



# SOS Inventory iOS 1.x

## Quick Start Guide



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# 1 Introduction

This *Quick Start Guide* serves as the user guide for version 1 of the SOS Inventory iOS app. The app is intended to serve as a companion to the web version of SOS Inventory, and the *Quick Start Guide* assumes that our iOS app users already possess a basic working knowledge of the SOS Inventory web app.

If you do not have an existing account with SOS Inventory, you must create one via the SOS Inventory website at <https://www.sosinventory.com> and go through the setup process for the web app prior to using the iOS app.

Help is available via the SOS Inventory website (<https://www.sosinventory.com/support>), as well as by contacting our Support Team by email at [support@sosinventory.com](mailto:support@sosinventory.com). Phone support is available for SOS Inventory Plus and Pro plan customers from 9 a.m. to 6 p.m. Central Time, Monday through Friday, by dialing 1-888-545-4146.

## 1.1 Installation

The SOS Inventory iOS app, available on Apple's App Store, can be installed on any iPhone or iPod Touch with an operating system of iOS 13 or higher, as well as on iPads with iPadOS 13 or higher. Install the SOS Inventory iOS app using the same installation process you normally use for apps on your device.

## 1.2 Signing in and out

Log into the SOS Inventory iOS app with the same credentials that you use for the web app. Once logged in, you will remain signed into the iOS app unless you sign out. To log out, select the **Tools** icon in the bottom right corner of your screen, then select **Sign Out**.

If you experience difficulty logging in, please contact our Support Team for assistance at [support@sosinventory.com](mailto:support@sosinventory.com).

# 2 Navigating the app

Once you sign into the iOS app, the **Work** menu page will appear on your screen (see the screenshot in the next section). At the bottom of the screen are the icons for the main menus in the app: **Work**, **Find**, **Lists**, and **Tools**.

## 2.1 Work menu

*\*Feature supports barcode scanning.*

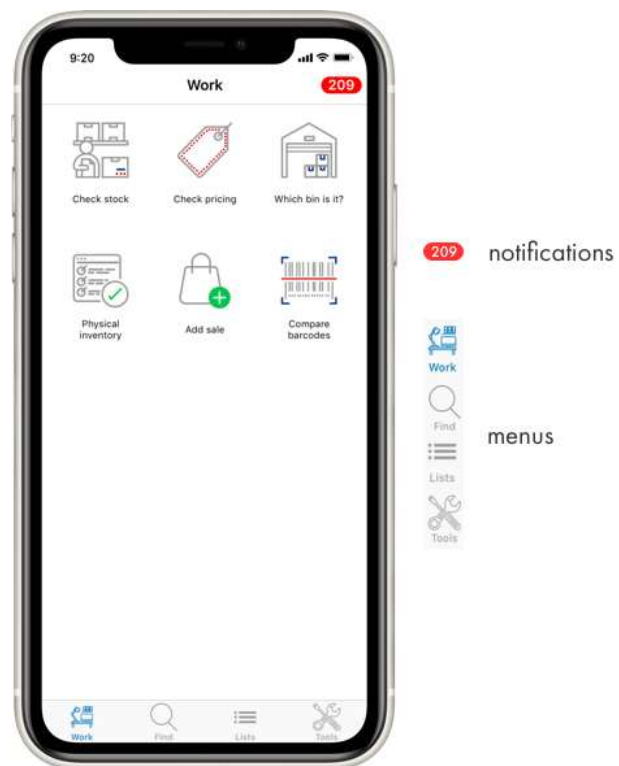
**Notifications.** In the top right corner of the **Work** menu, the presence of a red oval with a number inside indicates that you have one or more notifications.

**\*Check stock.** Provides the **On Hand** and **Available For Sale** quantities for a selected item. Can be filtered by location and date.

