TrackITSystem

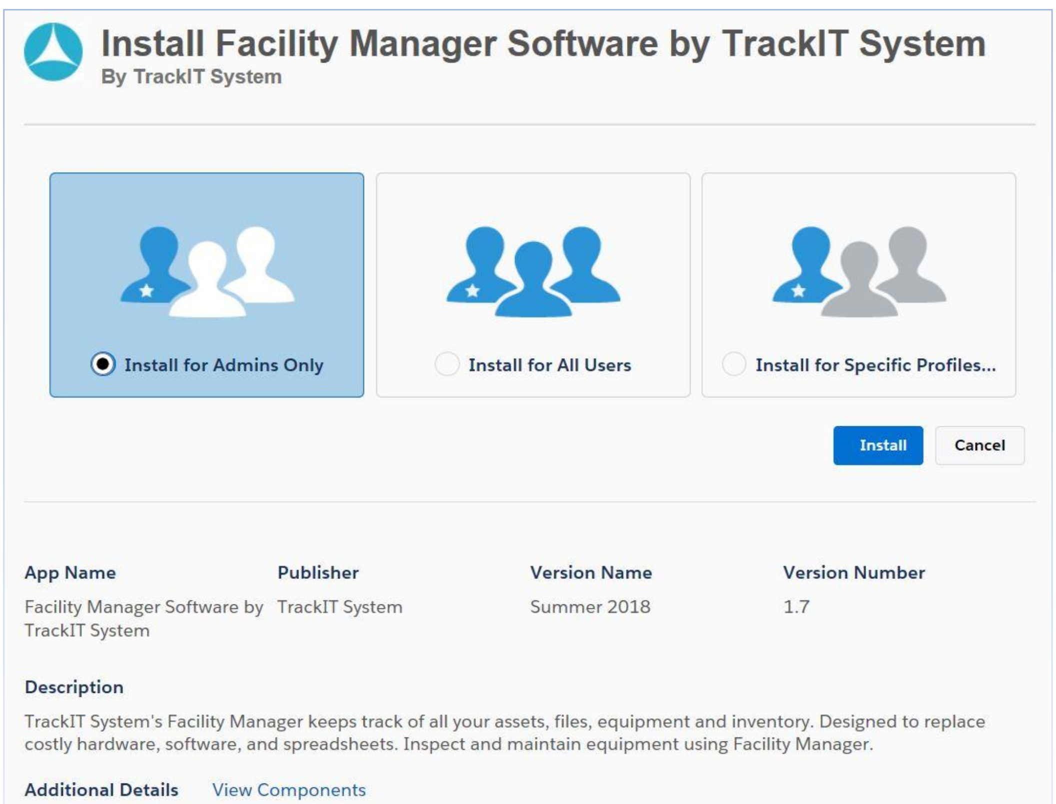
<u>Facility Manager Documentation – Installation and User Guide</u>

Pages 1 to 10 apply to the install and configuration for admins. The user guide begins on page 11

• If the application has not been installed yet, go to the installation URL provided by TrackITSystem or, if you're installing the package from the AppExchange, click **Get It Now** from the application information page:
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EcrpzUAB

Note: If you're installing into a sandbox, replace the www.salesforce.com portion of the installation link with test.salesforce.com. The package is removed from your sandbox organization whenever you create a new sandbox copy.
• Enter your username and password for the Salesforce organization in which you want to install the package, and then click the login button.

Select "Install for Admins Only". Click **Install**. You'll see a message that describes the progress and a confirmation message after the installation is complete. If message "This app is taking a long time to install. You will receive an email after the installation has completed." appears, please wait a few minutes and select "Done". After you receive the email, the app will be installed.



If your installation fails, see [Why did my installation or upgrade fail?](). After installation is complete, the following security settings are in effect.

Install for Admins Only:

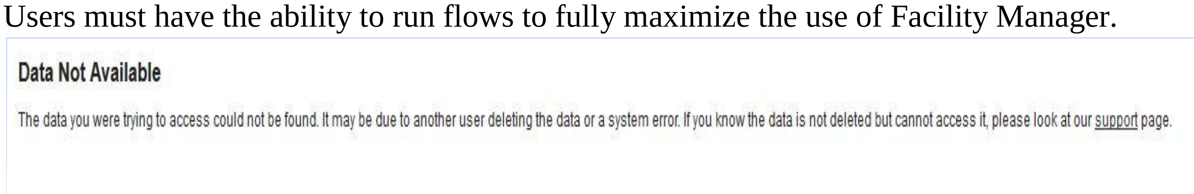
Specifies the following settings on the installing administrator's profile and any profile with the "Customize Application" permission.

- Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—determined by the package creator

See the online documentation for more help if needed. Salesforce help for package installation

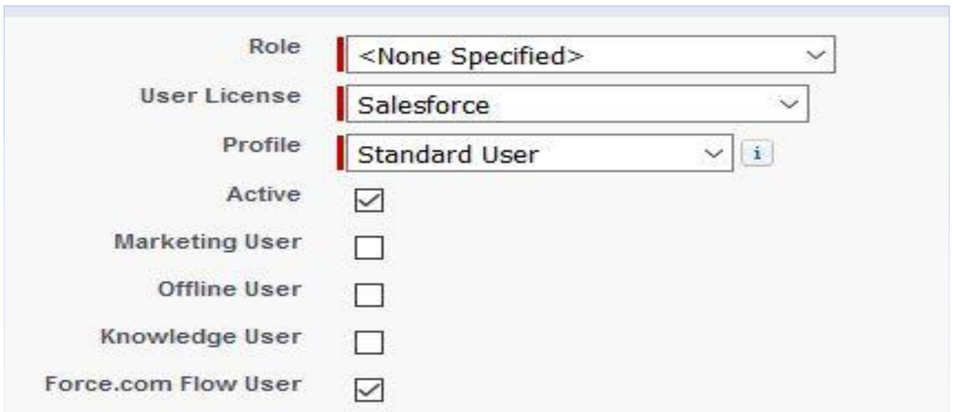
After installation, only administrators will have access to the Facility Manager application. In order to give access to specific users, please assign the permission set "Facility Manager User Permissions" to each user that will be accessing the app. Go to: Setup→Manage Users→Users in Classic Mode or Setup (Home Tab) →Users→Users in Lightning Experience. Click on the Username for the specific user to view the details. Under Permission Set Assignments, select "Edit Assignments". Move "Facility Manager User Permissions" to Enabled Permission Sets and "Save" your changes.

Users must have the ability to run flows to fully maximize the use of Facility Manager.

