For questions about SenoxIMS user manual ro to request changes, please contact Senox IT.

SENOX Inventory Management System

User Manual

Version 2.0

07/01/2022

1. Introduction

Senox Inventory Management System (SenoxIMS) is an inventory software designed to assist the company with physical inventory and managing the data in an organized and efficient way.

This User Manual provides the information necessary for inventory personnel to effectively use the Senox Inventory Management System (SenoxIMS).

1.1 Overview

Senox Inventory Management System (SenoxIMS) is a web-based application enabling its usage on existing desktop and mobile devices, with no additional hardware or user license requirements.

SenoxIMS provides the functionality required to conduct a successful physical inventory. Its main function is to process the actual count of products and materials on the company's warehouses, and match the count results with the numbers that have been tallied in the company's Epicor ERP system.

2. Getting Started

Instructions:

2.1 Set-up Considerations

Instructions:

2.2 User Access Considerations

Instructions:

2.3 Accessing the System

Instructions:

2.4 System Organization & Navigation

Instructions:

2.5 Exiting the System

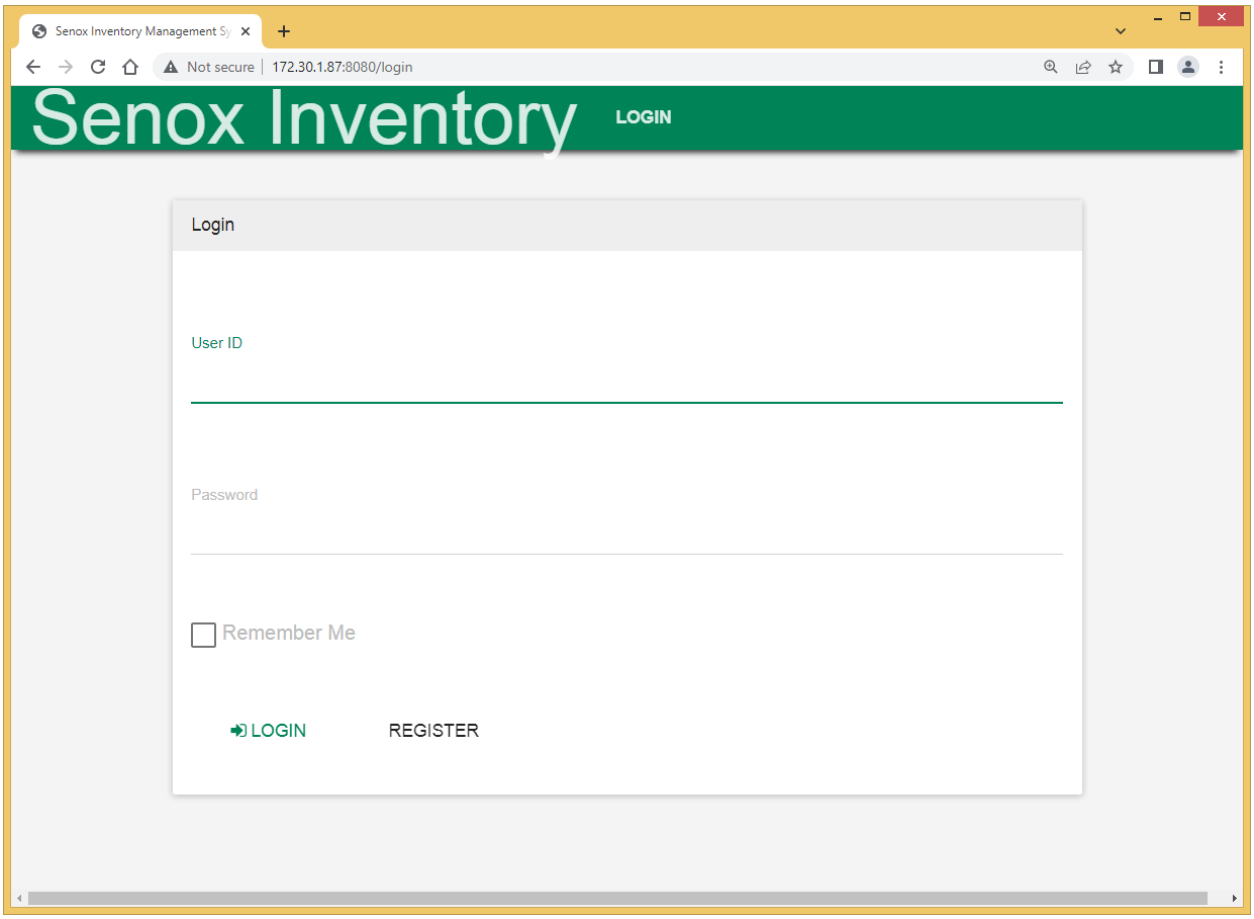
Instructions:

3. Using the System

Senox Inventory Manage System (SenoxIMS) is accessible from any web browser that runs on a computer or mobile device connected to the company's internal network. The following sub-sections provide detailed instructions on how to use the various functions or features of SenoxIMS.

3.1 Login

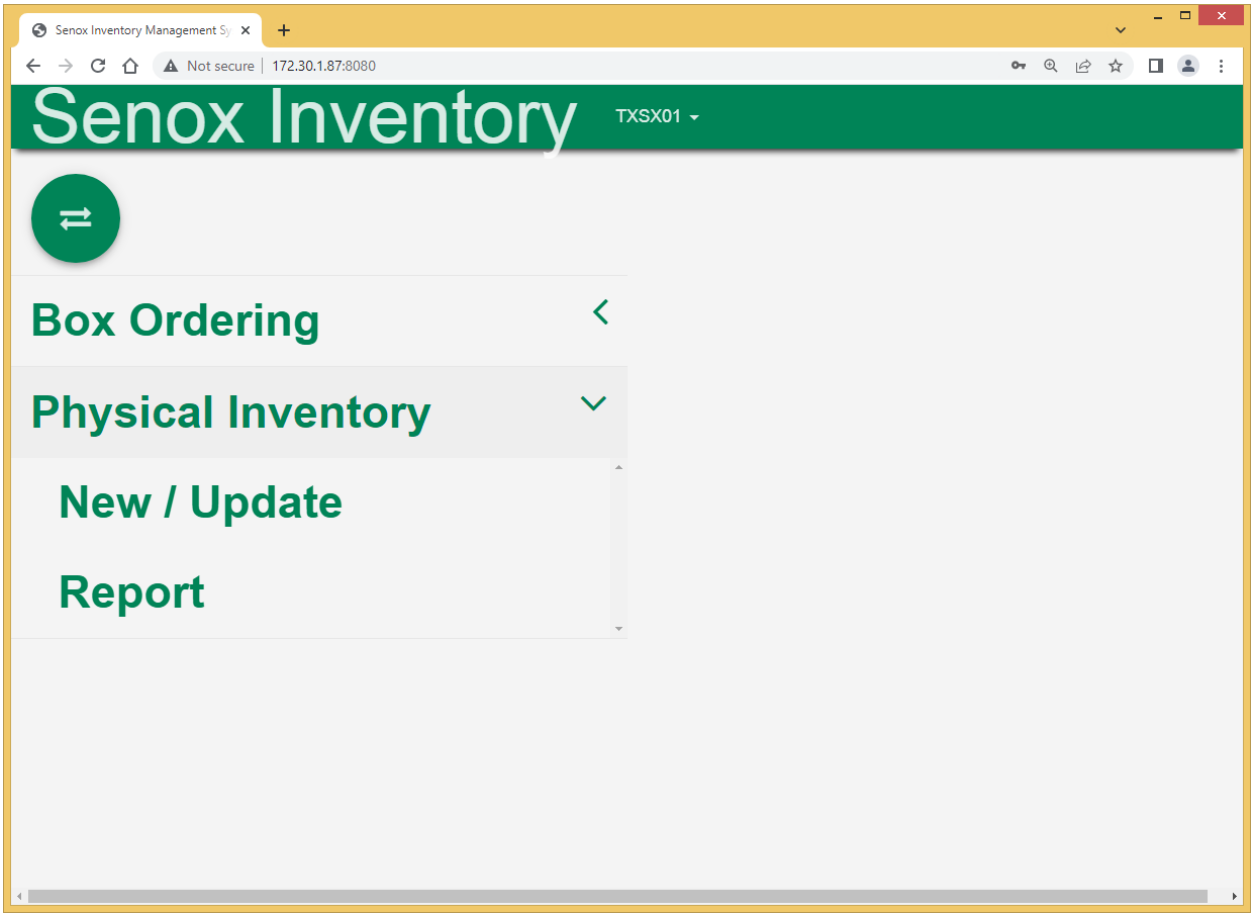
A user login is required to access SenoxIMS. Each user ID is assigned to a role having different level of access privileges.



Enter the User ID, password, and click LOGIN.

