



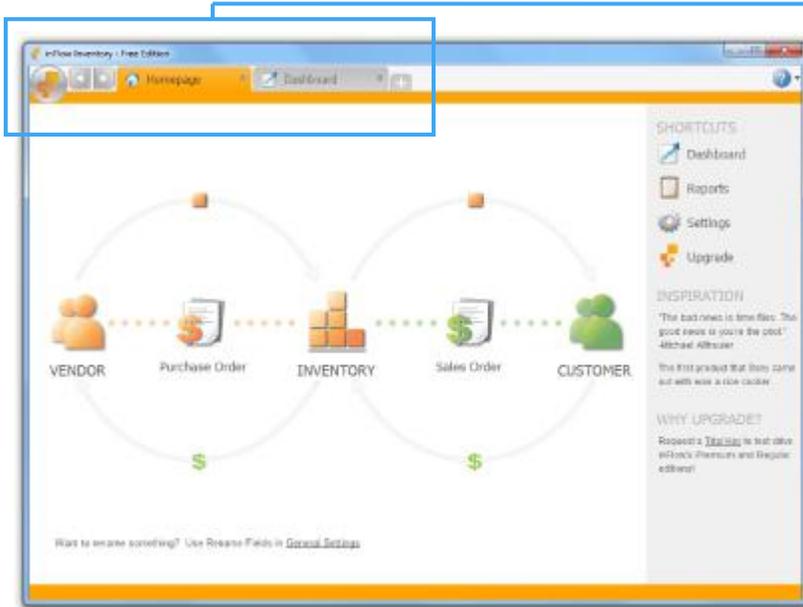
# quick guide

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Welcome to the inFlow Community! This quick-start guide includes all the important stuff to get you tracking your inventory before you know it! Just follow along and soon you'll be shipping orders, reordering stock and making sales in the blink of an eye.

# 1.0 How do I navigate around inFlow?

## 1.1 The inFlow homepage



The main menu button gives you access to all of inFlow inventory's features.



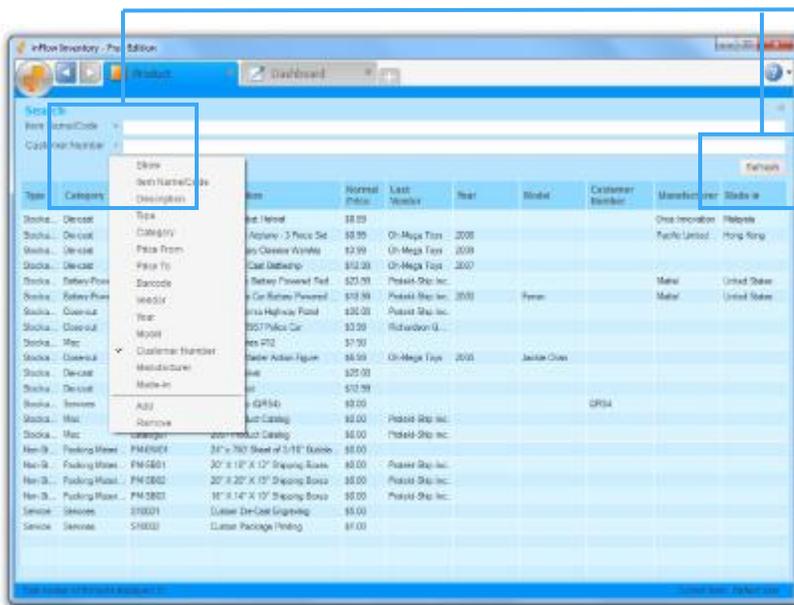
The navigation buttons let you jump back and forth through screens.



The new tab button allows you to open an additional screen so you can work on multiple aspects of your inventory at the same time

The **Home page** includes inFlow's most popular features and provides quick access to different stages of your inventory's journey from purchase to sale. You can hover over any of the icons to see more options and clicking the icon itself will open a blank record for you to use

## 1.2 inFlow listings view



Lists are sorted by filters. Change the filter by clicking the *drop down arrow*. You also add or remove filters here too.



Clicking *Refresh* updates the list. Right clicking it will also clear all filters.

inFlow inFlow uses **Listing Views** to show you what products you have in inventory, what sales orders you have on the go etc. You can control what you see in the list using the **Search** section at the top.

## How do I change what appears in the listing views?

To use filters:

1. Click into a filter's field.
2. Enter the value you want to use to filter your items.
3. Click *Refresh*.

Now your list will consist only of items which meet the criteria in your filters.