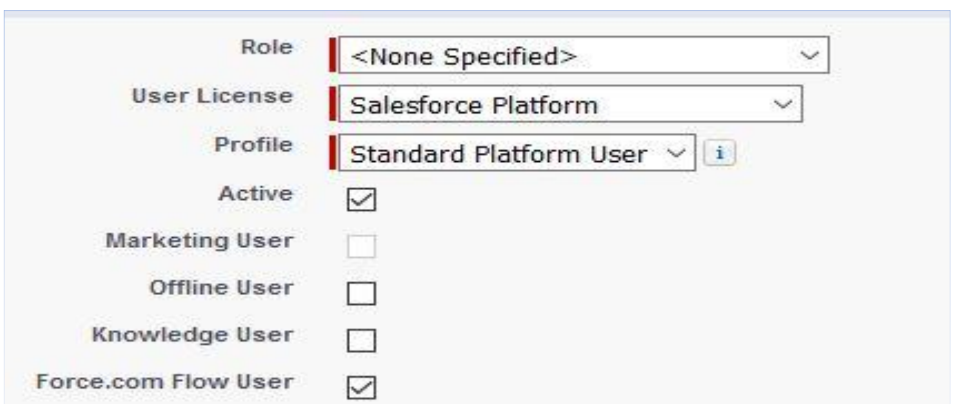


If the above message appears when selecting actions or buttons then go to: Setup→Manage Users→Users in Classic Mode or Setup (Home Tab) →Users→Users in Lightning Experience. Click on the Username for the specific user to view the details. Edit the user record, then check the "Force.com Flow User" checkbox and save the settings.

Select the profile for the user per licenses available.



For users that don’t use sales, service or marketing cloud in Salesforce, select the Salesforce Platform User. This license also comes with installations where the customer bought Facility Manager as a standalone application without any other Salesforce product.



Language Translation

Facility Manager is currently available in seven languages (with more to come).
English (Default)
French
German
Italian
Japanese
Portuguese
Spanish

To fully enable a specific language, go to: Setup→Translation Workbench→Translation Settings in Classic Mode or Setup (Home Tab) →User Interface→Translation Workbench→Translation Settings in Lightning Experience. If not enabled, click Enable. At the supported languages screen, click “Edit” for the specific language to enable it. Check the “Active” box and save the setting. Repeat the same for any other language that should be enabled.

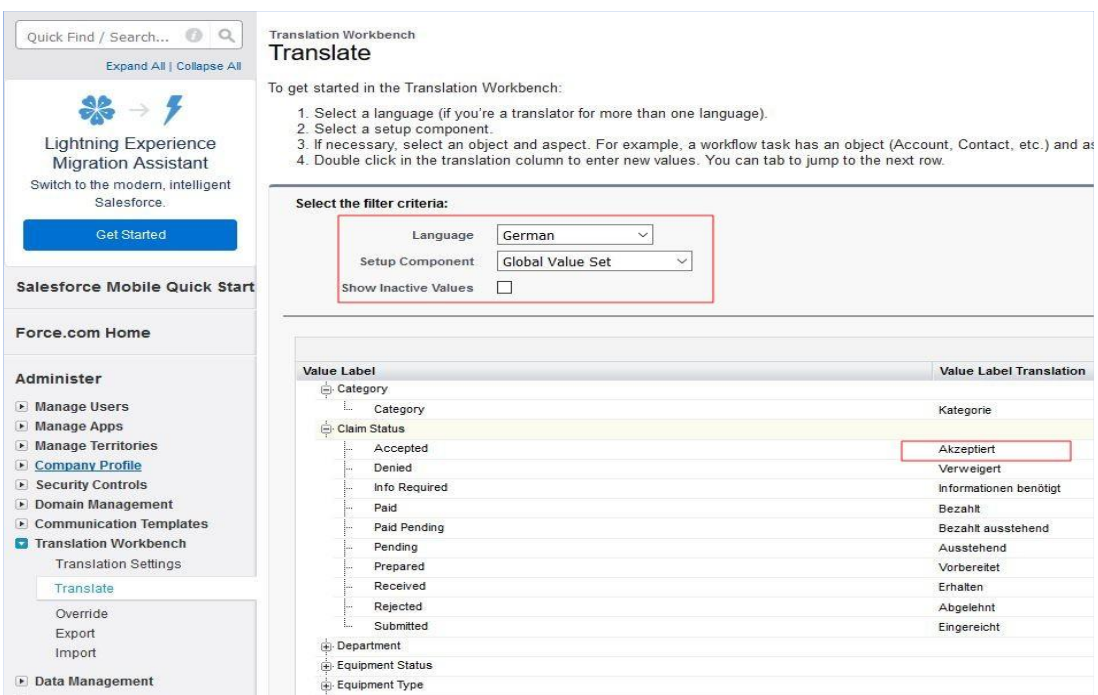
Set the user’s default language in Setup→Manage Users→Users in Classic Mode or Setup (Home Tab) →Users→Users in Lightning Experience. Click on the Username for the specific user to view the details. Edit the user record to change the language and save the settings.

PickList Settings

Update picklist values for your organization as needed. Go to: Setup→Create→Picklist Value Sets in Classic Mode or Setup (Home Tab) →Objects and Fields→Picklist Value Sets in Lightning Experience. Select the appropriate field to add or edit values to the picklist for the particular field. For example, select the Category field. Select “New” in the Values section and add a new category to the list. The default values can also be edited.

These values are in English by default. The values in the global picklist value sets also have corresponding translations. Translations for available languages are in the Translation Workbench.

Go to: Setup→Translation Workbench→Translate in Classic Mode or Setup (Home Tab) →User Interface→Translation Workbench→Translate in Lightning Experience. If not enabled, click Enable. Select the language and select Global Value Set in the Setup Component. Expand the Value Label for the particular field. Double-click the Value Label Translation to add/edit your translations for existing picklist values or new entries that were added. Save your translations when finished.



Barcode Labels

There are a number of options for using barcode labels with Facility Manager.

Pre-printed barcode labels can used to tag the items. Labels can be ordered in many different sizes and material to fit the specific needs of the customer. Contact TrackIT System for more information.

Label print software can be bought to generate and print your own barcodes on an as needed basis.

These tags can then be scanned with an attached USB or Bluetooth scanner to create records in the application.

Facility Manager also has built in Dymo LabelWriter printer support. Dymo LabelWriter 450 and the Dymo Label Software must be installed on computers that will be printing labels. Dymo label software version v.8.6.2.43438 or higher must be installed to be able to print from Facility Manager. This software should be installed on every computer workstation where label printing is necessary. The Dymo label printing service will be installed automatically with the label printing software. Facility Manager uses this service to send label print commands to the printer.