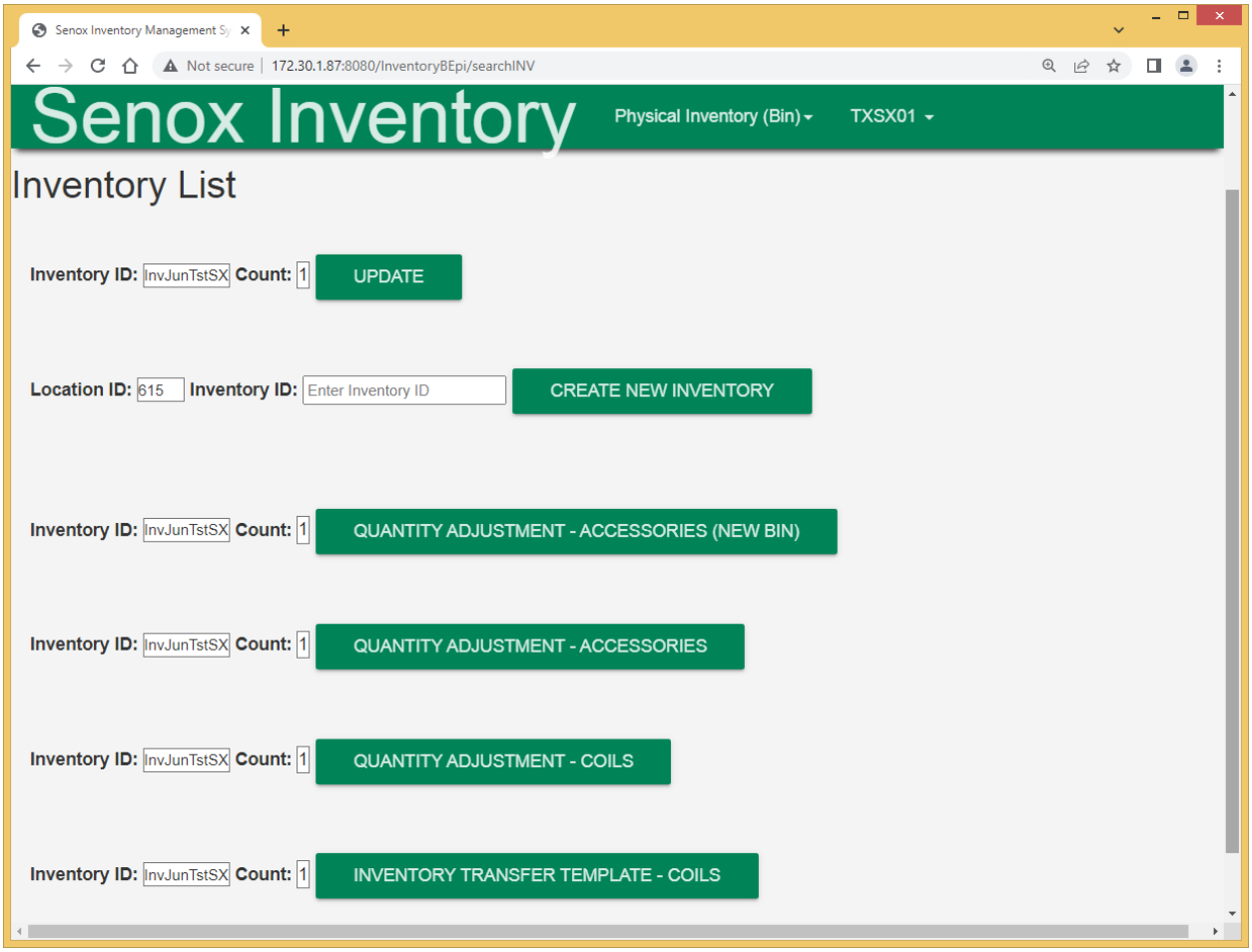
3.1.1 Main Menu

After login, click the green circle button to access the drop-down main menu. Then click "Physical Inventory" to access the Inventory submenu items.



3.1.2 Physical Inventory

From the Physical Inventory menu, select 'New / Update' to create a new Inventory ID or to update an existing one.



3.2 Create New Inventory

An Inventory ID specifies the inventory location, branch, or warehouse and all the items part numbers to be included in the inventory.

a. Location ID:

Click to Select a Branch Location from the Drop-down List

b. Inventory ID:

Enter New Inventory ID - Format:

InvMMMSiteX, -> 'MMM' = Month, 'Site' = Plant/Branch, 'X' = 1-9)

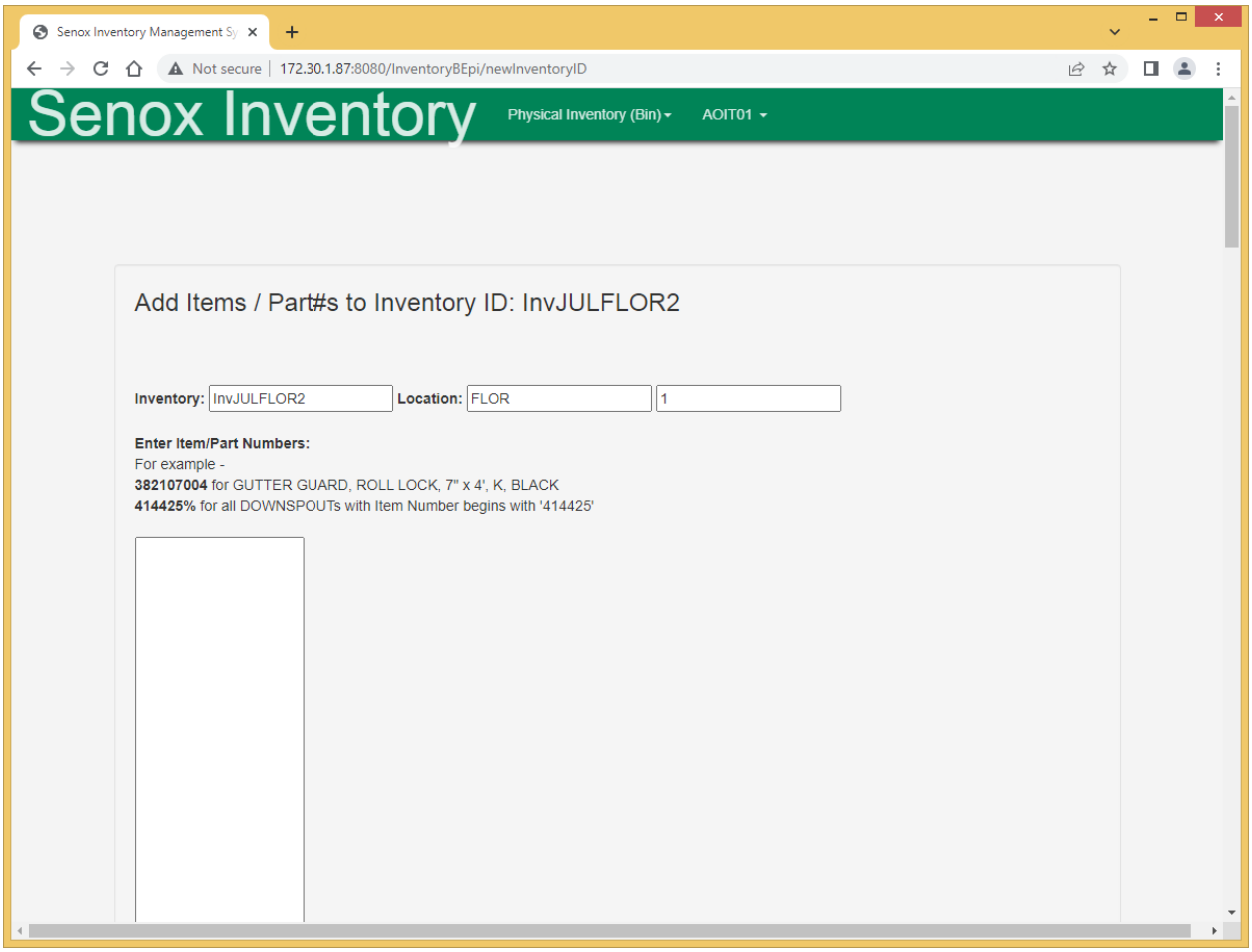
c. Create New Inventory

Create new Inventory ID with Selected Item/Part Numbers

Click this button to continue with entering Item/Part Numbers.

3.2.1 Create New Inventory

From the Create New Inventory panel, enter the Part numbers of all items to be counted in the inventory.



a. **Enter Item/Part Numbers**:

From the Enter Item/Part Numbers input text area, part numbers can be entered individually one per line, or multiple parts on the same line. For multiple parts input, first enter 1 or 2 alphanumeric characters of the part number, then use the percent character % to match all the remaining characters of the multiple part numbers.

Below is an example of entering all the part numbers included in one inventory:

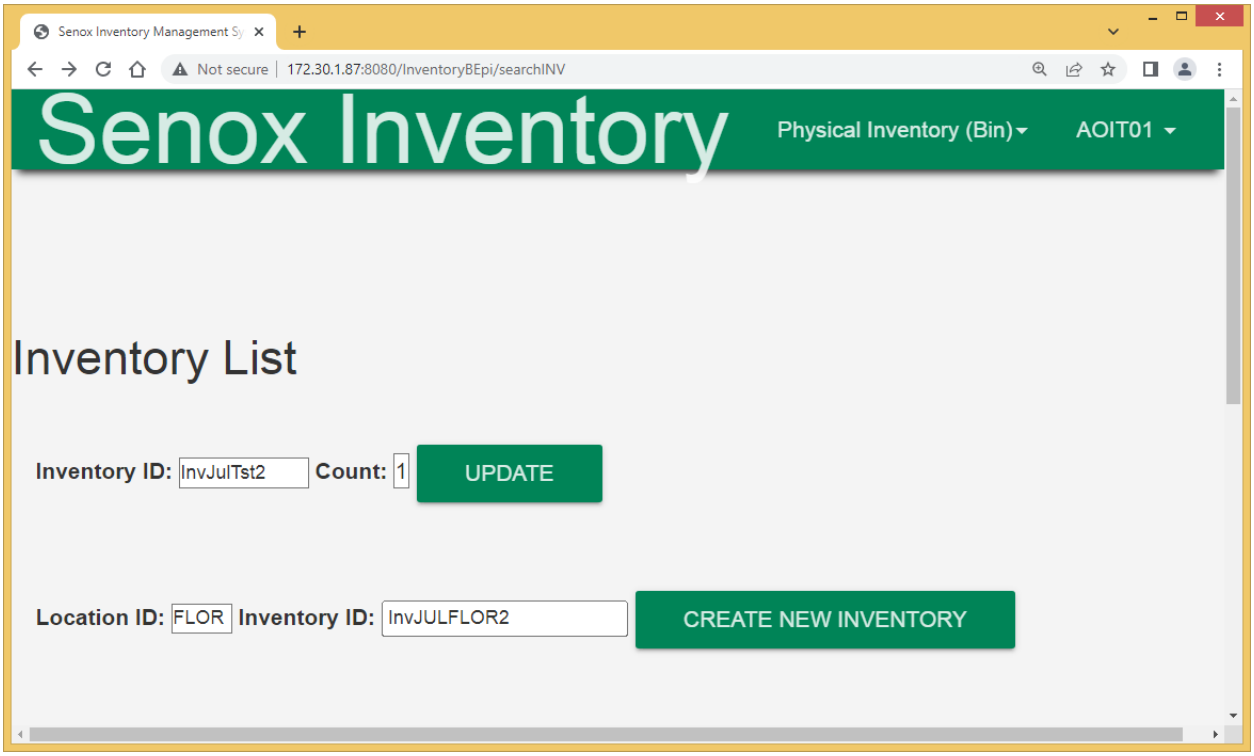
11%
13%
19%
21%
22%
23%
24%
25%
26%
29%
32%
33%
34%
35%
38%
39%
41%
42%
43%
44%
45%
49%
51%
52%
53%
54%
58%
59%
61%
62%
81%
84%
89%
8C%
8L%
91%
93%
94%
96%
97%
98%
99%
9A%
9D%
DX%
DZ%

ON%
OS%

b. **Click SUBMIT to create the new Inventory ID**.