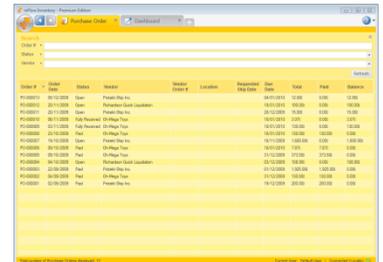
To change which filters you're using:

1. Click the filter title; you should see a dropdown appear.
2. Select the replacement filter from the list.



Name	Contact	Phone	Email	Address	City	State	Country	Created
Head Office	Head	800-555-9631	head@inflow.com	10000 Main St	San Jose	CA	USA	2012-01-01
Branch Office	Branch	800-555-9631	branch@inflow.com	10000 Main St	San Jose	CA	USA	2012-01-01

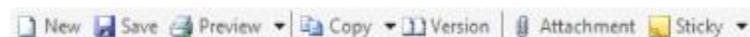
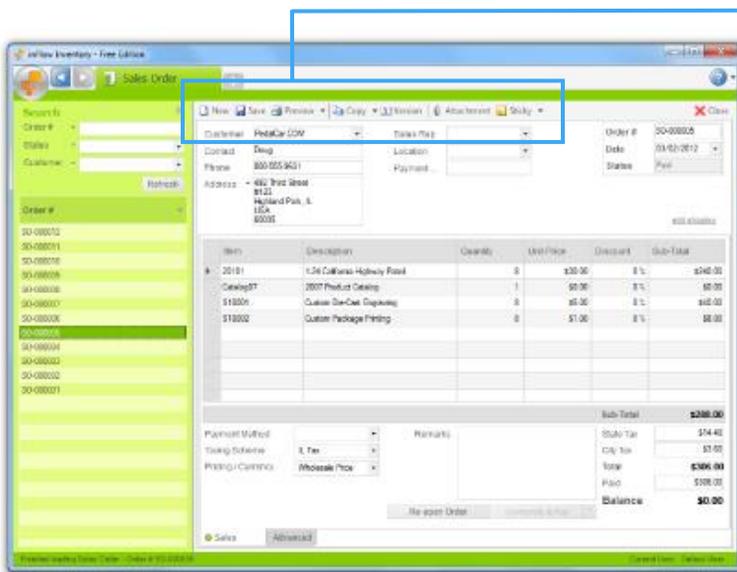
Example of a list of customers



Order #	Date	Status	Vendor	Vendor Location	Department	Qty	Unit Price	Total	Balance
PO0001	01-10-2012	Open	Product Dev Inc.	Product Dev Inc.	Product Dev	1	\$10.00	\$10.00	\$10.00
PO0002	01-10-2012	Open	Product Dev Inc.	Product Dev Inc.	Product Dev	1	\$10.00	\$10.00	\$10.00

Example of a list of purchase orders

## 1.3 Toolbar



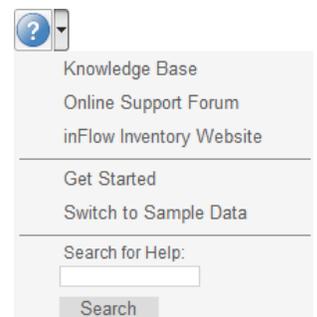
The toolbar shows up in a few places in the program and will look a little different depending on where you are. It lets you do important things like save the record you're working on or create a new one.

## 1.4 Help button

The *Help* button (blue question mark in the top right corner of your screen) helps you find answers to your questions using our articles, and community forum. It also allows you to switch to a sample database so you can test out features without making any changes to your own info

To switch to the sample database simply:

1. Click the *Help* button.
2. Choose *Switch to Sample Data*



When you're finished, switch back to your data by clicking the link on the homepage or simply:

1. Click the *help* button
2. Choose *Switch back to Your Data*.

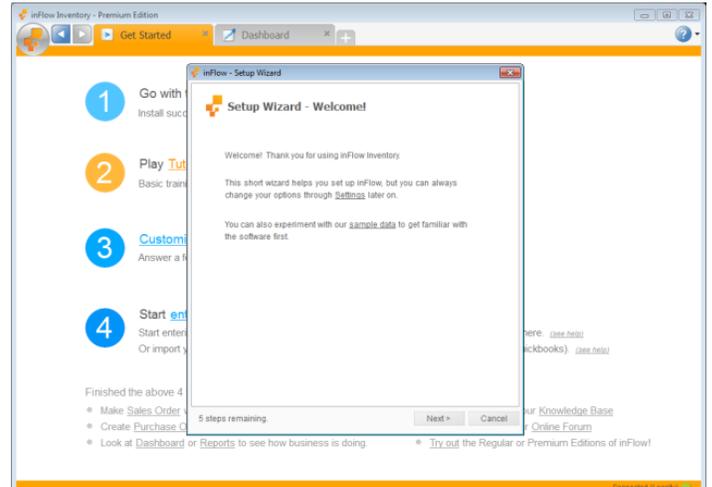
# 2.0 Where do I enter my information?