Two label sizes are available for printing within the application:

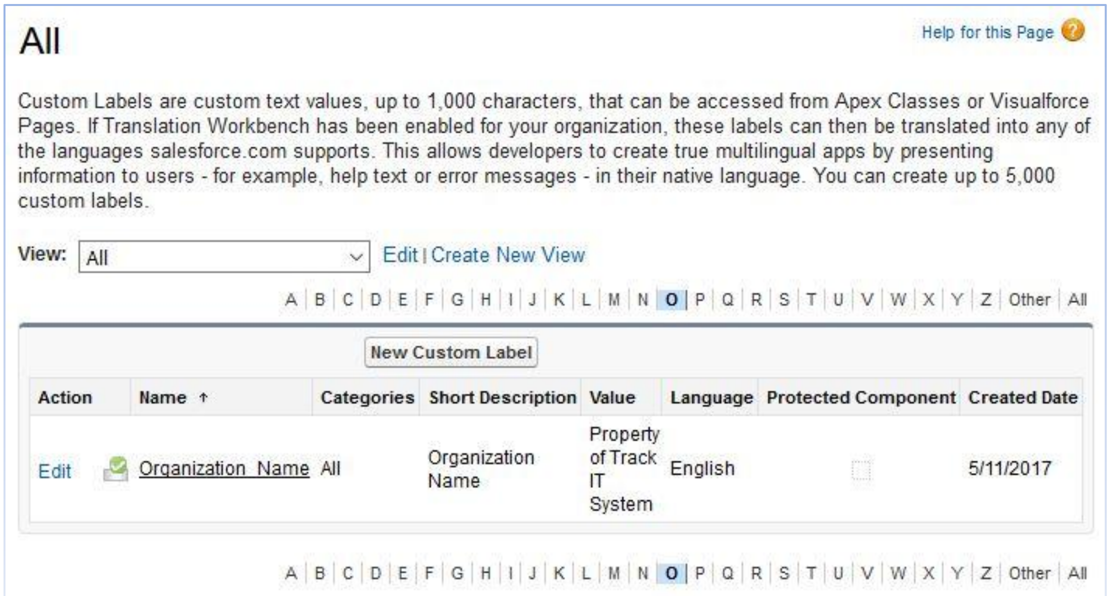
Dymo small labels - either durable (SKU 1933084) or adhesive (SKU 30334) labels - Size 1 1/4" by 2 1/4 ".

Dymo large labels - either durable (SKU 1933088) or adhesive (SKU 30256) labels - Size 4" by 2 5/16 ".

The labels can be printed for Items, Inventory, Locations and Assignees. Use the durable labels if the labels are needed to last for a long period of time and or subject to abrasion.

Item and Inventory labels contain three fields: The Item Number or Inventory Name of the record, Description field and “Property of TrackItSystem”. The “Property of TrackITSystem” should be changed to your company’s preference. The text can be changed to any wording the customer desires. Go to: Setup→Create→Custom Labels in Classic Mode or Setup (Home Tab) →User Interface→Custom Labels in Lightning Experience. Here are all the custom labels for your org. Modify the label called Organization Name (can be found under the “O” letter in the alphabetic drill down. Click on the Organization Name field (not the Edit Action) and select the “New Location Translations / Overrides” to override the existing text. Select the language and enter the new text that will appear on the labels in the Translation Text entry box. Click on “Save” to return to the previous page.

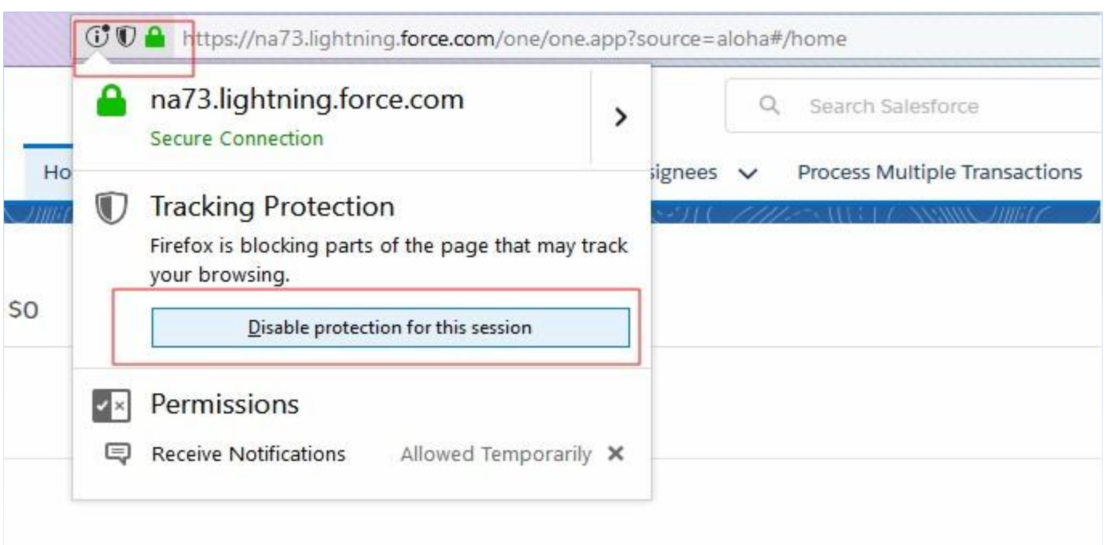
The packaged translations for each included language can also be overridden on this page. In addition, all of the custom labels can be overridden if needed.



Link to Dymo downloads and support: http://www.dymo.com/en-US/dymo-user-guides . Download either the Mac or Windows software for LabelWriter printers.

Salesforce Lightning Experience and Mozilla Firefox

If accessing Facility Manager using the Salesforce Lightning Experience through the Firefox browser, tracking protection must be turned off in Firefox. Click on the "Show Site Information" in the Firefox web address bar as shown below. Select the "Disable protection for this session". This is required to properly display certain pages and icons.



Application Maintenance

System Administrator permissions are needed to access Application Maintenance page.

Data cleanup can be performed using the functions in the Application Maintenance tab. Old and unnecessary records can be deleted for item and inventory transaction records that are no longer needed. These functions are also useful if hitting Salesforce data limits for your org. If more data or file storage is necessary, contact Saleforce support to increase data and or file storage limits.

These are some of the functions available by selecting the appropriate button:

Delete Duration Times - Records created after an item has been returned by an assignee. Keeps track of the times and duration that each item was assigned out and assigned back to its location.

Delete Item Transactions – Records created when an item is moved or assigned.

Delete Maint and Inspect Transactions – Records created when equipment is either inspected or a maintenance transaction is performed.

Delete Inventory Transactions – Records created when an inventory transaction is performed such as receive, issue, adjust or move.

The above functions will delete transactions prior to the date selected when performing each particular function. Follow the prompts to complete each function.

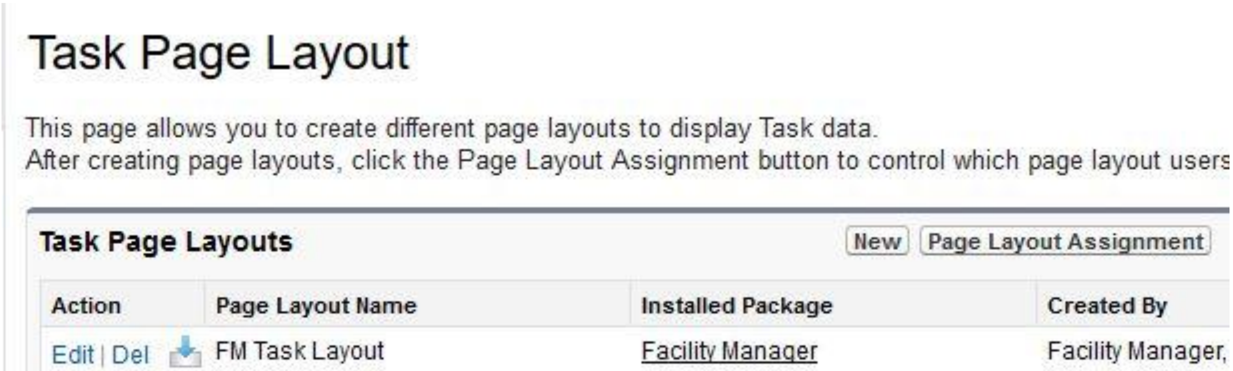
Delete Zero Inventory Locations – Deletes any inventory location where the inventory location quantity is equal to zero.

