

Once you have downloaded the app, you will need to enter your account ID, email address and password, all of which will have been sent to you by the InVentry support team.

After logging into the app, your device will synchronise your account information from the Audit & Compliance system. A number of different synchronisation screens will appear as shown in the example below.

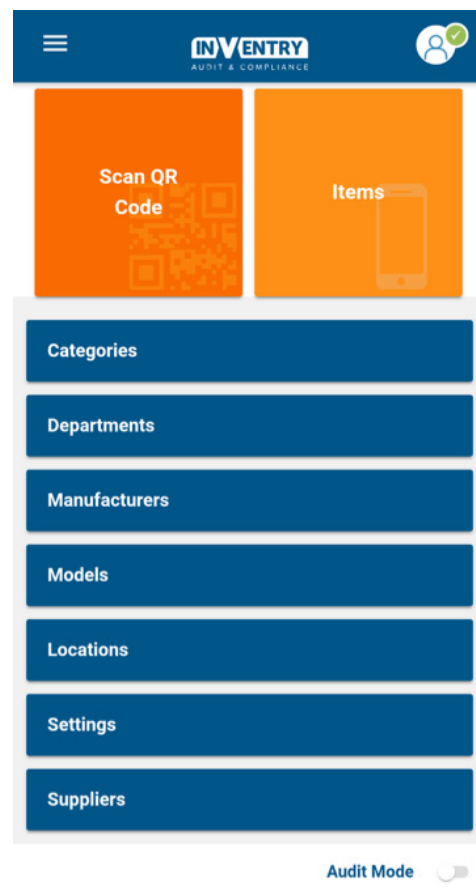
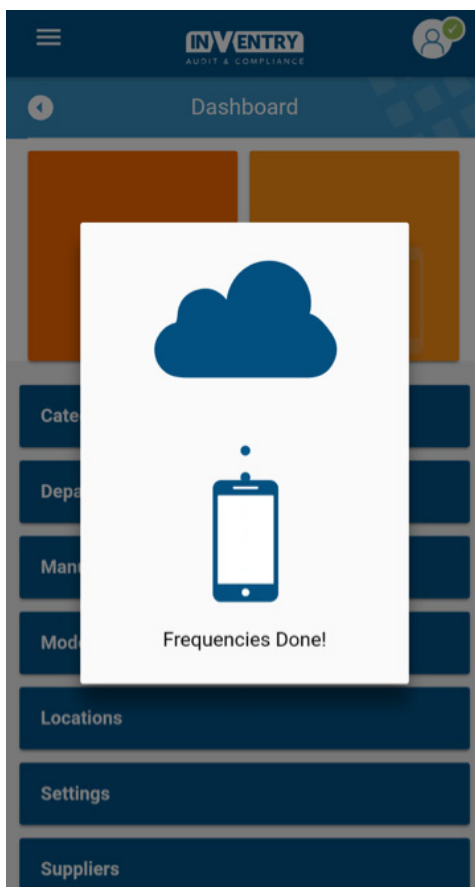
Account Id  
XXX

Email  
Example@Example.com

Password  
\*\*\*\*\*

LOGIN

Once your device has synchronised with the main system, you will be presented with the main Audit & Compliance dashboard as shown below.