## 2.1 Get started wizard

To make getting started even easier, inFlow features a *Get Started* page which includes the Setup Wizard. To access the wizard:

1. Click the *Main Menu* then go to > *General* > *Get Started*.
2. In the resulting window click Step 3, to *Customize inFlow*.

The Setup wizard will walk you through setting up your company information as well as a few decisions about taxes and products.

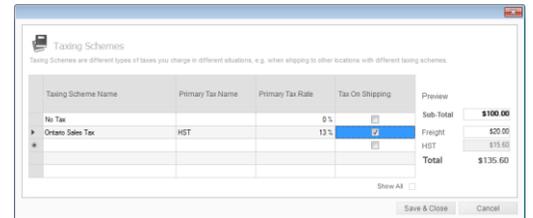


## How do I set up my taxes?

Taxing schemes calculate your taxes when completing Sales and Purchase orders. In the *General Settings* window, on the *Pricing & Tax* tab you will find the *Edit Taxing Schemes* button which will let you set up your taxes.

To set up a new tax:

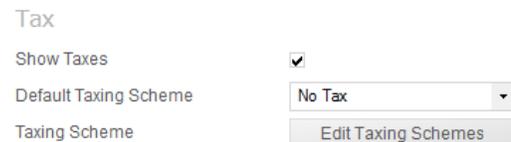
1. Click the *Main Menu* > *Settings* > *General Settings*.
2. Select the *Pricing & Tax* tab.
3. Click the *Edit Taxing Schemes* button.
4. Give your Taxing scheme a name, provide your tax name(s) and percentage(s).
5. Click *Save & Close*.



You may want to select your tax as the default scheme. This tells the program to charge that tax on all new orders going forward (unless the vendor or customer has their own default scheme).

To do so (in the *Pricing & Tax* tab):

1. Click the dropdown next to *Default Taxing Scheme*.
2. Select the appropriate scheme.
3. Click *Save & Close*.



## 2.2 Entering a product

*Products* in inFlow are the different types of things you buy, sell and track inventory for. To create a new product record, click the *Main Menu* > *Inventory* > *New Product*. First give your item a name, or code. You can use your product's actual name but it must be unique so you can also use a short code like "090821A" instead.

To enter the item's name or code:

1. Click into the *Item Name/Code* field at the top of the record.
2. Enter your product name or code.
3. Click *Save* in the top toolbar.



## 2.3 Entering product costs

Costs in inFlow reflect what you've paid for an item (including shipping fees and any other tariffs etc). These will be updated based on your purchase orders and used to calculate profit. To enter the cost of your item:

1. Click into the *cost* field in the Costing Info section of your product record.
2. Enter the cost.
3. Click *Save* in the top toolbar.

### Costing Info

Costing Method

Moving Average

[Edit / History](#)

## 2.4 Entering product prices

inFlow has *Pricing/Currency* schemes which allow you to set up prices for your products. Your prices will appear in your Sales Orders. To enter your price:

1. Click into the box to the left of the = sign, beside one of your schemes.
2. Entering the price.
3. Click *Save*.

### Sales Info

Normal Price

\$45.00 = 200 % Markup

Retail Price

= % Markup

Wholesale Price

= % Markup

[Add new Pricing / Currency](#)

## 2.5 Setting up your stock level

inFlow allows you to record how much stock you have in one or multiple locations:

1. Click into the first cell in the location column and choose from the list. If the location isn't listed click *Add/New* to add it.
2. Click into the quantity column and type the stock level.
3. Hit *Tab*.
4. Click *Save*.

### Inventory

	Location	Quantity
	Main Warehouse	25
▶*		0

Quantity on Hand

0

## 2.6 Creating a CSV file

An import can create records in inFlow from a list that you already have. But in order to use your file, it will need to be in the CSV format and the easiest way to do this is using Microsoft Excel.