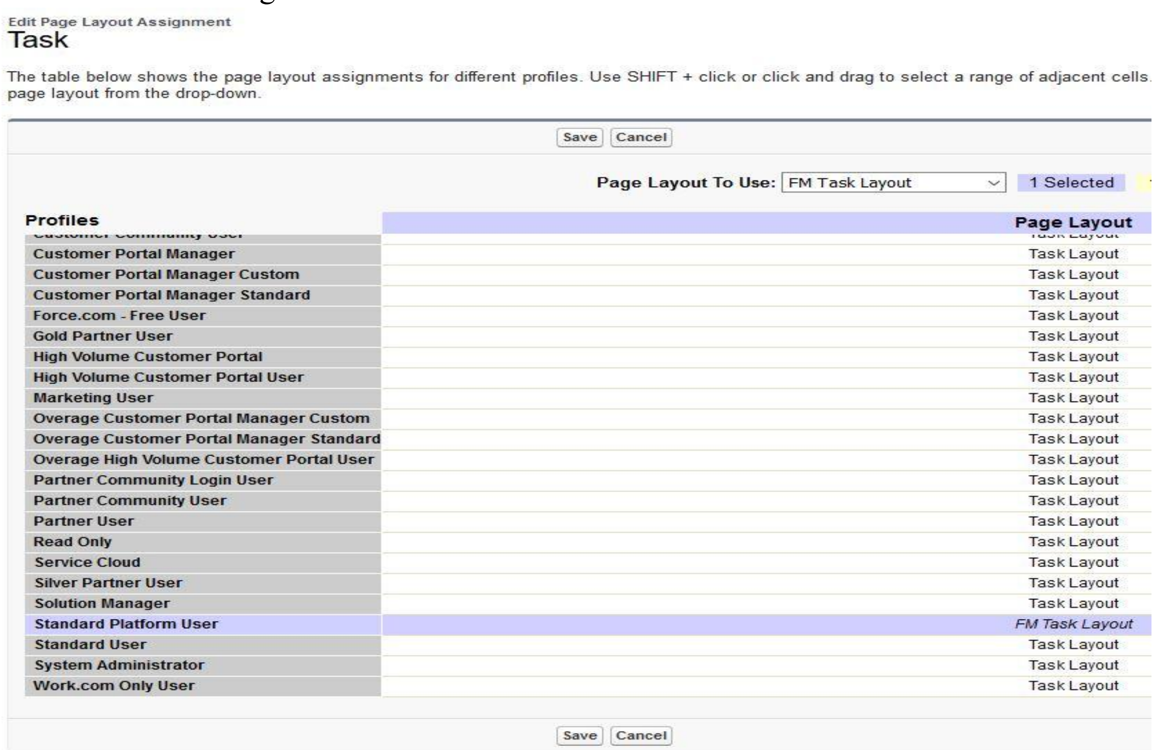
Delete Blank Inventory Locations – Deletes any inventory location where the inventory location quantity is blank.

Facility Manager Tasks and Events Setup Instructions

For customers that would like to use the task and event features, please follow the setup directions below. Follow the specific steps below for the Lightning Experience and the Classic version.

Classic and Lightning Setup:

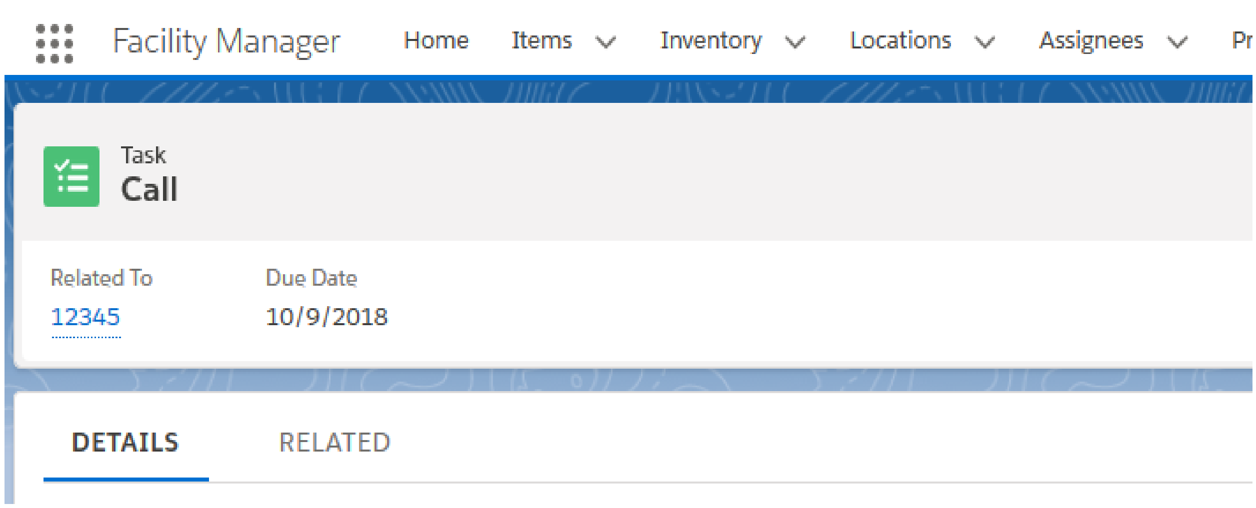
1. Go to Setup and select ‘Customize’ under the ‘Build’ section. Select ‘Activities’ to expand the view. Select ‘Task Page Layouts’. There should be at least two layouts available, the default Task Layout and FM Task Layout that was created in your org when Facility Manager was installed.
2. 

3. Select the ‘Page Layout Assignment’ button.
4. Select the ‘Edit Assignment’ button.
5. 

6. In the example screen above, the Standard Platform User was selected by left clicking on the any part of the line. The line will turn light purple when selected.
7. After making the selection, click on the down arrow in the 'Page Layout To Use' dropdown box. Select the 'FM Task Layout' for the profile selected. Then select 'Save' to apply the change.
8. This will apply the new layout to any user that is using that profile. In the example above, any user that has the 'Standard Platform User' profile will see the new task page layout.
9. If the new layout will not be used by all users that have a particular profile, the profile can be cloned and specific users can be assigned to the cloned profile that will be using the FM Task Layout. Assign each user to the cloned profile. Follow the steps above to assign the FM Task Layout to the cloned profile. Make sure each user also has the 'Facility Manager User Permissions' permission set assigned to them to have access to the full application.
10. Setup the Event Page Layout using the same procedure above that was used to setup the Task Page Layout above.
11. Go to Setup and select 'Customize' under the 'Build' section. Select 'Activities' to expand the view. Select 'Event Page Layouts'. There should be at least two layouts available, the default Event Layout and FM Event Layout that was created in your org when Facility Manager was installed. Follow the procedure above for events as you did for tasks, just select the 'FM Event Layout' for the profile selected in step 7.

