

# Getting Started

## Introduction

The Warehouse and Stock Application (WAS) is a powerful tool designed to assist warehouse operatives with stock management.

Companies of all sizes can benefit from using the app, whether you operate a manned or unmanned warehouse, or store stock within a retail shop. WAS makes stock management easy and efficient.

The current version of the app supports the following stock management processes:

- **Goods In** - capturing images, item condition, and serial numbers.
  - **Supplier Collection** - tracking supplier returns and marking them as collected.
  - **Manual Store** - storing items in barcoded locations.
  - **Bulk Move** - moving multiple items between locations.
  - **Stock Take** - stock take on fully tracked items and their locations.
  - **Load Vans** - picking stock for in-house vans and external carriers.
  - **Picking Jobs** - picking stock for in house vans and external carriers by location.
  - **Unload Vans** - tracking unloading of collections and failed deliveries.
  - **Order Collection** - completing customer collections with image and signature capture.
  - **Stock Count** - stock count linking to the Desktop process.
  - **Stock Management** - assign images, store serial numbers, change retail prices (configuration controlled), and reprint labels.
  - **Custom Menus** - Manage users menus from NCompass, simplify or remove menu items on a user by user basis
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## Stock Swapping

Stock swapping is a feature that can be enabled on a per-user basis and is turned off by default.

When picking stock for vans, this feature allows the operator to pick the most accessible stock number, provided the model number matches.

If stock swapping is disabled, the operator must pick the exact stock number allocated to the sale.

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# Pallet Management

The pallet feature allows multiple items to be stored under a single pallet number.

Each item within the pallet still retains its own unique stock number, but individual labels are only printed if the pallet is split.

This feature is turned off by default and should only be used when items are stored on pallets or within outer cartons.

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# Automatic Transfers Within Branch

## New Feature

This feature must be enabled in NCompass configuration.

When enabled, stock will automatically transfer between stock rooms and branches. For example:

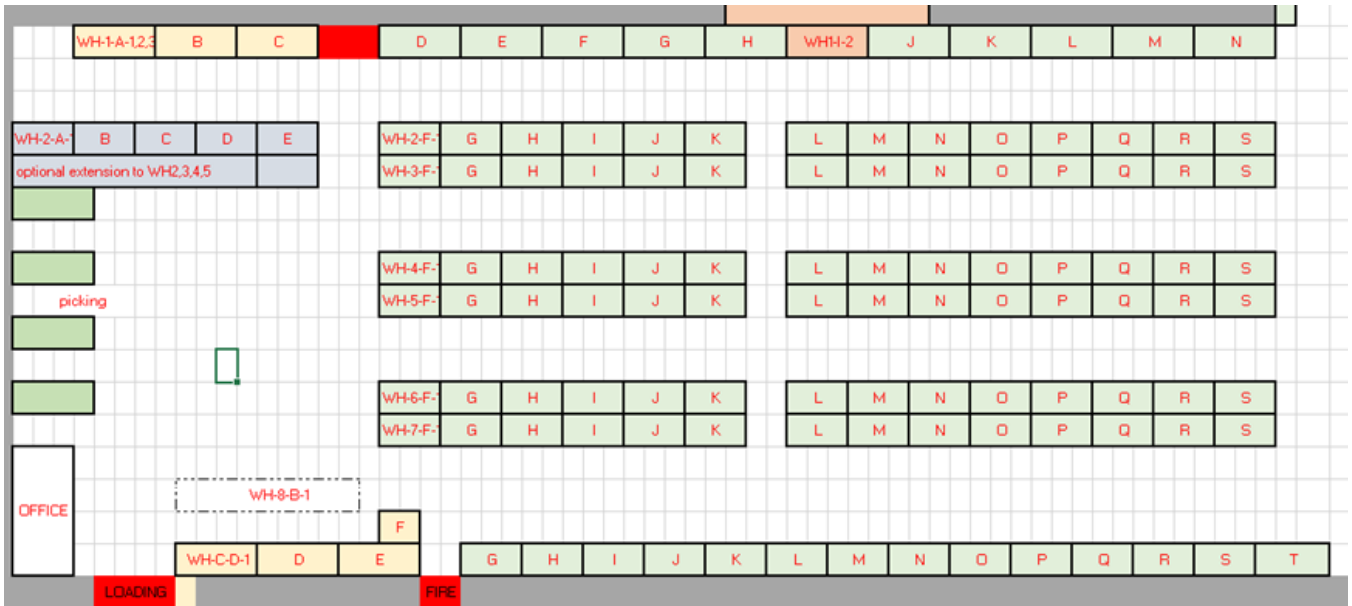
- If an item is stored in a location locked to **Stock**
  - And is then scanned into a location locked to **Display**
  - The item will automatically move to the **Display** stock room
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# Warehouse Mapping

As part of the initial setup, an Implementation Engineer will typically visit your warehouse to advise on the best way to map your warehouse into stock locations.