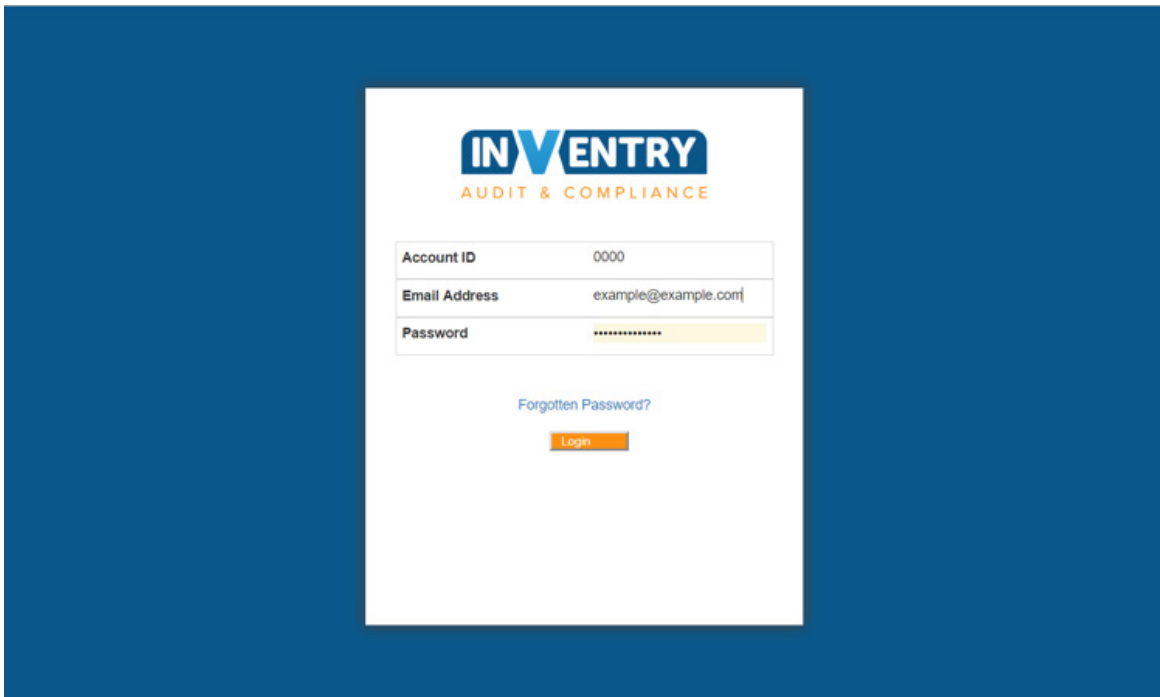


## How to login via desktop

To login to your Audit & Compliance system via desktop, open up your internet browser (Chrome, IE, Firefox, etc) and enter the URL below:

<https://inventoryaudit.co.uk>

You will then need to enter the same account ID, email address and password you used to gain access to the app. After entering your details press 'Login' to access your system. From this screen you can also request for your password to be reset.

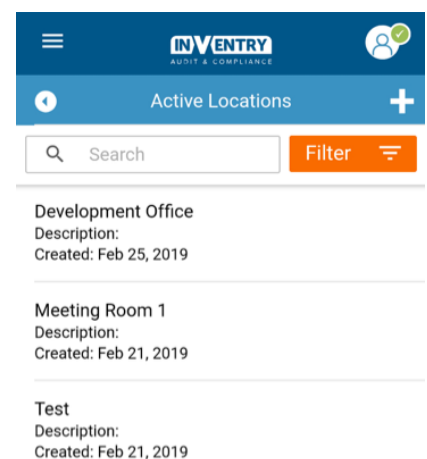


## How to setup a location

The first part of completing your audit will require you to setup your locations. This can be any room, classroom, storage or location in your building that you have chosen for your audit trial.

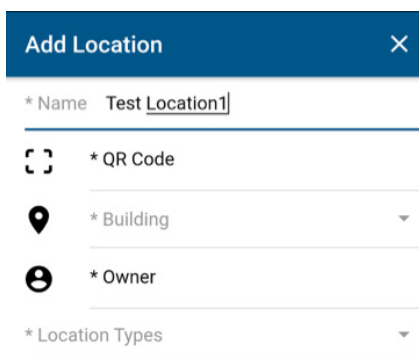
**Please note - we advise that you complete the following steps using the InVentry Audit & Compliance app.**

From the main dashboard, click on the 'Locations' button to begin. After that you will be presented with a screen like the one on the right. To add your location press the + button in the top right hand corner.



You will then need to enter all this locations information before you are able to save the location.