**\*Check pricing.** Obtains unit and total pricing for an item. Can be filtered by customer, price tier, and quantity.

**\*Which bin is it?** Specifies the bin number of an item at a bin-tracked location.

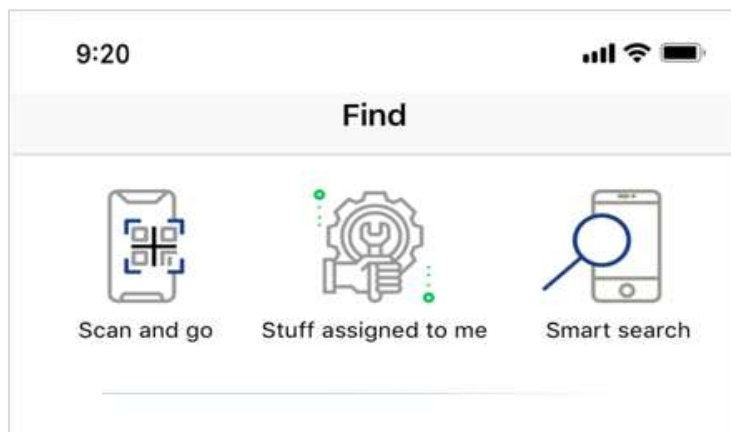
**\*Physical inventory.** Allows you to conduct a physical count of your items, comparing the number in the system to the quantity you actually have. SOS Inventory will generate an adjustment transaction for a physical count that has a discrepancy. See [Counting physical inventory](#) in this guide for more information on the feature.



**Add sale.** A “quick add” feature that allows the creation of a new sales transaction (estimate, sales order, sales receipt, or invoice) without having to access its list.

\***Compare barcodes.** A utility feature that allows a comparison of two barcodes. This feature does not add any data to the system.

## 2.2 Find menu



\***Scan and go.** Uses your device's built-in camera to open from a printed barcode a corresponding item or transaction. This feature can be used, for example, to scan the QR Code of a printed sales order. The app will open the sales order. You can then

edit the sales order if needed or perform an action (such as generating a shipment transaction). For more information, see [Using Scan & go](#).

**Stuff assigned to me.** Pulls up a list of your assigned transactions and tasks.

**Smart search.** Conducts a global search of data available within the system.

## 2.3 Lists menu

The **Lists** menu is the most feature-rich area of the iOS app. This menu is a listing of lists, and it functions in a manner that is very similar to the web app's **Operations** menu. The menus in both apps contain the same lists, in the same order. Both allow you to filter data, create a new record, flag important records with stars, and conduct a quick search within a list.