They will:

- Create stock locations within NCompass
- Provide a document containing barcodes to print and place around the warehouse
- Advise on barcode design depending on storage type (e.g. floor labels vs racking labels)

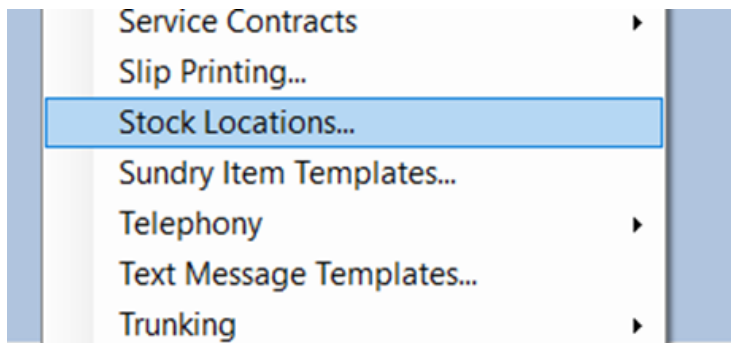


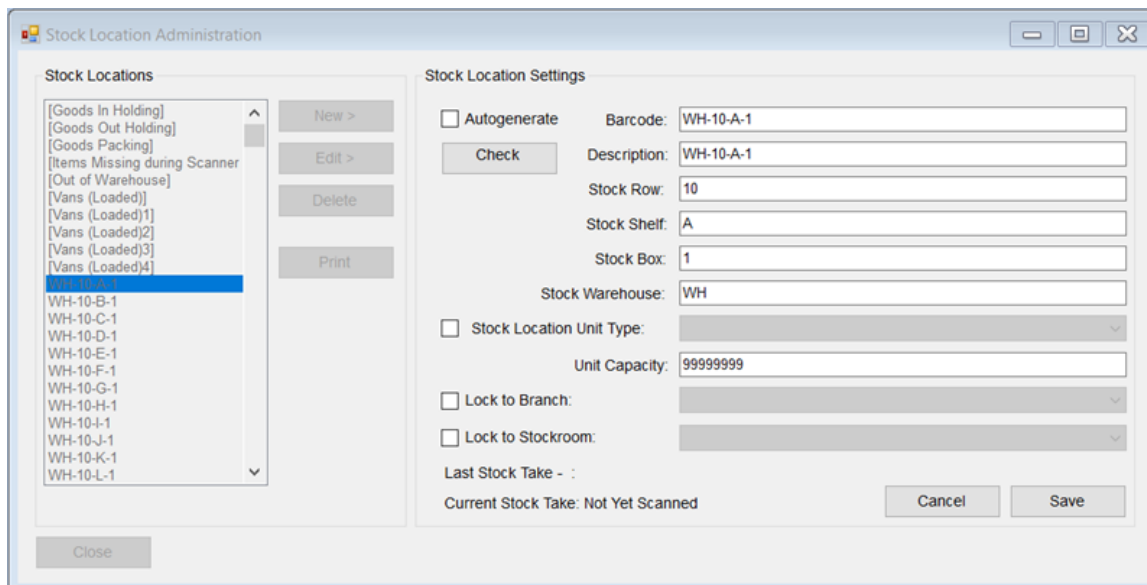
# Stock Location Management

You can create your own stock locations; however, it is strongly recommended that you consult the Implementation or Support Team before making changes.

From NCompass, navigate to:

## Administration > Stock Locations





## Creating a Stock Location

1. Tick **Autogenerate** to automatically build a barcode.
2. Enter a **Description** for the barcode.
3. Enter a **Stock Row**.
4. Enter a **Stock Shelf**.
5. Enter a **Stock Box**.
6. Enter a **Warehouse Prefix**.
7. Enter a **Unit Capacity** (if required).
8. Lock the location to a **Stock Room** if applicable.
  - This is required for Automatic Transfers within branch.
9. Click **Check** to confirm the barcode is unique.
10. Click **Save**.

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## Starting the App

1. Press the power button on the top of the handset to turn on the screen.
2. Swipe up on the lock icon to unlock the device.

No PIN or pattern is required by default, although this can be configured in device settings.

Ensure the device has **Wi-Fi or 4G connectivity**, otherwise the app will not function.

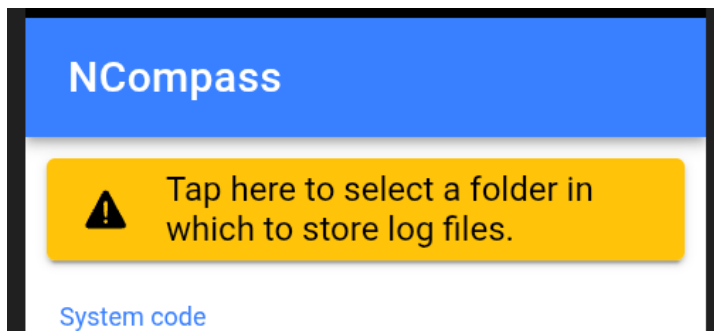
The app icon is blue and displays a warehouse symbol.