Once you have your list open in excel, simply re-save it as a CSV. To do so:

1. Choose *Save As* from the dropdown menu.
2. At the bottom of this window you'll see a field *Save as Type*, choose *CSV (comma delimited)* from the dropdown.
3. Click *Save*.
4. Excel will warn you about the loss of formatting, this is not a problem, please click *Yes* to complete your save.

## 2.7 Importing your data

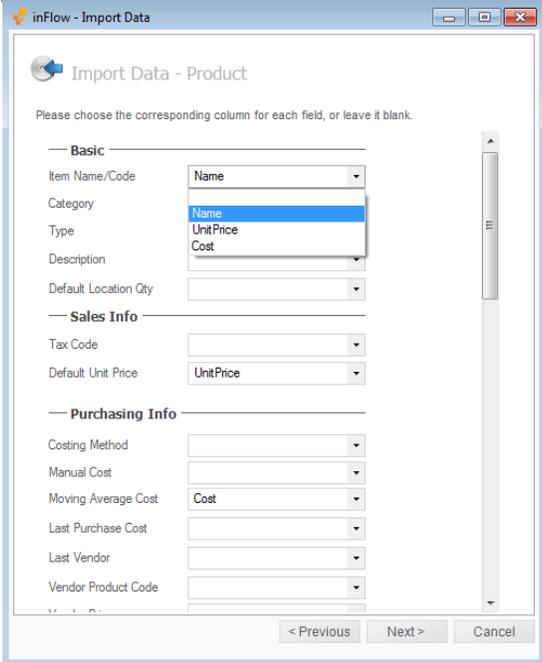
Now that you have your import file you're ready to go ahead with your import. But first, **it's important to backup your database.** This is done so that you can restore to your backup after the import (thereby wiping the changes you made) if you need to.

To Backup:

1. Click *Main Menu* then choose > *General* > *Backup Data*
2. Select the location you'd like to save the backup.
3. Click *Next*.

To import:

1. Click *Main Menu* then choose > *General* > *Import Data*
2. Select the *Products* data type at the top of the screen.
3. Click the *Browse* button to select the file you'd like to import then click *Next*.
4. In this screen match the inFlow field name to the right column in your file by selecting it from the dropdown list.
5. Once you're satisfied with your matches, click *Next*.



inFlow will import your products and let you know what has been updated! If your update didn't go according to plan and you'd like to reverse it please use the backup you made before your import.

To Restore Data:

1. Click the *Main Menu* button.
2. Go to the *General* section.
3. Choose *Restore Data* from the list.
4. Select your backup file.
5. Click *Next*.

Now that you've restored your pre-import backup you can try the import again.

### What if my import doesn't work?

If your first attempt to import didn't work try first exporting the type of information that you want to import. By exporting your "products" from the system you will end up with a CSV file that includes all the available columns of information. This can help you format your information and create and import file.

A few things to remember:

1. The required fields must be filled (Eg. a spreadsheet for products must include an item name/code on each line).
2. Any information going into one field must all be in the same column, inFlow can't import into one field from two columns.
3. Duplicate required values can be a problem, try to avoid them whenever possible.

## 2.8 Creating a customer record

The quickest way to create a customer record is to do so during your sales order. *Sales orders* in inFlow allow you to sell items to your customers.

**To create a new sales order:**

1. Click *Main Menu > Sales > New Sales Order*.
2. Begin typing into the *Customer* field; you should see your customer's name appear in the *add new* section below if they are not in the system.
3. Click *Add* to create a new record.
4. Continue filling in your customer's info, when you save this order you will be asked if you want to save those details back to this customer's record.

Name	Contact	Details
Budget-Minding Collectibles	Bob Weiss	<a href="#">View</a>
PedalCar.COM	Doug	<a href="#">View</a>
Serious Deals For You	Debra Ignatieff	<a href="#">View</a>
Wall-Mart	George Elliot	<a href="#">View</a>

SEARCH: Name  [Refresh](#)

ADD NEW: Name  [Add](#)

Continue on with your orders:

5. Click into first cell in the table and select an item from your list. Continue as necessary until you've selected all the items your customer wants to buy.
6. Click *Complete & Pay* to complete the order and move your inventory out of stock.