3.2.2 UPDATE Inventory

Inventory scanning, counts, and edits are done in the UPDATE function.



a. Inventory ID:

Click to Select an Inventory ID from the Drop-down List

b. Count:

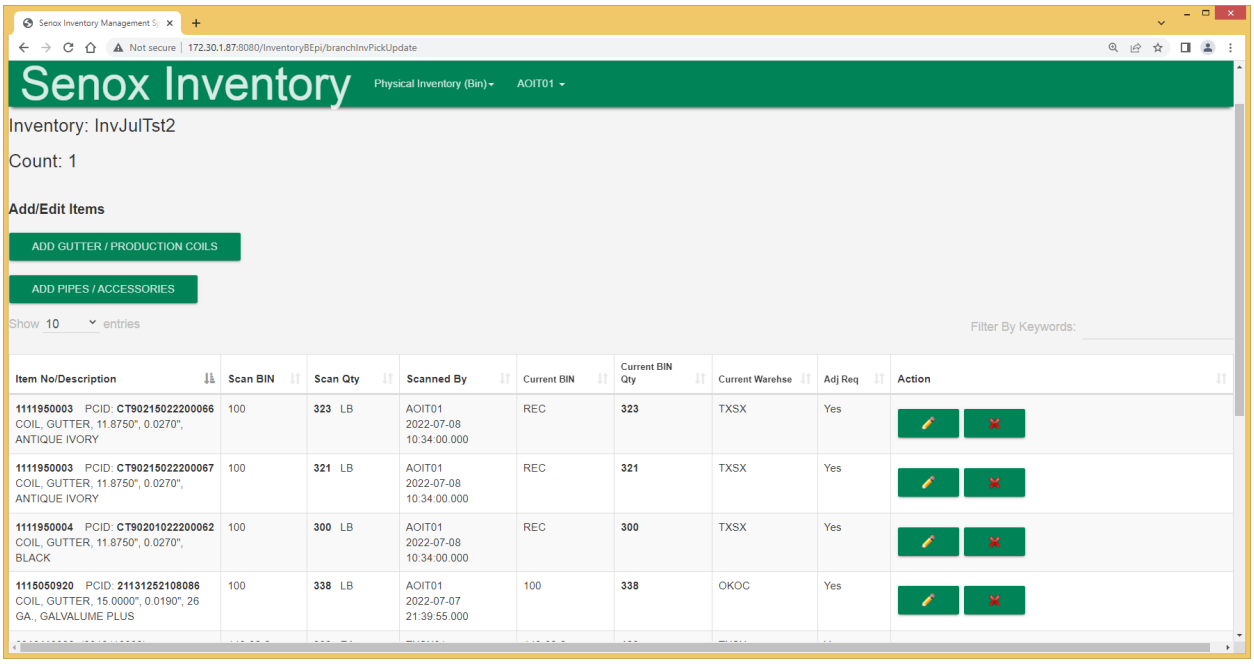
Enter the Count cycle. Default to Count 1.

c. UPDATE

Click UPDATE to start Enter / Scan Coils or Accessories and the Counts

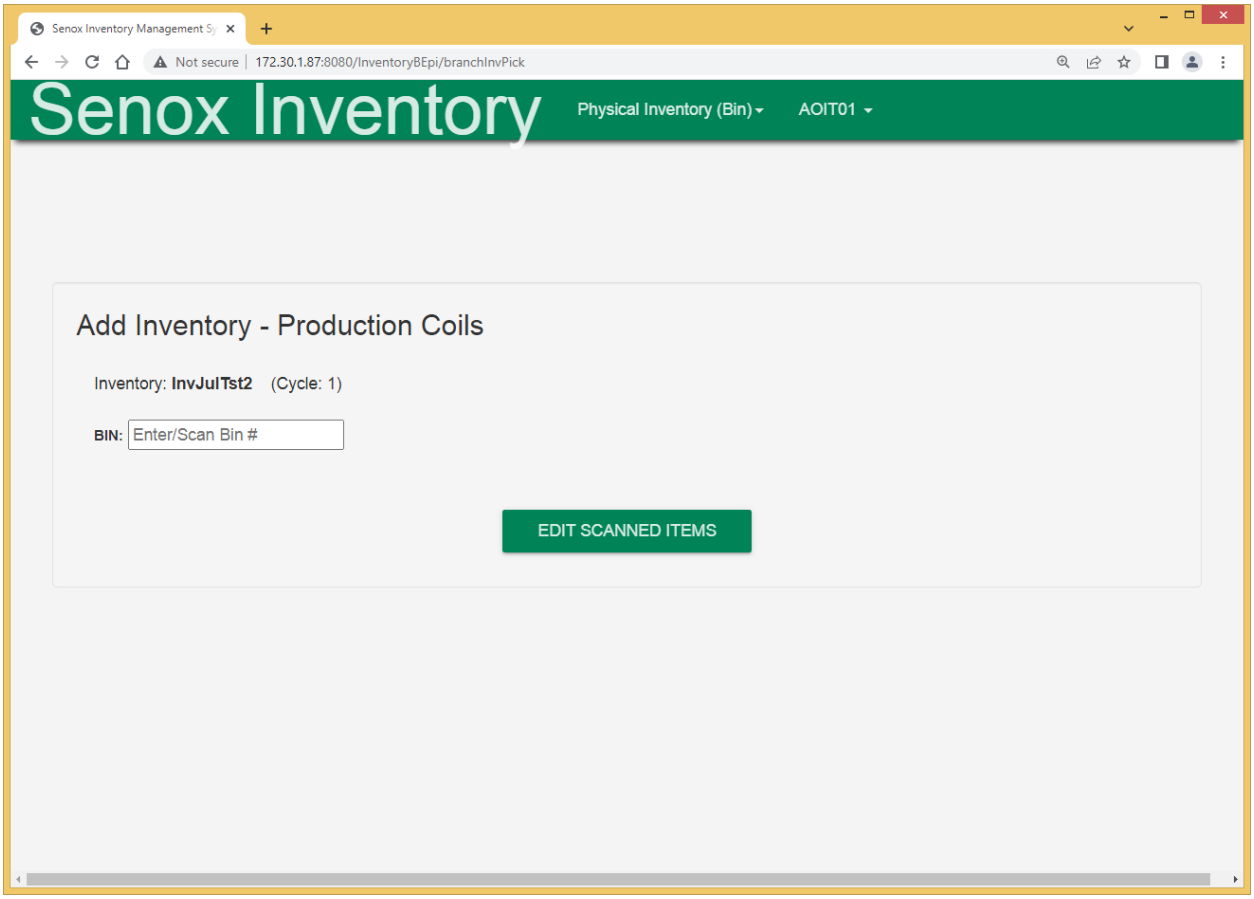
3.2.3 Inventory Counts

Perform Inventory Counts from the UPDATE panel.



A. ADD GUTTER / PRODUCTION COILS

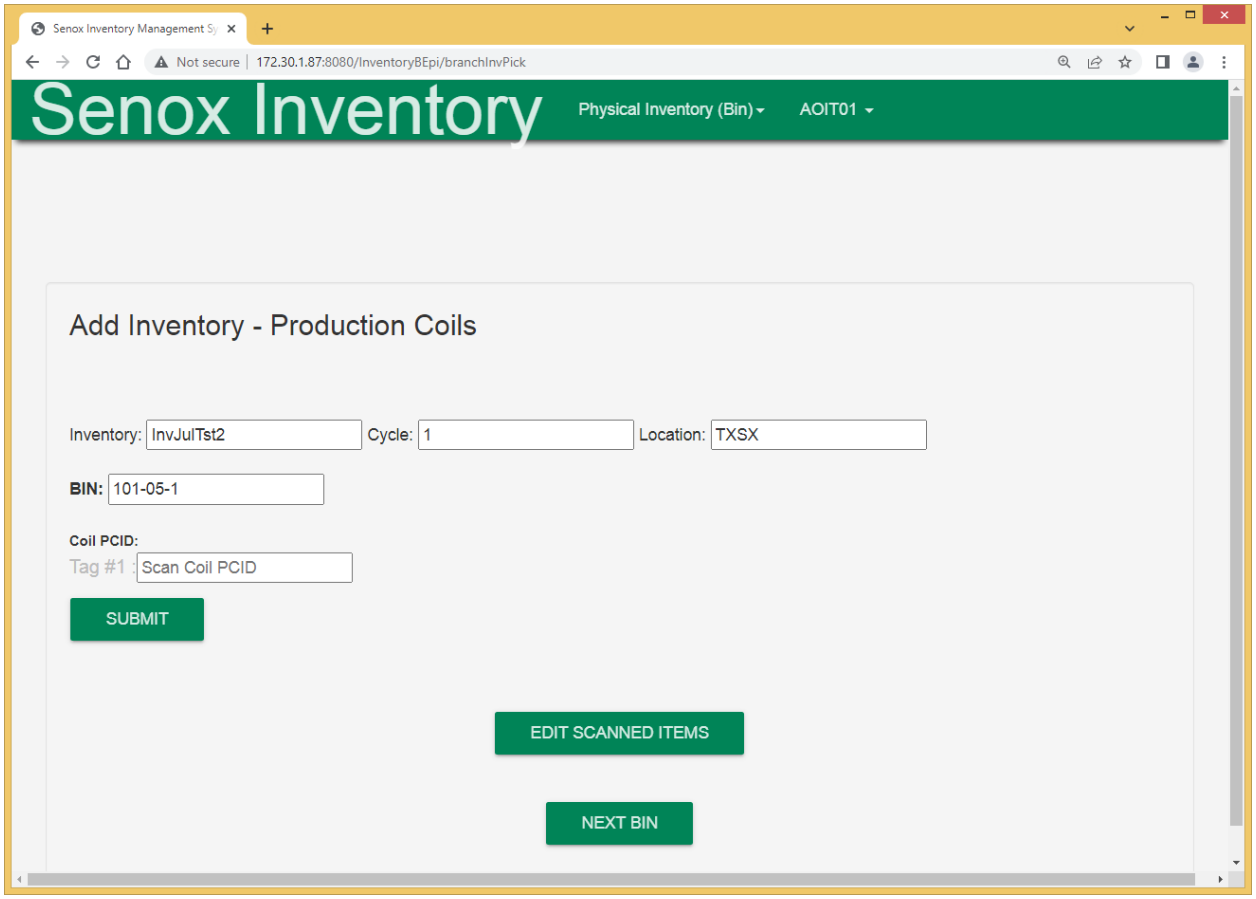
Enter or scan the barcode of the Bin label on the rack and the coil PCID barcode from the Coil's label.