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# Logging In

When you Log in for the first time on WAS Version 2.10.0 or later, you will be prompted to setup a storage location for the Apps Log files



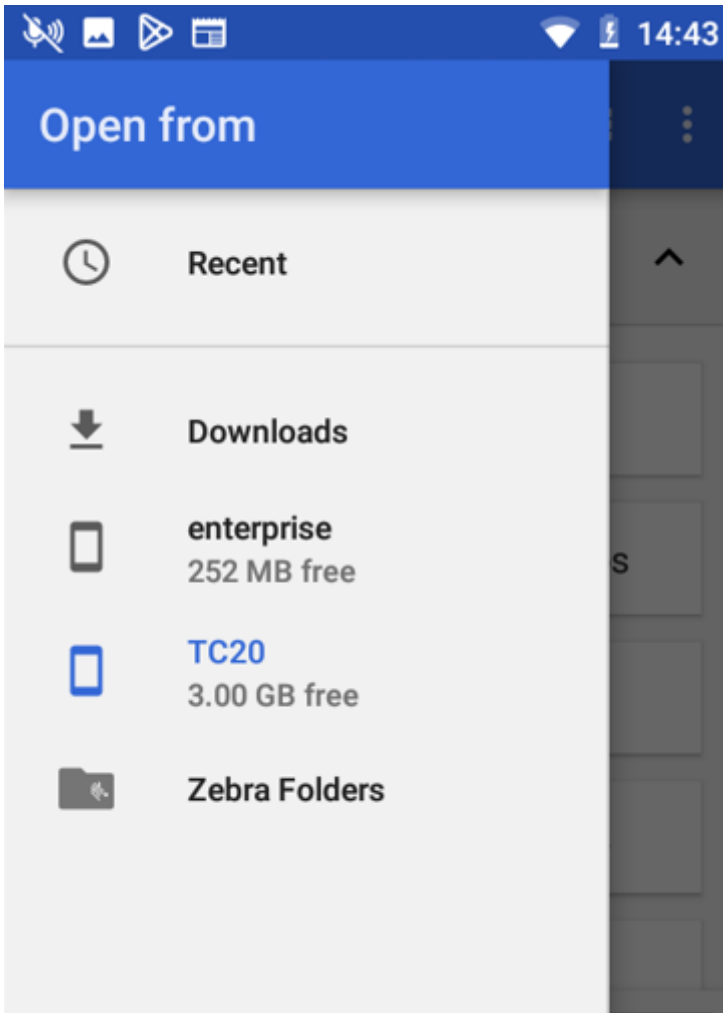
Click the 'Tap Here' Box and it will ask you to select a folder

## Select log folder

You'll be prompted to select a folder where the app can write log files. We suggest creating a folder named "NCompass WaS" for this purpose.

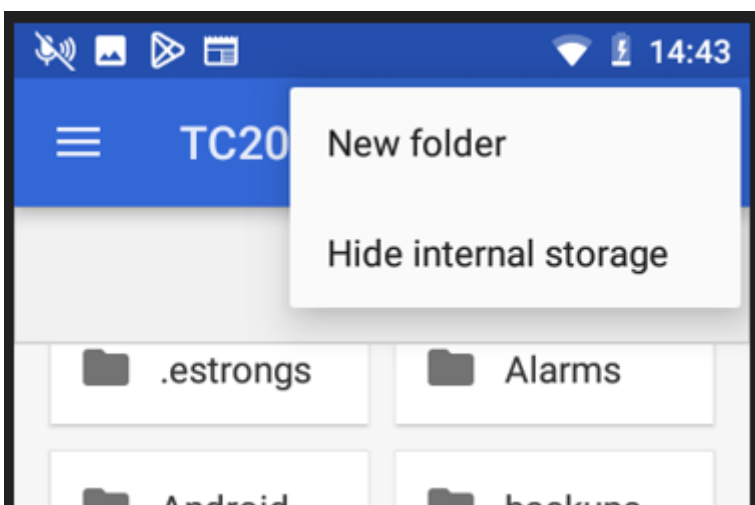
**CANCEL**   **OK**

Click 'Ok'

