
BarTender Track & Trace

User Guide

Version 12.1



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Introduction to BarTender Track & Trace

Track & Trace is an inventory management solution for BarTender users provided by Seagull Software. This is a subscription add-on for BarTender Cloud.

Track & Trace is ideal for small businesses where inventory tracking is important for the business and currently performed manually. Track & Trace is a great alternative to managing assets with spreadsheets or pen and paper. It can also be used in:

- Manufacturing
- Warehousing
- Food
- Retail
- Medical Devices
- Healthcare

Disclaimer: The application no longer has unrestricted access to external directories. Instead, users must select the folder where files will be saved or retrieved. This change ensures greater control and security over file access while maintaining the necessary flexibility for managing configurations, reports, or other documents.



Currently, Bartender can be used as the printing or encoding solution for item-level labeling.

Reviewing Assets in Track & Trace

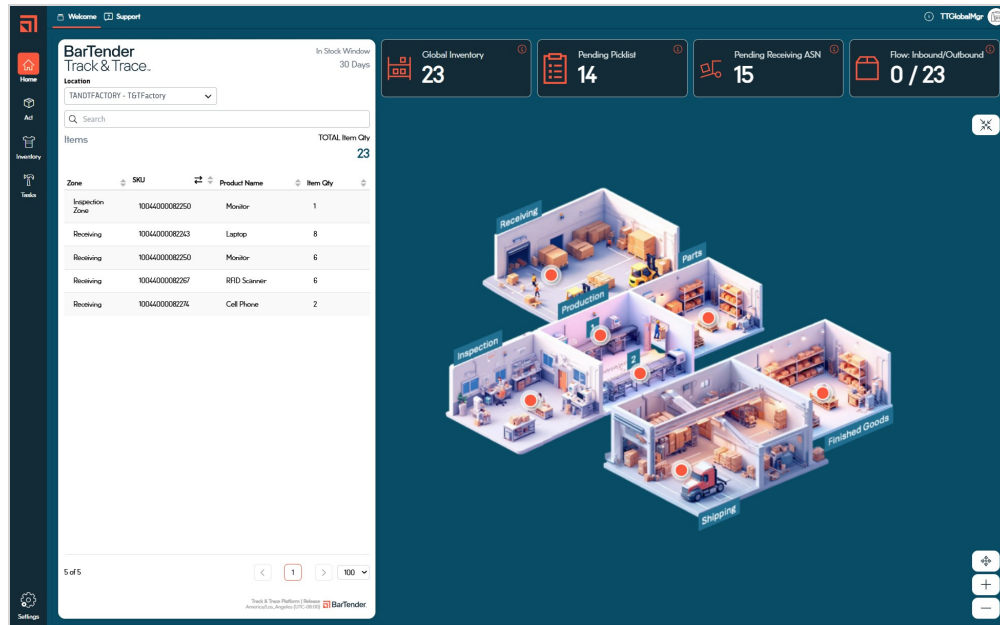
The Track & Trace home page provides an overview of Track & Trace sites .

In This Section

- [The Track & Trace home page](#)
- [Using the Track & Trace home page](#)

The Track & Trace Home Page

The Track & Trace home page is designed to provide an overview of Track & Trace sites and show the movements of assets at glance: what is on site, what has come into the site, what has left the site. An administrator can quickly search for assets utilizing various methods and check the fulfillment of each zone.



The home page is divided into two sections: The Inventory panel and the site map.



The home page is available in BarTender Track & Trace Professional and Enterprise editions.

The home page enables you to:

- Monitor what goes in and out of the site to control the flows and the activity.
- Check the level of stock by site and zone at any time.
- Search a specific reference and show it on the map to localize any asset or lack of asset immediately.



While site managers and site operators have access to the Track & Trace Console, only the global manager has access to all sites through the home page. Site managers and site operators are restricted to information for their approved sites only.

