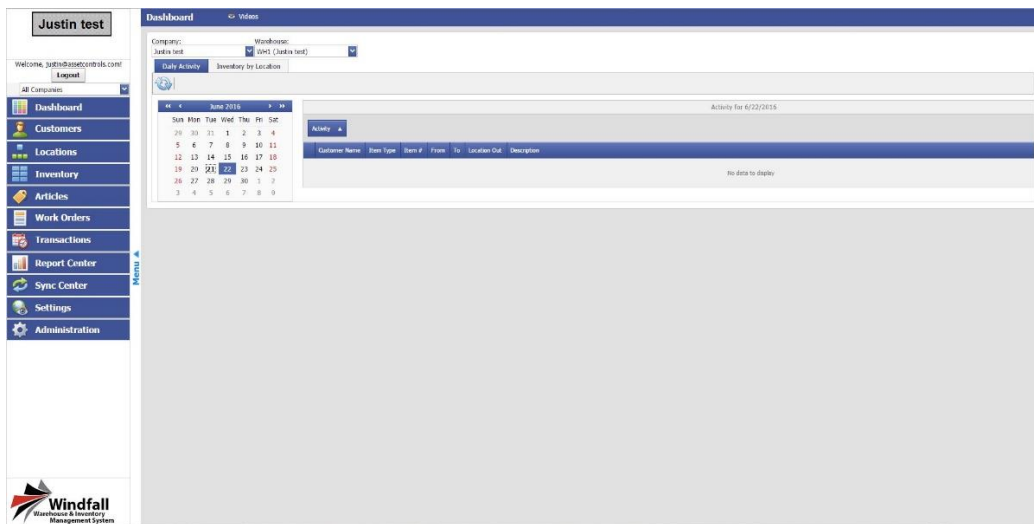# Windfall Commercial Setup Guide

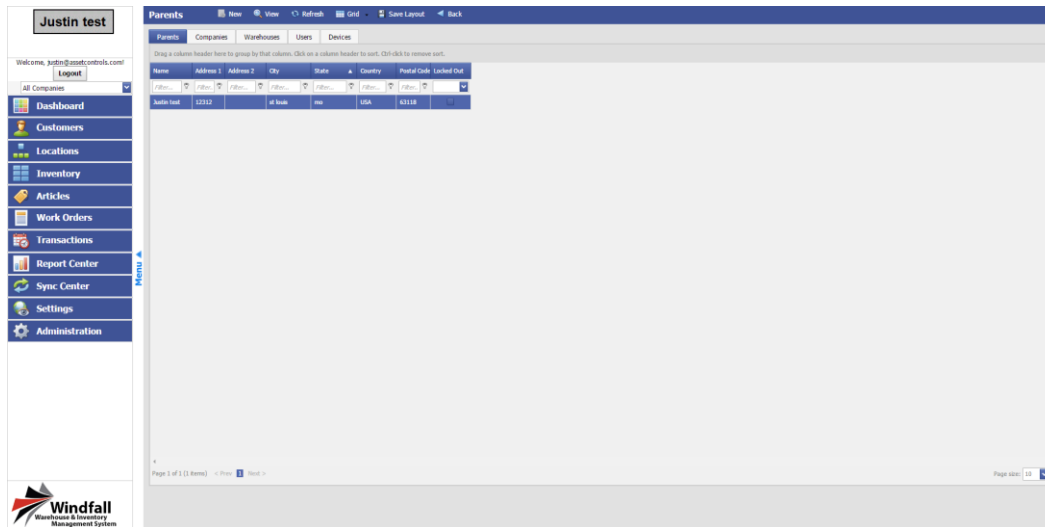## Admin User Creating Additional Users

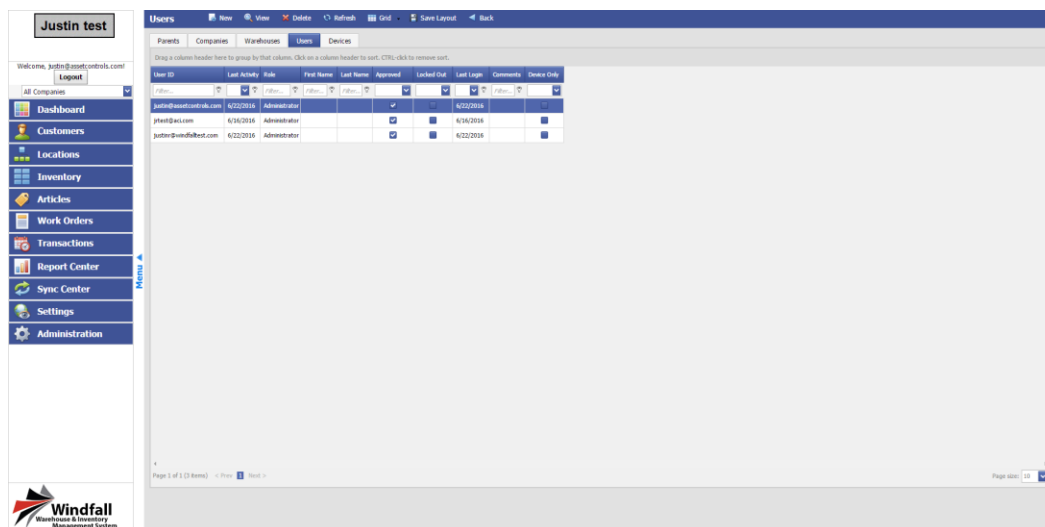- Login using the provided username and password.

- From the Dashboard screen click on the Administration button.