1. **BIN**:

Scan the Bin barcode or Type in the Bin number and hit Enter.

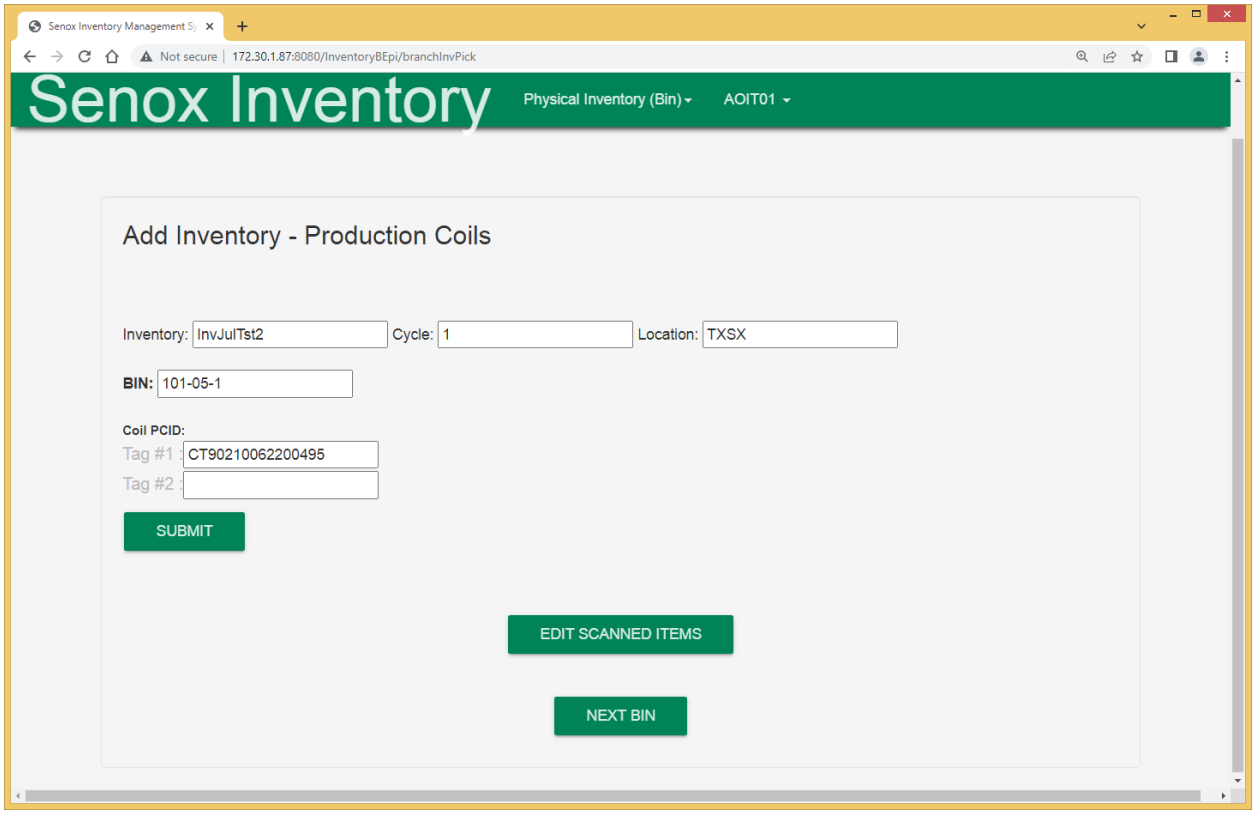
If the Bin number is a valid Bin used at the Plant / Warehouse, the ‘Coil PCID’ field is displayed for input:



2. Coil PCID:

Scan the Coil's PCID Barcode, or Type in the PCID and hit 'Enter'

The next Coil PCID input field will be displayed to allow entering another coil PCID.



3. SUBMIT

Click SUBMIT to add the quantity counts of the entered PCIDs.

After SUBMIT, the Coil PCID fields are cleared out and ready for entering more PCIDs from the same BIN.

4. Edit Scanned Items

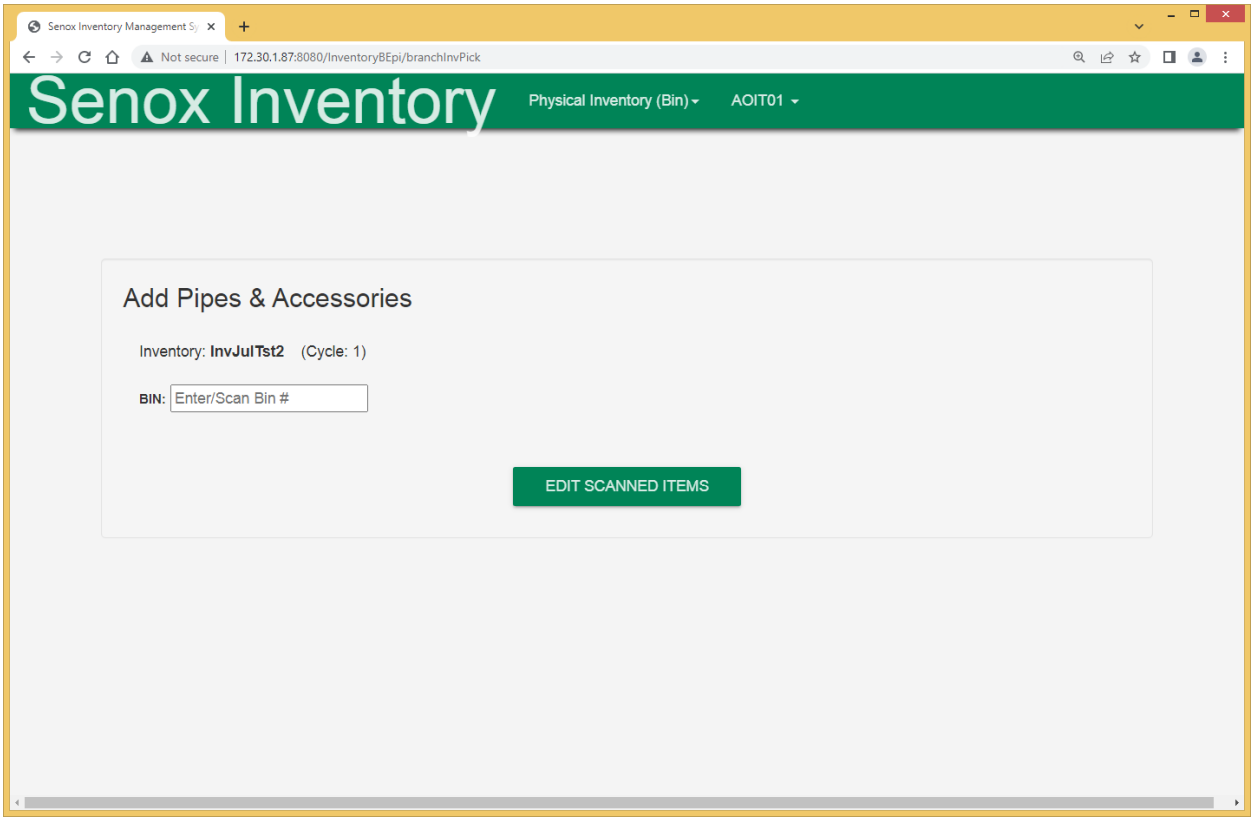
Edit Scanned Items goes back to the UPDATE panel where the scanned items can be Edited or Delete.

5. Next BIN

When all the Items in the current BIN are entered, click NEXT BIN to start counting of the Next Bin location.

