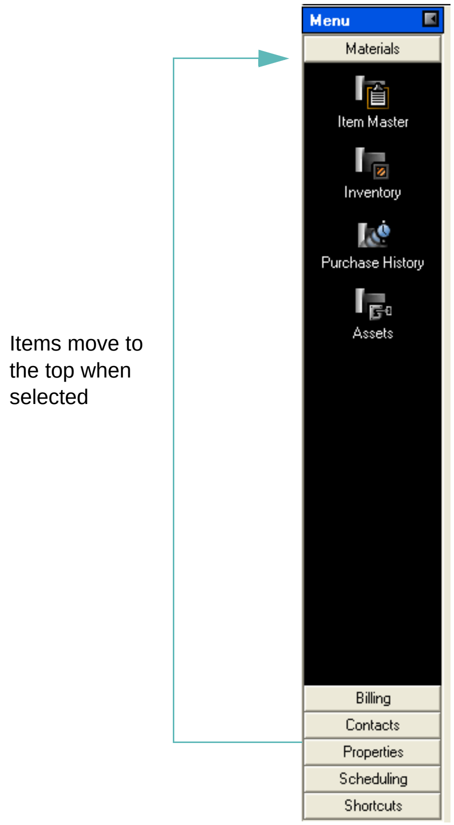
Status Bar

Located at the bottom of the application window, the Status bar shows a variety of status information.



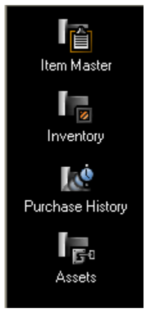
Module Menu

The Module menu contains a list of modules and is located on the bottom left of the Main window. When you select a module, all of its sub-modules are displayed in the sub-module selection area. When a module is selected, it is moved to the top of the menu.



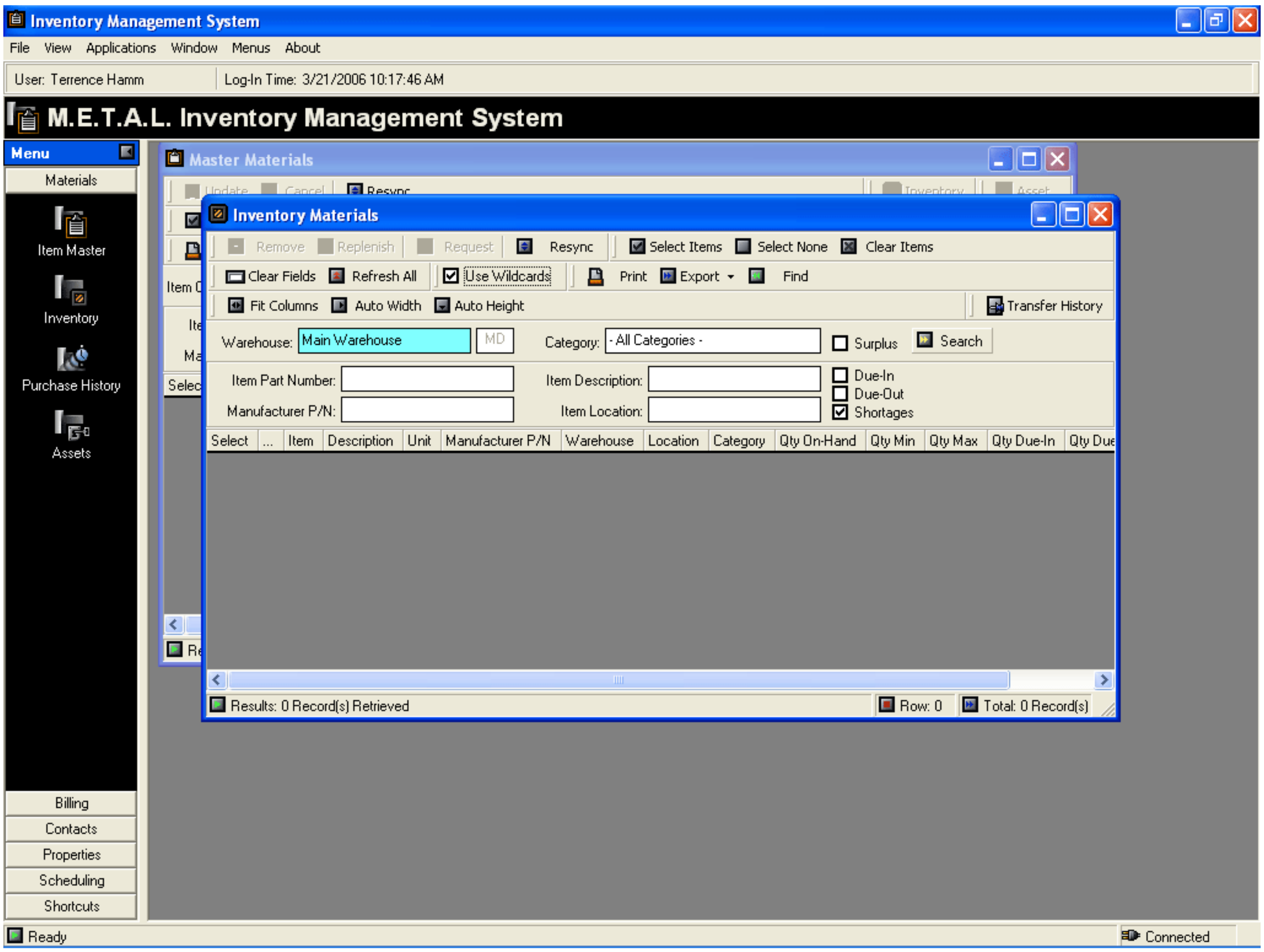
Sub-module Selection Area

The sub-module selection area appears on the left side of the main window. After you click a module from the module menu, the sub-module selection area is populated with related items within the module (sub-modules). Each sub-module that has been clicked opens a window in the display area.



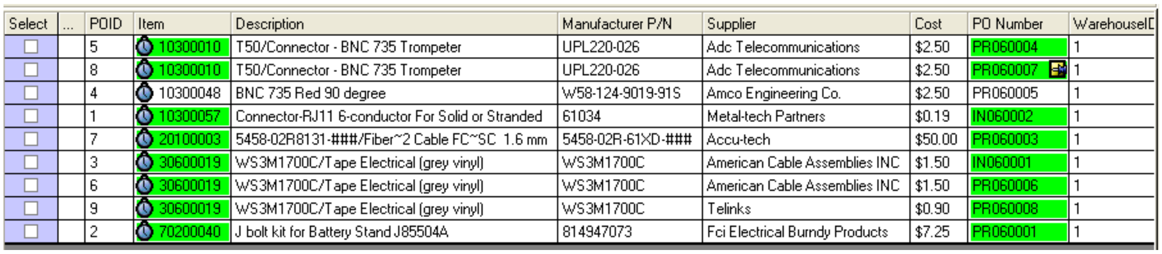
Display Area

The display area is the area in which windows appear. You can open as many windows as you wish. The window on top is called the active window. You can enter information in this window and it is affected by the functions you execute. You can recognize the active window because its title bar is a different color than that of the other open windows. You can make a window active by clicking on it.



Understanding Tables

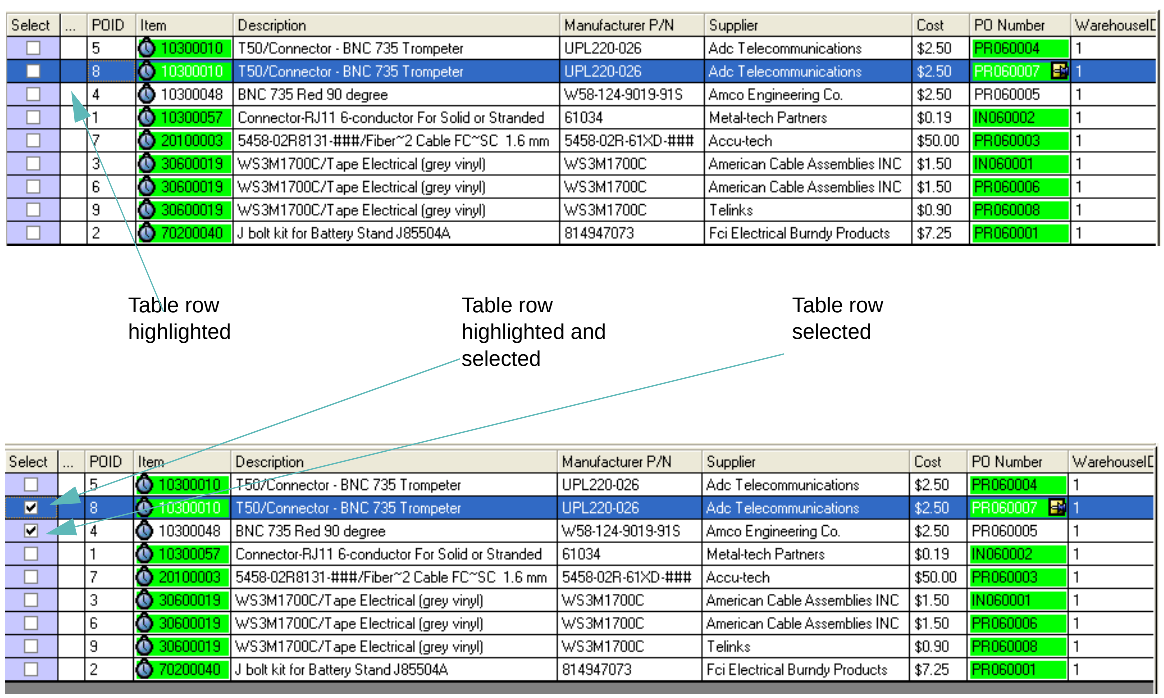
Many of the windows in METAL Inventory have tables. You can modify the way tables display and select items in the table on which actions selected in the toolbar apply. Right-click menus are also available for each row.



Select	...	POID	Item	Description	Manufacturer P/N	Supplier	Cost	PO Number	WarehouseI
☐		5	10300010	T50/Connector - BNC 735 Trompeter	UPL220-026	Adc Telecommunications	$2.50	PR060004	1
☐		8	10300010	T50/Connector - BNC 735 Trompeter	UPL220-026	Adc Telecommunications	$2.50	PR060007	1
☐		4	10300048	BNC 735 Red 90 degree	W58-124-9019-91S	Amco Engineering Co.	$2.50	PR060005	1
☐		1	10300057	Connector-RJ11 6-conductor For Solid or Stranded	61034	Metal-tech Partners	$0.19	IN060002	1
☐		7	20100003	5458-02R8131-###/Fiber~2 Cable FC~SC 1.6 mm	5458-02R-61XD-###	Accu-tech	$50.00	PR060003	1
☐		3	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	American Cable Assemblies INC	$1.50	IN060001	1
☐		6	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	American Cable Assemblies INC	$1.50	PR060006	1
☐		9	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	Telinks	$0.90	PR060008	1
☐		2	70200040	J bolt kit for Battery Stand J85504A	814947073	Fci Electrical Burndy Products	$7.25	PR060001	1

Selecting Rows

There is a difference between selecting a row via clicking the row's selection checkbox and highlighting the row. Selecting a row's checkbox applies to search criteria and toolbar buttons. See "Searching Through Records" on page 2-10 for search-related information. Toolbar button actions are applied only to selected rows, if any rows are selected. Highlighting a row allows you to invoke the row's right-click menu and execute those options on the specific row. You may highlight multiple rows using CTRL-click. You can select all rows by clicking the **Select Items** button. You can deselect all rows by clicking the **Select None** button.