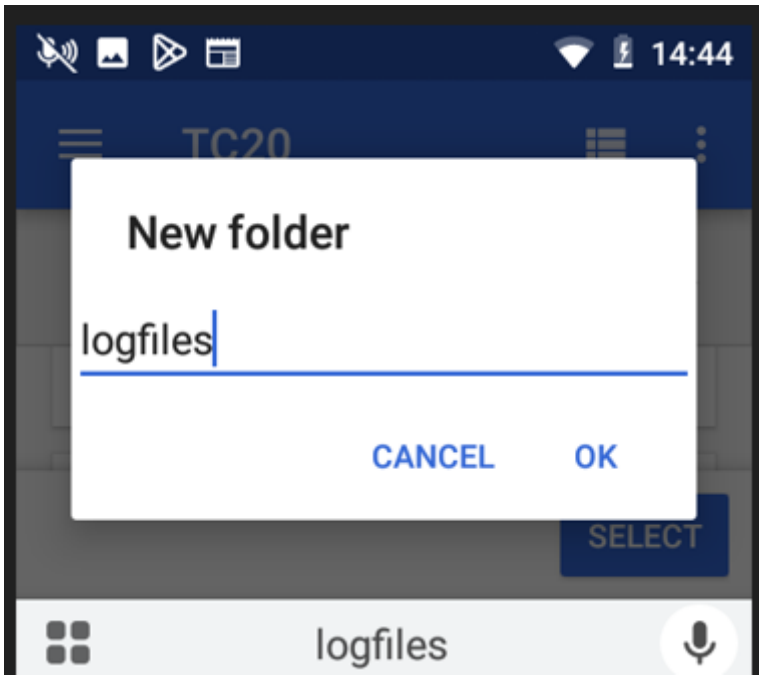


And navigate to a folder on your device, TC20/TC21/TC28 etc

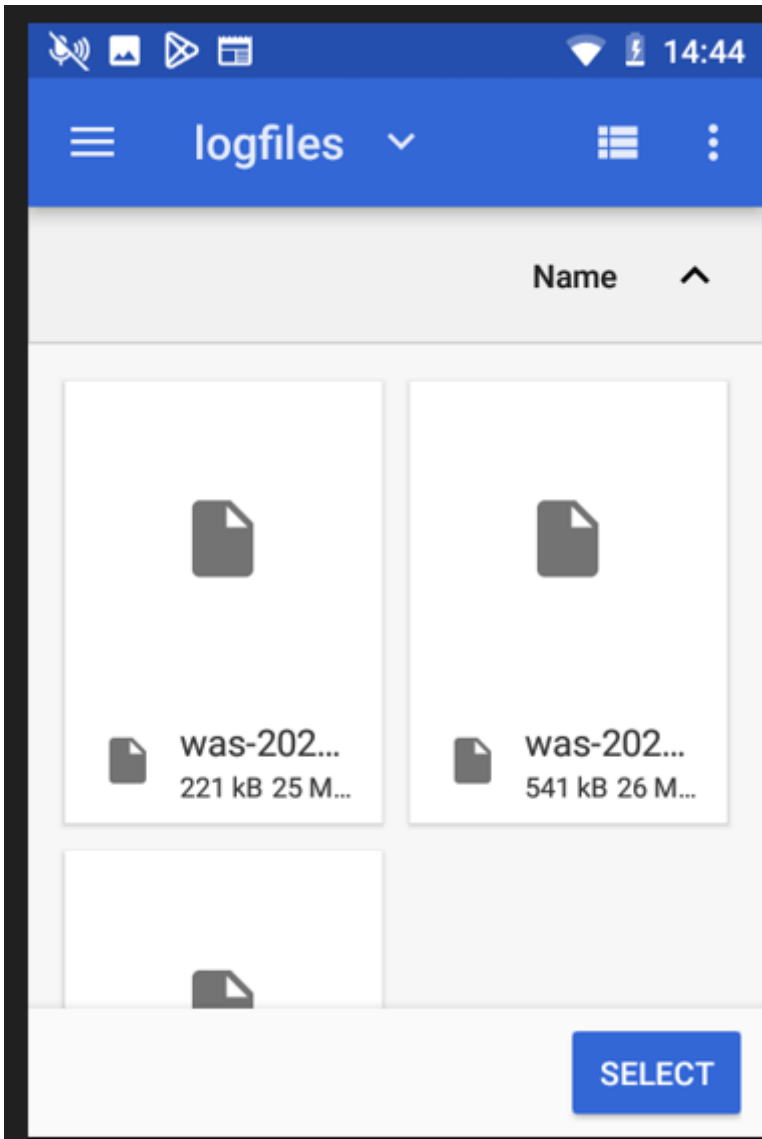
Then Select the new folder option form the menu ...