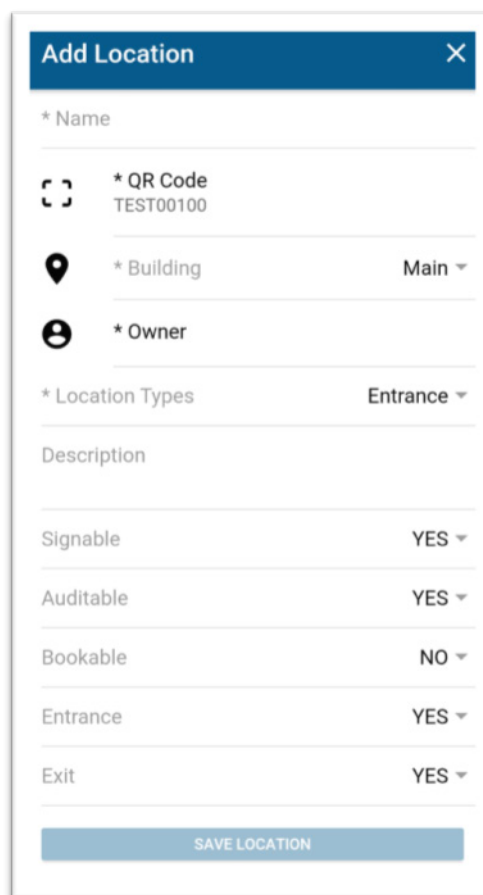
Start by giving your location a name.



The screenshot shows the 'Add Location' form with the following fields:

- \* Name: Test Location1
- \* QR Code: (empty)
- \* Building: (empty dropdown)
- \* Owner: (empty)
- \* Location Types: (empty dropdown)

Next you will need to assign a QR code to that location from the labels provided to you by InVentry. We advise that you place this on the door of the room you are auditing. After you have placed your label and scanned the QR code you will then be returned to the location screen with the QR code field completed as shown below.

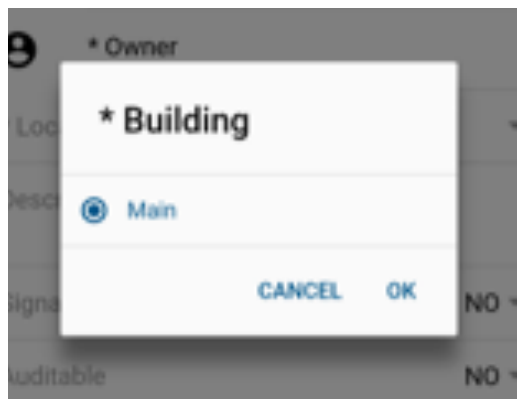


The screenshot shows the 'Add Location' form with the following fields:

- \* Name: (empty)
- \* QR Code: TEST00100
- \* Building: Main
- \* Owner: (empty)
- \* Location Types: Entrance
- Description: (empty)
- Signable: YES
- Auditable: YES
- Bookable: NO
- Entrance: YES
- Exit: YES

SAVE LOCATION

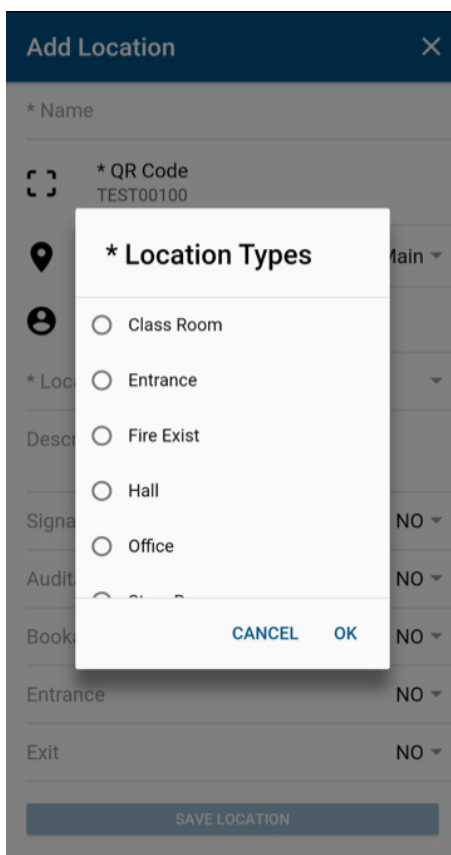
You then assign the building to this location. This is a predefined list that can be customised in the full version of Audit & Compliance. For your free trial the only option you have is 'Main'.



Next you assign an owner for this location. The list of owners will vary depending on the users who have been added to your system. For this free trial please select yourself as the owner.



Next define the location type. This is a predefined list that can be customised in the full version of Audit & Compliance. In this free trial there are several you can choose from, please select the location type from the dropdown list that is most relevant to you.