Select	...	POID	Item	Description	Manufacturer P/N	Supplier	Cost	PO Number	WarehouseI
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☐		4	10300048	BNC 735 Red 90 degree	W58-124-9019-91S	Amco Engineering Co.	$2.50	PR060005	1
☐		1	10300057	Connector-RJ11 6-conductor For Solid or Stranded	61034	Metal-tech Partners	$0.19	IN060002	1
☐		7	20100003	5458-02R8131-###/Fiber~2 Cable FC~SC 1.6 mm	5458-02R-61XD-###	Accu-tech	$50.00	PR060003	1
☐		3	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	American Cable Assemblies INC	$1.50	IN060001	1
☐		6	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	American Cable Assemblies INC	$1.50	PR060006	1
☐		9	30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	Telinks	$0.90	PR060008	1
☐		2	70200040	J bolt kit for Battery Stand J85504A	814947073	Fci Electrical Burndy Products	$7.25	PR060001	1

Select	...	POID	Item	Description	Manufacturer P/N	Supplier	Cost	PO Number	WarehouseI
☐		5	10300010	T50/Connector - BNC 735 Trompeter	UPL220-026	Adc Telecommunications	$2.50	PR060004	1
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☑		4	10300048	BNC 735 Red 90 degree	W58-124-9019-91S	Amco Engineering Co.	$2.50	PR060005	1
☐		1	10300057	Connector-RJ11 6-conductor For Solid or Stranded	61034	Metal-tech Partners	$0.19	IN060002	1
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☐		2	70200040	J bolt kit for Battery Stand J85504A	814947073	Fci Electrical Burndy Products	$7.25	PR060001	1

Changing Column Width

To change the width of a column, place the cursor on the vertical line separating the columns after the name of the column that is to be expanded. The cursor displays as a vertical line with an arrow through it. Hold the mouse button and drag the column separator to the desired width. Release the mouse button when you are satisfied with the width.

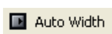
Sorting by Columns

You can rearrange the display of columns by clicking on a column header. The information in the table is then displayed according to the column clicked. The columns do not move.

Fitting Columns

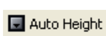
You can click the **Fit Columns** button to adjust the width of the columns to the available display area. Column headers are truncated.

Auto Width Columns



You can adjust the columns to spread across the available display area providing each column the width it needs to fully display its contents by clicking the **Auto Width** button. You will need to scroll to see nonvisable columns.

Auto Height Rows



The **Auto Height** button sizes the row height to the contents of the row.

Copying Rows and Cells

You can copy rows or cells. Select these options by right-clicking the row and selecting the **Copy Rows** or **Copy Cells** option from the menu.

Removing Rows from Display

The **Remove** item available on a row's right-click menu removes the item from the display, but not from the database. You can also remove rows that are not selected (checkbox) by clicking **Clear All**. Only the items that are checked will remain in the table.

Display Options

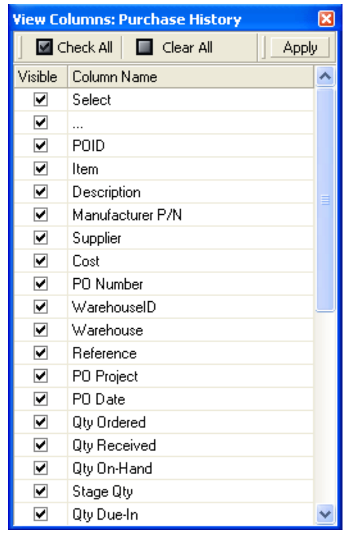
You can select which columns are displayed in your table and how columns are grouped by right-clicking the table header.

Table Column Selection

To change the columns displayed:

1. Right-click the table header and select **View Columns**.

   The View Columns window appears.



2. Check or uncheck the desired columns.
3. Click **Apply**.

   You are returned to the Display Area. Your settings are saved.

Grouping Columns

To group the columns displayed:

1. Right-click the table header and select **Group Columns**.

   The table redisplays based on the last column selected.

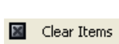
   You can select **Ungroup Columns** to return the display to its default view.

Viewing Row Specific Information

You can view the information displayed in the row in a separate window by clicking the row’s ellipse icon. You can view the item properties for the row by double-clicking the row.

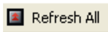
Clearing Rows

You can clear listed rows from the displayed table. These items are no longer displayed, but not deleted.



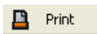
Clear Items removes non-selected rows from the table while **Clear All** removes all rows from the table display.

Refreshing Errors



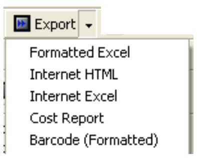
The system notifies you of processing errors by color-coding rows (yellow). You can remove the color-coding by clicking the **Refresh All** button.

Printing Tables



You can print the information displayed in the table by clicking the **Print** button.

Exporting Tables



You can export the table into a variety of formats by selecting the **Export** button. The export formats are:

Format	Description
Formatted Excel	Importable to Excel documents.
Internet HTML	Formatted in HTML and can be viewed in Browser.
Internet Excel	Formatted for Excel and can be viewed in Browser.
Barcode Simple	A simple barcode for all rows is generated and is available to copy to the clipboard or export to Microsoft Word via right-click menu.
Barcode Formatted	Invokes a window allowing you to specify barcode generation options. See “Formatted Barcode Generation” on page 2-9.

Formatted Barcode Generation

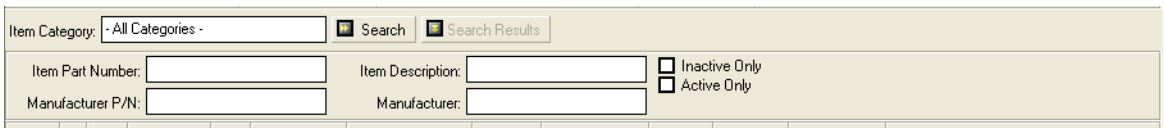
When you select Barcode Formatted from the export button, a window appears allowing you to select which items appear along with the barcode that is generated. Check the desired options and preview the generated format by clicking the preview tab. Click the **Export** button. The barcodes for all rows in the table are generated and are available to copy to the clipboard or export to Microsoft Word via right-click menu.

Related Windows

You can invoke windows related to a particular cell by double-clicking within that cell. Some windows are editable and some are not.

Searching Through Records

Many windows in the system provide the capability to search and display records. Located records are displayed in a table below the search criteria. While the actual search criteria differs per sub-menu selection, the basic search technique is similar. Search criteria consists of a combination of pulldown selections, data entry fields, and check boxes. All field entry is not case-sensitive. When you press the **Search** button, all data entered is searched for and results are returned below in a table form at. The table is listed by default from the lowest item number to the highest.



Note: Pulldown arrows appear when you click on a pulldown field.

Note: Pressing Enter on any field invokes the search for all fields (same as clicking the Search button).

Retaining Searched Rows

If you wish a row to remain on screen while you conduct additional searches, click the Select checkbox for that row. The row is moved to the top of the screen after the next search is executed and the check remains in the box.

Wildcard Searches

Data entry fields automatically wildcard entries. Items are found that have the entered text anywhere in the string (*string*). If you need to wildcard text in between two strings (string*string) you do need to enter an asterisk or percent sign. The screen displays a percent sign regardless of what was entered. You can invoke additional wildcard options by double-right-clicking on a data entry field.

Note: A single right-click on a data entry field invokes the Windows standard right-click menu. You must right-click twice to invoke the wildcard menu.

Narrowing Searches

You can narrow a search to only search within the currently displayed list by selecting the **Search Results** button, where available.

Clearing Search Criteria

You can clear all data entry, pulldown, and checkbox items in the search area by clicking the **Clear Fields** button.

Shortcuts

The Shortcuts Module, accessible via the Module menu, allows you to enter shortcut icons to other applications including other application in the METAL Suite.

Default Settings

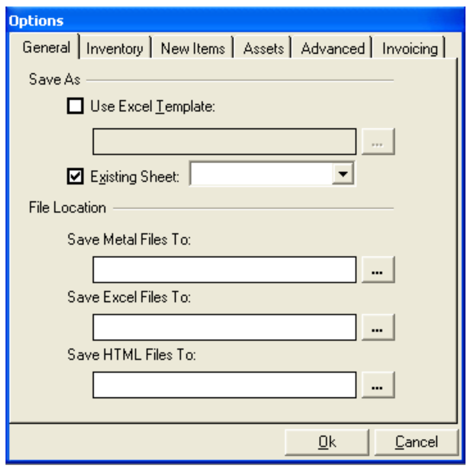
Default settings control how information is presented throughout the system including the way searches execute.

To enter default settings:

1. Select **Default Settings** from the **View Menu**.

   The Options window appears.

2. Click the **General** tab.

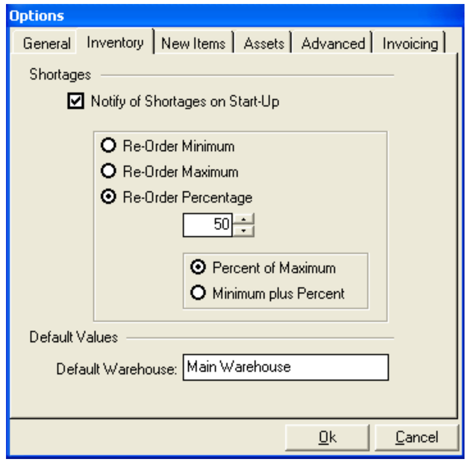


3. Enter General tab settings.

   Here you select an existing Microsoft Excel spreadsheet to use when saving output to Excel. You can also select and existing sheet once the template you desire has been selected.

   You can specify the default location for saving files outputted to different formats.

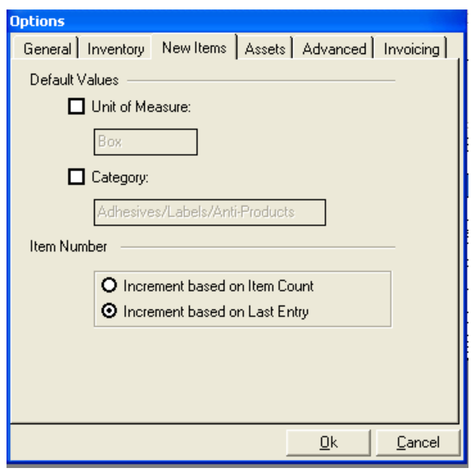
4. Enter **Inventory** tab settings.



You can specify to notify of any shortages upon startup. Each time you log into the system, a shortages window is displayed. In case of shortages, you can specify to re-order minimum, maximum, or percentage. If Percentage is selected, you can specify the Percent of Maximum or Minimum Plus Percent.

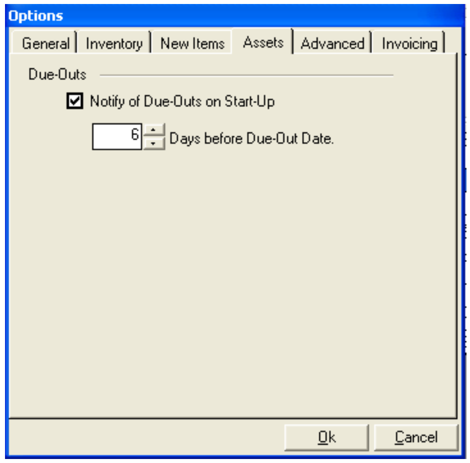
You can also specify a default warehouse to appear in the Inventory search criteria.

5. Enter **New Items** tab settings.



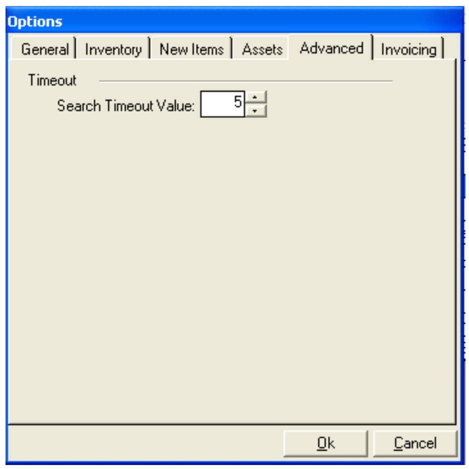
You can specify a default Unit Of Measure and Category to use when creating new items. You can also tell the system how to increment item number. You can increment based on item count or by last entry.

6. Enter **Assets** tab settings.



You can specify to notify about due-outs on startup. A window displays telling you of due-outs upon each login.