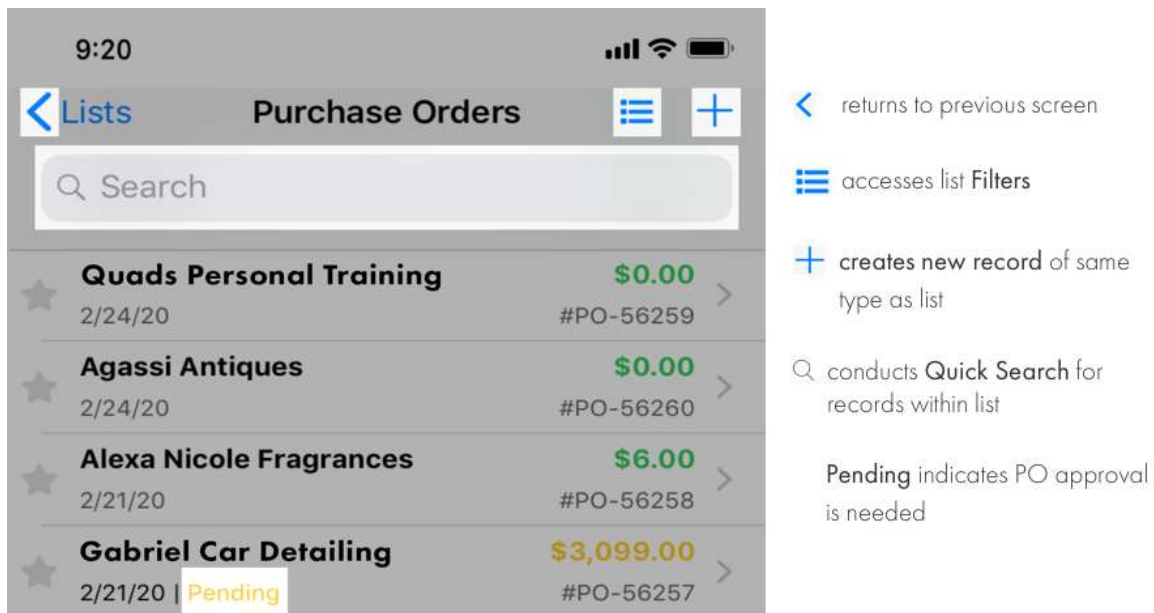


One key difference, however, is how the **Actions** menu features of the web app are accessed in the iOS app. In SOS Inventory iOS, **Edit** and other actions (such as **PDF**, **Email**, and **Create Shipment**) are accessed in the top menu of an individual transaction or other record—not in its corresponding list. Please see [Editing and deleting records, applying actions, and signing transactions](#) in this guide for more information about using actions in the iOS app.

Although many similarities exist between the overall list functions of both the web and iOS apps, please note that some differences do exist in the options available for filters, as well as those for actions.

### 2.3.1 Standard screen layout for individual lists

The screenshot below of a **Purchase Orders** list is an example of the typical layout used for lists in the iOS app:

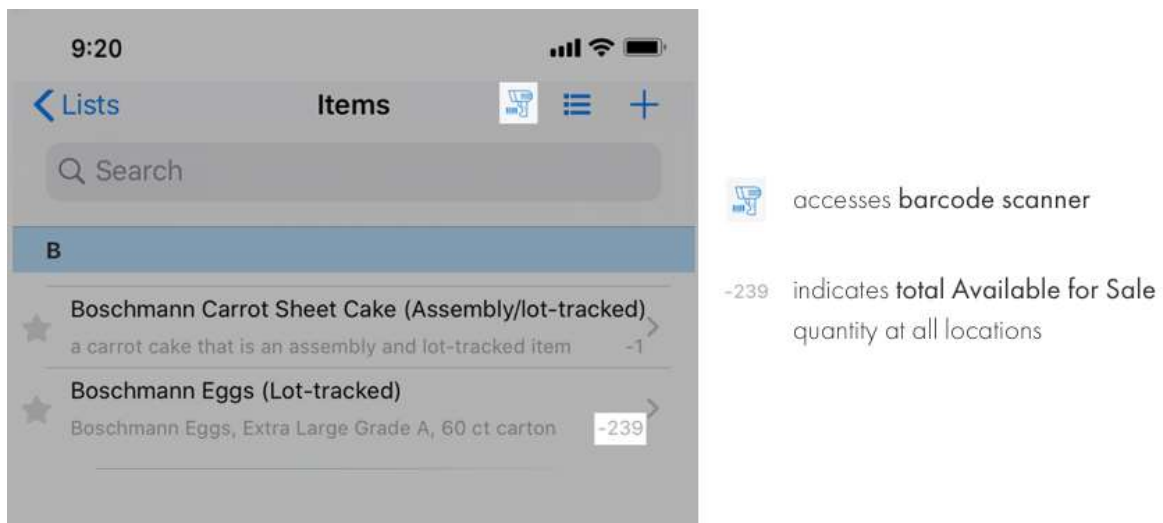


### 2.3.2 Screen layout for Items list

The **Items** list is very heavily used in the SOS Inventory iOS app. It is accessed when (1) adding new and editing existing items; (2) adding line items on transactions; and (3) conducting physical inventory. The iOS app supports the use of barcode scanning for all these processes.

Although the **Items** list screen layout is like that of other lists, it also possesses a barcode scanner icon, as shown in the next screenshot. The barcode scanner accesses your device's camera to make the scan.

The number at the right of each item record indicates the total Available for Sale quantity at all locations.