Enter a suitable folder name and click 'OK'

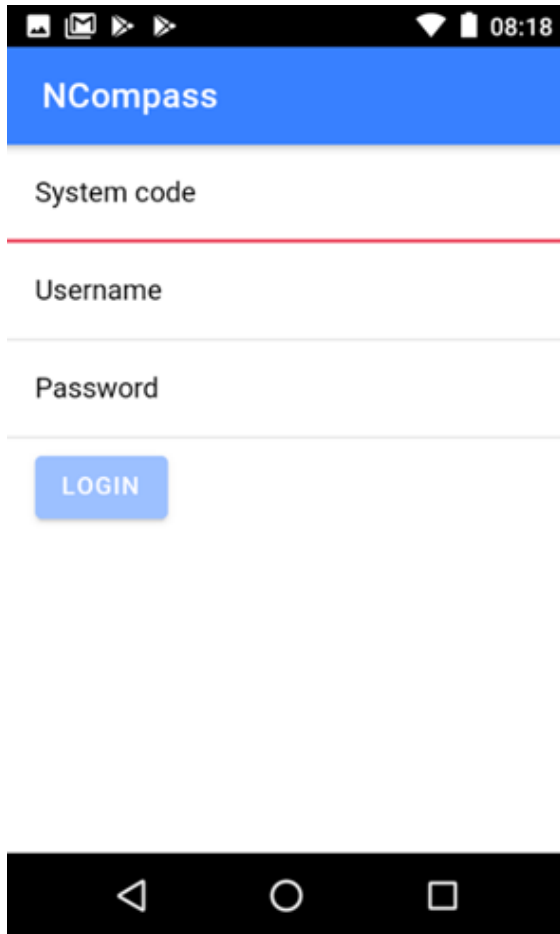


Then click 'Select'



The APP will not ask again, unless teh device is reset

You must log in at least once per day for security reasons. It is recommended to log out at the end of each day.

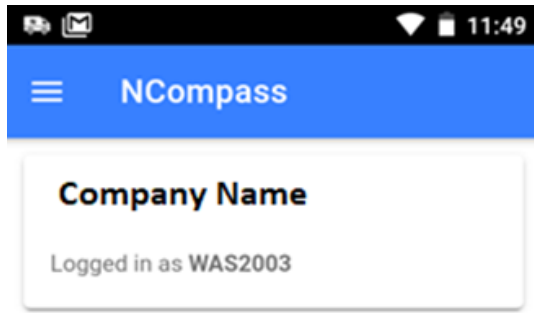


You will be provided with QR codes for login. Scan your QR code to log in.

In the latest release of NCompass, staff selection and PIN entry can be enforced. This ensures: All actions are logged against the signed-in user, Improved auditing and accountability.

**Please contact the Support Team if you are interested in enabling this feature.**

If you get a Salesperson prompt on the scanner when logging in, select yourself from the drop-down menu. If you have a password set up in NCompass input it or just click 'Confirm' to log in.



After a few seconds, you will be logged in and taken to the home screen displaying your company name.

Tip: You can return to the home screen at any time. If another user needs to log in, simply scan their QR code to fast-switch users — no logout required.

## Navigation

Access the full application menu by selecting the menu icon.



Tip: You can open the menu at any time while using the app to quickly switch processes.

# Log Out

To Log Out when you are finished with the App:

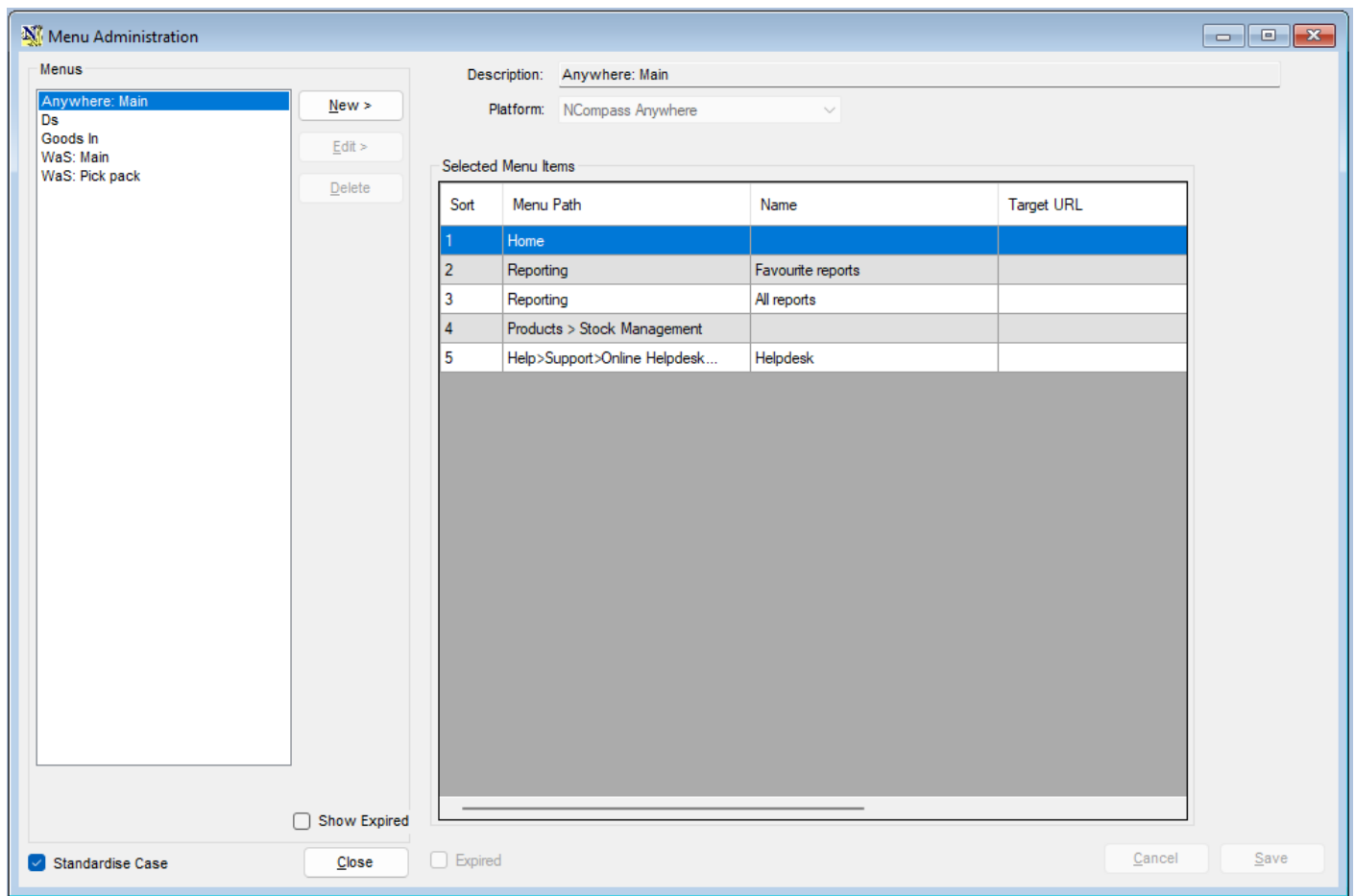
- Click on the **Menu Icon**
- Scroll all the way to the bottom of the menu
- Click **Log Out**

## Customising Menu items

The default setting for the APP will show all menu items, if you would like to limit the menu options, for Example, if you have a user that only needs to do goods in, you can set a custom menu, with just the items the user needs to complete is tasks, in this example, [goods in] and [manual store]