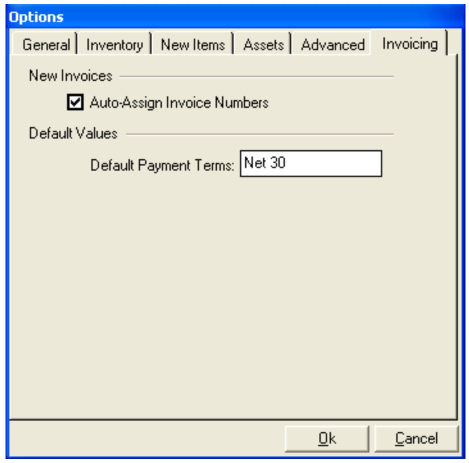
7. Enter **Advanced** tab settings.



You can specify how many minutes of search time is allowed before the system times out.

Understanding the Interface

8. Enter **Invoicing** tab settings.



You can specify to assign invoice numbers automatically and the default payment terms on invoices.

9. Click **OK**.

You are returned to the Display Area. Your settings are saved.

Setting User Accounts

JackHammerSoft performs initial user setup; however, users with administrator privilege can add additional users and users groups.

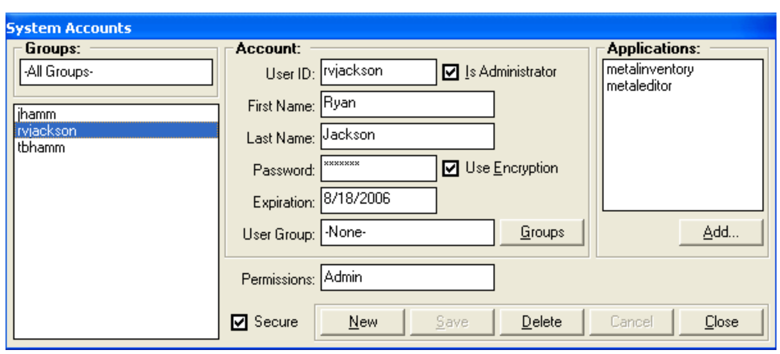
Creating Users

Users with administrator privilege can add, modify, and delete users.

To add new user accounts:

1. Select **User Accounts** from the **View** menu.

The System Accounts window appears.



2. Click **New**.

The window is repopulated with blank fields.

3. Enter the User ID.

4. Enter the user's first and last name.
5. Enter the user's password and click **Use Encryption** to encrypt the password.

   Encryption is a safety feature for passwords. Click the **Secure** checkbox to display asterisks instead of the actual password.
6. Enter the expiration date in mm/dd/yyyy format.
7. Select the **User Group** from the pulldown.

   To create new user groups, click the **Groups** button.
8. Click **Save**.
9. Use the **Add** button to add JackHammerSoft applications to which you want the user to have access.

Note: User information must be saved prior to adding applications.

To modify user accounts:

1. Select **User Accounts** from the **View** menu.

   The System Accounts window appears.
2. Select the desired account.

   The window is repopulated with user data.
3. Make the desired changes.
4. Click **Save**.

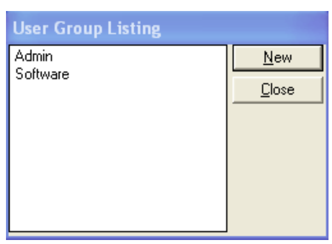
Creating User Groups

Users with administrative privilege can create new user groups. User groups are a general grouping of users.

1. Select **User Accounts** from the **View** menu.

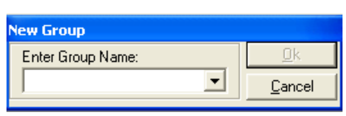
   The System Accounts window appears.
2. Click the **Groups** button on an existing user window.

   The User Group Listing window appears.



3. Click **New**.

   A new window appears.



4. Enter the Group name.
5. Click **OK**.

   The group is added to the list.
6. Click **Close**.

Database Reports

Database Reports are custom built for each client.

To generate database reports:

1. Select **Database reports** from the **View** menu.

   The Database Reports window appears.

Parameters Icon

2. Select the desired report from the pulldown.
3. Click the Parameters icon.

   The parameters required to generate each report are listed.
4. Enter the desired parameters.
5. Click **OK**.

   The report is generated.

   Depending on the size of the report, this could take some time. You may print or export the report as desired.

Chapter 3: Using the Properties Module

The Properties module allows you set up information such as warehouses, categories, and units of measure, that can be used by other windows in METAL. Much of this information has been created by JackHammerSoft for you, but you can add or change this information as desired.

In This Chapter

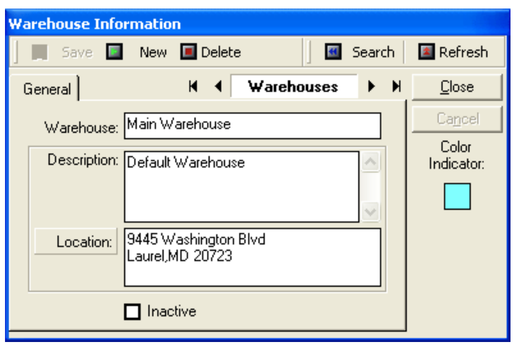
Warehouses

This sub-module creates the lists of warehouses where inventory is kept.

To add warehouses:

1. Click the **Properties** module in the module menu.
2. Click the **Warehouses** sub-module icon.

   The Warehouse information window appears.



   You can scroll through the existing list of warehouses using the back and forth arrows.

3. Click **New.**
4. Enter the name of the warehouse.
5. Enter a warehouse description.
6. Click the **Location** button to add a location.

   A window appears allowing you to add location information.

7. Click **OK**.

8. Double-click the color icon to select a color for the warehouse.

   This color is displayed in the search criteria and can help you easily identify the warehouse when scrolling through the pulldown menu.

9. Click **Save**.

   If desired, click the Inactive checkbox to inactivate the warehouse.

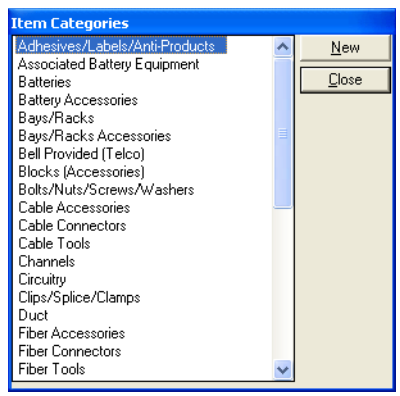
Item Categories

This sub-module creates the lists of categories for inventory items.

To add categories:

1. Click the **Properties** module in the module menu.
2. Click the **Categories** sub-module icon.

   The Item Categories information window appears.



   All existing categories are listed.

3. Click **New**.

   The new category window appears.

4. Enter the name of the category.
5. Click **OK**.
6. Click **Close**.

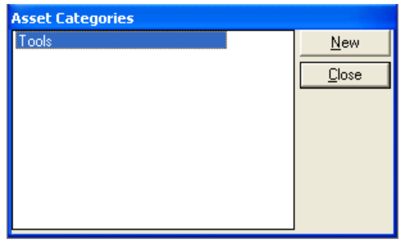
Asset Categories

This sub-module creates the lists of categories for assets.

To add categories:

1. Click the **Properties** module in the module menu.
2. Click the **Asset Categories** sub-module icon.

The Asset Categories information window appears.



All existing categories are listed.

3. Click **New**.

   The new category window appears.
4. Enter the name of the category.
5. Click **OK**.
6. Click **Close**.

Inventory Categories

This sub-module creates the lists of categories for inventory types.

To add categories:

1. Click the **Properties** module in the module menu.
2. Click the **Inventory Categories** sub-module icon.

   The Inventory Categories information window appears.

All existing categories are listed.

3. Click **New**.

   The new category window appears.
4. Enter the name of the category.
5. Click **OK**.
6. Click **Close**.

Inventory Locations

This sub-module creates the lists of categories for inventory locations within warehouses.

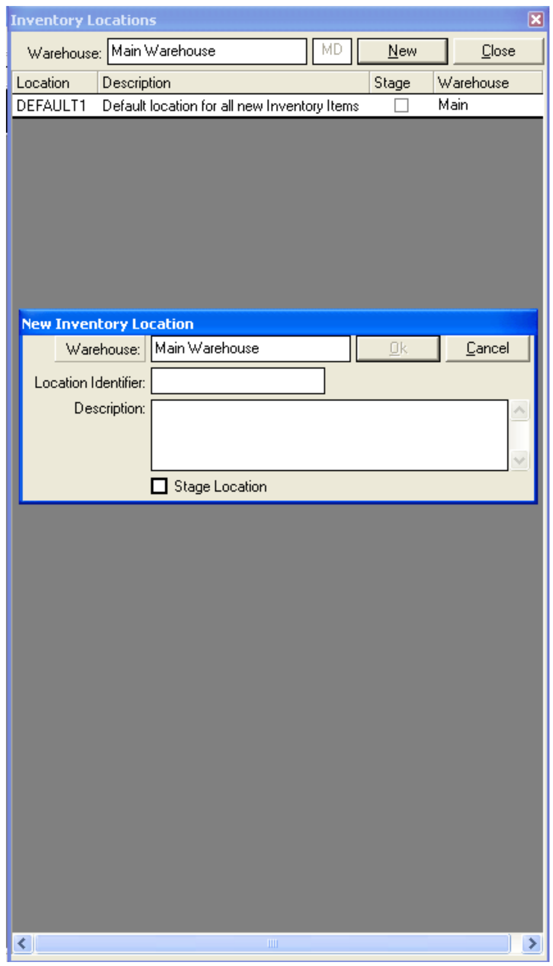
To add locations:

1. Click the **Properties** module in the module menu.
2. Click the **Inventory Locations** sub-module icon.

   The Inventory Locations information window appears.

   You can scroll through the existing list of categories.
3. Click **New**.

   The New Inventory Location window appears.



4. Click the **Warehouse** pulldown menu to select a warehouse.

   You can click the Warehouse button to create a new warehouse.
5. Enter the Location Identifier and Description.
6. If this is a staging location, check the **Stage Location** box.
7. Click **OK**.
8. Click **Close**.

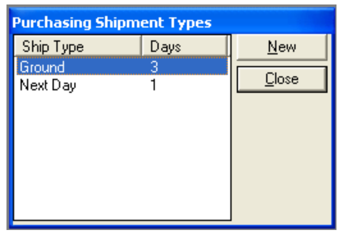
Shipment Types

This sub-module creates the lists of categories for shipment types.

To add categories:

1. Click the **Properties module** in the module menu.
2. Click the **Shipment Types** sub-module icon.

   The Purchasing Shipment Types information window appears.



   All existing categories are listed.
3. Click **New**.

   The new shipment type window appears.
4. Enter the shipment type and number of days for shipment.
5. Click **OK**.
6. Click **Close**.

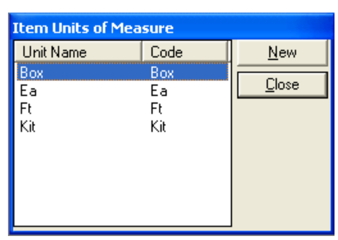
Units of Measure

This sub-module creates the lists of categories for units of measure.

To add categories:

1. Click the **Properties** module in the module menu.
2. Click the **Units of Measure** sub-module icon.

   The Item Units of Measure information window appears.



   All existing categories are listed.
3. Click **New**.

   The new unit of measure window appears.
4. Enter the Unit of measure name and the abbreviation code.
5. Click **OK**.
6. Click **Close**.

New Part Number

This window is identical to the new item window in “New Item” on page 5-3.

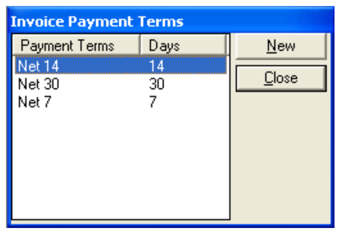
Payment Terms

This sub-module creates the lists of categories for payment terms.

To add categories:

1. Click the **Properties** module in the module menu.
2. Click the **Payment Terms** sub-module icon.

   The Invoice Payment Term information window appears.

   All existing categories are listed.
3. Click **New**.