Item	Description	Quantity	Unit Price	Discount	Sub-Total		
		0	\$0.00	0%	\$0.00		
Category	Item	Description	Normal Price	Details			
Die-cast	00303A	Amy Combat Helmet	\$8.99	<a href="#">View</a>			
Die-cast	04275	4" Classic Airplane - 3 Piece Set	\$8.99	<a href="#">View</a>			
Die-cast	090821A	3.75" Military Classics Warship	\$3.99	<a href="#">View</a>			
Die-cast	10201	1:700 Die Cast Battleship	\$12.99	<a href="#">View</a>			
Battery-Powered	12875	Mini-Truck Battery Powered Red	\$23.99	<a href="#">View</a>			
Battery-Powered	14232	Mini-Sports Car Battery Powered Red	\$18.99	<a href="#">View</a>			
SEARCH: Item Name/Code <input type="text"/>					Sub-Total	\$0.00	
Description <input type="text"/>					Freight		
Category <input type="text"/>					<a href="#">Refresh</a>	Total	\$0.00
ADD NEW: Item Name/Code <input type="text"/>					<a href="#">Add</a>		

When you save your order inFlow will ask you whether you'd like to save the additional information in your order (such as address, phone number etc.) to your records. The dialogue will include a list of everything that was changed during your order.

1. Review the list and uncheck anything you don't want saved.
2. If you would like inFlow to remember your choices for future orders ensure the "Always do this" option is checked.
3. Click *Save Selected*.

Do you want to save these as the Customer defaults?

Billing Address

Contact Name

Phone

Always do this  
[Change Settings](#)

[Save Selected](#) [Skip](#)

## 2.9 Creating a vendor record

As with your Customer Record, the quickest way to create a vendor record is to do so during your purchase order. The purchase order works in much the same way as the sales order described earlier however purchase orders are used to bring inventory into your warehouse rather than reduce it.

Item	Description	Vendor Product Code	Quantity	Unit Price	Discount	Sub-Total	
			0	\$0.00	0%	\$0.00	
Category	Item	Description	Normal Price	Details			
Close-out	76289B	Kung Fu Master Action Figure	\$6.99	<a href="#">View</a>			
Die-cast	9400	Police Basket	\$25.00	<a href="#">View</a>			
Die-cast	9500	Boat Basket	\$12.99	<a href="#">View</a>			
Services	cases		\$20.00	<a href="#">View</a>			
Misc	Catalog06	2006 Product Catalog	\$0.00	<a href="#">View</a>			
Misc	Catalog07	2007 Product Catalog	\$0.00	<a href="#">View</a>			
SEARCH: Item Name/Code <input type="text"/>					Sub-Total	\$0.00	
Description <input type="text"/>					Freight		
Category <input type="text"/>					<a href="#">Refresh</a>	Total	\$0.00
ADD NEW: Item Name/Code <input type="text"/>					<a href="#">Add</a>	Paid	\$0.00
					<a href="#">Receive &amp; Pay</a>	Balance	\$0.00

To create a new Purchase Order:

1. Click *Main Menu > Purchasing > New Purchase Order*.
2. Begin typing into the *Vendor* field; you should see your vendor's name appear in the *add* new section
3. Click *Add* to create a new record.
4. Continue filling in your vendor's info, when you save this order you will be asked if you want to save those details back to this vendor's record.
5. Click into the item column and select an item from your list. Continue as necessary until you've selected all the items you would like to purchase.
6. Click *Receive & Pay* to complete the order and move the items you've received into your inventory.

## 3.0 What else should I know?

### 3.1 Reports

Reports allow you to see trends and analyse information that you've been capturing in inFlow. For example, you might want to know what your profit levels were this month and you can pull a Sales Profit Report to tell you. To access the reports list, click the *Main Menu > Reports > Report List* from the options.

In this window you'll see the different categories of reports, Sales, Purchasing and Inventory and each section includes reports which relate to that part of your business.

To run a report:

1. Go to the *Report List* and click on the name of the report you'd like to pull. This will open the menu for that report (as pictured here).
2. As with *Listing Views* you can use the filters here to control what appears in the final report. Filters here can be swapped out and added or removed as necessary.
3. Click the [>>More](#) link to the left of the generate report button (not pictured) to expand your options.
4. Choose which columns you want to include by checking them off in the *Columns* dropdown.
5. Next, choose how you'd like to group your order
6. Choose the info you'd like to use to sort your data in the *Sort By* fields.
7. When you're ready, click the *Generate Report* button to create your report.