B. ADD PIPES / ACCESSORIES

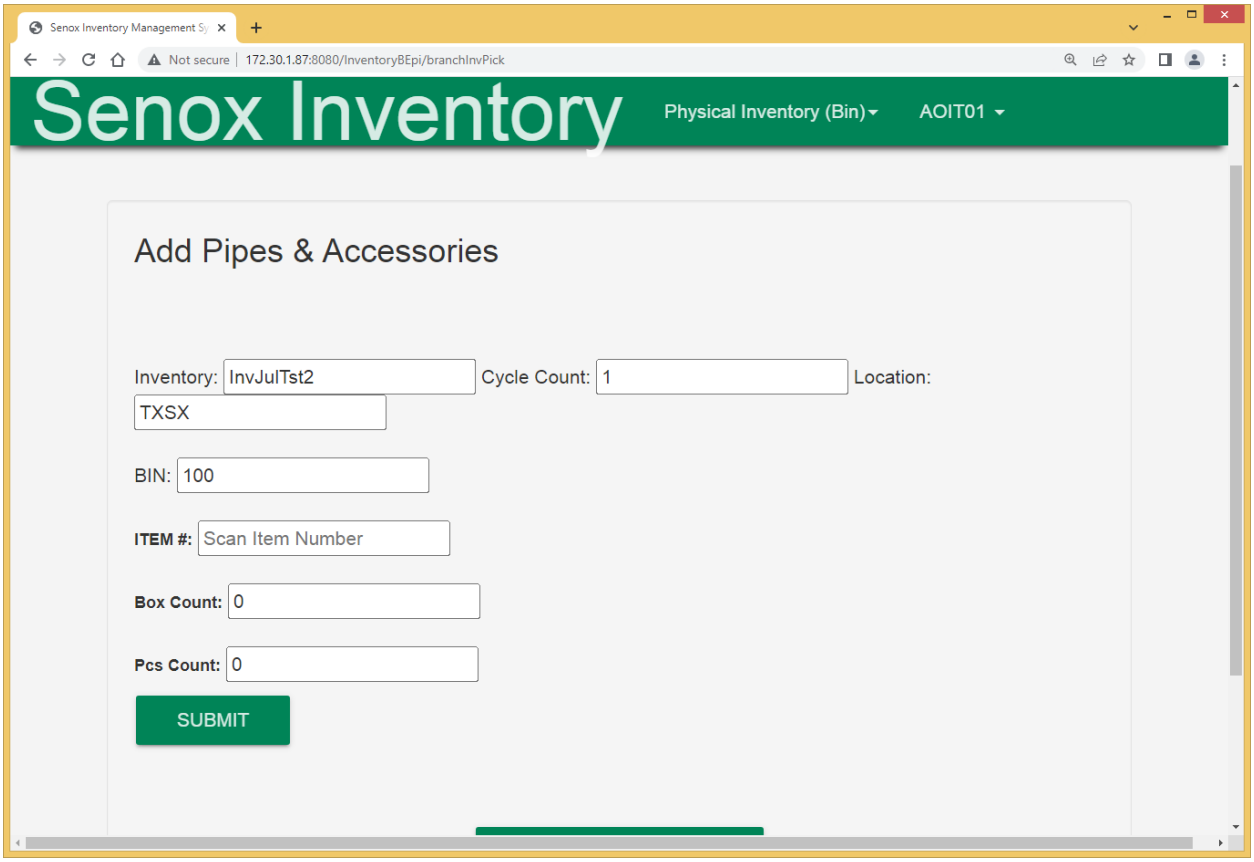
Enter or scan the barcode of the Bin label on the rack and the barcode of the Item's Part number.



1. **BIN**:

Scan the Bin barcode or Type in the Bin number and hit Enter.

If the Bin number is a valid Bin used at the Plant / Warehouse, the 'ITEM #', Box Count, and Pcs Count fields are displayed for input:



2. ITEM #:

Scan the ITEM # Barcode, or Type in the ITEM # and hit 'Enter'.

3. Box Count:

Enter the Total number of Boxes

4. Pcs Count:

Enter the Total number of pieces

5. SUBMIT

Click SUBMIT to add the total quantity count of the entered ITEM #.

6. Edit Scanned Items

Edit Scanned Items goes back to the UPDATE panel where the scanned items can be Edited or Delete.

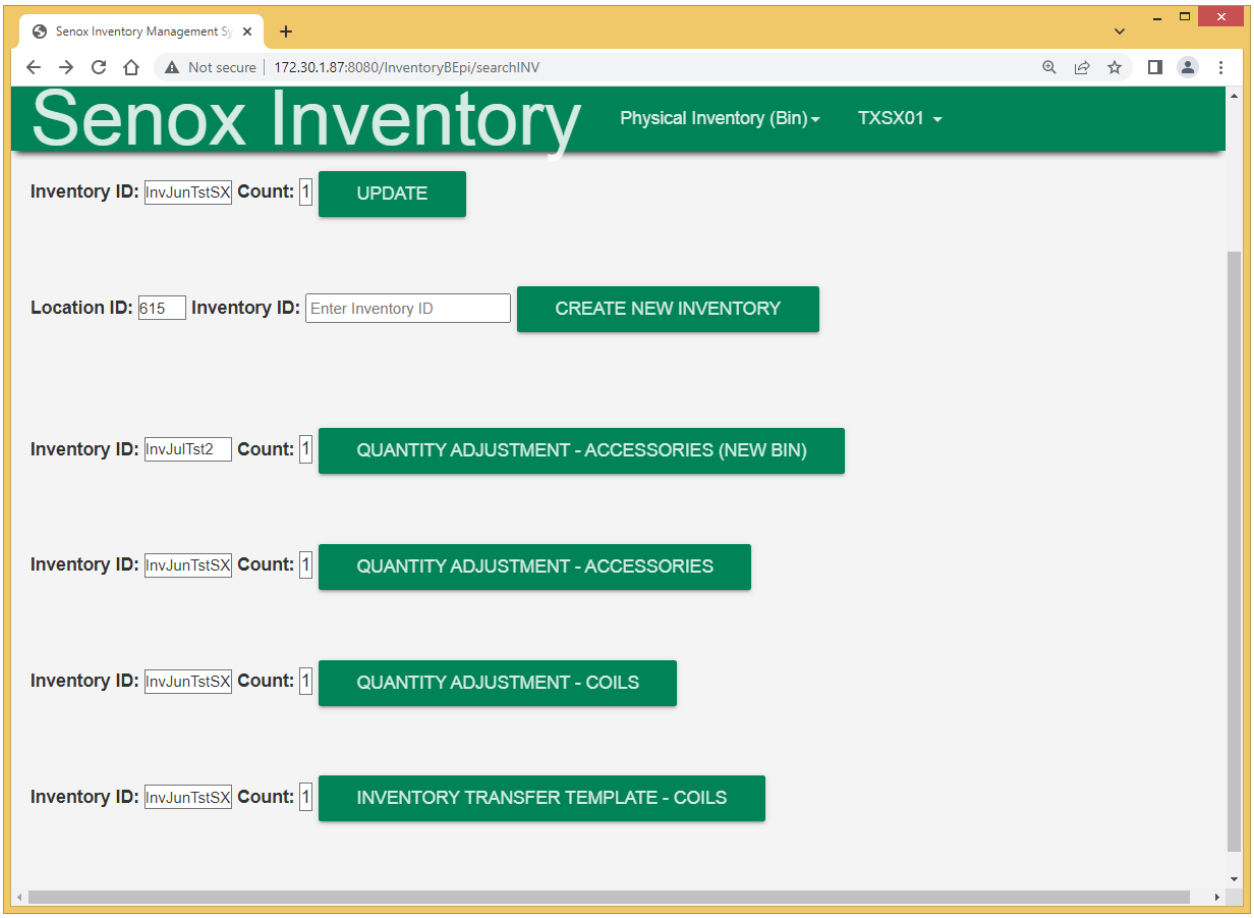
7. Next BIN

When all the Items in the current BIN are entered, click NEXT BIN to start counting of the Next Bin location.

3.3 Quantity Adjustment

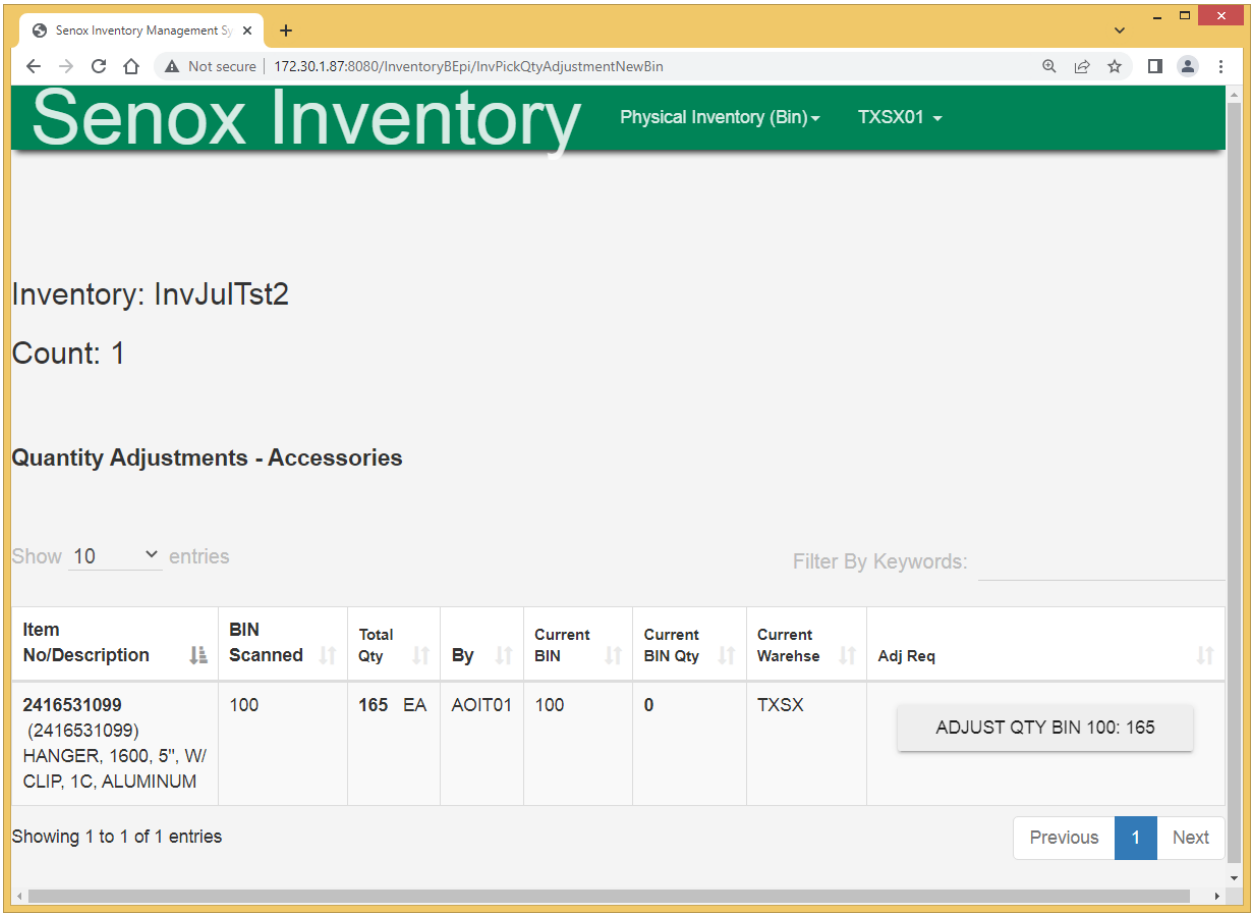
Quantity Adjustments - Execute when All Scanning & Counts are complete.