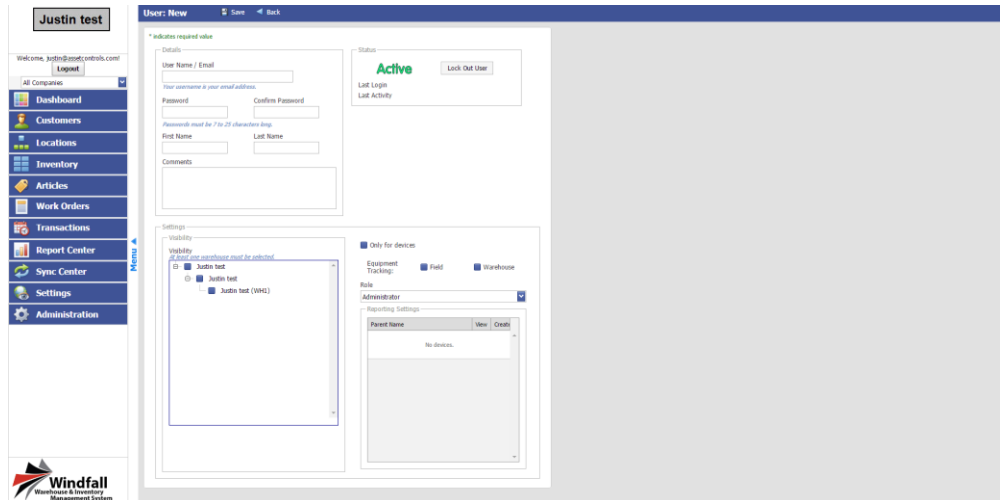
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- The Windfall Administration screen appears. Click on the Users tab.
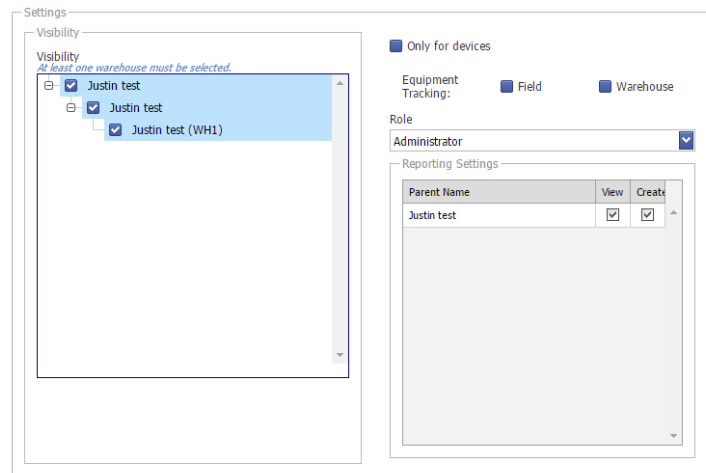
- All existing users will list in the grid. Click the New button to add new user.