Tracking Assets

Use the home page track assets. When you first open the Track & Trace home page, the page displays the Assets list. If a site has been selected, this list displays all the assets from the selected site. If a zone has been selected on the map, this list displays only the assets in that zone.

Use the Search field to specify a set of assets to display in the list. You can search by GTIN, SKU, or product name. Once the search completes, the list displays the assets that match the search parameters.

The screenshot shows the BarTender Track & Trace interface. The top navigation bar includes 'Welcome' and 'Support'. The main header displays 'BarTender Track & Trace.' and 'In Inventory Window 5 Days'. A sidebar on the left contains icons for Home, Act, Inventory, and Tasks. The main content area features a 'Site' dropdown menu set to 'TANDTWAREHOUSE - T&TWareho...', a search field, and a table of items. The table has columns for Zone, SKU, Product Name, and Item Qty. The total item count is 11.

Zone	SKU	Product Name	Item Qty
Receiving	10044000082243	Laptop	7
Receiving	10044000082250	Monitor	1
Shipping	10044000082243	Laptop	1
Storage Area 2	10044000082250	Monitor	1
Storage Area 2	10044000082267	RFID Scanner	1

Select an item in the search results to display a detail modal containing additional information about the selected asset.





The screenshot shows the BarTender Track & Trace interface with a detail modal open for a 'LAPTOP' asset. The modal displays the asset's name, quantity (7 QTY), and a table of EPC (Electronic Product Code) values. The table has columns for EPC, Status, and Last Scan. The asset is currently 'Sellable Not Accessible'.

EPC	Status	Last Scan
303402AF8069800624521001	Sellable Not Accessible	12/01/2025
303402AF8069800624521002	Sellable Not Accessible	12/01/2025
303402AF8069800624521003	Sellable Not Accessible	12/01/2025
303402AF8069800624521004	Sellable Not Accessible	12/01/2025
303402AF8069800624521005	Sellable Not Accessible	12/01/2025
303402AF8069800624521006	Sellable Not Accessible	12/01/2025
307804AC03089800000006088	Sellable Not Accessible	11/30/2025

The Map


A map of the selected site displays in the home page's main panel. This map can be zoomed in or out and moved around the home page.



-  Click to zoom in on the map.
-  Click to zoom out on the map.
-  Click, then drag the map to a new location on the home page. Click again to anchor the map at the new location.
-  Click to return the map to its original size and location on the home page.



You can also use the wheel on your mouse to zoom in and out.

To see a summary popup of any zone on the map, simply click  in that zone.

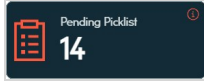


- Displays the total number of items in the selected zone.
- Filters the Items list to show only items from that zone.

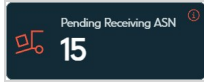
Across the top of the map are three KPIs that provide additional information about the site.



Displays the total number of items available in stock.



Displays the number of picklists to be handled in the application.



Displays the number of ASN expected to be received.

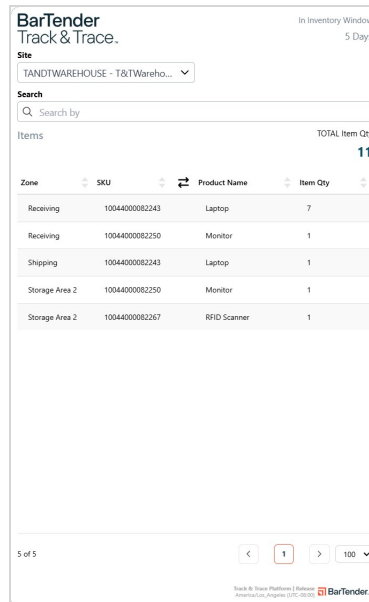


Displays the total number of inbound and outbound items in the past 24 hours.

Using the Track & Trace Home Page

The Home page provides at-a-glance item information for the selected site. It includes an inventory panel, an item detail panel, KPIs, and a map of the site.

To search for items in inventory



1. In the **Site** field on the Inventory panel, select the site to work with.



Locations in the Site list are limited by the user's role. Operators and Site Managers are limited to the sites for which they have permissions.