Compare the actual count with the On-hand quantity in Epicor and any discrepancy can be corrected by executing the Epicor Quantity Adjustment function.



3.3.1 Quantity Adjustment – Accessories (New Bin)

This panel displays the counts of items in a warehouse Bin but they are not found in the system. The Quantity Adjustment will add the total counted quantity to the same warehouse Bin in the system.



In the above example, warehouse TXSX Bin 100 contains 0 item # 2416531099.

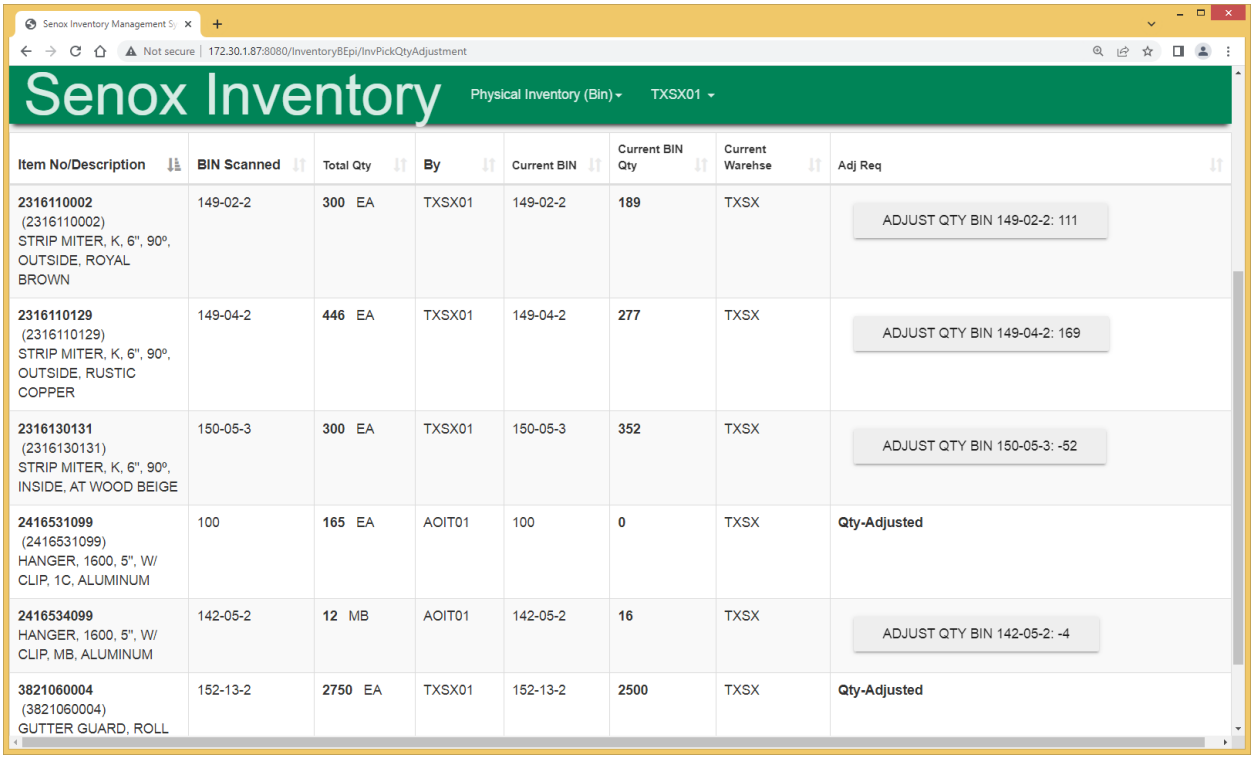
Click 'ADJUST QTY BIN 100: 165' to execute Quantity Adjustment.

The result is warehouse TXSX Bin 100 with On-hand Qty = 165.

Note: It is recommended to execute Quantity Adjustment on all rows in this panel before proceeding to the main 'Quantity Adjustment – Accessories' panel.

3.3.2 Quantity Adjustment – Accessories

This panel displays the counts of items in a warehouse Bin comparing with the current On-hand quantity in the system. Depend on the discrepancy, Quantity Adjustment will add or subtract the difference to the warehouse Bin On-hand quantity in the system.



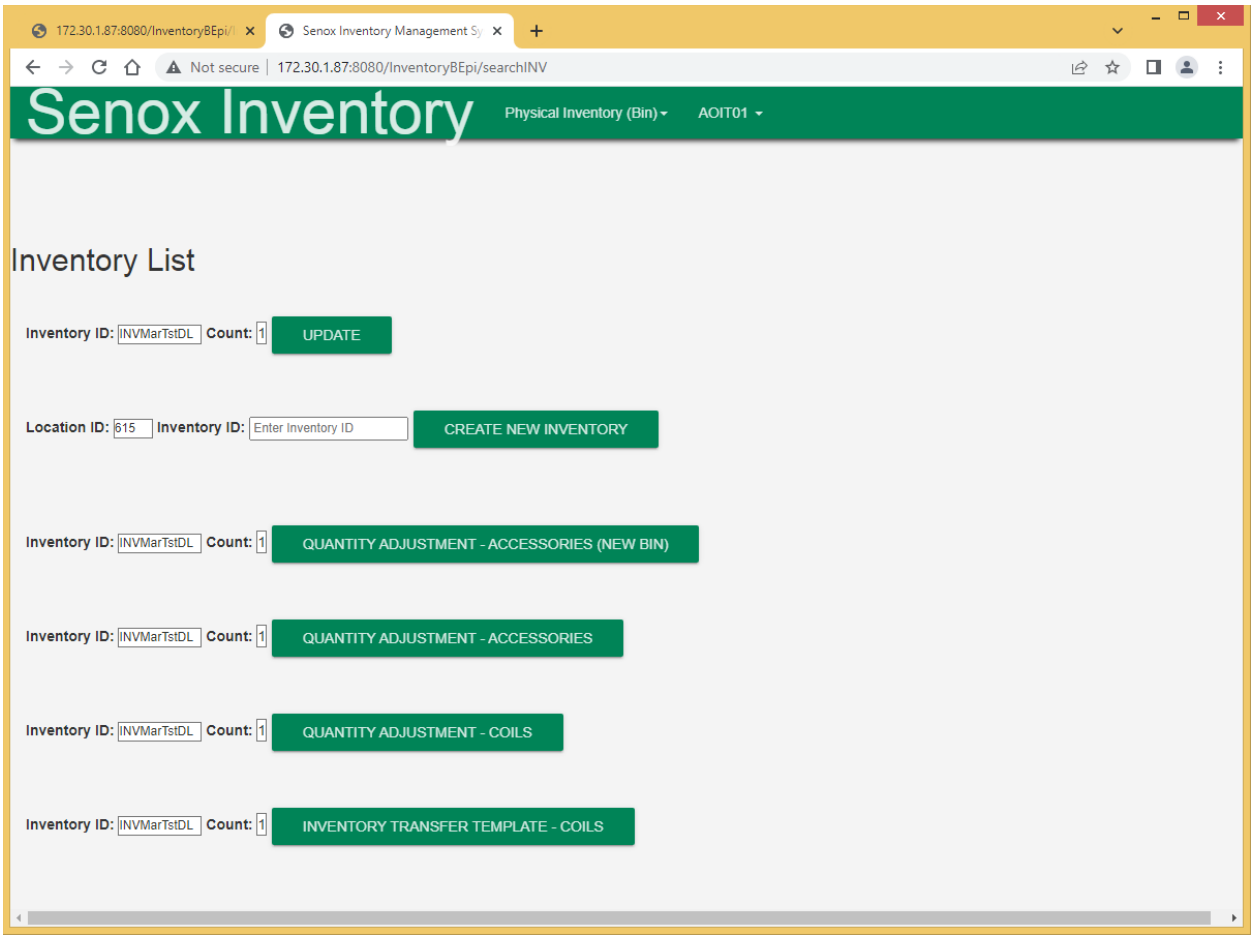
Note: After clicking the ADJUST QTY BIN button, the button is disabled and replaced with "**Qty-Adjusted**" to indicate the warehouse Bin **On-hand Qty** is equal to the counted **Total Qty**.

3.4 Coils PCID – Inventory Transfer

Coils Bin & Warehouse Adjustment data export to Excel, then import to Epicor via Inventory Transfer.

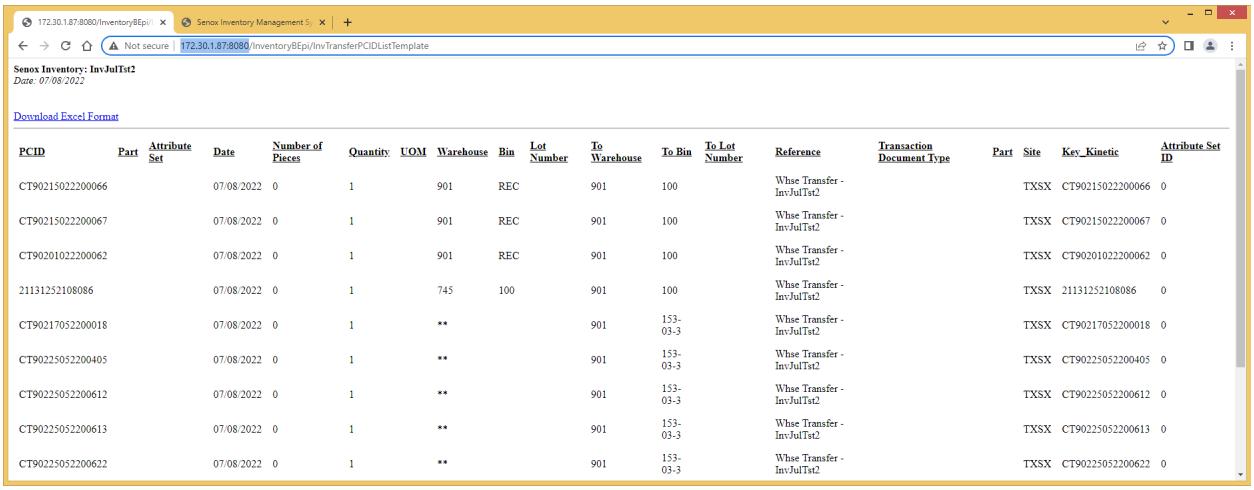
3.4.1 Inventory Transfer Template – Coils

From the "New / Update" panel, select "INVENTORY TRANSFER TEMPLATE – COILS"



3.4.2 Coil PCID Data Format

Coil PCID data is displayed in the same format as the Epicor Inventory Transfer module. Click ‘Download Excel Format’ to download / save the data in an Excel file.