The screenshot shows the 'Add Location' form with a modal for selecting a location type. The modal lists the following options:

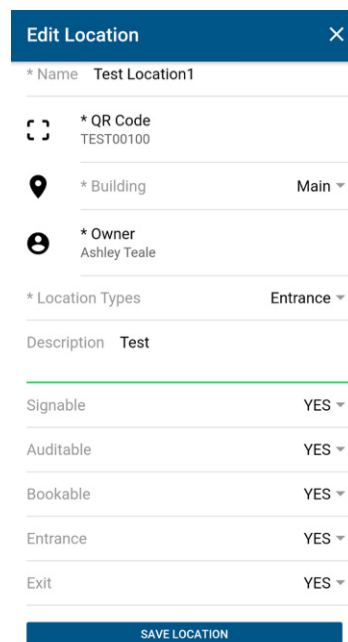
- Class Room
- Entrance
- Fire Exist
- Hall
- Office

Buttons for 'CANCEL' and 'OK' are visible at the bottom of the modal. The background form shows fields for Name, QR Code (TEST00100), Location (Main), and a 'SAVE LOCATION' button at the bottom.

Once you have entered the above information you are then able to save the location. There are other fields which can be completed as follows:

- Description – enables you to provide more detailed information the location
- Signable – not available in the free trial
- Auditable – not available in the free trial
- Bookable – not available in the free trial
- Entrance – not available in the free trial
- Exit – not available in th free trial

After you are happy with the information entered, press 'Save Location' to complete the setup.



The screenshot shows the 'Edit Location' form for 'Test Location1'. The fields are as follows:

- \* Name: Test Location1
- \* QR Code: TEST00100
- \* Building: Main
- \* Owner: Ashley Teale
- \* Location Types: Entrance
- Description: Test

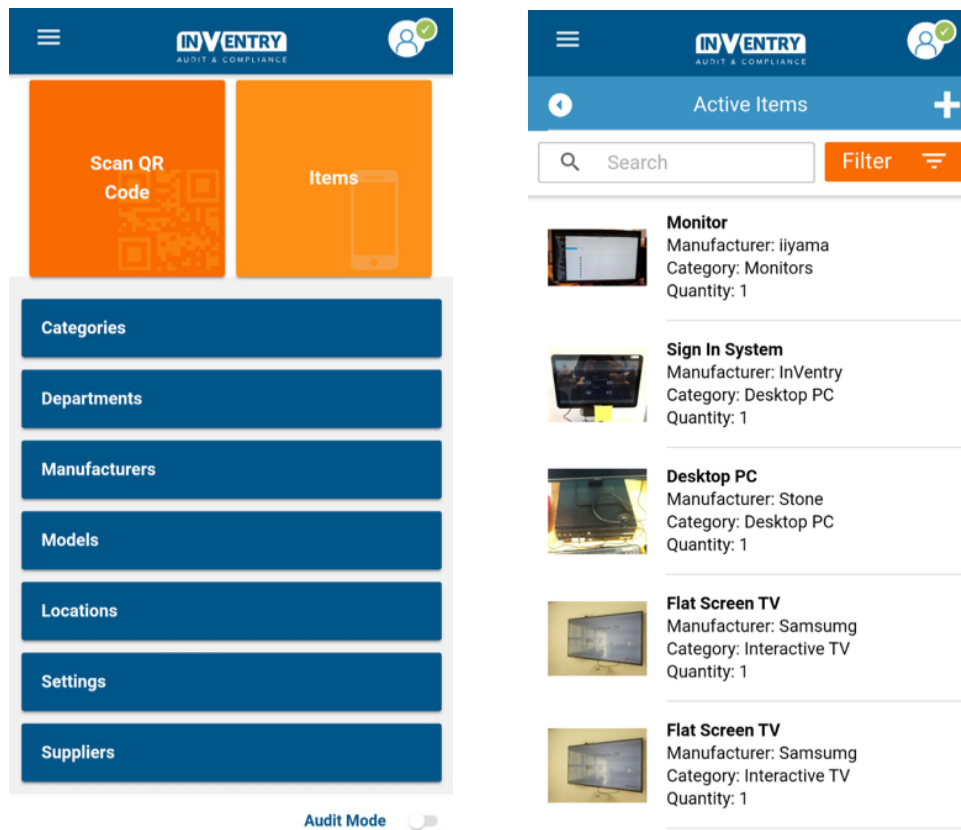
Below these fields are several toggle switches, all currently set to 'YES':

- Signable: YES
- Auditable: YES
- Bookable: YES
- Entrance: YES
- Exit: YES

A 'SAVE LOCATION' button is at the bottom.