Menus are setup in NCompass Desktop

Administration > Menus



- Click New

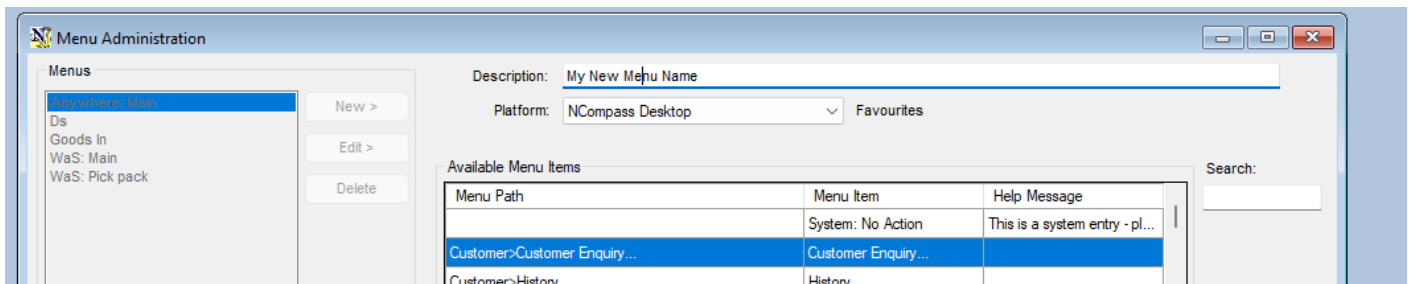
Or

- Highlight a menu and click edit

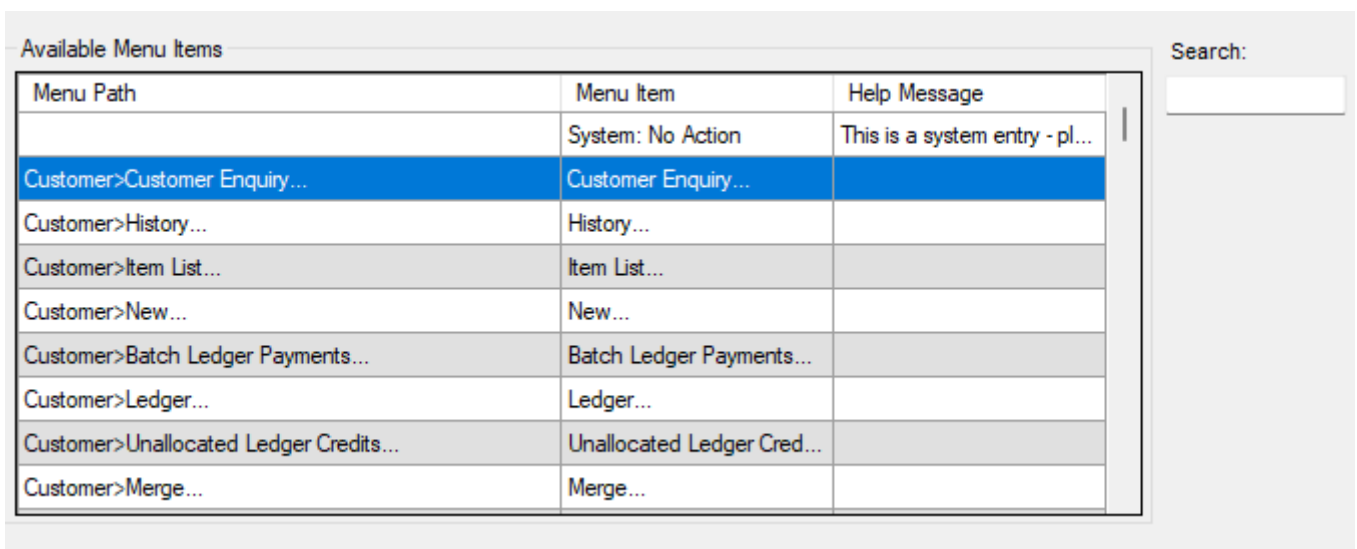
**Note:** Some Menus in the list are system default menus and cannot be edited or deleted

For New menus

- Enter a description for the Menu
- Select the platform the menu is for from the drop down list (WaS)