Notes for Lightning Experience users

The task and event compact layout can be changed from the default layout to specific layouts for task and events for Facility Manager. This is a global change, so only make the change if it does not affect any non Facility Manager users such as existing sales or service cloud users. If Facility Manager is the only application in the organization, then changing the compact layouts should not be an issue.



1. Go to Setup and select 'Customize' under the 'Build' section. Select 'Activities' to expand the view. Select 'Task Compact Layouts'. There should be at least two layouts available, the System Default and FM Task Compact Layout that was created in your org when Facility Manager was installed. The System Default should be checked as the primary assigned layout.

2. Select the ‘Compact Layout Assignment’ to change the default layout. Select the ‘Edit Assignment’. Change the ‘Primary Compact Layout’ from System Default to ‘FM Task Compact Layout’ and save the change.
3. Go to Setup and select ‘Customize’ under the ‘Build’ section. Select ‘Activities’ to expand the view. Select ‘Event Compact Layouts’. There should be at least two layouts available, the System Default and FM Event Compact Layout that was created in your org when Facility Manager was installed. The System Default should be checked as the primary assigned layout.
4. Select the ‘Compact Layout Assignment’ to change the default layout. Select the ‘Edit Assignment’. Change the ‘Primary Compact Layout’ from System Default to ‘FM Event Compact Layout’ and save the change.

Setting up recurring series of events is currently not available in Lightning Experience. Please use the classic version of Salesforce if setting up recurring events. Salesforce is always adding features to Lightning in every release, check for new features when each Salesforce release is generally available.

Contact TrackIT System at info@trackitsystem.com or 404-850-9988 for assistance if necessary.

Please let us know how we can make our application better, we are always happy to hear suggestions on improving Facility Manager and adding more useful features!

Facility Manager Documentation - User Guide

Facility Manager keeps track of equipment, assets, files and stock inventory. The application is designed for speed and ease of use.

Facility Manager consists of four main objects and six related objects where data is stored. Consider these objects as tables in a relational database. The four main objects are item, inventory, location and the assignee object where records will be created by users. The related objects are updated when transactions are performed on items, inventory, etc.

The item object contains records of unique items such as files or equipment. The inventory object contains records of stock inventory that have multiple quantities and can be stored in multiple locations. The location object contains location names where items and inventory are located. The assignee object is populated with the names of users that will be receiving items and inventory and also performing maintenance and inspections if needed.

Every item record must have a location; in fact the only required fields for these records are the item number and the location that they are in. Other field entries are optional based on the need of the user. Before items such as files, assets or equipment are added, at least one location record is needed to place the item in. So let's add our first location record!

Adding New Records:

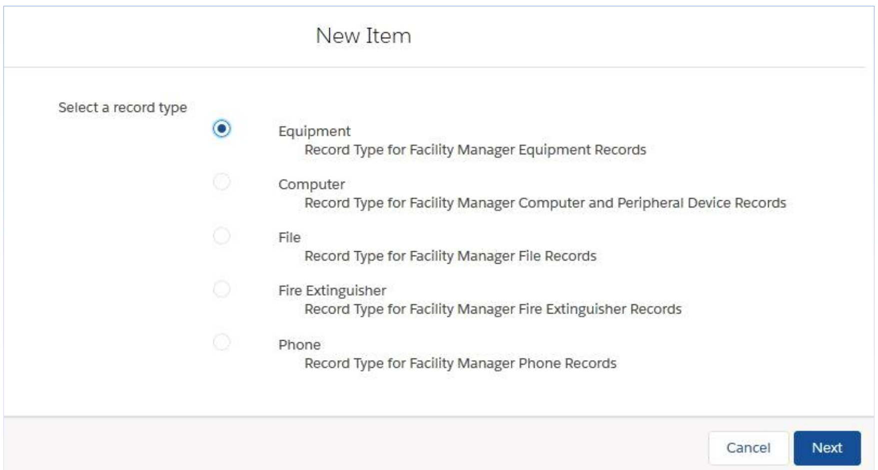
Locations:

Select the Locations tab to view Locations. The Recently Viewed list will display any records that have already been entered or viewed. Select the 'New' action button to add a location. The location ID field is the only required field and cannot be duplicated. The user will receive a message if adding a new location with the same ID of any previously entered locations. The location ID is a standard text field with a maximum length of 80 characters including letters, numbers and spaces. It is recommended to keep the records names or ID's as small as possible and still have relevance for your application. The reason being is if printing a barcode, a large ID will take up more space than is available on the barcode label.

Enter a description if needed, this field displays on the item records alongside the location ID. Enter an optional address for the location if necessary. Select 'Save' to create the location record. Select the 'Save & New' to save and to create another record.

Items:

After creating some location records, the next step is to create either item or inventory records depending on what is being tracked. Unique items like files, equipment, fire extinguisher or asset information is stored in the item object. Select the Items tab and select ‘New’ to add a record. The item object has five different record types: Equipment, Computer, Fire Extinguisher, File and Phone. The page layout and fields change depending on the record type selected. Equipment record type is used for assets or equipment such as heavy machinery, tools or any other unique item that your organization depends on. File record type is used for physical or virtual files such as contracts, insurance claims, law and accounting files, tax returns, etc. Select Equipment, Fire Extinguisher, Computer, Phone or File depending on the type of record information that will be added. Select ‘Next’ or ‘Continue’ depending if Lightning or Classic version is being used.



Enter an item number, location and any other pertinent information for the record. Item Number and Location are the only two fields where entry is required. This applies to all record type entries.

The Item Number is a standard text field with a maximum length of 80 characters including letters, numbers and spaces. It is recommended to keep the records names or ID’s as small as possible and still have relevance for the application. The reason being is if printing to a barcode label printer, long item identification names will not fit on the label as barcodes.

The item number can be keyed in or a barcode can be scanned into the field. Preprinted barcode labels can be used for this purpose. Select the location from the related location object where the item is kept. The location description will display when the record is saved. Enter any other pertinent information for the record and save. If the item needs to be assigned out at this point, select an assignee that has received the item. The assignee should already be entered into the assignee object so they are available for selection. The related assignee information will display when the record is saved. These include the Assignee Phone, Assignee Email and Assignee Dept.

Assignees:

Enter assignees in the assignee object much the same way as entering locations. This will be a list of names who will be borrowing items or inventory in Facility Manager. This table is used to assign items to responsible parties and to also issue inventory. The assignee name is the only required field but the phone, email and department fields will display on the item records when these items are given to the assignee. The assignee name does not have to be a person's name. For example, if a piece of equipment is to be given to another company for a testing period and there is no need to capture a specific person, the assignee name can be just the company name. So just use the assignee name field instead of the company field to enter the information and save to create the record. Now the company name will be available for selection when assigning items out in addition to the rest of the assignee entries.

Inventory:

Inventory information is entered in a slightly different way. Inventory consists of multiple quantities of an item and different quantities can be stored in multiple locations. Just like items are placed in a location that exists in the related location object, inventory is also placed in one or more locations in the related location object. Locations can contain items or inventory or both, just add any location name to the location object as needed.