## How to add an item

From the main dashboard press the 'Items' button. Once you have completed your audit you will be able to see all of your items in this section. To add your first item press the + button in the top right hand corner.



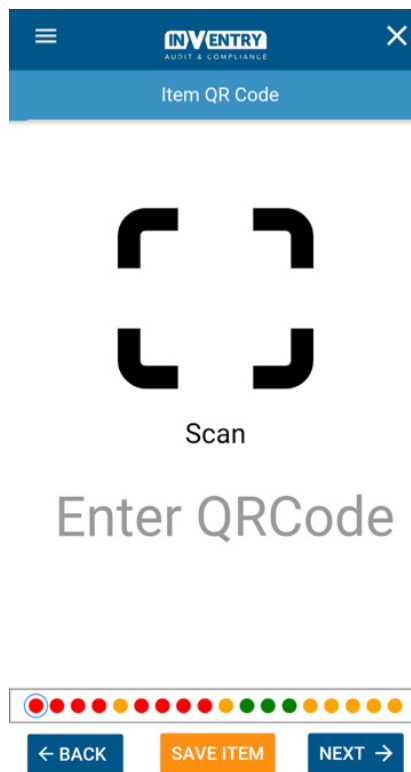
To add an item, you have access to several step-by-step screens. These screens are represented by the coloured dots found at the bottom. The colours represent different information for each screen as follows:

**Red = Required Fields**

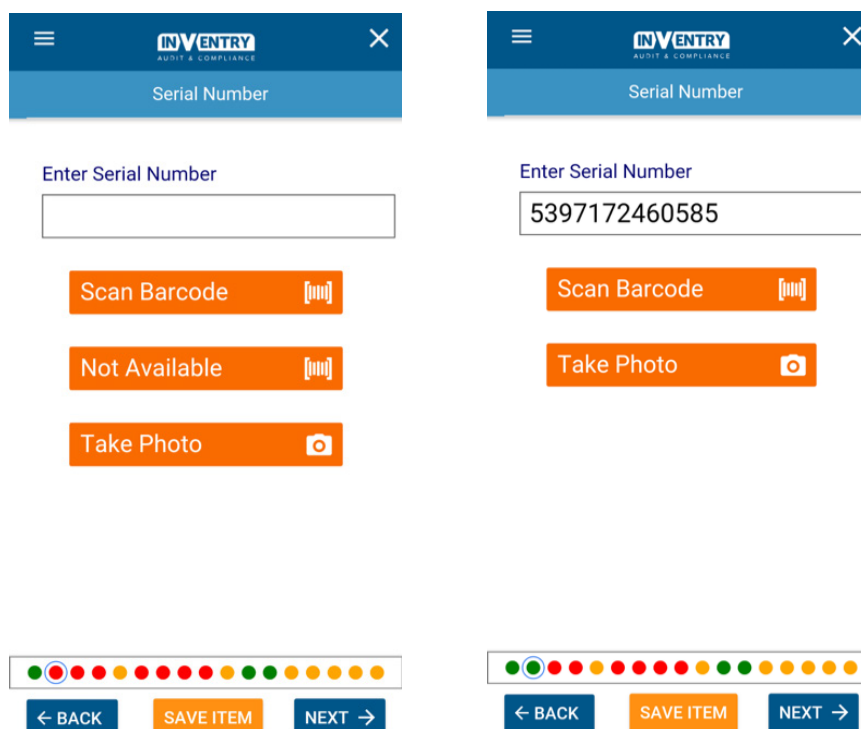
**Yellow/Orange = Optional Field**

**Green = Field Completed**

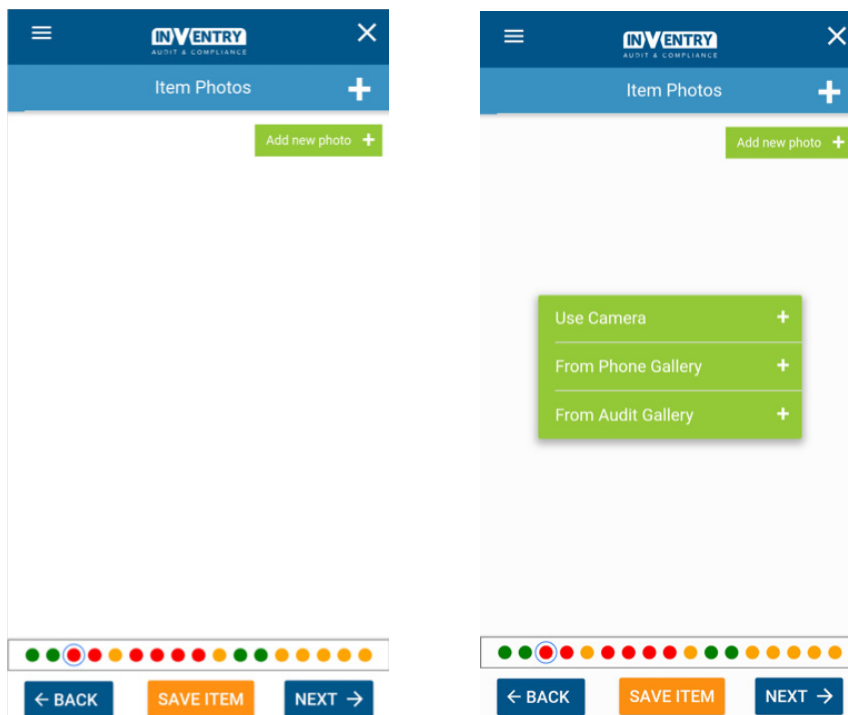
The first screen for adding an item prompts you to scan the QR code of the item you wish to add. Place the next label in the roll on the item and scan the QR code by pressing the 'Scan' button and then pressing next.



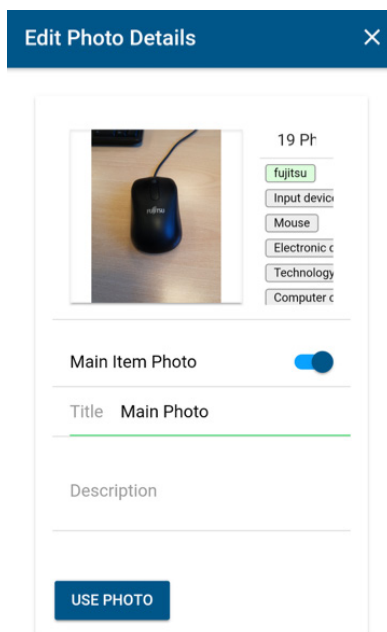
Next you can add the serial number for the item. You can either enter the serial number manually, scan the serial number barcode (if available) or take a photo of the serial number. If no serial number is available, choose the 'Not available' option. Once you have completed this step, press the 'Next' button.



On the next screen, you add a photo or stock image of the item. This image does not only provide a visual reference on the item, it also interacts with our built-in recognition software. Once you take a photo or upload a stock image, the recognition software will add a number of tags to the photo to make adding the item easier.



In the example below, a photo of a mouse has been taken and the recognition software has assigned several different tags shown to the right of the image.