2. In the **Search** field, enter the full or partial text of the items to work with. You can search by GTIN, SKU, or product name.

The items display below the **Search** field with the following details:

- **Zone:** Displays the inventory zone where the item is located.
- **Identifier (SKU or GTIN):** Displays the item's SKU or GTIN. By default, GTIN is displayed.
- **Product Name:** Displays the name of the item.
- **Item Quantity:** Displays the number of items in the inventory.
- **Total Item Qty:** Displays the total number of items in the search results list.

3. Click  in any column heading to sort the list by that column.

A portion of the control darkens to indicate the direction of the sort. For example, ▲.

4. Click ↔ to switch between SKU and GTIN in the identifier column.

To view item details

The screenshot shows the BarTender Track & Trace interface. On the left, the 'Inventory' panel displays a list of items with columns for Zone, SKU, Product Name, and Item Qty. The 'Site' is set to 'TANDTWAREHOUSE - T&TWareho...'. A search bar is present. The right panel shows details for a 'LAPTOP' item, including its EPC, status ('Sellable Not Accessible'), and last scan date (12/01/2025). The interface includes navigation controls like arrows and a page number indicator.

1. In the **Site** field on the Inventory panel, select the site to work with.



Locations in the Site list are limited by the user's role. Operators and Site Managers are limited to the sites for which they have permissions.

2. In the **Search** field, enter the full or partial text of the items to work with. You can search by GTIN, SKU, or product name.
3. In the search results list, select the asset whose details you want to view.

A pop-out panel displays the following details:

- **Item Name:** Displays the name of the item.
- **Zone:** Displays the zone within the site where the item is located.
- **Identifier (SKU or GTIN):** Displays the asset's SKU or GTIN.
- **Quantity:** Displays the number of items in the zone.

- **EPC:** Displays the item's Electronic Product Code.
 - **Status:** Displays the item's status code.
 - **Last Scan:** Displays the date the item was last scanned.
4. Click ▲ in any column heading to sort the list by that column.
- A portion of the control darkens to indicate the direction of the sort. For example, ▼
5. Click ↩ to close the item detail list.

To view items by location



- On the map, click ● in the zone whose information you want to view.
 - A KPI for that zone displays containing
 - The total number of items in the selected zone.
 - The name of the zone.
 - The Items panel displays the assets in the selected zone.