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- The New User Window Will appear.
- Enter the user information.

- In the settings box:
  - **Visibility:** Assign a warehouse to the specific user by checking the boxes next to desired warehouse in the Visibility options.
  - **Only for Devices:** If this user has limited access to the warehouse the option to check only for devices limits the user to only have access to Windfall through the Windfall Mobile Pro application.
  - **Role:**
    - **Administrator:** full access to Windfall. The user is able to create other users as well as full utilization of the warehouse functions.
    - **Standard User:** The user has no access to the Administration function in Windfall but is still able to utilize all the functions within the warehouse.
  - **Report Roles:** If the users' needs access to the reports in Windfall check this box.

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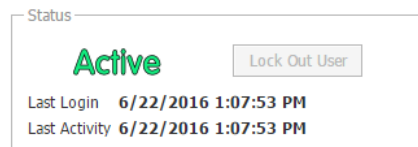
- In the Status box:
  - o **Lock Out User:** If a user needs to be restricted from Windfall the Lock Out User will not let them log in with their assigned user id and password.
  - o **Last Login:** When the user last logged in.
  - o **Last Activity:** When the user last recorded activity.
- Click the save and exit button. The user will now be created and ready to login.
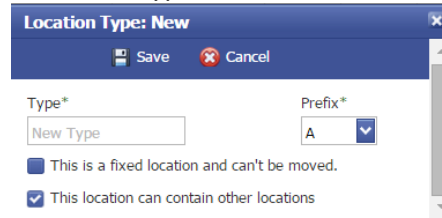
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Adding Location Types

- From the Home screen click on the Locations button.
- The Location screen appears with two selections.
  - **Location Types:** 9 default Location types. (Cage, Employee, Floor, Miscellaneous, Pallet, Rack, Record Storage, Trailer, Vault)
  - **Locations:** The name of the physical warehouse Location Type section of the screen.
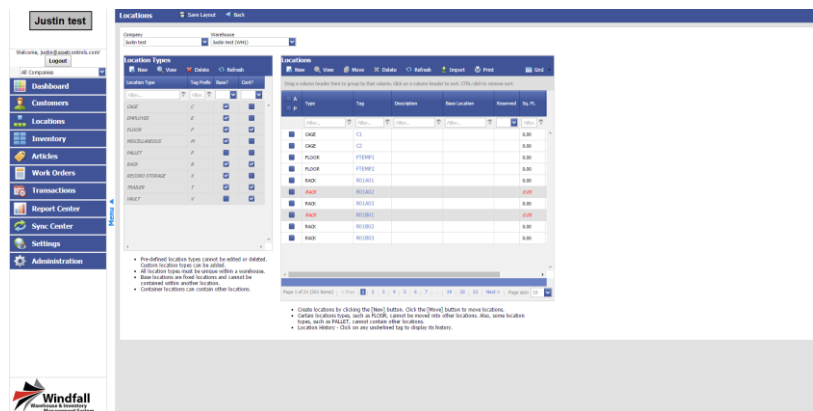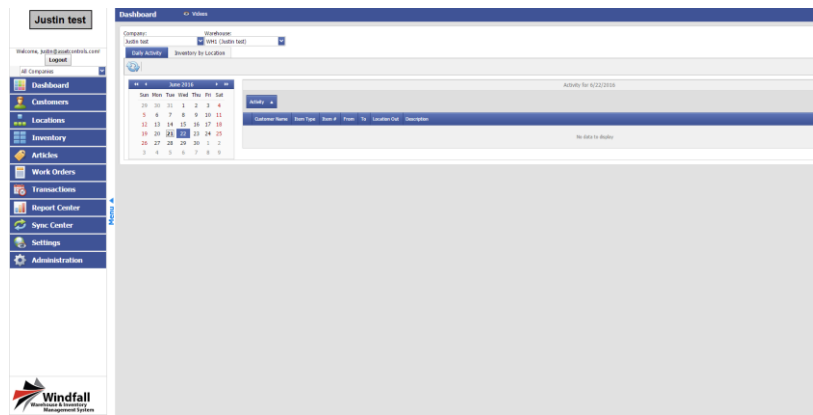
- To add a new Location Type click the New button on the Location Type section of the screen.