Select the Inventory tab to add inventory records. Select the "New" button to add a record. At this point, the only required field is the Inventory Name field. Complete any other appropriate information for the inventory record and select "Save". Notice that there was no location field in the add inventory screen? That's because inventory can be added to multiple locations. Once an inventory record is created, select the Receive Inventory action (Lightning) or button (classic view) to add inventory quantity to one or more locations.

Barcode Labels:

There are two different methods for using barcode labels in Facility Manager. The first is to print out the barcode label to a Dymo LabelWriter 450 printer using the Print Barcode actions after entering the item data. These can be printed for an item at any time after the record is created. The second method is to use preprinted labels with an auto numbering sequence. These can be bought or printed locally using barcode label printing software.

Facility Manager has built in Dymo LabelWriter printer support. Dymo LabelWriter 450 and the Dymo Label Software must be installed on computers that will be printing labels. Dymo label software version v.8.6.2.43438 or higher must be installed to be able to print from Facility Manager. This software should be installed on every computer workstation where label printing is necessary. The Dymo label printing service will be installed automatically with the label printing software. Facility Manager uses this service to send label print commands to the printer.

Two label sizes are available for printing within the application:

Dymo small labels - either durable (SKU 1933084) or adhesive (SKU 30334) labels - Size 1 1/4" by 2 1/4 ".

Dymo large labels - either durable (SKU 1933088) or adhesive (SKU 30256) labels - Size 4" by 2 5/16 ".

The labels can be printed for Items, Inventory, Locations and Assignees. Use the durable labels if the labels are needed to last for a long period of time and or subject to abrasion.

Tip:

When using the Dymo label print function, keep the record names to a length that will fit on the label and barcode. The larger label can contain more characters and also contains the description field. Do not include the ampersand (&) sign and the apostrophe or single quote (‘) in the name and description fields if using Dymo label print functions because these two special characters are used in the xml files sent to the printer to generate the barcode and label fields.

Routes:

Routes can be created to maintain and inspect equipment, fire extinguishers and locations in a specific sequence. After creating the route, add equipment, fire extinguishers or locations using the “New Route Step” button to create steps for the route. Each step will contain one item or location in the route sequence. Once all the route steps are created, select “Run Route Steps” to run the route. This can be run by technicians from the mobile application. Each step in the route will trigger the appropriate inspection or maintenance routine selected in the route step.

Editing Records:

Records can be edited in the items, inventory, locations and assignee objects after records are created. The main record name cannot be changed after the initial creation in each of the above objects. The primary reason is because the field name should always match the associated barcode attached to the record.

The main record name fields for the above objects are:

Items = Item Number

Inventory = Inventory Name

Locations = Location ID

Assignees = Assignee Name

All the above fields are of 80 character text field data types and can include alphabetic, numeric and most special characters.

If the above record names need to be changed after initial creation, contact the system administrator to temporally disable the validation rule for the particular object where the record name change needs to be performed. After making the change, make sure to have the rule activated again to prevent any accidental changes to record names. If needed, print out the new barcode name and apply to the item or inventory, etc.

Transaction Processing:

There are two different methods to performing transactions in Facility Manager. Transactions can be started at the individual record that the transaction is performed on or using the Process Multiple Transactions Tab. Depending on whether the classic version or the lightning version is used, starting a transaction at the view record page will vary slightly.

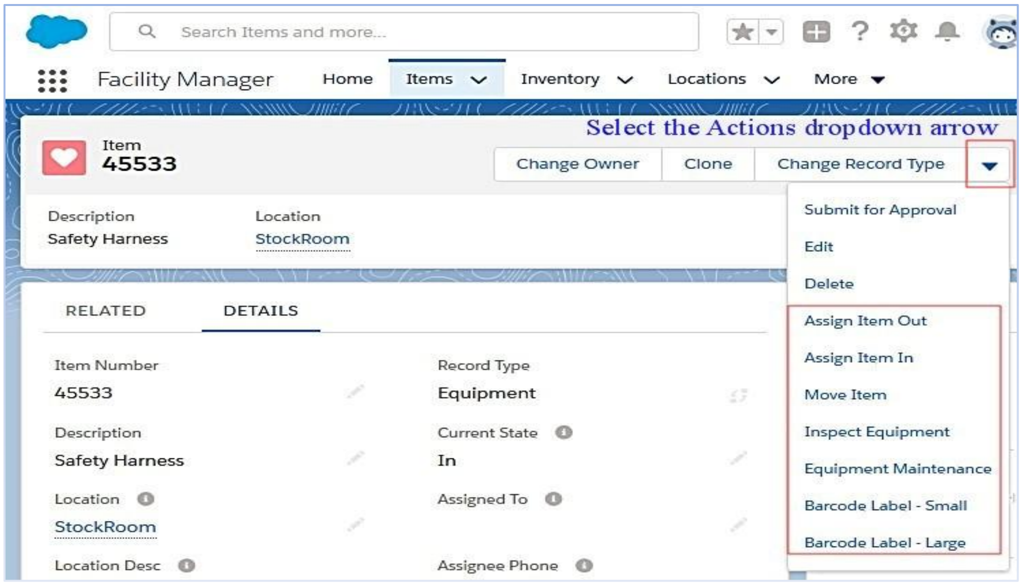
In Salesforce Classic, transactions can be started at the view record screen by selecting the appropriate button on the screen. In Salesforce Lightning, transactions can be started at a view record screen by selecting the appropriate action. The available buttons/actions vary depending on whether inventory or items are selected. The available actions or buttons for items vary with each record type.

Assigning Items:

Items can be assigned out to any entity in the assignee object. The item can also be assigned out when the record is initially created. It can be assigned at the record view using the ‘Assign Item Out’ button in classic mode or the ‘Assign Item Out’ action in Lightning Experience. One or multiple items can be quickly assigned using the ‘Process Multiple Transactions’ tab and using the attached barcode scanner. Returning items work the same way using the above methods.

To assign an item such as a file or piece of equipment to an entity in the assignee table, first add that assignee to the table using the ‘Assignees’ tab.

Select the item record using the Salesforce search functions or use the ‘Item’ tab to find the item to process. Alternatively use an attached USB barcode scanner to scan the item barcode label in the search field. Once on the records’ detail view page, select either the ‘Assign Item Out’ or ‘Assign Item In’ to perform the appropriate transaction. Follow the simple steps in the transaction flows to complete the process.



To quickly scan multiple items using barcodes in batch mode, see the ‘Process Multiple Transactions’ section below.

Tip:

Items can be moved from one location to another or assigned in or out directly from the record view screen using the ‘Edit’ function. Edit the record and assign or move the item. Save the record and Facility Manager will create the appropriate transactions. If needed, both a move and an assignment can be performed at the same time using this method.

Tip:

If using the Lightning interface, a new assignee can be added when modifying the Assigned To field directly on the record view screen. Edit the record and click on the ‘Assigned To’ field. In Lightning there will be an option to add a new assignee. Select the ‘+ New Assignee’ action to open the dialog box. Complete the form and save the new assignee record. Then save the item record to complete the process. If changes do not appear immediately, refresh the page to see the updated changes.

