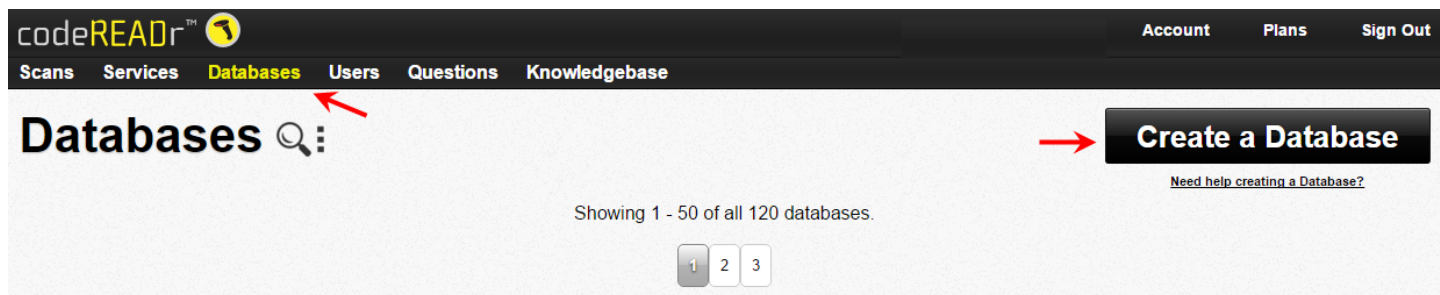


Inventory Audit – Step by Step Instructions with Validation

Step 1: Databases. Sign into codeREADr.com and upload your item database.



Name your database.

A screenshot of the database creation form. The 'Name' field contains 'Warehouse 1', with a red arrow pointing to it. Below the name field, there is a checkbox labeled 'Values should be case-sensitive.' with a note: 'Once you create the database, this setting cannot be changed.' At the bottom, there is a 'Create Database' button, with a red arrow pointing to it.

Import your CSV file. ***It must be in a specific format:***

Column 1: Barcode (e.g. 12345) = mandatory field

Column 2: Description (e.g. Extra Virgin Olive Oil) = optional field

A screenshot of the 'Warehouse 1' database page. The title 'Warehouse 1' is at the top, with a 'Rename' button next to it. Below the title, it says '0 values in database (ID 423859)'. There is a navigation bar with 'Search', 'Add', 'Import' (highlighted with a red arrow), and 'Export' buttons. Below this is a 'CSV Import' section. It contains the text 'Save time over manual data entry. Recommended for pre-existing data.' and a link 'Want to learn more? Check out our [formatting guidelines](#)'. Below this is a 'Choose File' button with the text 'No file chosen' next to it. At the bottom, there is an 'Import Database' button, with a red arrow pointing to it.

Step 2: Service - Create. Create a validation service type.



You can choose Online or On-Device (i.e. Offline). On-Device is faster and does not require an Internet connection when scanning.

A screenshot of the 'Validate Scans with a Database' configuration form. The form has a radio button selected for 'Validate Scans with a Database'. Below this, it asks 'Where would you like the validation to happen?' with two options: 'Online in Real-Time' and 'On-Device and Later Sync Online' (selected). Below that, it asks 'What database would you like to validate your scans against?' with a dropdown menu showing 'Warehouse 1' and a link to 'create a new one'. At the bottom, it asks 'What should be the status of duplicate scans?' with two options: 'Valid' (selected) and 'Invalid'. Red arrows point to the 'Validate Scans with a Database' radio button, the 'On-Device and Later Sync Online' radio button, the 'Warehouse 1' dropdown, and the 'Valid' radio button. A red text label 'Choose database' is next to the dropdown menu.

Step 2: Service - Name. Name the service. Notice the consistency in the name of the database and service. That's optional but helpful if you create a lot of different databases and services.

Name


Warehouse 1

Describe Your Service

Provides instructions to users after the service is selected. Can include HTML - See [our knowledge base](#) for more information.

Add instructions here for the app user (if necessary).

Step 2: Service - Users. Add app usernames. Be sure to check the box next to each one that you want to authorize to scan.

☒ xxx-111  **Check to authorize app-user(s) to scan for this Service.**

Add a User

Create a New User

Username

xxx-222

Password

xxx-222 **Create**

Step 2: Service - Questions. Add the ability for your app-users to enter the quantity of items represented with each scan and optionally any comments about the item.