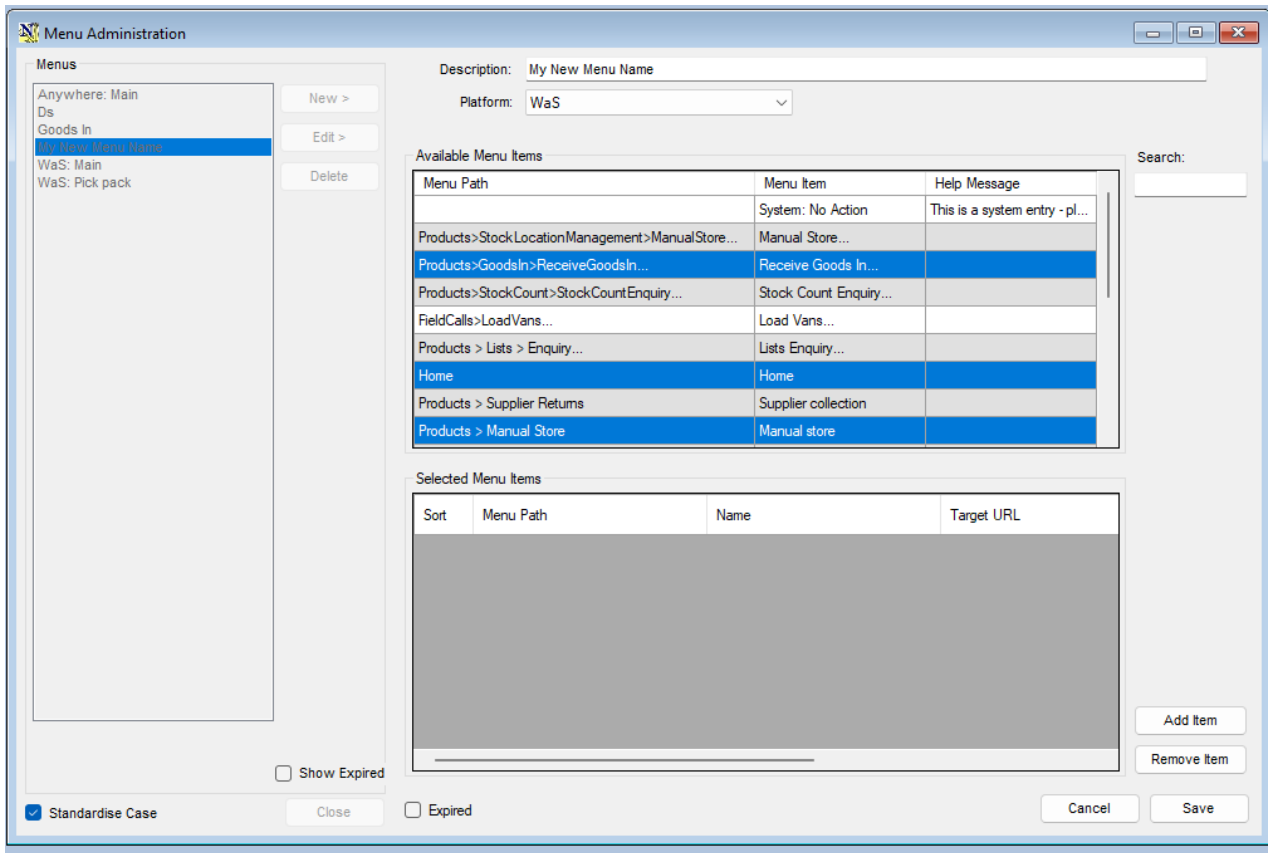


once the platform is selected you will be presented with a full list of the available menu items in the top list



You can also search for the menu item with the search box

Highligh your menu item(s) you want to add (the normal windows multiselect will work with the list)



Click 'Add Item'

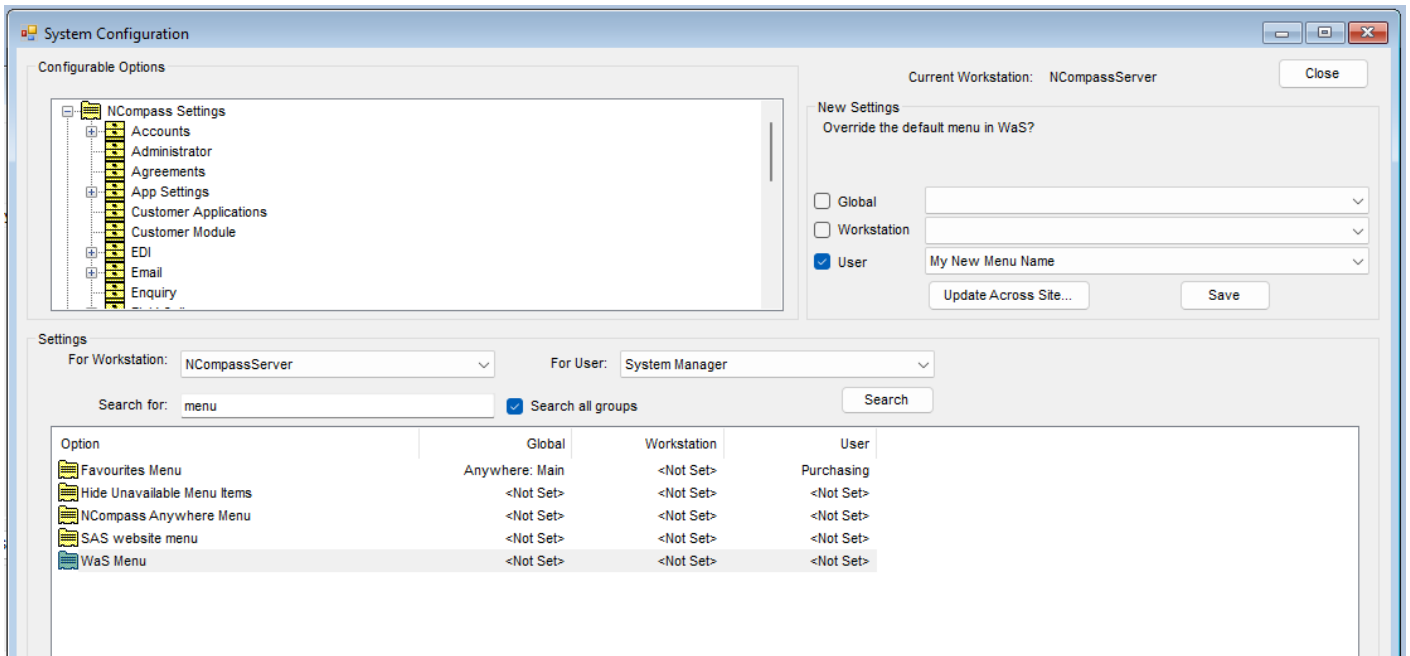
Click 'Save' When you your selection

## Adding your menus to a workstation or User

This is done from

Tool > Configuration

- Enter 'WAS Menu' in the search box and tick 'search all groups'
- Highlight the 'WaS' Menu' entry
- Select the user from the dropdown



You can set the Menu at workstation or user level, As a WaS log in is normally tied to a workstation, it's usually best to set it at User Level

Your new setting will take place the next time the user logs out of WaS and logs back in, or you can force the update by going to the Scanners menu

Menu > Settings

Scroll down to the Data Section

Device ID

78ea7b8852ad05d5

User settings

Engineer: Ben Barter

CHANGE

Branch: Demo Branch 1

Data

Reload lookup data



Printer



- Click on 'Reload Lookup Data'

You New Menu will now be used