Whenever an item is assigned in or out, moved from one location to another, inspected or maintained an appropriate transaction record is created. Facility Manager is designed to keep track of when, where, who and time the transactions were performed.

Tip:

Items cannot be assigned out to another assignee if the item record is currently assigned out. The item must be assigned back in before being taken out again. The reason being is that Facility Manager keeps tracks of the time that the item was assigned to an entity, so it needs to be assigned back in to capture the duration time for the assignment.

Moving Items:

Moving an item from one location to another basically follows the steps outlined in the assign items section above. Select the 'Move Item' button in classic mode or the 'Move Item' action in Lightning to move the item to the new location. During the move process, select the location from the available location ID's from the drop-down list. If the location ID does not exist, create a new location record using the 'Locations' tab first. Then move the item to the new location.

Equipment Inspection and Maintenance:

Equipment inspection and maintenance transactions are available for equipment records. Once an equipment record is created, inspection or maintenance transactions can be created to keep track of inspection and maintenance information.

Equipment inspection information can be stored in Facility Manager. The inspection transaction can be performed from either the equipment record itself or from the Process Multiple Transactions tab. If the transaction is started from a specific equipment record, the process automatically selects the underlying record. If started from the Process Multiple Transactions tab, the process will prompt for the equipment name.

The Process Multiple Transactions page is designed primarily to quickly process multiple items using barcode labels and attached barcode scanners. Multiple pieces of equipment can be inspected without having to lookup each record and then start the inspection process.

Tip:

Facility Manager automatically captures the user ID of the person who logged in when the transaction is performed. This is captured in the 'Created By' and 'Last Modified By' fields in the transaction record.

Equipment inspection at the equipment record view screen:

Select the equipment record by using the Salesforce search function or using the 'Items' tab. The equipment barcode can be scanned to select the record in the search box. At the record view screen, select 'Inspect Equipment' button in classic mode or the same action in Lightning Experience.

The inspection fields consist of:

Inspection Date: Enter the current date or the date of the actual inspection if different.

Inspection Result: Enter either Pass or Fail.

Inspection Type: Select one of the available types. Select None if no entry is needed.

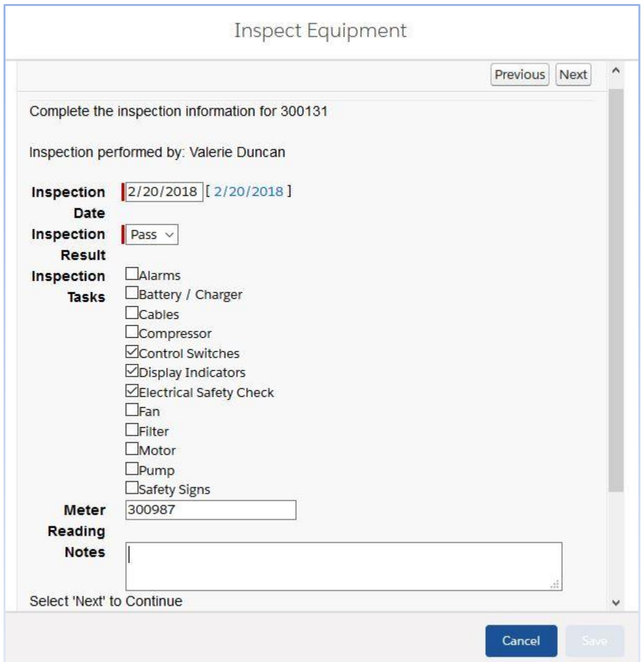
Inspection Tasks: Select one or more of the available tasks. Your system administrator can override or add more tasks to the available picklist if needed.

Tip:

Have your system administrator add or modify values needed for your particular use case. Global picklist values can be found in Setup→Create→Picklist Values Sets in Classic Mode or Setup (Home Tab) →Objects and Fields→Picklist Value Sets in Lightning Experience. Values can be added here to any picklist type field in Facility Manager.

Meter Reading: Enter the current meter reading or mileage if performing vehicle inspections. Field is optional. Your system administrator can override the field name if needed.

Notes: Enter any additional information in the notes section if needed. Select 'Next' and 'Finish' to complete the transaction.



Equipment maintenance at the equipment record view screen:

Select the equipment record by using the Salesforce search function or using the 'Items' tab. The equipment barcode can be scanned to select the record in the search box. At the record view screen, select 'Equipment Maintenance' button in classic mode or the same action in Lightning Experience.

The maintenance fields consist of:

Maintenance Date: Enter the current date or the date of the actual maintenance if different.

Check Box If Inventory Used: Check this box if any parts were used from inventory. This will start the issue inventory flow at the next screen.

Maintenance Type: Select Maintenance or Repair. Repair option does not update maintenance data in the equipment screen.

Maintenance Tasks: Select one or more of the available tasks. Your system administrator can override or add more tasks to the available picklist if needed.

Meter Reading: Enter the current meter reading or mileage if performing vehicle inspections. Field is optional. Your system administrator can override the field name if needed.

Notes: Enter any additional information in the notes section if needed.

Receive and Issue Inventory:

After an inventory record is created, the inventory will have no location or quantity until the receive inventory function is performed. Select the 'Receive Inventory' button in classic mode or the 'Receive Inventory' action in Lightning to receive the quantity at the location for each inventory record as needed. Select the location where the inventory will be stored and select the quantity at that location. Since inventory items can be stored in multiple locations, select the 'Receive Inventory' function again to receive inventory to any other location or locations where inventory will be stored. Use the receive inventory function to replenish inventory as needed.

Select the issue inventory function when inventory is depleted or given to users. Select the 'Issue Inventory' button in classic mode or the 'Issue Inventory' action in Lightning to issue quantity from a location for each inventory record as needed. In the inventory issue function, select the location where inventory will be issued from. The dropdown list will only display locations where there is an available quantity of inventory for the selected record. Enter the amount of inventory in the 'Quantity' field. Select the assignee or 'None' in the 'Issue to' dropdown field. This will reduce the inventory at that location.

Move Inventory:

Select the 'Move Inventory' button in classic mode or the 'Move Inventory' action in Lightning to move inventory quantity from one location to another location if needed. The 'Move From Inventory Location' field displays only locations where inventory quantity is currently available. Enter the amount to move in the 'Quantity' field. Select the new destination location to move the inventory to in the 'Move To Inventory Location' field.

Adjust Inventory:

Select the 'Adjust Inventory' button in classic mode or the 'Adjust Inventory' action in Lightning to change the amount of inventory quantity in a location if needed. Select the inventory location where the adjustment needs to be made. Enter the amount to adjust in the 'Quantity' field. Enter a negative number to reduce the amount of inventory at that location.

Note:

If the inventory quantity amount entered is greater than the amount available at the Move, Issue or Adjust Inventory functions, an error will occur. Inventory quantity cannot be negative at any location.