Additional sub-menus appear when using the iOS app to conduct a physical inventory. When conducting a physical count, the name of the list is called **Items to Inventory**—but the content of the list is the same. See [Counting physical inventory](#) in this guide for more information.

## 2.4 Tools menu

**Refresh Static Data.** Updates infrequently changed data in the system. See [Refreshing data in the iOS app](#) for more information about this feature.

**Update Cache.** Updates all data in the system except static data.

**Sync with QuickBooks.** Performs a manual sync to QuickBooks Online.

**Account Info.** Includes your user email address, company name, SOS account number, QuickBooks account number, the status of your account, and your subscription plan's expiration date.

**Switch Companies.** Allows a user with access privileges to switch from the SOS Inventory account of one company to that of another company. Also specifies the default company to use when the iOS app is opened.

**Sign Out.** Logs out of the SOS Inventory iOS app.

**Settings.** Includes the following:

- **Auto-scan serials.** Allows back-to-back barcode scans of serial items, bypassing the need to select the scanner icon before each scan. This setting is disabled by default.
- **About.** Shows the currently installed versions of the app and server, as well as acknowledgements.

**Help and Support.** Includes the following:

- **Online Help.** Links to the Support page of the SOS Inventory website, which includes: (1) PDFs of the iOS app's *Quick Start Guide* and web app's *SOS Inventory 8.x User Guide*; (2) video tutorials; (3) step-by-step How-To's; (4) FAQs; (5) our Support Team's email address; and (6) our toll-free phone number.
- **iOS Quickstart Guide.** Links directly to the user guide for the iOS app.
- **Email Us.** Allows sending an email to SOS Inventory Support via your email client.
- **Terms of Service.** Outlines the service agreement between you and Saddle Oak Software, LLC, for the use of SOS Inventory.
- **Privacy Policy.** Outlines our policy on the data we collect from customers.

## 2.5 Barcode scanner


The barcode scanner in the SOS Inventory iOS app accesses your device's camera to make a scan. As previously mentioned, scanning a printed barcode of an item, transaction, or other record will open it in the app.

The scanner can be accessed by selecting the **Barcode scanner** icon in the Items list, as well as through the **Check stock**, **Check pricing**, **Which bin is it?**, **Physical inventory**, **Compare barcodes**, and **Scan & go** features in the iOS app.



-  flash toggles on/off
-  move a corner to **resize** scan area
-  slider zooms in/out

The scan area can be resized or moved with a stylus or finger. To resize, simply pick any corner and move the circle inward or outward. To move the scan area, select anywhere within the scan region and slide.

The  **Flash** icon, a toggle located in the upper right corner of the scanner screen, allows you to enhance the lighting for your scan if needed.

Move the blue **Slider**, located at the bottom of the touchscreen, to zoom in or out of an image.

# 3 Syncing and refreshing data

When you log in to the SOS Inventory iOS app for the first time, the web app knows it and will begin the process of loading data to your device automatically. Once the initial sync is complete, communication between the iOS and web apps occurs thereafter in real time every time you save a transaction, item, customer, vendor, and so on. However, you do need to refresh your iOS app's screen to see the web app's most current information.

If your business has configured the web version of SOS Inventory for automatic syncing with QuickBooks Online, any new or updated data that is saved in the iOS app will sync with QuickBooks at its regularly scheduled interval. You can perform a manual sync with QuickBooks Online by going to the **Tools** menu and selecting **Sync with QuickBooks**.

## 3.1 Refreshing data in the iOS app

The SOS Inventory iOS app offers four different types of refreshes, each tailored to the type of data refresh you desire: (1) an individual list; (2) an individual record (transaction, item, customer, or vendor); (3) all lists; and (4) static data.

**Refreshing an individual list or record.** When you are viewing an individual list or record, use a *downward swipe gesture* on the touchscreen to refresh the list or the data in a record. A spinner will appear while the refresh is in progress.

**Refreshing all lists.** To obtain the most comprehensive refresh, go to the **Tools** menu and select **Update Cache**. This will update all data in the app except static data.