- The New Location Type window will appear.

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- Enter the New Location Type and a prefix to associate the type. You cannot use pre-existing types and prefixes.

- Specify if the location type is a fixed location or if the location type can contain other locations.
    - **Fixed Location:** the location cannot be moved throughout the warehouse.
    - **Location can contain other locations:** A location such as a floor can contain a vault location.

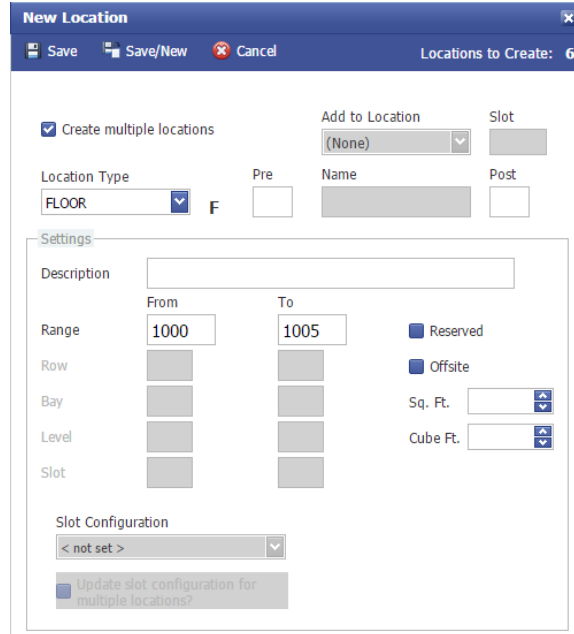- Click Save when finished and the new location type will be added.

Adding New Location

- To add a New Location click on the New button under the Location Section.

- The New Location window will appear.
- Select the Location Type.
- Enter name and any additional information.
    - **Location Type:** The general classification of the location.
    - **Pre and Post**: Additional fields that could be used in defining a direction in the warehouse. (Ex: Floor Pre: N, Name: 001 Location would be FN001)
    - **Name**: The title of the physical location. (Ex: 001)
    - **Add to Location**: If this location is going to be located in another location this option will become active. (Ex: Vault 001 will be added to Floor 001)
    - **Reserved:** The Location is locked. Inventory cannot be added to it until reserved is unchecked.
    - **Offsite**: The Location is outside the main warehouse or at another location.
- Click Save. The Location screen will populate with the new location.

Creating Multiple Locations

- To create multiple locations check the Create Multiple Locations box.
- Select the Location Type.
- Enter the range of locations in the From and To fields.