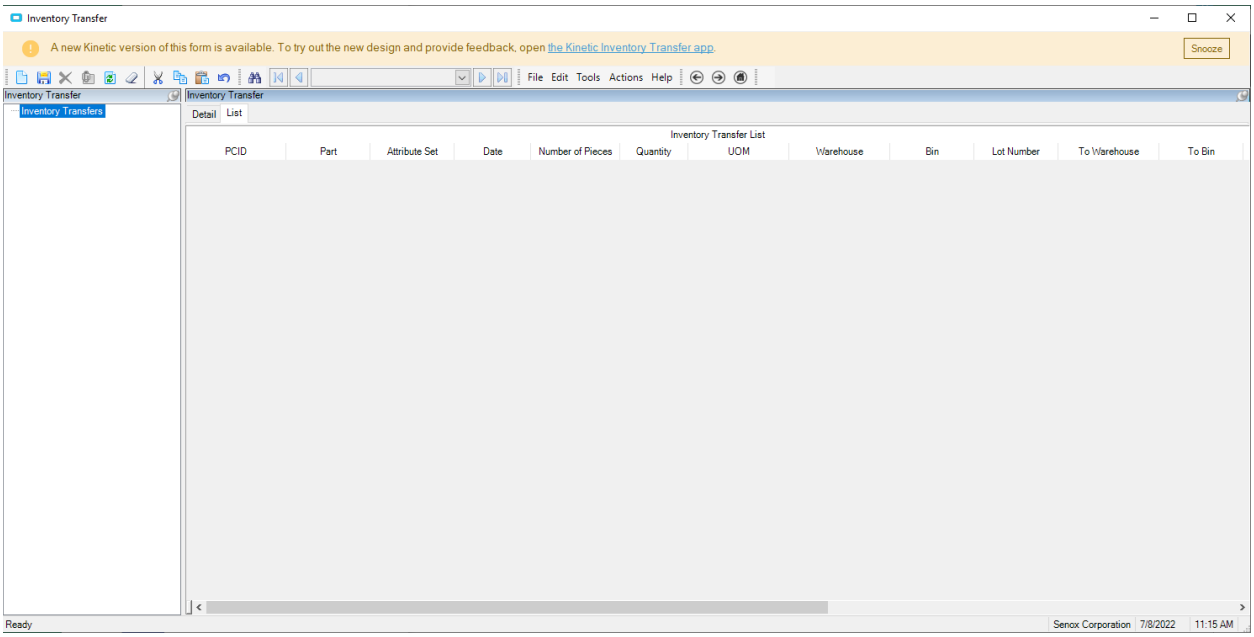
Senox Inventory: InvJulTst2
Date: 07/08/2022

Download Excel Format

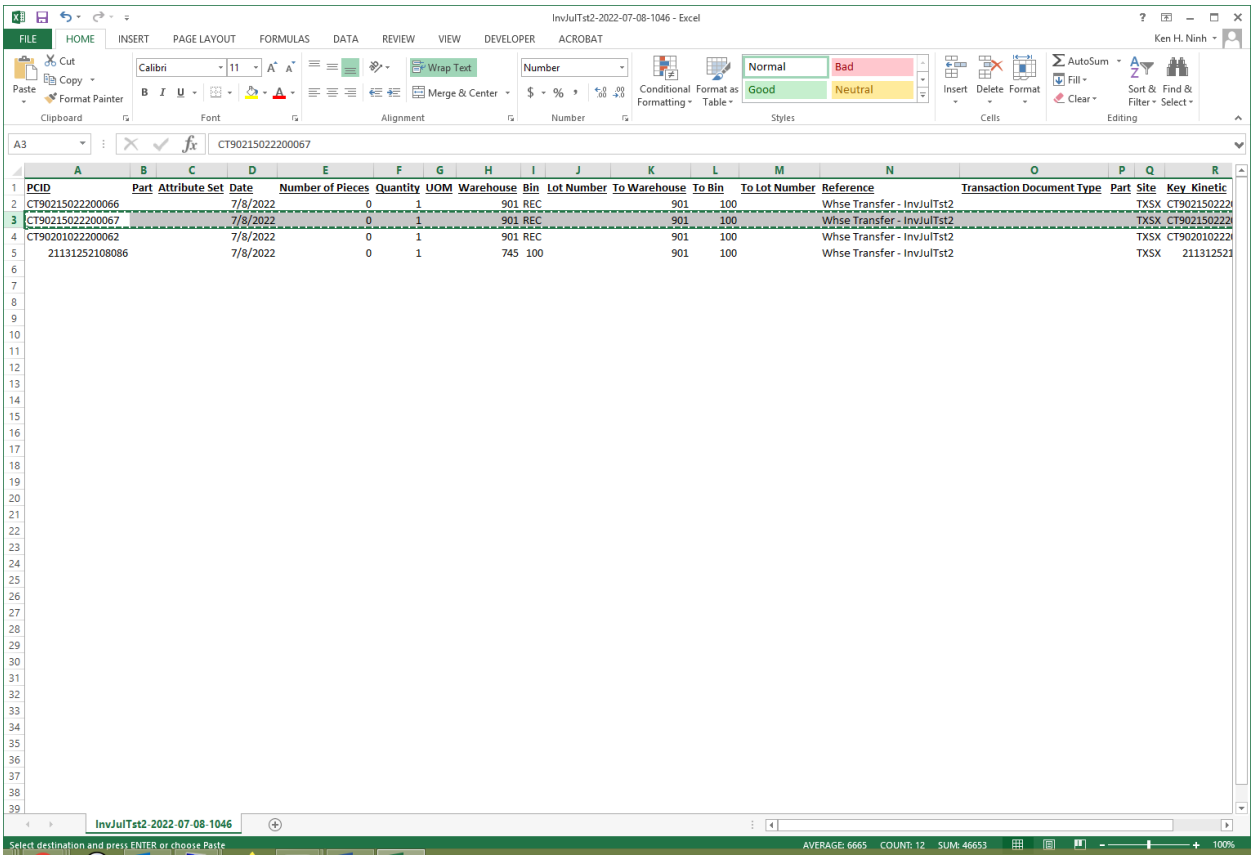
PCID	Part	Attribute Set	Date	Number of Pieces	Quantity	UOM	Warehouse	Bin	Lot Number	To Warehouse	To Bin	To Lot Number	Reference	Transaction Document Type	Part	Site	Key_Kinetic	Attribute Set ID
CT90215022200066			07/08/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT90215022200066	0
CT90215022200067			07/08/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT90215022200067	0
CT90201022200062			07/08/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT90201022200062	0
21131252108086			07/08/2022	0	1		745	100		901	100		Whse Transfer - InvJulTst2			TXSX	21131252108086	0
CT90217052200018			07/08/2022	0	1		**			901	153-03-3		Whse Transfer - InvJulTst2			TXSX	CT90217052200018	0
CT90225052200405			07/08/2022	0	1		**			901	153-03-3		Whse Transfer - InvJulTst2			TXSX	CT90225052200405	0
CT90225052200612			07/08/2022	0	1		**			901	153-03-3		Whse Transfer - InvJulTst2			TXSX	CT90225052200612	0
CT90225052200613			07/08/2022	0	1		**			901	153-03-3		Whse Transfer - InvJulTst2			TXSX	CT90225052200613	0
CT90225052200622			07/08/2022	0	1		**			901	153-03-3		Whse Transfer - InvJulTst2			TXSX	CT90225052200622	0

3.4.3 Epicor Inventory Transfer

a. From Epicor, start the Inventory Transfer module and Select the List tab.

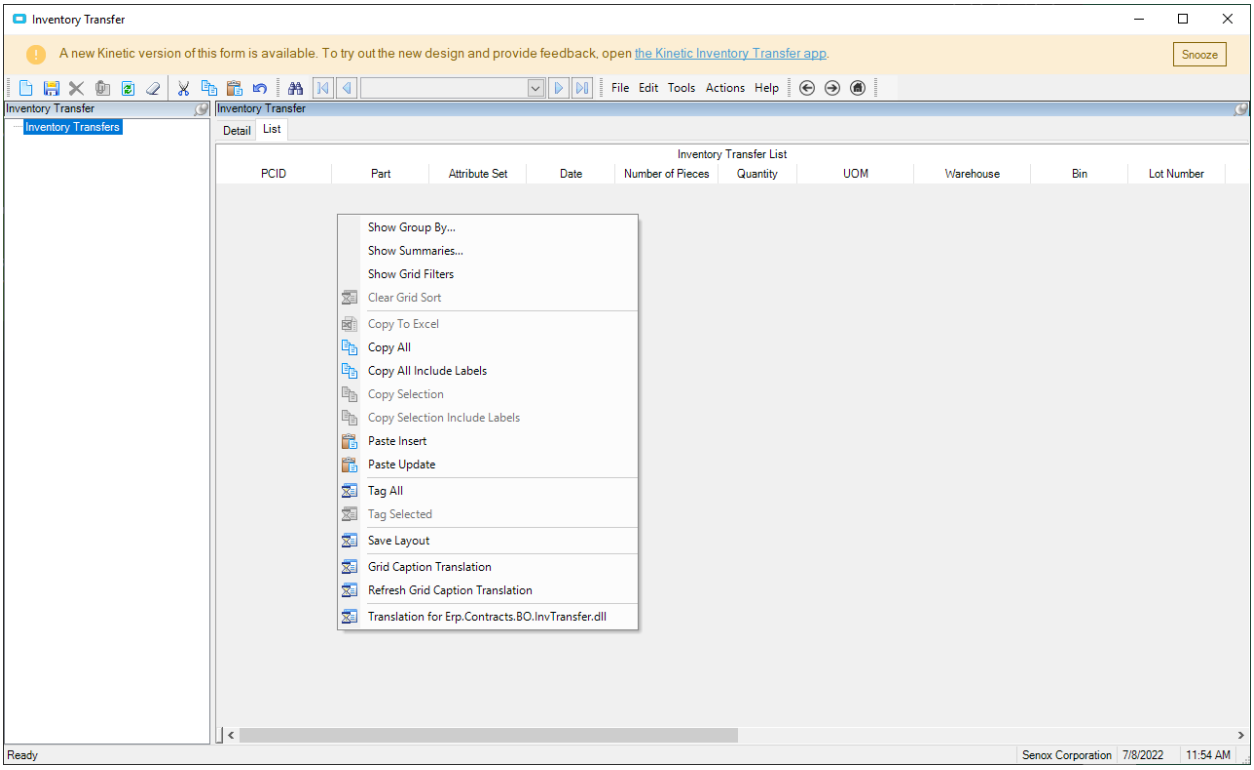


b. Open the Inventory Transfer Excel file downloaded in previous step. Select and copy the row(s) that need to be moved to the correct Warehouse & Bin location.