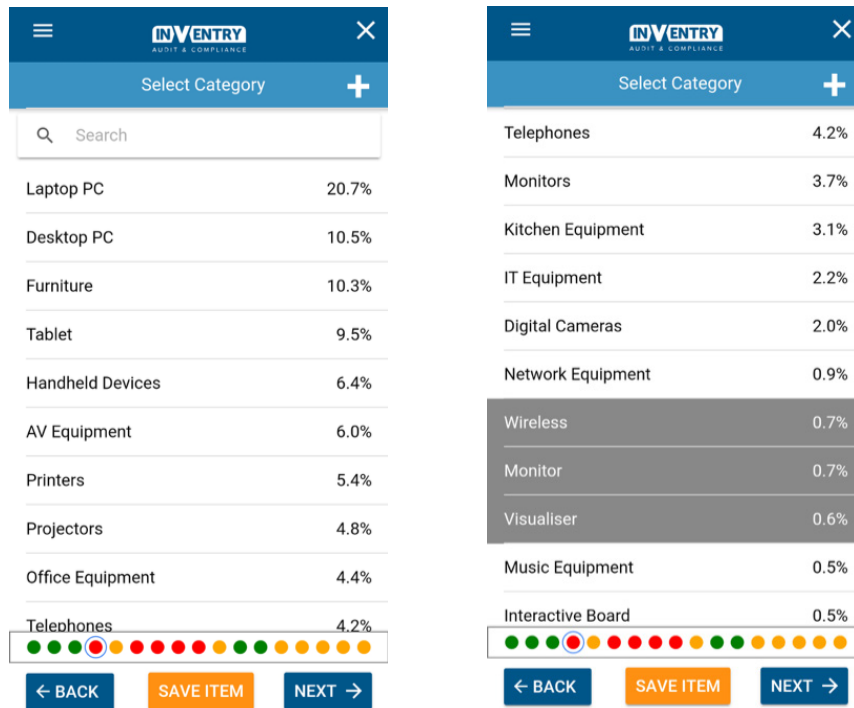


After selecting 'Use photo' the next screen will prompt you to categorise the item. If the item has been recognised, the system will attempt to automatically determine which category the item needs to go into. Categories are split into two colours:

**White Category = Already in the system and can be selected**

**Grey Category = A new category can be created.**

Below are two screen shots, first (on the left) shows how the list will look if the item can fit into an existing category. And the second (on the right) shows you a list with suggestions of a category for the item. The percentage number next to the category name, is how confident the system is of the item categorisation.



Please Note: The 'Save Item' button at the bottom of the screen that is yellow, will turn green after you have filled out enough information to save the item.

You are still able to add the following information before saving the item.

**Location** – where the item is located.

**Owner** – who is the owner of this item.

**Department** – what department does the item belong to.

**Supplier** – if know, who was the supplier of the item.

**Status** – what is the current status of the item.

**Can be booked out** – only available with the InVentry sign in system integration.

**Purchase date** – if know, what was the purchase date.

**Warranty date** – when does the warranty run out for the item.

**Replacement date** – when do you think the item will need to be replaced.

**Purchase cost** – how much did the item cost to purchase.

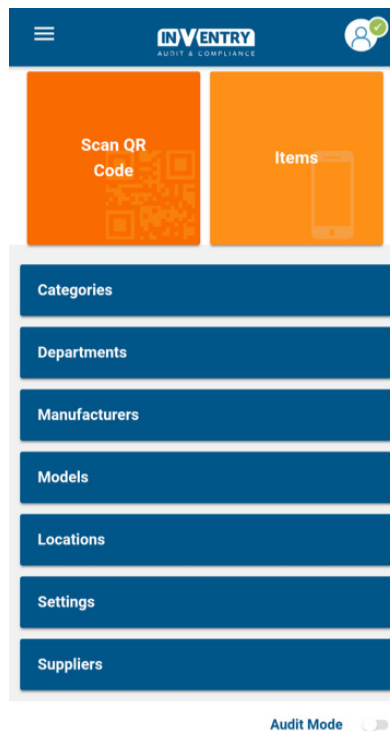
**Notes** – any supporting information you wish to put with the item.

## How to view an item

There are two ways of viewing items in the system. The options are:

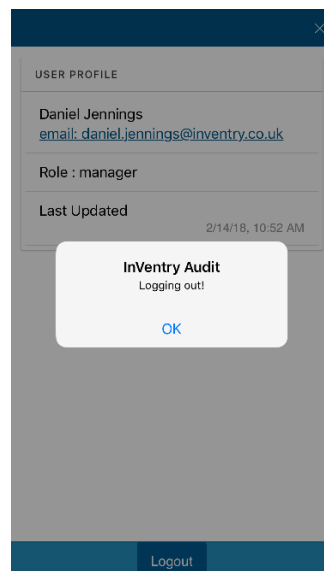
- Scan an item barcode from the home screen – this will then display the item details.
- Click into the 'Items' section of the app and search for the item.

Both of the above options are accessed from the dashboard tiles labelled 'Scan QR Code' or 'Items'.



## How to logout of the app

To log out of the app, press the icon with the three lines in the top left hand corner and then press 'Log Out'.



## How to logout of the website

To logout of the website, down the left hand navigation pane at the bottom. Select 'Log Out'.