- Enter any additional information.
- Click the Save button to finalize the save or click the Save/New button to save and continue making more locations.
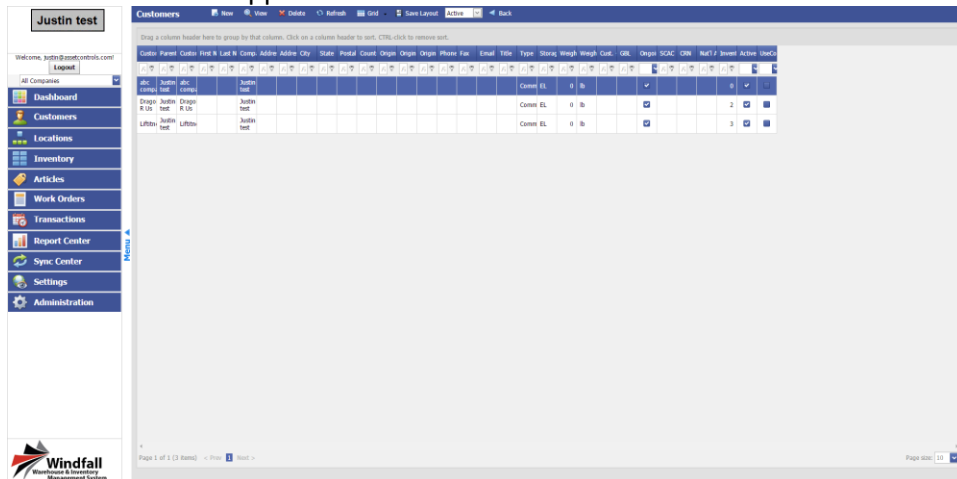
Adding a Customer
- To create new customers click on the Customers button.
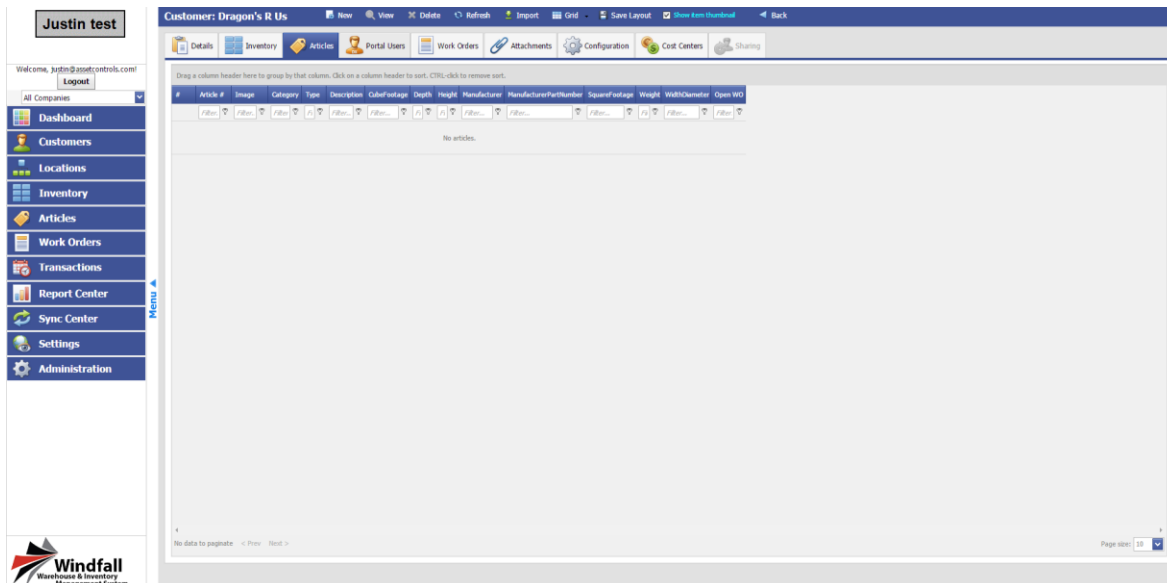- The Customer List screen will appear. Click the New button.

- Type in the Customer name in the field labeled Customer Name.
- Select Commercial from the dropdown Customer Type.
- Select a Storage Type from the dropdown box.
- New customers will default to "Keep Active"
- If the customer will utilize Components, check the Use Components box.