The screenshot shows a configuration panel for a report. It is divided into two main sections: 'Filter By' and 'Display'.  
**Filter By:** Contains three dropdown menus: 'Customer' (empty), 'Order Date' (set to 'All'), and 'Status' (set to 'Open, In Progress, Fully Shi').  
**Display:** Contains several settings: 'Columns' (set to 'Order Number, Status, Paym'), 'Orientation' (radio buttons for 'Landscape' and 'Portrait', with 'Portrait' selected), 'Group By' (set to 'Location'), 'First Sort By' (set to 'Order Number'), 'Then Sort By' (empty), and 'Then Sort By' (empty). Below these are 'Report Title' (set to 'SALES ORDER PROFIT REPO') and 'Description' (empty). At the bottom, there is a '<< Less' link and two buttons: 'Add to My Reports' and 'Generate Report'.

### 3.2 Backup and restore data

Your database (i.e. your information) will backup automatically every day you use inFlow to a local folder on your computer. You can also back up your database manually to save it elsewhere (like an external drive or other computer) so that you can move your program as well.

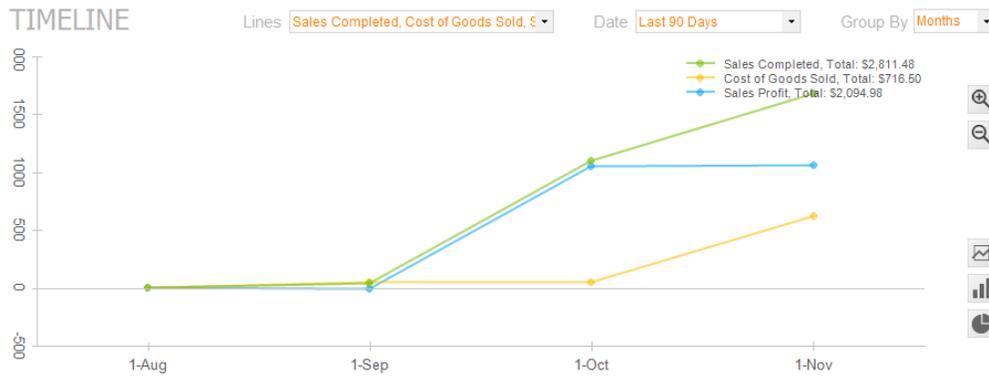
To Backup:

1. Click *Main Menu > General > Backup Data*.
2. Select the location you'd like to save the backup.
3. Click *Next*.

To Restore Data:

1. Click *Main Menu > General > Restore Data*.
2. Select your backup file.
3. Click *Next*

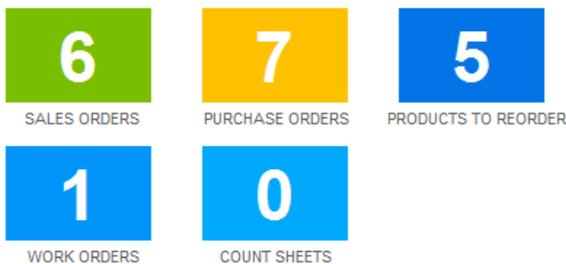
## 3.3 Dashboard



Much like reports, the Dashboard allows you to quickly see information about your sales, purchases and inventory. The main graph can provide visual representations of your sales totals, cost totals etc.

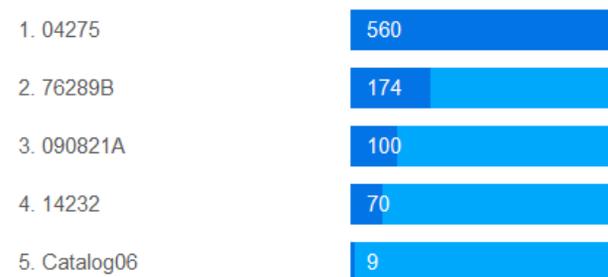
Using the dropdowns at the top of the screen you can get different info and can control your graphs using the buttons on the right. Items of interest, like Outstanding Sales and Purchase Orders, will appear along the bottom of the dashboard so you can quickly see what requires your action.

### OUTSTANDING



[details](#)

### TOP 5 PRODUCTS w/ highest qty available



While the “Top 5” list on the right can show you any number of statistics at a glance like the top five vendors your company purchases from, the products that sell the quickest, your most active customers or (as in the example above) the top five products in stock.

## What should I do now?

If you haven't already done so, please go ahead and [download inFlow Inventory](#).

If you have more questions, you can visit our [support page](#) which will provide you with help articles and options to get in touch. We also have [video tutorials](#) and [community forums](#).

Of course, you can also follow us on [twitter](#) and say hello on [facebook](#)!