Optional: Choose Questions **Save and Continue**

What Are Questions?
Questions are codeREADr's method of data collection. They ask the mobile user for more input in the form of multiple choice, checkboxes, or a text field in which the user can add their own info. On this page, you can decide at which point in scanning your questions will be presented to your mobile users.

Select the order of questions asked upon each scan by dragging questions in the fields below... **Add a Question**

You must add either a) a 'Short Answer (Manual)' question type for the app-user to manually enter the quantity of the item scanned; or b) a 'Multiple Choice (Dropdown Menu)' question type with the first answer option set to '1' if you mostly scan every item – in this way the '1' is auto-recorded as the quantity.

You can optionally add a 'Short Answer (Manual)' question type to both Valid and Invalid scans for app-users to add comments.

Select the order of questions asked upon each scan by dragging questions in the fields below...

Question
Question to prompt the user with

Quantity

Answer Type
How the user will answer

Short Answer (Manual)

Close Submit

Drag and drop the question to 'Ask before submitting any scan'.

Optional: Choose Questions

What Are Questions?
Questions are codeREADr's method of data collection. They ask the mobile user for more input in the form of multiple choice, checkboxes, or a text field in which the user can add their own info. On this page, you can decide at which point in scanning your questions will be presented to your mobile users.

Save and Continue

Select the order of questions asked upon each scan by dragging questions in the fields below...

Ask before submitting any scan

Drag To Here

Drag and Drop

Scan is submitted

Ask after submitting any scan

Drag To Here

Add a Question

Available Questions

Quantity

Step 3: Scan Records - Export Template. You can create as many export templates as you want but one needs to be in a very specific format for auto-importing into the codeREADr Google Sheets Add-On.

Scans

Search Scans Scan Uploads Bulk Scan Removal Export templates

Scan Export Templates

What Are Templates?
Templates let you export only necessary codeREADr scan data in your own order of appearance.

Create a Template

Warehouse 1

Service Name Employee ID Item Barcode Description Date Scanned Audit Quantity Status Comment

Edit Delete

This is the format required for the Add-On. You drag these items from columns to the left.

The screenshot shows a web interface titled 'Columns for the template'. It contains a list of columns: 'Barcode', 'Result', 'Quantity', and 'Comments'. The 'Result' column is selected, and the 'Alter Column' dialog is open. The dialog has a 'Change Header' field with the text 'Description'. Below this is a 'Pattern' field and a 'Replacement' field. The 'Barcode' column is highlighted in yellow, and the 'Quantity' column is highlighted in blue. The 'Comments' column is highlighted in yellow.

You must follow this order and use these column names:

← **Must be 'Barcode'.**

← **Change 'Result' to 'Description'.**

[The 'Result' is the item description you had in column 2 of your database.]

← **Must be 'Quantity'.**

← **Any additional questions here and below.**

Step 4: Filtering and CSV Download Link. This link is the one you use to import to the Sheet's Add-On.

- Filter by Service 'Warehouse 1'
- Chose the export template 'Warehouse 1'
- Name the CSV Link 'Warehouse 1'
- Save and copy the link

Filter ←

Scan Values / Responses

▶ **Advanced Search Options**

From

To

Scan Category

☒ All ☐ Real-time ☐ Uploaded

With These Scan Results

☒ Valid ☒ Invalid ☒ Saved

▼ **Services** ←

Type to begin filtering...

☐ All Services

☐ Include Deleted Services

☐ Access Control and Ticke...

☐ Asset Tracking

☐ Attendance

☐ Database Builder

☐ Mobile Security

☐ Safety Status


☐ Scan to Order

☒ Warehouse 1 ←

Export a CSV File

Output Format: ←

Warehouse 1 ▼


Template **Warehouse 1** 

created on May 09, 2016

Your CSV export will contain the following columns:

- **Device ID**

Email Data **Download Data**

▼  **Save CSV Download Link**

Timezone for Link:

Account's Timezone ▼

☐ Choose a random name

☒ Enter a name ←

Warehouse 1

☐ Require user login

Save Download Link

[View My Download Links](#) ←

Step 5: Inserting to Sheets. Follow the instruction tab after opening this 'codeREADr Template' in Google Sheets (click [here](#)).

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