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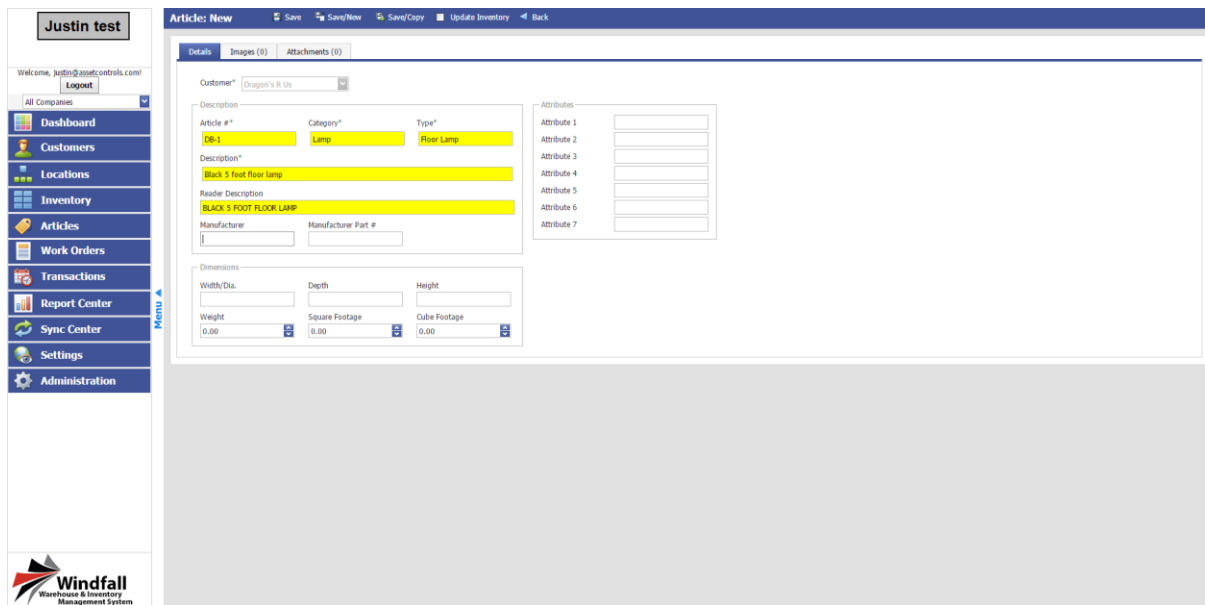
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- Click Save.

Adding Articles

- Articles will only need to be created in the case of that it is known prior to receiving what is coming into the warehouse. There is also the option to import articles which is covered in the Importing Articles document.
- Click on the Article Tab within the customer.

- Click New to create an article.
- Populate the four required fields for each article. (Article #, Category, Type, Description). All other fields are optional.
- The fields will turn yellow signifying the information needs to be saved. Click Save.
- Continue to follow this process until all articles are created.

CONFIGURATION
Adding Scanner Prompts

- To collect additional data about items when using articles or to collect data about items without using articles, scanner prompts will need to be set up.
- Click on the Configuration Tab within the customer.
- Listed on the screen are default scanner prompts. Check the prompts of the fields that will be collected.
- Check the box in the Inv. Display column to be able to view the data within Windfall.
- Check the box in the Windfall Mobile column to be able to view the prompts in the Windfall Mobile app.
- Check the box in the Remember Value column for Windfall mobile to remember the information entered for all pieces when scanning IN product.

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Adding Additional Scanner Prompts

- To create additional scanner prompts click the Add Prompt button.
- Type in the name of the prompt.
- Select the Type. Refer to the descriptions of each type to choose the correct type.
- Enter the Description.
- Check the options for Inv. Display, Windfall Mobile, and Remember Value if needed.
- Click Save.

Type: Yes/No - Windfall Mobile will give you the option to select Yes or No when entering data for that prompt
Date - Windfall Mobile will give you a date prompt field to enter for that prompt
Whole Number - Windfall Mobile will show a prompt field to enter a number
Decimal - Windfall Mobile will allow the user to enter a number with a decimal field
Text - Windfall Mobile will allow the user to enter any text data

Length: The field length for the prompt. For example if the field is set to 50.00 this means you can enter 50 characters into that given field.
If an invalid length is entered, a length will be determined based on your input.
WholeNumber and Decimal lengths can be at most 15 numbers. Text can have a length of 8000 characters.
For Decimal lengths, the numbers before and after the decimal represent those lengths respectively.
For example, a decimal length of 3.5 will allow values up to 999.99999.

Windfall Mobile Prompt Order lists your inventory prompts in the order they will display in Windfall Mobile.

To change the prompt order, highlight the prompt and use the arrows to move the prompt up or down within the list.