Process Multiple Transactions:

The ‘Process Multiple Transactions’ page is used to process item or inventory transactions for multiple records without having to search for each record prior to performing the transactions. Multiple items can be processed quickly using barcodes and scanners or typing in item or inventory names. Lets select the ‘Process Multiple Transactions’ tab to perform some transactions! Select the ‘Assign Item Out’ button to start assigning items out. Select the user that will be receiving items from the dropdown picklist and select ‘Next’. Scan a barcode or enter the ID of the item to be assigned. If this is the only item to be assigned to out, check the ‘Check if last item’ box and select next to complete the process. If assigning multiple items out to the assignee, do not check the ‘Check if last item’ until all items have been scanned or entered. As long as this box remains unchecked, continue entering items by selecting the ‘Next’ button and scan or enter the remaining items.

Tip:

If the ‘Check if last item’ box is not checked and there are no more items left to scan, just check the box while leaving the item field empty and select ‘Next’ to process the previously entered items.

The process works the same for assigning items in, except there is no assignee prompt screen. Just scan or enter each item and when complete, check the ‘Check if last item’ box and select ‘Finish’.

The Move Items function will move multiple items from their current location to the selected location. Select the ‘Move Item’ button to move items to a new location. Select the location from the dropdown list of available locations and select the ‘Next’ button. Add any new location to the location object prior to the move transaction so that they are available for selection. Scan each item barcode or enter the item number and select ‘Next’ until all items that are to be moved are added to the list. Check the ‘Check if last item’ box when the last item is selected and the ‘Finish’ button to process the records and complete the transaction.

The ‘Archive Files’ button starts the archival information process. Enter the archival information such as archive box number, archive date, location name and address of the location where files are stored in an offsite storage facility. Select ‘Next’ and enter all files that will be archived. Check the ‘Check if last item’ box when the last item is selected. Select ‘Next’ and then ‘Finish’ buttons to process the records and complete the transaction.

The ‘Inspect Equipment’ and ‘Equipment Maintenance’ buttons can be used to process multiple transactions for inspections and maintenance for equipment records. Scan or enter the equipment item number to be inspected or maintained. Complete the inspection or maintenance information for the piece of equipment at the next screen. Select ‘Next’ to enter the next equipment item and complete the inspection or maintenance information for that record. Check the ‘Check if last item' box when the last item is selected. Select 'Next' and then 'Finish' buttons to process the records and complete the transaction.

The inventory transactions work the same way as the transactions at the individual record level. The only difference is the functions will prompt for the inventory name. Scan or enter the inventory name and continue processing the transactions the same way as at the individual record level.

Tip:

When performing multiple transactions, open the 'Process Multiple Transactions' page tab in a new separate browser window. Resize the window to your liking. Keep this browser window open to perform transactions as needed.

Reports:

Select the report tab to access the predefined reports for Facility Manager if needed. Select the 'All Folders' tab and click on the 'Facility Manager Reports' to view the report list. Reports in Salesforce can be exported to xls or csv formats if needed. Reports can be cloned and modified as needed.

Salesforce Mobile App:

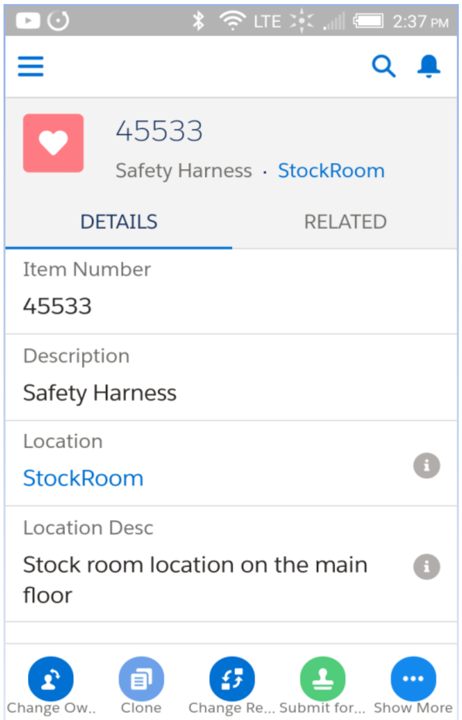
Use the following link to learn how to use the Salesforce mobile application. Learn about the application using trailhead modules on this page. The Salesforce mobile application is available for iOS or Android devices. Check the website's download links for current compatibilities.

https://www.salesforce.com/solutions/mobile/app/getting-started/

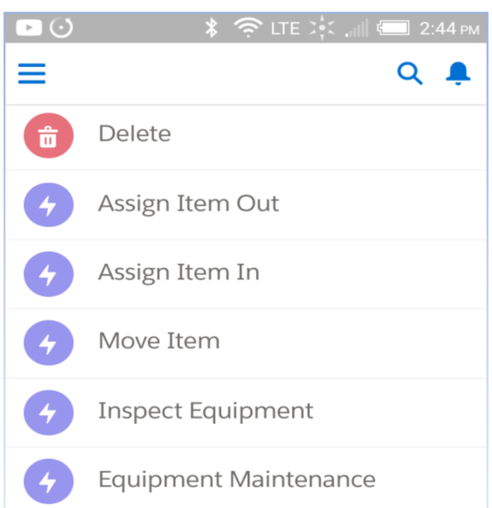
When you are familiar with the mobile app, fire up Salesforce on your device, and let's walk through some transactions.

1. Tap to open the navigation menu, then pull down to refresh.
2. Let's first create a new record such as a file or equipment item. In the Recent section of the navigation menu, tap **More**, then tap **Items**.
3. Tap **New**.
4. Enter the item number and location information (required).
5. Fill out any other fields, then tap **Save**. Inventory, locations and assignees can be created using the same procedure.
6. Use the search function to find records to process transactions on a particular item or inventory.

7. Select a record from the search result to view the record information and access the action bar.
8. Pull down to refresh the action bar if it is not visible.
9. Tap **Show More**.



10. The 'Show More' will display the remaining actions that can be performed for the particular record type currently viewed.



11. Run any function as you would at the record view in the full Salesforce app.

Notes:

The Salesforce mobile app comes with some handy built-in actions, and they live in the action bar and action menu ( ) at the bottom of the screen. The action bar is visible on most pages, so quick actions are just one tap away for mobile users.

Currently, printing barcodes to Dymo LabelWriter printers is not supported in the mobile app. Labels can be pre-printed using the Dymo Label Printing Software where the Dymo printer and software are installed and then used when creating a new record in the mobile app.

Barcodes cannot be scanned directly in the Salesforce mobile app unless using a keyboard application that supports barcode scanning. Tec-it.com provides a soft-keyboard application for Android devices for a small fee. The ‘Barcode/NFC Scanner Keyboard for Android’ can be downloaded from the Google Android Play Store. This is a separate application and not affiliated with TrackIT System or Salesforce. This is provided for informational purposes only and TrackIT System is not responsible for the development, functionality, use or any adverse effects on customers’ equipment.

Alternatively, scanning barcodes can be accomplished using a barcode scanning app in iOS or Android. There are many free barcode scanning applications available in the Apple App Store and on Google Android Play Store. Open the barcode scanner app and scan a barcode, then copy it to the clipboard. Most of the scanning apps should have this feature available. Toggle back to the Salesforce mobile app and paste into the search box to find a record or into the item or inventory name fields when creating a new record.

Please let us know how we can make our application better, we are always happy to hear suggestions on improving Facility Manager and adding more useful features!

Contact TrackIT System at info@trackitsystem.com .