**Refreshing static data.** Some data—such as locations, units of measure, price tiers and settings—do not change very often. Most static data will

correspond to features under the web app's **Settings** menu, as well as the Miscellaneous section of the **Company Menu**. If you desire to refresh static data in the iOS app, go to the **Tools** menu and select **Refresh static data**.  
NOTE: The iOS app allows only the *refreshing* of static data so that it matches the information contained in the web app. Any *modifications* to settings or other static data must be performed in the web app.

# 4 Working with data records

The iOS app allows you to perform some of the most common functions performed in the web version of SOS Inventory: the ability to create and edit a record, as well as apply an action (including the ability to generate a child transaction from a parent transaction). The iOS app also offers a unique function: the ability to sign a transaction.

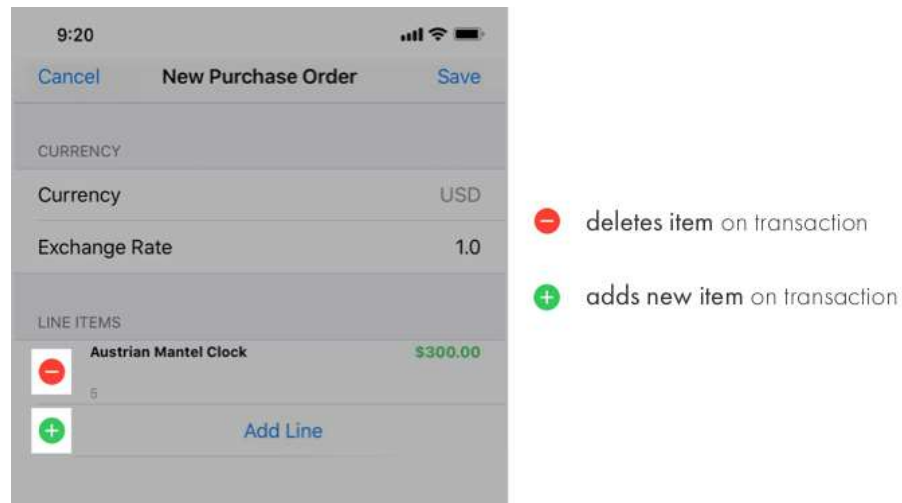
## 4.1 Creating a new record

The steps required to create a new record in SOS Inventory iOS app are basically the same, whether you are creating a transaction, customer, vendor, or item.

Here's what you need to do to add a new record:

1. Open the **Lists** menu at the bottom of the touchscreen.
2. Open the appropriate list for the type of record you wish to create.
3. Select **Add New** (the + icon in the top right corner of the list).
4. Complete the data fields as needed.
  - a. Data fields in the SOS Inventory iOS app are the same as those in the web app. Please refer to the [SOS Inventory 8.x User Guide](#) if you need help with data field descriptions.
  - b. If you are creating a transaction, use the following additional steps for *each* line item:
    - i. Use the **Add Line** feature (see the New Purchase Order screenshot on the next page) to add a line item. (In **Builds** and **Process Transactions**, the terms used are **Add Input** and **Add Output**.)
    - ii. The transaction's **Line Item** screen will open. Under the **Item** heading, select >.

- iii. The **Items** list will open. Search for and select the desired item—or select the barcode scanner icon and scan the item's barcode.
- iv. After you select the item or scan its barcode, the app will immediately return to the transaction's **Line Item** screen. Enter the desired quantity, unit of measure, and any other data needed for the item.
- v. When finished, select **Done** in the upper right corner. This will take you back to your transaction page, where you can add another item or continue completing the rest of the transaction data fields.