   The new unit of measure window appears.
4. Enter the Payment Term Description and the number of days for payment tolerance.
5. Click **OK**.
6. Click **Close**.

Chapter 4: Using the Contacts Module

The Contacts module allows you to set up reusable information about manufactures, clients, and vendors.

In This Chapter

- Manufacturers
- Clients
- Vendors
- Contacts

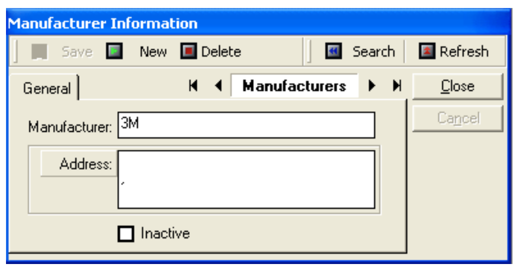
Manufacturers

You can create manufacturers to be used throughout the system.

To add a manufacturer:

1. Click the **Contacts module** in the module menu.
2. Click the **Manufacturers** sub-module icon.

   The Manufacturer Information window appears.



   You can scroll through the existing list of warehouses using the back and forth arrows.

3. Click **New.**
4. Enter the name of the manufacturer.
5. Click the **Address** button to add an address.

   A window appears allowing you to add address information.

6. Click **OK**.
7. Click **Save**.

   If desired, click the **Inactive** checkbox to inactivate the manufacturer.

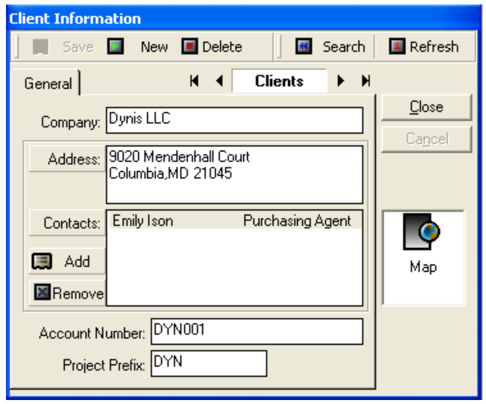
Clients

You can add clients by company.

To add a client:

1. Click the **Contacts** module in the module menu.
2. Click the **Clients** sub-module icon.

   The Client Information window appears.



   You can scroll through the existing list of warehouses using the back and forth arrows.

3. Click **New.**
4. Enter the name of the Company.
5. Click the **Address** button to add an address.

   A window appears allowing you to add address information.

6. Click **OK**.
7. If desired, attach a map to the client's location.
8. Click the **Add** button to add existing clients.

   A window appears allowing you to add clients. You can also click the **Contacts** button to invoke the client creation window. In addition, you can remove clients from the list by clicking the **Remove** button.

9. Enter the account number.
10. Enter a Project Prefix.

    This prefix can be up to four characters. It associates the client with the prefix and is appended to the project number. It associates the client with the project. This allows you to select the code in the Metal Editor Auto Project field.

11. Click **Save**.

    If desired, click the **Inactive** checkbox to inactivate the manufacturer.

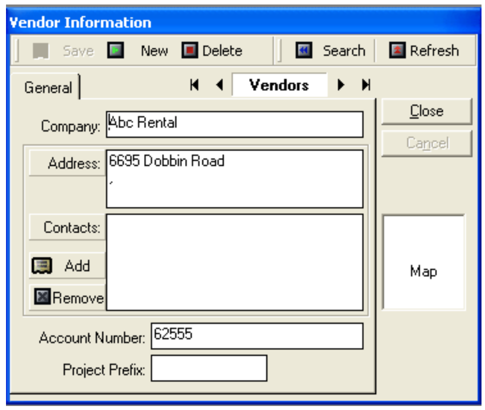
Vendors

You can add vendors by company.

To add a vendor:

1. Click the **Contacts module** in the module menu.
2. Click the **Vendors** sub-module icon.

   The Vendor Information window appears.



   You can scroll through the existing list of warehouses using the back and forth arrows.

3. Click **New.**
4. Enter the name of the company.
5. Click the **Address** button to add an address.

   A window appears allowing you to add address information.

6. Click **OK**.
7. Click the **Add** button to add existing vendors.

   A window appears allowing you to add clients. You can also click the **Contacts** button to invoke the vendor creation window. In addition, you can remove clients from the list by clicking the **Remove** button.

8. Enter the account.
9. Click **Save**.

   If desired, click the **Inactive** checkbox to inactivate the manufacturer.

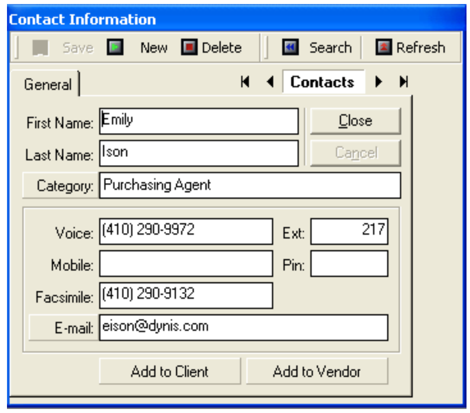
Contacts

You can add individual contacts regardless of their company affiliation.

To add a contact:

1. Click the **Contacts** module in the module menu.
2. Click the **Contacts** sub-module icon.

The Contacts information window appears.



You can scroll through the existing list of contacts using the back and forth arrows.

3. Click **New.**
4. Enter the name of the contact and additional contact information.
5. Click the Category pulldown to assign a category to the contact.

   You can create a new category by clicking the **Category** button.
6. If desired, click the **Add to Client** or **Add to Vendor** buttons to add this client to those lists.
7. Click **Save**.

   If desired, click the **Inactive** checkbox to inactivate the manufacturer.

Chapter 5: Using the Materials Module

The Materials module allows you to enter and track items in your inventory. It contains the Item master for creating new items, tracking inventory, viewing purchase history, and tracking assets.

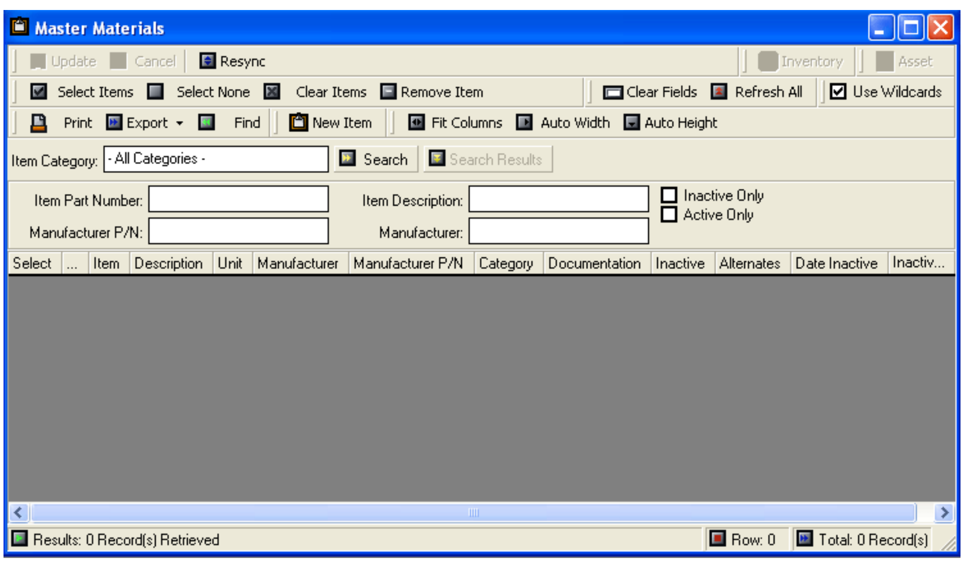
Item Master

The Item Master sub-module is the control center of the entire application. Any part that has been ordered, will be ordered or needs to be inactivated, replaced, or documented is entered and maintained through this screen. Any and all edits to existing items are accomplished via the Item Master; however, items contained in this list cannot be deleted as they maintain an active history of all transactions in the Inventory system.

To access the Item Master:

1. Click **Materials** in the Module Menu.
2. Click the **Item Master** sub-module icon.

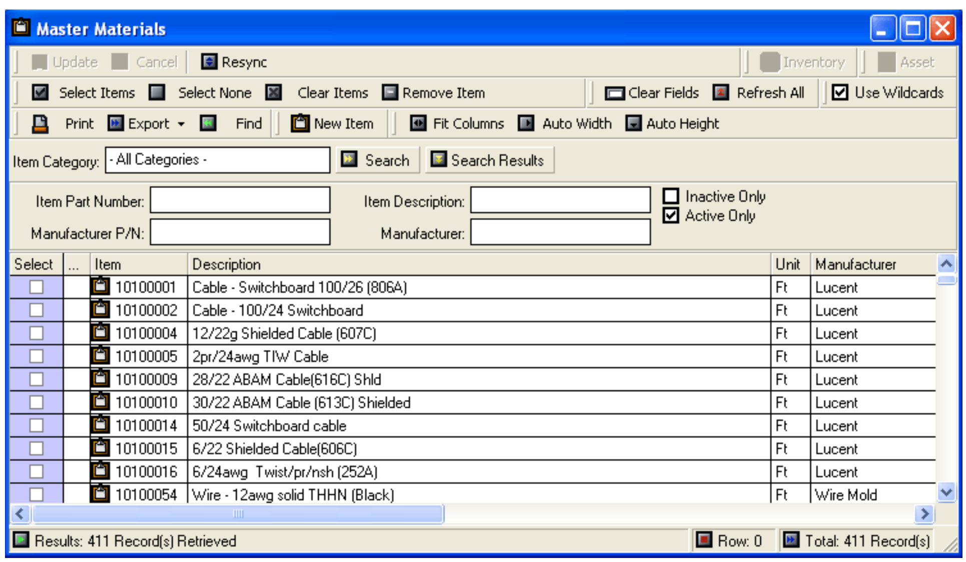
   The Master Materials window appears.



Search Criteria

The search criteria for the Item Master includes:

Search Item	Description
Item Category	This pulldown lists all created categories.
Item part number	This data entry field allows you to enter an existing METAL part number.
Manufacturer Part Number	This data entry field allows you to enter an existing Manufacturer part number.
Item Description	This data entry field allows you to enter a brief description upon which to search.
Manufacturer	This data entry field allows you to enter an existing manufacturer.
Inactive/Active	These check boxes allow you to narrow the search to inactive or active items. Inactive items are labelled inactive for searches, but are not removed from the database.



Find Item

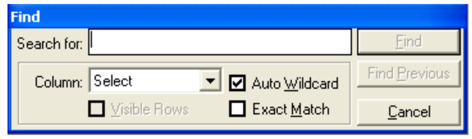
The Find item window allows you to find items within a column that are already listed in a previous search.

To find items in the table window:

1. Select a desired cell.

   The cell should be in the column you wish to search.
2. Click **Find**.

The Find window appears.



3. Enter the item to search for in the Search for field.

   The data type must match the data type for the column. For example, if you choose the column type Item, item numbers must be entered.
4. Select the column type.
5. Click **Find**.

   The found items are repopulated in the table.

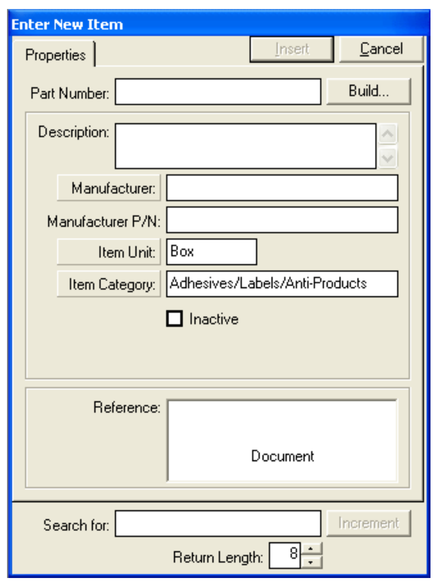
New Item

The New Item window allows you create new inventory items and store them in the database.

To create new items:

1. Click **New Item**.

   The Enter New Item window appears.