PCID	Part	Attribute Set	Date	Number of Pieces	Quantity	UOM	Warehouse	Bin	Lot Number	To Warehouse	To Bin	To Lot Number	Reference	Transaction Document Type	Part	Site	Key	Kinetic
CT90215022200066			7/8/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT902150222	
CT90215022200067			7/8/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT902150222	
CT90201022200062			7/8/2022	0	1		901	REC		901	100		Whse Transfer - InvJulTst2			TXSX	CT902010222	
21131252108086			7/8/2022	0	1		745	100		901	100		Whse Transfer - InvJulTst2			TXSX	211312521	

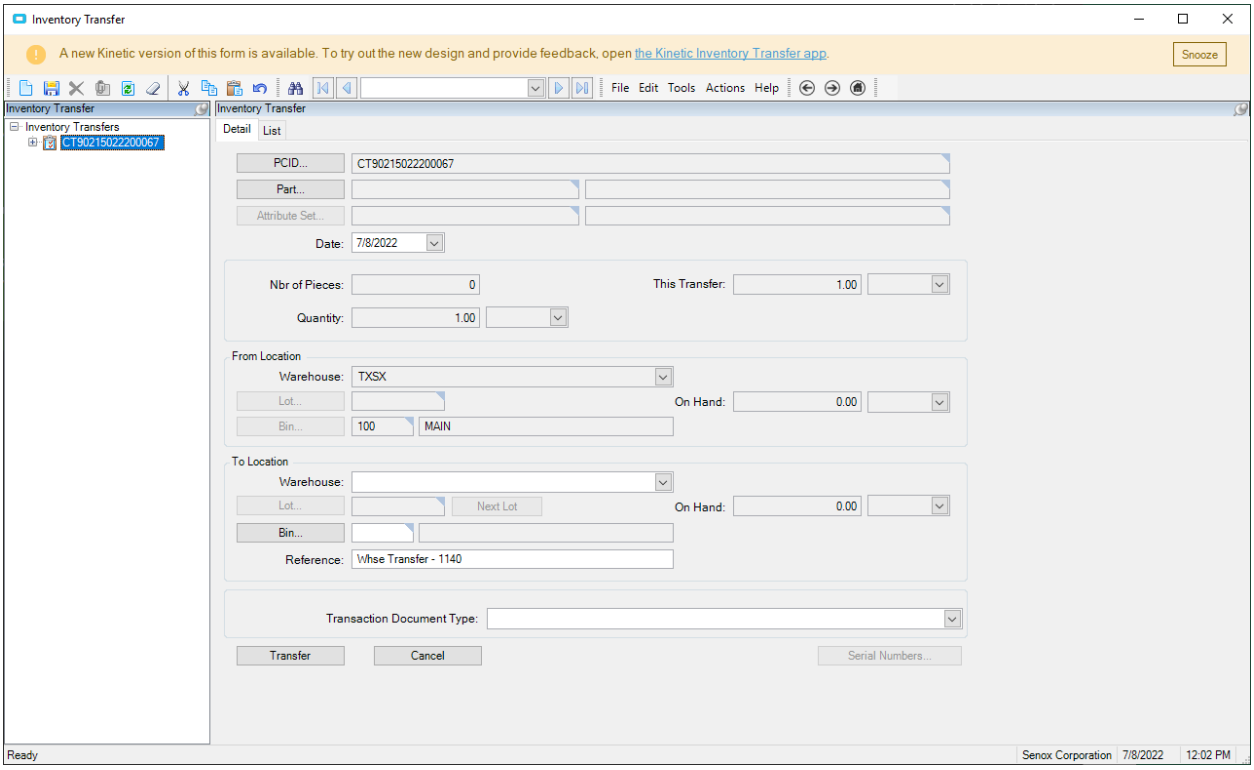
c. From the Epicor Inventory Transfer List tab panel, right click anywhere in the blank List panel



d. Click ‘Paste Insert’ to paste the copied PCID row(s) data from the Excel file to the List tab panel.

Warning: ‘Paste Insert’ executes the transfer / move inventory immediately.

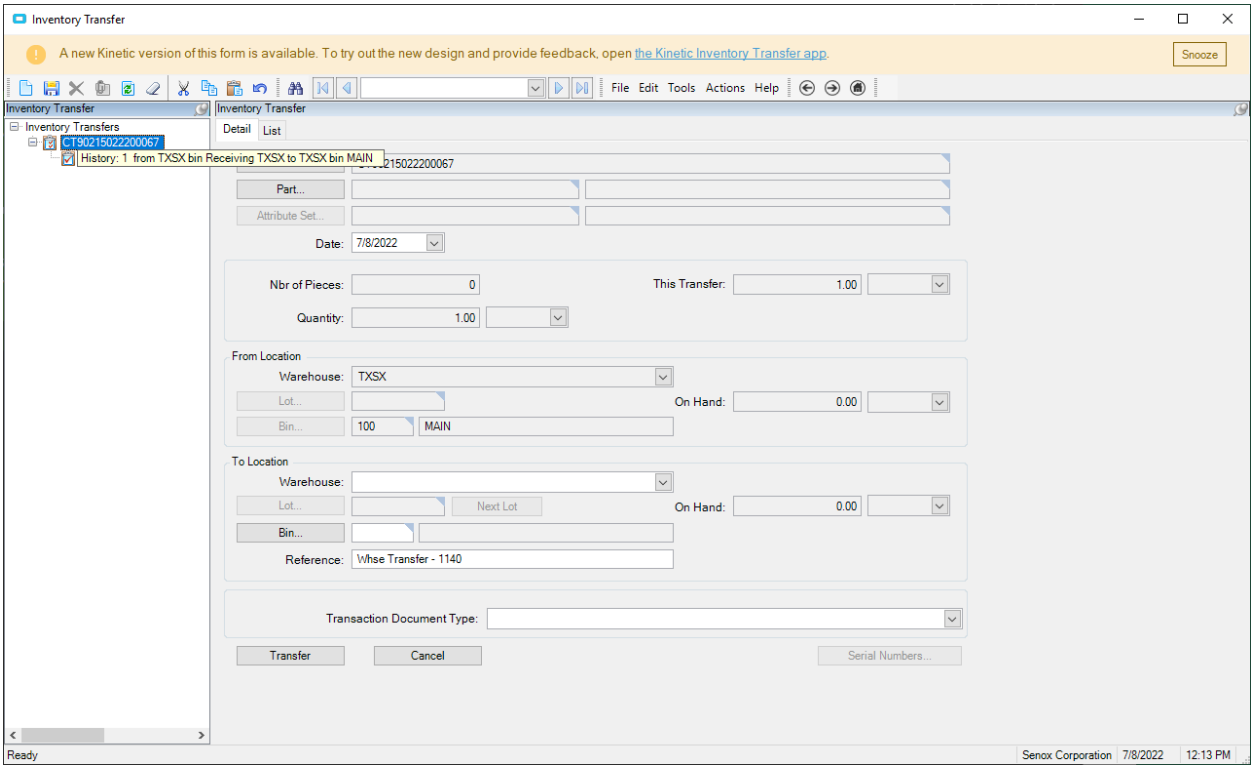
Below is the result of ‘Paste Insert’ showing the coil PCID was moved from TXSX receiving Bin REC to TXSX Bin 100.



From the sidebar menu, click the PCID and you will the history of the inventory transfer:

“From TXSX bin Receiving to TXSX bin MAIN”

After verifying a few PCIDs are moved properly to the specified Warehouse + Bin, you can copy a large number of PCIDs and move them all in one ‘Paste Insert’ click.


Inventory Transfer
A new Kinetic version of this form is available. To try out the new design and provide feedback, open the Kinetic Inventory Transfer app.
Snooze
File Edit Tools Actions Help
Inventory Transfer
Inventory Transfers
CT90215022200067
History: 1 from TXSX bin Receiving TXSX to TXSX bin MAIN
Inventory Transfer
Detail List
Part...
Attribute Set...
Date: 7/8/2022
Nbr of Pieces: 0
This Transfer: 1.00
Quantity: 1.00
From Location
Warehouse: TXSX
Lot...
On Hand: 0.00
Bin... 100 MAIN
To Location
Warehouse:
Lot...
Next Lot
On Hand: 0.00
Bin...
Reference: Whse Transfer - 1140
Transaction Document Type:
Transfer
Cancel
Serial Numbers...
Ready
Senox Corporation 7/8/2022 12:13 PM

Appendix A: Record of Changes

This User Manual will get updated to reflect changes or new functions added to SenoxIMS.

Table 1 - Record of Changes

Version Number	Date	Author/Owner	Description of Change
2.0	*07/07/2022*	*Ken Ninh*	*2022 Version*
<X.X>	*<MM/DD/YYYY>*		*<Description of Change>*
<X.X>	*<MM/DD/YYYY>*		*<Description of Change>*