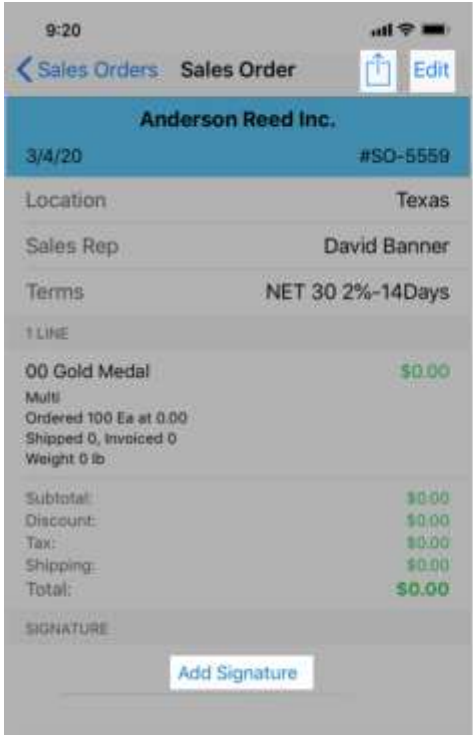
5. When finished entering the data fields for the transaction, select **Save** in the top right corner of the touchscreen.
6. Upon saving, the data is immediately updated to the web app. The new transaction will appear in its designated list on your iOS app, but a refresh is required for the transaction to be seen in the web app or on another iOS device.



# 4.2 Editing and deleting records, applying actions, and signing transactions

Like the web app, SOS Inventory's iOS app allows existing records to be modified using the **Edit** action. The **Actions** menu icon (⌵) provides additional options, although the iOS app may not have all the options that are accessible in the web app at this time.

To delete an existing record, locate the record on its list, then make a *leftward swipe* and select the red **Delete** button. SOS Inventory will ask you to confirm that you want to delete the record.



⌵ accesses **additional actions** that can be applied to record

**Edit** action modifies an existing transaction or other record

**Add Signature** allows a signature to be added to a transaction

A feature unique to the SOS Inventory iOS app allows you to obtain signatures for transactions from your phone's touchscreen. You can sign using either a stylus or a finger.

## 4.3 Using **Scan & go**

The **Scan & go** feature of the SOS Inventory iOS app allows you to use the barcode scanner to open the data record of any barcoded item or any transaction that has been printed with a QR Code. Once opened, the item or transaction can be edited as needed.

### 4.3.1 Criteria for using **Scan & go** to open transactions

1. The hard copy of the transaction must be from a PDF created using the SOS Inventory's **PDF** action.
2. The PDF form template chosen for the transaction must be compatible with the **Scan & go** feature. The form templates in SOS Inventory that can be used with **Scan & go** use the naming convention **[name of transaction type] with QR Code (App Use)**. For example, **Sales Order with QR Code (App Use)**. These templates, which are found in the web app's **Template Library**, must be added to the **Form Templates** list via the web app. For more information on using templates and the Template Library, see Chapter 19, Form Templates, in the [SOS Inventory 8.x User Guide](#).

### 4.3.2 Opening an item or transaction with **Scan & go**

1. Go to the **Work** menu and select **Scan & Go**.
2. Scan the item barcode or transaction QR Code. The record will then open.

# 5 Counting physical inventory

The iOS app makes the process of conducting physical inventory counts easier. It allows you to pull up the item you need to count with a search or barcode scan. The app shows the quantity listed in the system and allows you to enter a corrected value if needed. If you need to stop and then resume your counting later, the app allows you to pick up where you left off.

When you have completed your inventory counting session, SOS Inventory will generate an adjustment transaction for all the items affected by quantity changes. You can preview the adjustment before saving. NOTE: To avoid a slow processing time for the adjustment transaction, we recommend that the number of adjusted items be limited to 200 line items per inventory session.