2. Enter the part number for the item.

   You can use the search criteria (at the bottom of the window) to search for the last part number used in a series. You must specify as many digits of the number and the return length of digits to locate the number. For example, you could enter 101004 and 7 to locate the next number in the 1010040 series.
3. Enter a Description for the items.
4. Enter the Manufacturer.

Select an item from the pulldown or click the **Manufacturer** button to invoke a list of existing manufactures or to add a new one.

Enter the Manufacturer Part Number.

5. Enter the Item Unit.

   Select an item from the pulldown or click the **Item Unit** button to invoke a list of existing Item Units or to add a new one.

6. Enter the Item Category.

   Select an item from the pulldown or click the **Item Category** button to invoke a list of existing Item Category or to add a new one.

7. Enter the Item Replacement.

   Select an item from the pulldown or click the **Item Replacement** button to invoke a list of existing items that could replace this item if it is inactive.

8. If desired, enter a reference document by double-clicking in the box.

   Your windows explorer window is invoked and you may select any document to attach. A reference document is referred to as documentation in table rows.

9. Click **Insert**.

Linking and Creating Alternates

Alternates are additional items that may be used instead of this item. Alternate items are interchangeable.

To create alternates:

1. Highlight a row.
2. Right-click and select **Create Alternates**.

   The Enter New Item window appears.

3. Enter the part number and item information of the item to be used as an alternate for the selected row.
4. If the item also has a replacement, enter the replacement.

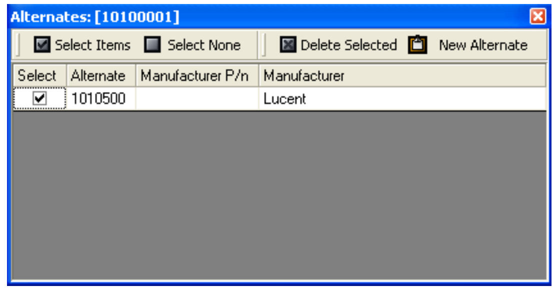
   Replacements only apply to inactive items. Make sure the Inactive check box is marked.

5. Click **Insert**.
6. Link the alternate as described below.

To link alternates:

1. Highlight a row.
2. Right-click and select **Link Alternates**.

The Link Alternate window appears.



3. Click the select checkbox for desired alternate.
4. Close the window.

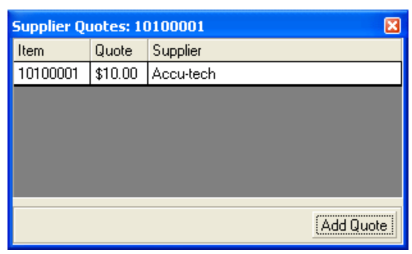
Viewing and Entering Supplier Quotes

The same item may be available through different suppliers. You can view existing suppliers for the item or add a new supplier for the item.

To view existing suppliers:

1. Highlight the desired row and right-click.
2. Select **View Supplier Quotes**.

   The Supplier Quotes list appears listing existing quotes on this item.

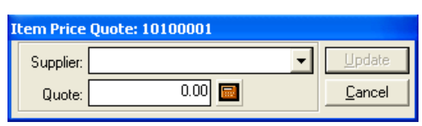


3. Close the window or click **Add Quote** to add a new quote.

To add a new quote:

1. Highlight the desired row and right-click.
2. Select **Enter Supplier Quote**.

   The Item Price Quote window appears.



3. Select the desired supplier.
4. Enter the amount of the quote.
5. Click **Update**.

   The quote is added to the list.

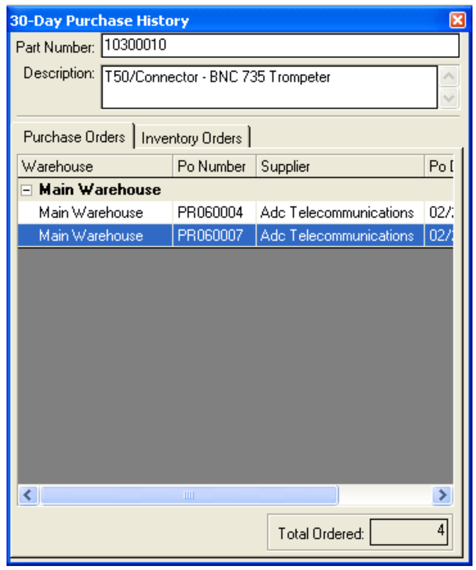
Purchase History

You can view the Purchase History for an item.

To view purchase history:

1. Highlight the desired row and right-click.
2. Select **Purchase History**.

   The Purchase History window appears. You can click the **Purchase Order** tab to view purchase order history and the **Inventory Order** tab to view inventory orders.



3. Close the window.

Add to Inventory

If the item is active, it can be added to the inventory of a specific warehouse.

To add the item to inventory:

1. Highlight the desired row and right-click.
2. Select **Add to Inventory**.

   The Inventory window appears.
3. Select the desired warehouse.
4. Click **OK**.

Add to Assets

You can add items to assets if the item is not an inventory item.

To add items to assets:

1. Highlight the desired row and right-click.
2. Select **Add to Assets**.
   The Asset Properties window appears.
3. Enter the desired criteria.
   You can specify the serial number, item location, and asset category for the item. You can specify the date the item is due out and select the due-out type. You can inactivate the asset, if desired. Inactive removes items from normal searches, but does not remove them from the database.
4. Click **Update**.

Synchronizing Updates

The Resync toolbar button allows you to synchronize updates with other recent updates in the system.

To synchronize updates:

1. Highlight the desired rows.
   You can CTRL-click to select multiple rows.
2. Click **Resync**.
   Recent updates that apply to the selected rows are synchronized.

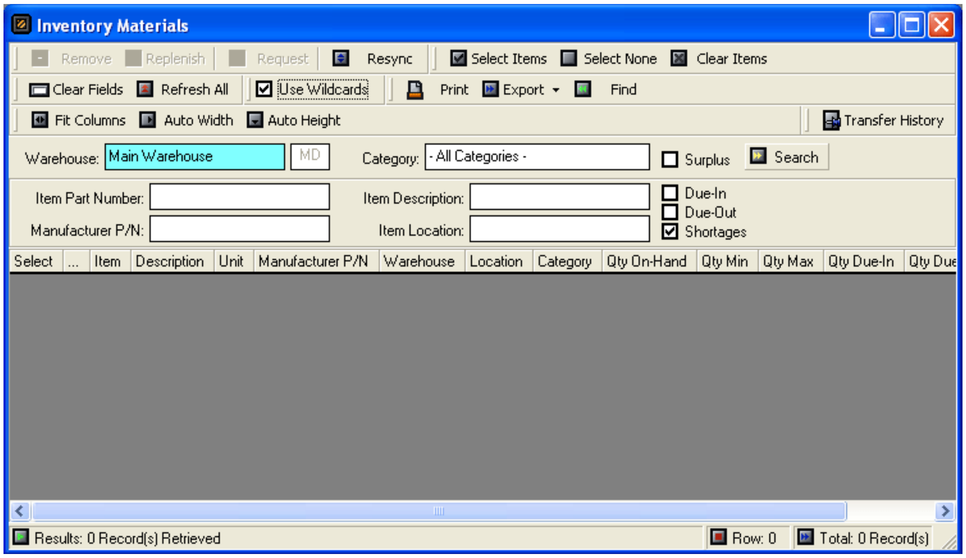
Inventory

The Inventory sub-module, using the items created in the item master, controls your in-stock items. The inventory interface tracks the location(s), displays the on-hand quantities and allows the user to set min/max levels for demand items. Current demands on stock (due-ins and due-outs), including individual transactions, are both tracked and displayed via this screen.

Surplus or excess items are also controlled as part of the Inventory sub-module; these are items with on-hand quantities but no future demand.

To access Inventory Materials:

1. Click **Materials** in the Module Menu.
2. Click the **Inventory** sub-module icon.



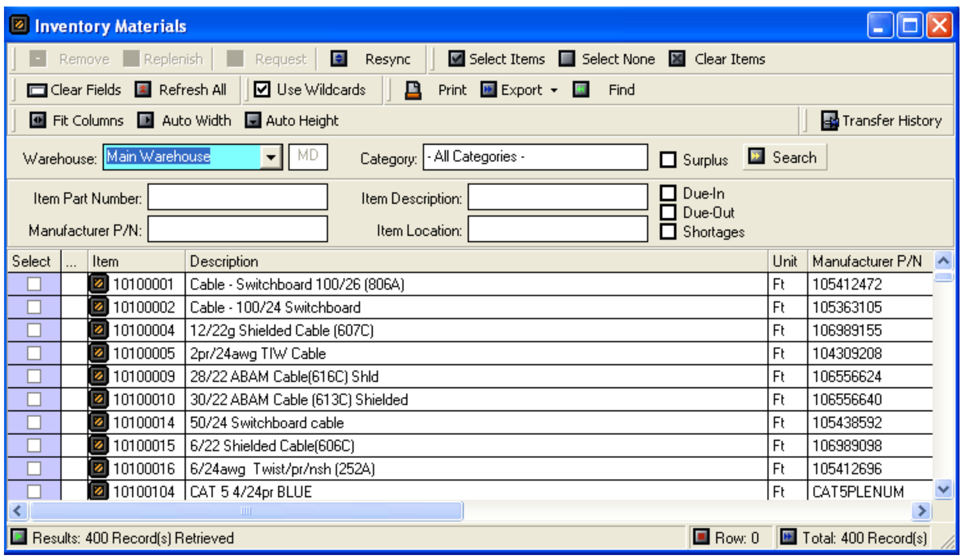
Search Criteria

The search criteria for the Inventory sub-module includes:

Search Item	Description
Warehouse	This pulldown lists all warehouses. If previously configured, each warehouse displays in a different color for quick recognition.
Category	This pulldown lists all categories.
Item part number	This data entry field allows you to enter an existing METAL part number.
Manufacturer Part Number	This data entry field allows you to enter an existing Manufacturer part number.
Item Description	This data entry field allows you to enter a brief description upon which to search.
Item location	This data entry field allows you to enter an item location.
Due-in/Due-out	These check boxes allow you to narrow the search to items that are due-in and/or due-out. Due-in orders are waiting to come in after a purchase order has been placed. Due-out items are ready to ship. A request has been made to pull from inventory.

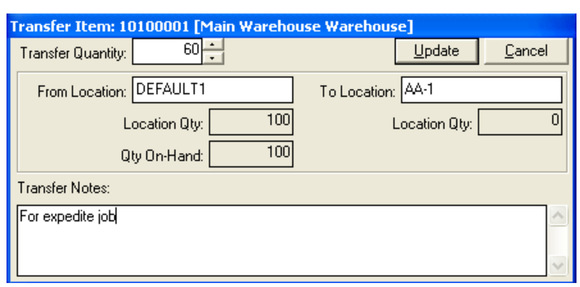
Search Item	Description
Surplus	This check box allows you to narrow your search to items that are in surplus. Surplus is also stock, but is removed from stock when it equals zero. Surplus is not usually reordered.
Shortages	This check box allows you to narrow your search to items that are in shortage. A shortage means there is not enough stock to meet the quantity minimum. It could be plus or minus zero. All shortage are highlighted yellow in the table.

The table lists details for each item. The Qty columns show the availability of the item. Yellow anywhere in the row indicates shortages. Yellow in the QTY columns indicates a shortage specific to that column.



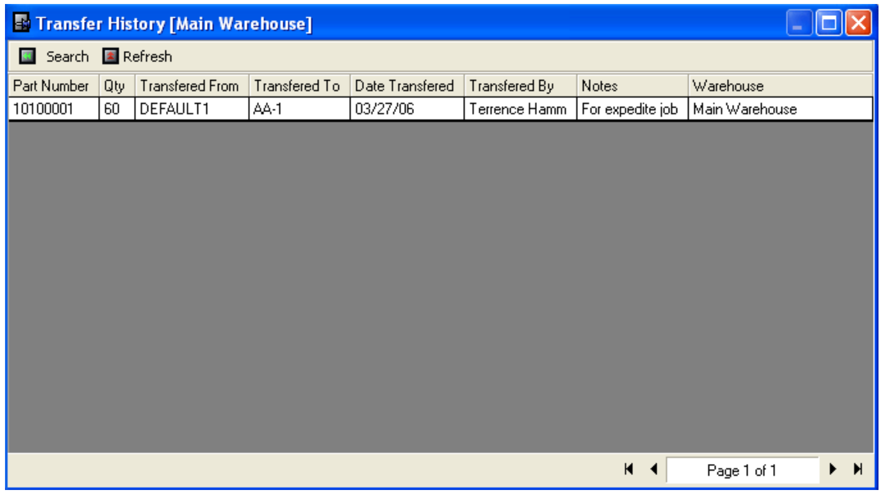
Transfer Items

You can transfer items to an inventory or staging location by right-clicking the row and selecting **Transfer Item**. Enter the amount to transfer and the location to transfer the inventory as well as a description of the transaction and click **Update**.



Viewing History

You can view transfer history, location history, purchase, and inventory history. The **Transfer History** button allows you to view the transfer of all items in the database. It does not apply to selected or highlighted rows. Twenty records are shown at a time. You can view the transfer history of a specific item by right-clicking the highlighted row and selecting **Transfer History**. Enter the transfer dates and click **OK**.



Use the right-click menu to view the item’s specific location, purchase history, and inventory history.

Removing Items from Inventory

Clicking the **Remove** button removes the selected items from inventory.

Reordering Items

Clicking the **Replenish** button reorders the selected items based on default settings. Selecting **Order** from the right-click menu replenishes the item selected.

Special Requests

When you have a special request and need to circumvent the normal purchase order process, you can use the **Request** button. This invokes the Material Request window. The item must have an existing project. Select the project, requestor, and cause.

Returning Items To Inventory

You can return unused items to stock by right-clicking the item and selecting **Return Item**.

To return an item:

1. Right click the item's row.
2. Select **Return** from the menu.

   The Return Items window appears.
3. Enter the quantity to return.
4. Click **Return Reason** to select a reason.
5. Enter the Return Location.
6. Click **OK**.

Locating Purchase Orders

You can list purchase orders (due-in) for an item by right-clicking the item and selecting **Purchase Orders**. The part number for the item is listed in the popup window and any related purchase orders are shown.

Purchase History

The Purchase History sub-module is the shipping and receiving hub of the Inventory System. This interface displays a historical view of any and all transactions associated with an item. Due-ins, due-outs, transfers, cannibalizations, shipments and all related tracking information are managed via this screen. Purchase orders track supplier, cost, shipping, receiving and overall item handling by project, PO number and date.

The system tracks four types of purchase orders:

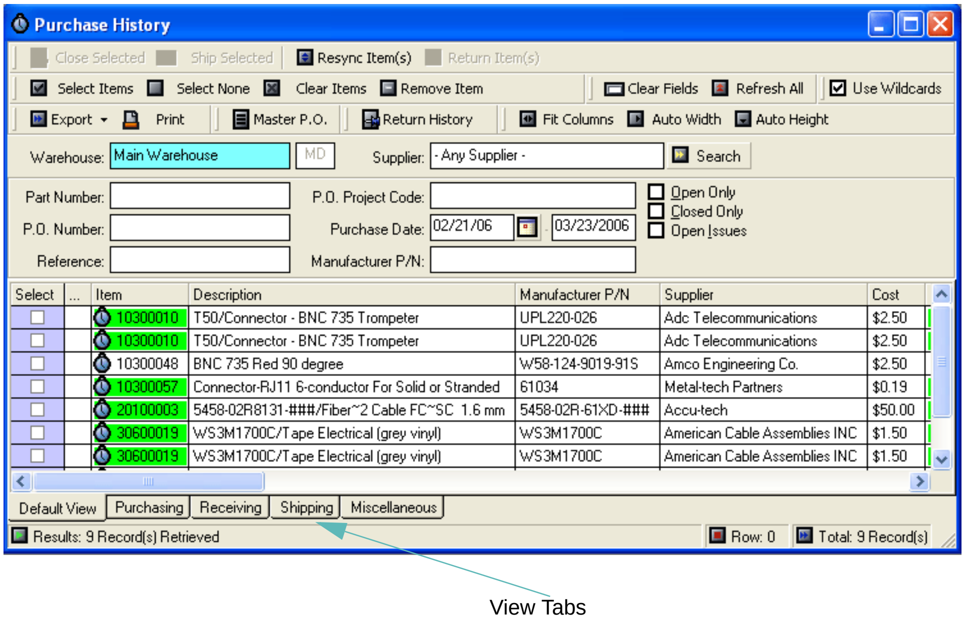
Type	Description	Code
Standard	Items are ordered from the supplier	PR
Request	Special Material Request	RQ
Inventory	Purchase order is cut against stock	IN
Special	Accounts for partial, not paid for, or staging	SP

The Purchase table can be quite large. In an effort to help you manage the display, viewing tabs have been added to the bottom of the table window. You can click each tab to narrow the columns shown. In addition, you can customize the five tabs.

To customize access Purchase history viewing tabs:

1. Click **Materials** in the Module Menu.

2. Click the **Purchase History** sub-module icon.



3. Click the desired view tab.
4. Right-click the table header and select **View Columns**.

   The column window appears.
5. Check the desired columns to display.
6. Click **Apply**.
7. Right-click the tab name and select **Rename Tab View**.

   A window appears.
8. Enter a new tab name.
9. Click **OK**.

Search Criteria

The search criteria for the Purchase History sub-module includes:

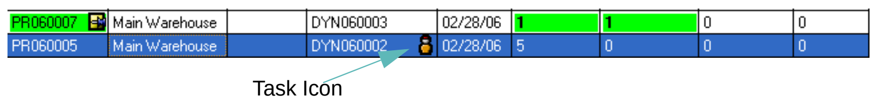
Search Item	Description
Warehouse	This pulldown lists all warehouses. If previously configured, each warehouse displays in a different color for quick recognition.
Item part number	This data entry field allows you to enter an existing METAL part number.
Manufacturer Part Number	This data entry field allows you to enter an existing Manufacturer part number.
Supplier	This pulldown lists all suppliers.
P.O. Number	This data entry field allows you to enter an existing purchase order number.
Reference	The name of a reference document.

Search Item	Description
P.O. Project Code	A project code number.
Purchase Date	Enter or select the beginning and ending date range. Entry in the ending data field alone searches specifically for that day.
Open Only/ Closed only	Check these boxes to search through open or closed POs.

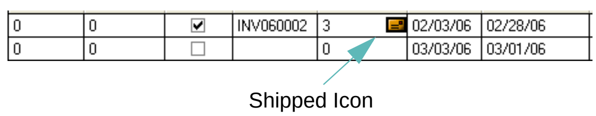
You can invoke the master purchase order list by date and warehouse by clicking the **Master PO** button.

Found purchase order are color coded. Green indicates a closed purchase order and yellow indicates that an order has been partially received. The line items represent the entire purchase order, not individual items on the purchase order.

If a project has an associated task, an icon appears in the PO Project field. You can double-click this field to invoke a list of all tasks associated with that project.



If the number shipped equals the number received, an icon appears in the QTY shipped field.



You can change the ship-to address line by line and at the project level. Line level changes are useful when you split your project across multiple locations. Highlight the row or rows and right-click the desired ship-to address, then select the desired options to change the address for the specified row(s).

Viewing History

You can view return history, project history, receive, and shipping history using the right-click menu. The **Return History** button allows you view the returns of all items in the database by warehouse. It does not apply to selected or highlighted rows. Twenty records are shown at a time. You can view the return history of a specific item by right-clicking the highlighted row and selecting **Return History**. Enter the return date range. Click **OK**. Enter the warehouse and click **OK**.

Returning Items Inventory

Clicking the **Return Items** button returns inventory to stock. This applies to selected items and can only be used for IN orders.

Closing Items

Clicking the **Close Selected** button sets the quantity received to the quantity selected for each selected item.

Updating Purchase Orders.

You can update the shipment type, request date, and reference files for purchase orders by right-clicking the item and selecting **Edit PO**.

You can add notes to a purchase order by right-clicking the item and selecting **PO Notes**.

Item Edits

You can edit the date due in for an item or add notes to an item by right-clicking the item and selecting **Edit Item**.

Record Receiving

You can record the receipt of an item by right-clicking the item and selecting **Receive Item**. Enter the transfer quantity and verify the remaining information.

Shipping the Item

Ship received items by right-clicking the item and selecting **Ship Item**. The **Ship Selected** button ships the selected items. You can ship specific items by right-clicking the item and selecting Ship item.

Reopening the item

Transfer the item by right-clicking the item and selecting **Reopen Item**.

Item and Supplier Information

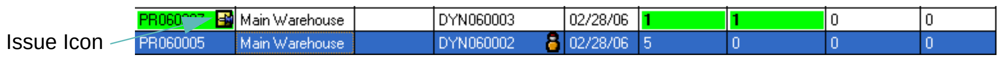
You can view information about the item by right-clicking the item and selecting **Item Properties**. You can view and change information about the supplier by item by right-clicking the item and selecting **Item Supplier**.

Checking Inventory

You can view the inventory by right-clicking the item and selecting **Check Inventory**. Double-clicking the fields listed in Check Inventory table invoke windows with expanded information specific to that cell.

Issue Tracking

You can enter and track issues related to line items by highlighting the row(s), right-clicking, and selecting **Issue Tracking**. If issues exist, a note icon appears in the PO Number field. You can double-click the note icon to invoke a window that displays issue history.

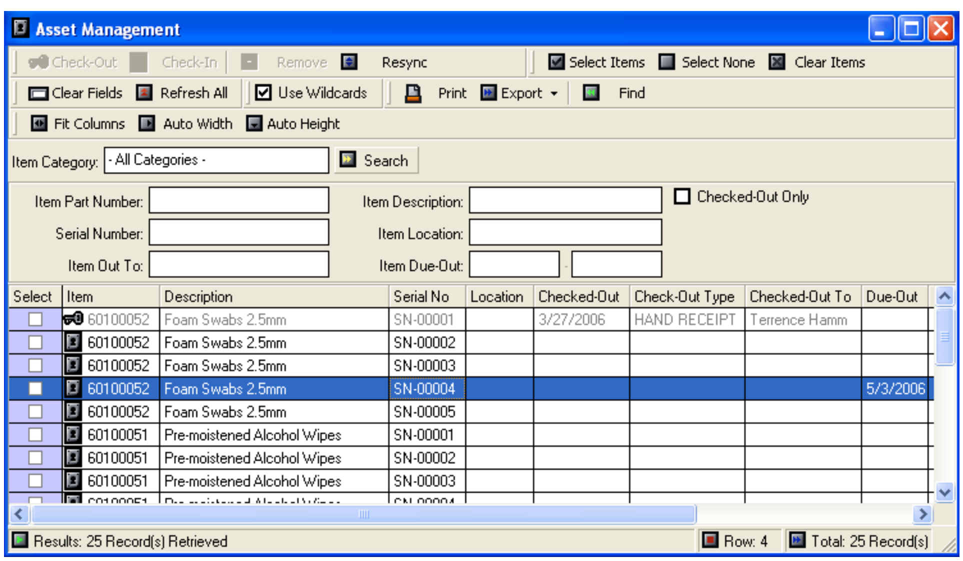


Asset Management

The Assets sub-module tracks company resources by a unique serial identifier. This unique identifier allows a manufactured part to be listed multiple times within the system. Assets are checked-in and checked-out via hand-receipt, rather than requisitioned.

Assets listed in the table are quickly identified by their status icon.

Icon	Definition
	Checked-in
	Checked-out, not editable.