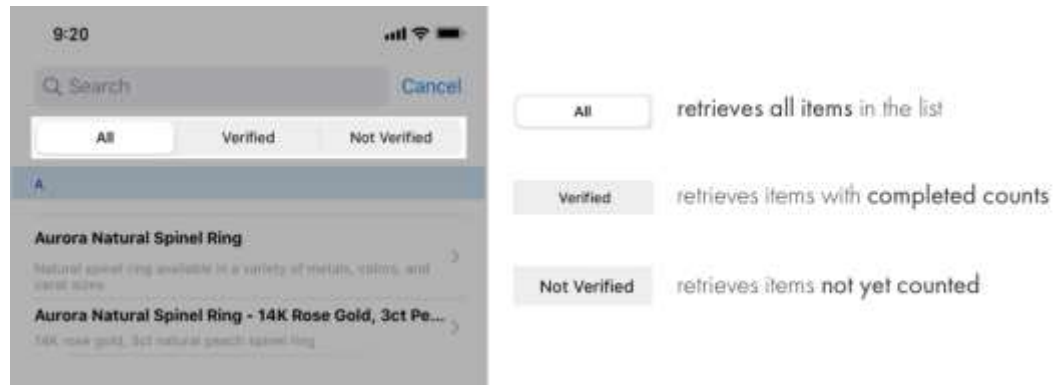
## 5.1 Initiating a new physical count

1. Go to the **Work** menu and select **Physical Inventory**.
2. Select the **Location** where you are performing the count.
3. By default, the **As Of** field uses the current date and time as the basis for your physical count. If you need to change either the date or time, do so.
4. Select **Begin Inventory**. A spinner will appear while SOS Inventory pulls the data from the specified location.
5. Select **Inventory**.
  - a. If the location is not bin tracked, SOS Inventory will pull up the **Items To Inventory** list.
  - b. If the location is bin tracked, SOS will display the **Bins To Inventory** list. Select the desired bin. The app will pull up the **Items in Bin** list.

6. Select the **Filters** icon and choose the number of **Results to Display**, as well as the **Category** and **Tags** (if applicable). When finished, select **Done**. Then locate the item you wish to count, using any of the following methods:

- a. Enter the name of the item you wish to count in the Search bar.

NOTE: The sub-menu below will appear once the cursor is placed in the Search bar. It allows you to view all items in the list, only those which have already been verified by a physical count, or only those items that have yet to be counted.



NOTE: If the selected item is lot tracked, SOS Inventory will pull up all the lots associated with that item on the **Lots** list. Choose the appropriate lot from the list.

- b. Select the **Barcode scanner** icon and scan the item barcode.
7. Conduct a count of your item.

- a. *Counting items that are not serial tracked.* If the **Expected Count** differs from the **Actual Count**, enter the correct value in the **Actual Count** field. Whether your count is changed or unchanged, select **Save** in the upper right corner when finished with that item.
- b. *Counting items that are serial tracked.* Selecting a serial-tracked item will display the **Serials** list. For each serial-

numbered item in which the physical count is verified, toggle the circle icon to the right of the number—or select the **Barcode scanner** icon and scan the serial item's barcode. (For an item with a verified count, the circle will move to the right and the icon background will become green.) When finished, select **Done** in the upper right corner.

As the screenshot below shows, once the count of an item has been completed, SOS Inventory will add **Count: n** for that item in the **Items to Inventory** list (if not a bin-tracked item) or the **Items in Bin** list (if a bin-tracked item). This allows you to distinguish at a glance the items on the list that have completed counts from those which do not.



8. Repeat steps 6 through 8 for each item you wish to count.
9. When finished with the last item you will count (or have time to count), select the **Back** arrow in the upper left corner of the list page. The app will automatically save your work. You can pick up where you left off later, if needed. See the next section, [Resuming a partially-completed physical count](#), for more details.
10. Select **Preview Adjustment** to view the adjustment. You can revise the count of any item listed if it does not appear to be correct. Do not proceed to step 12 unless you are finished with your counting and satisfied with what you see in the preview.

11. Select **Save and Finish**. The iOS app will automatically generate an adjustment transaction to reflect any changes you made to item quantities. The system will issue a message to notify you that an adjustment has been created and saved.

## 5.2 Resuming a partially-completed physical count

If you need to continue working on a physical count that you previously started, take the following steps:

1. Go to the **Work** menu and select **Physical Inventory**.
2. Select **Continue Previous Inventory**. Change the **As Of** date and time, if desired.
3. Follow steps 5-12, as listed under [Initiating a new physical count](#).