Search Criteria

The search criteria for the Inventory sub-module includes:

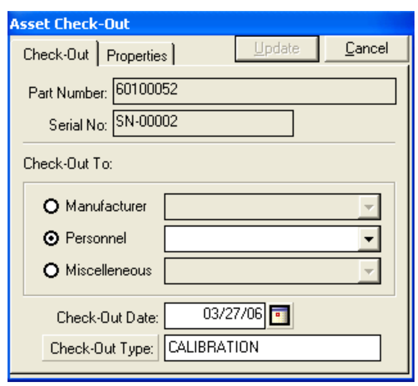
Search Item	Description
Item Category	This pulldown lists all categories.
Item part number	This data entry field allows you to enter an existing METAL part number.
Item Description	This data entry field allows you to enter a brief description upon which to search.
Serial Number	This data entry field allows you to enter a serial number.
Item Location	This data entry field allows you to enter an item's location.
Item Due-out	This field allows you to enter a date range.
Checked-Out Only	This check boxes allow you to narrow the search only to items that are checked-out.

Viewing History

You can view the history of specific assets by right-clicking the row and selecting **Asset History**.

Checking In and Out

The **Check-out** and **Check-in** buttons allow you to check selected items in and out. You can right-click a row and select **Check-in** or **Check-out** for a specific asset.



Viewing and Editing Assets

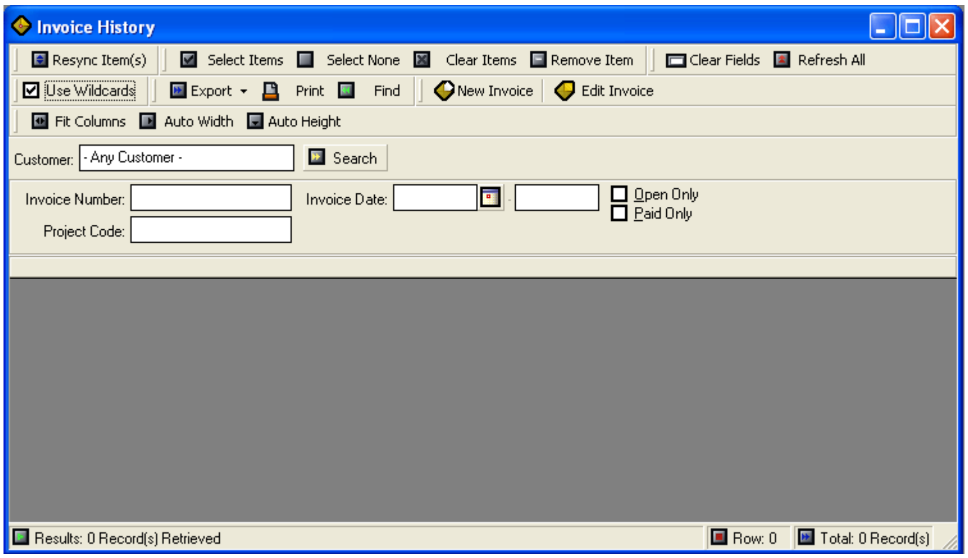
You can view and change asset properties by right-clicking the asset and selecting **Edit Item**. Here you can also view a 180 day assets history log. You can view the item's properties by right-clicking the asset and selecting **Item Properties**.

Removing Assets

You can remove assets from the search criteria, not the database, using the **Remove** button.

Chapter 6: Using the Billing Module

The Billing module allows you to create and track invoices.



Invoices

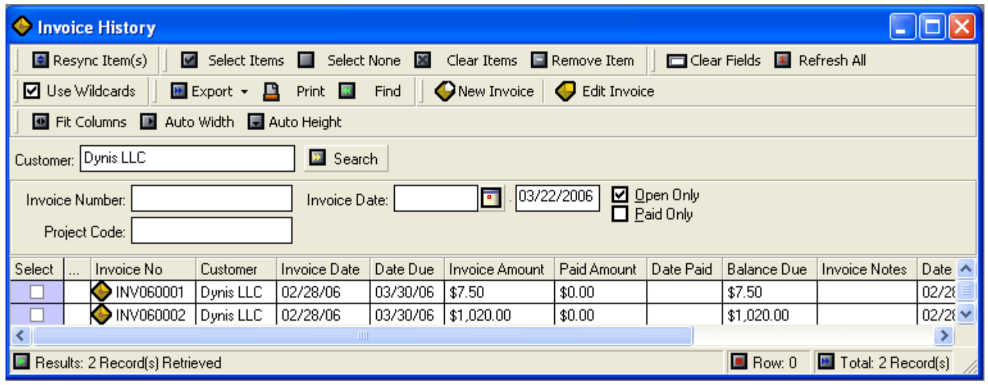
The Invoices sub-module allows you to create and track invoices.

Search Criteria

The search criteria for the Invoices sub-module includes:

Search Item	Description
Customer	This pulldown lists all customers.
Invoice number	This data entry field allows you to enter an existing invoice number.
Project Code	This data entry field allows you to enter an existing project code.
Item Description	Enter or select a date range. An entry only in the second field searches for that day.
Open Only/Paid Only	These check boxes allow you to narrow the search only to unpaid open invoices or paid invoices.

Yellow indicates a partial invoice.



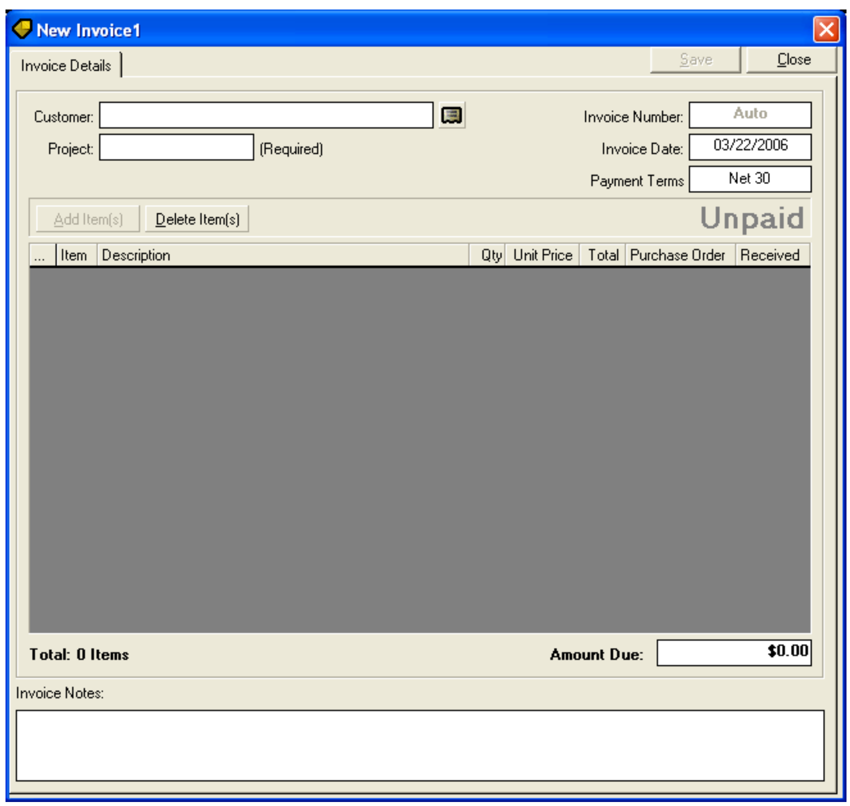
Creating New Invoices

You can bill a customer via an invoice for any items in the database.

To create an invoice:

1. Click **Billing** in the Module Menu.
2. Click the **Invoices** sub-module icon.
3. Click the **New Invoice** button.

   The new invoice window appears.



4. Select the customer from the pulldown.

   You can see detailed client information by clicking the rolodex icon.

5. Select the project number from the pulldown.
6. Enter the invoice date (if different than today's date).
7. Select the payment terms.
8. Click the **Add Item(s)** button to select an item to bill.

   You can remove selected items using the **Delete** button.

9. Repeat step 8 until all items have been added.
10. If desired, add notes.
11. Click **Save**.

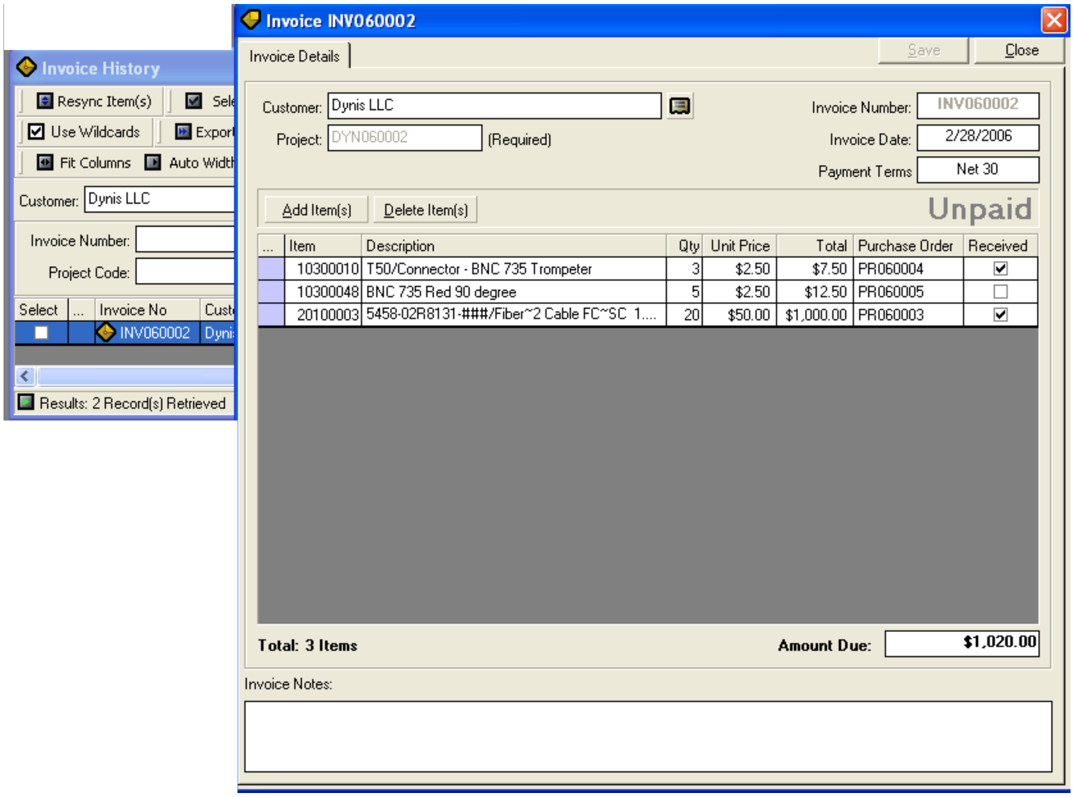
Editing Invoices

You can edit an invoice displayed in the invoices table.

To edit an invoice:

1. Click **Billing** in the Module Menu.
2. Click the **Invoices** sub-module icon.
3. Search to display invoices in the table.
4. Highlight the row for the desired invoice.
5. Click the **Edit Invoice** button.

The invoice window appears for that row.



6. Select the customer from the pulldown.

   You can see detailed client information by clicking the rolodex icon.

7. Select the project number from the pulldown.
8. Enter the invoice date (if different than today's date).
9. Select the payment terms.
10. Click the **Add Item(s)** button to select an item to bill.

    You can remove selected items using the **Delete** button.

11. Repeat step 10 until all items have been added.
12. If desired, add notes.
13. Click **Save**.

Chapter 7: Using the Scheduling Module

The scheduling module allows you to schedule personnel for tasks and to send mail reminders to keep personnel on track.

In This Chapter

- Personnel
- Send Mail

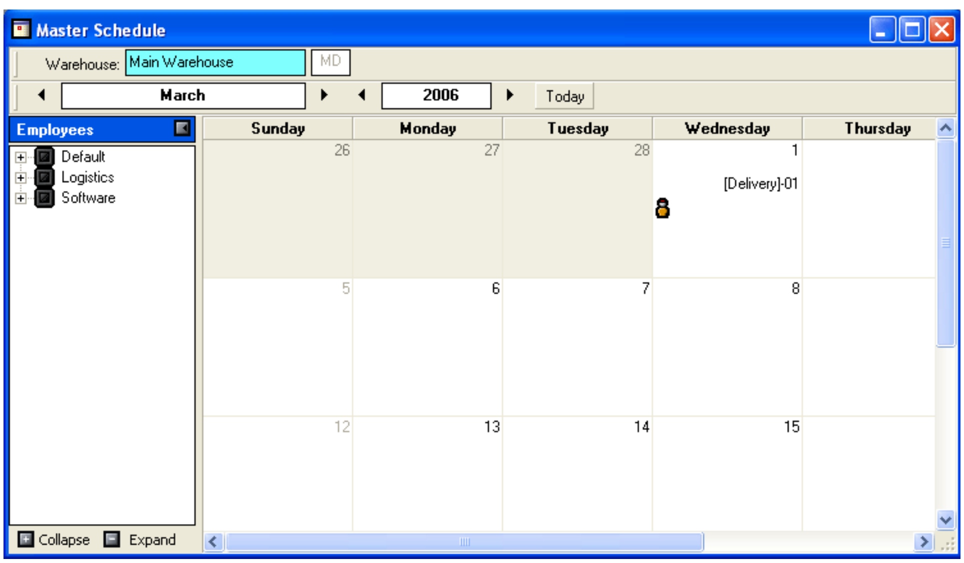
Personnel

The Personnel sub-module is used to assign people to tasks on a specific date. It is useful for delivery schedules. When tasks are scheduled in this sub-module, an icon appears next to the related items in the Purchase History table. You can double-click the Project field showing this icon in the Purchase History table to show all tasks related to the project.

To add calendar entries:

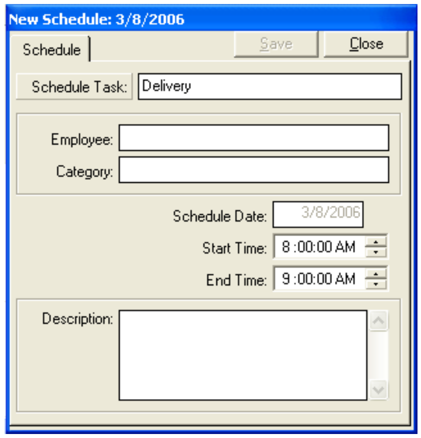
1. Click **Scheduling** in the Module Menu.
2. Click the **Personnel** sub-module icon.

   The calendar appears.



3. Select the **Warehouse** with the employees to which you want to assign tasks.
4. Use the calendar sorter to select a month and year.

5. Double-click the calendar day to invoke the scheduler.



6. Select a **Schedule Task** from the pulldown.

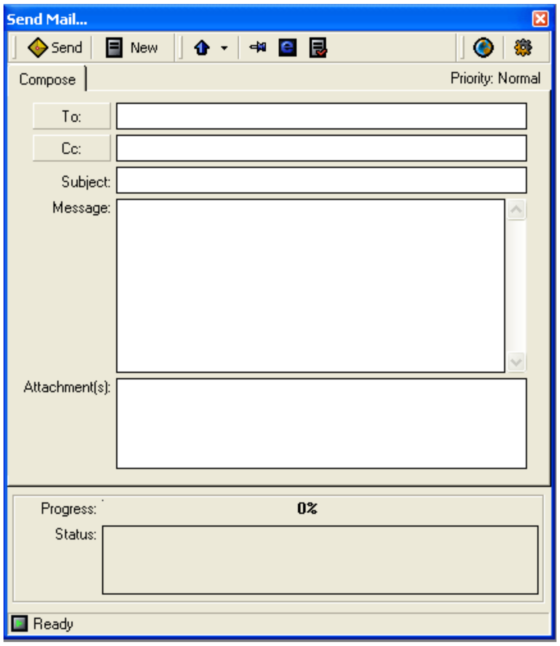
   You can create new tasks by clicking the **Schedule Task** button.

7. Select the **Employee** and **Category** from the pulldowns.
8. Select the **Start** and **End** times using the arrow controls.
9. Enter the task **Description**.
10. Click **Save**.

    The task is entered in the calendar. You can associate these tasks with a project in the Purchase History table.

Send Mail

You can notify employees about scheduled tasks using the Send Mail sub-module. This utility works in a similar fashion to other e-mail clients. The To: list is generated from the contacts you created in the Contacts sub-module. Double-click in the Attachments box to attach documents.



Chapter 8: Reports

In This Chapter

All reports, such as invoices and purchase orders, are printed outside of METAL Inventory via Microsoft Access. If you do not have the full version of Access, JackHammerSoft installs enough drivers for you to be able to print these reports.

Generating Reports

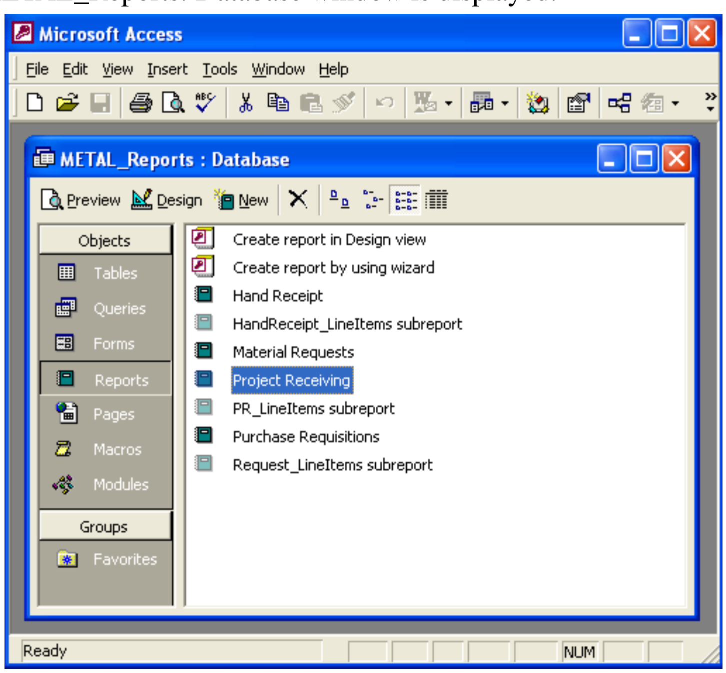
You can generate the reports provided or create custom reports. Supplied reports are:

- Hand receipts
- Material requests
- Project Receiving
- Purchase Requisitions

To generate reports:

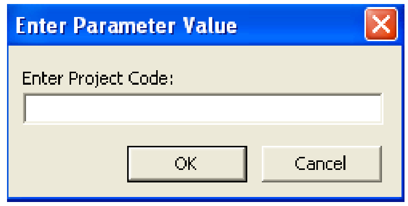
1. Navigate to the **JackHammerSoft** folder in the **Program Files** folder on your hard drive and double-click **Metal_Reports**.

   This is a Microsoft Access file and displays the Microsoft Access icon style set for your system. Microsoft Access opens and the METAL_Reports: Database window is displayed.



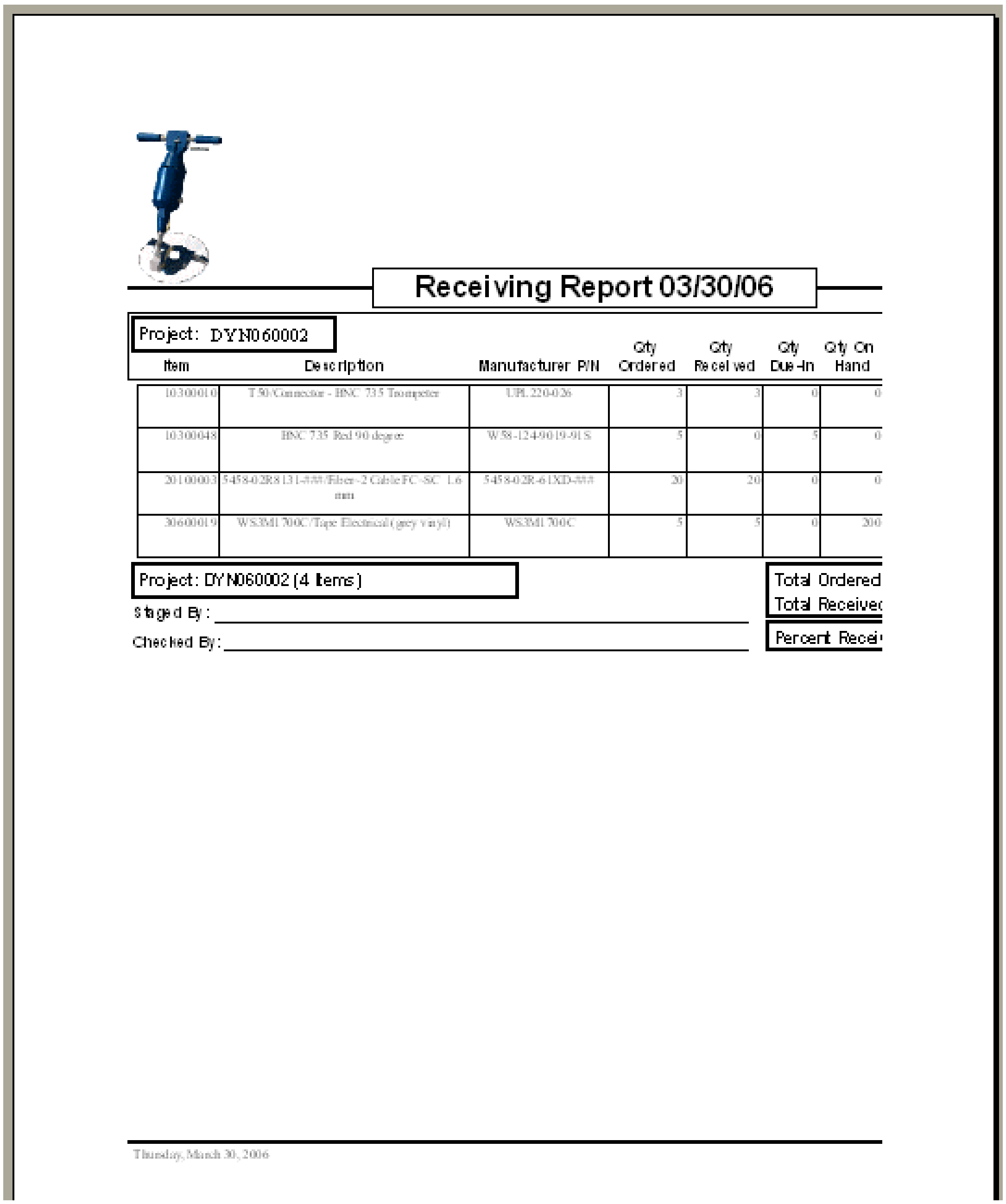
2. Double-click the desired report.

   A window appears requesting parameters. This example shows the Project Receiving report.



3. Enter the desired parameters and Click **OK**.

   The report appears.



Receiving Report 03/30/06

Project: DYN060002

Item	Description	Manufacturer P/N	Qty Ordered	Qty Received	Qty Due-In	Qty On Hand
10300010	T 50/Connector - BNC 735 Trompeter	UPL 220-026	3	3	0	0
10300048	BNC 735 Red 90 degree	W58-124-9019-91S	5	0	5	0
20100003	5458-02R8131-###/Fiber-2 Cable FC-SC 1.6 mm	5458-02R-61XD-###	20	20	0	0
30600019	WS3M1700C/Tape Electrical (grey vinyl)	WS3M1700C	5	5	0	200

Project: DYN060002 (4 Items)

Staged By: ______

Checked By: ______

Total Ordered

Total Received

Percent Recei

Thursday, March 30, 2006

Printing Reports

You may print a generated report by selecting the Access **Print** button on the report window. You can also generate and print reports simultaneously. This is a way to combine the two functions into one task.

To generate and print reports:

1. Navigate to the **JackHammerSoft** folder in the **Program Files** folder on your hard drive and double-click Metal_Reports.

   This is a Microsoft Access file and displays the Microsoft Access icon style set for your system. Microsoft Access opens and the METAL_Reports: Database window is displayed.
2. Right-click the desired report and select **Print**.

   A window appears requesting parameters.
3. Enter the desired parameters and Click **OK**.

   The report is generated and printed to your default printer.

Reports

Index