fake toggler

1. fake stuff 1
2. fake stuff 2

Managing Track & Trace

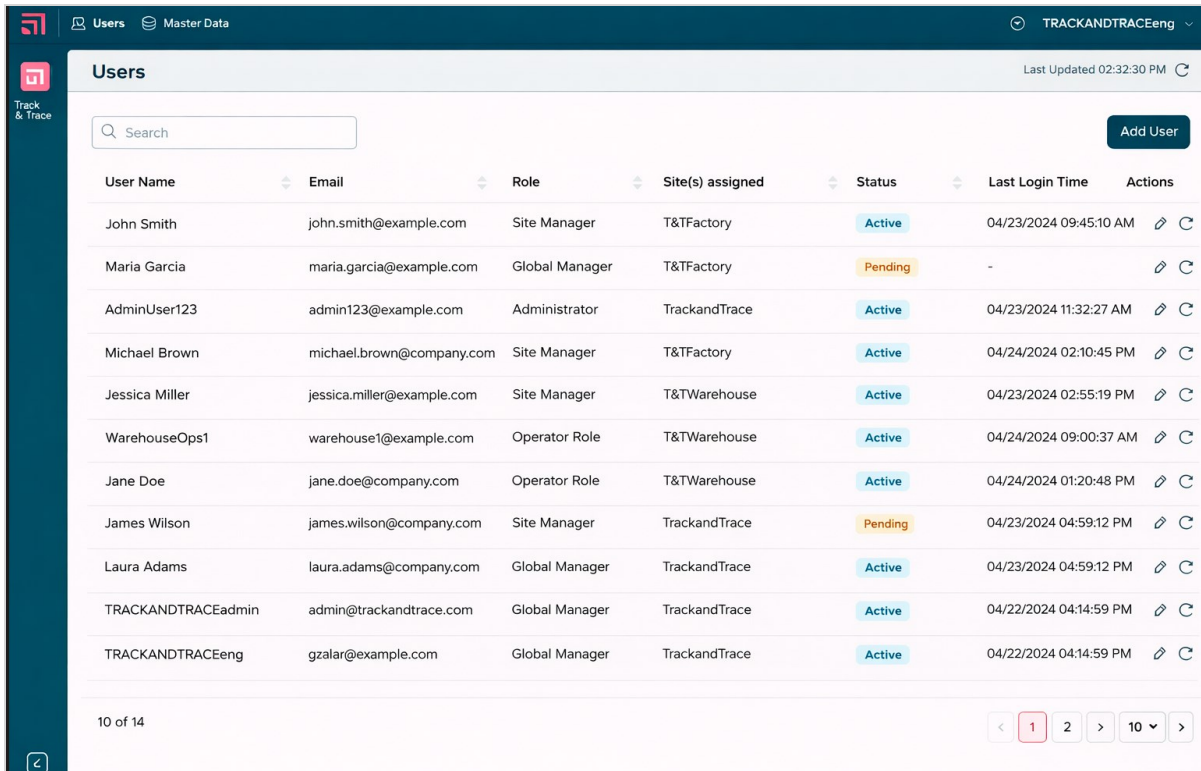
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The Users Dashboard

The User Dashboard enables Global and Site Managers to create users (Site Managers or Operators) and assign these new users roles and locations. This provides managers with the ability to manage their own personnel without having to contact Seagull Software.

User management now includes role-based access to user lists, enhanced search capabilities, and comprehensive audit logging for identity and access changes, improving security, visibility, and governance.



User Name	Email	Role	Site(s) assigned	Status	Last Login Time	Actions
John Smith	john.smith@example.com	Site Manager	T&TFactory	Active	04/23/2024 09:45:10 AM	 
Maria Garcia	maria.garcia@example.com	Global Manager	T&TFactory	Pending	-	 
AdminUser123	admin123@example.com	Administrator	TrackandTrace	Active	04/23/2024 11:32:27 AM	 
Michael Brown	michael.brown@company.com	Site Manager	T&TFactory	Active	04/24/2024 02:10:45 PM	 
Jessica Miller	jessica.miller@example.com	Site Manager	T&TWarehouse	Active	04/23/2024 02:55:19 PM	 
WarehouseOps1	warehouse1@example.com	Operator Role	T&TWarehouse	Active	04/24/2024 09:00:37 AM	 
Jane Doe	jane.doe@company.com	Operator Role	T&TWarehouse	Active	04/24/2024 01:20:48 PM	 
James Wilson	james.wilson@company.com	Site Manager	TrackandTrace	Pending	04/23/2024 04:59:12 PM	 
Laura Adams	laura.adams@company.com	Global Manager	TrackandTrace	Active	04/23/2024 04:59:12 PM	 
TRACKANDTRACEadmin	admin@trackandtrace.com	Global Manager	TrackandTrace	Active	04/22/2024 04:14:59 PM	 
TRACKANDTRACEeng	gzalar@example.com	Global Manager	TrackandTrace	Active	04/22/2024 04:14:59 PM	 




 The users list can be sorted any of the columns except Actions.

The User Dashboard:

- Gives managers a quick, at-a-glance presentation of users and their information for a tenant (Global Managers) or a site (Site Managers).
- Facilitates adding and removing users directly.
- Accessible only by Global or Site Managers.

The Users page presents information in the following columns:

<input type="checkbox"/> User Name	Email	Role	Site(s) assigned	Status	Last Login Time	Actions
<input type="checkbox"/> Alex Johnson	user1@example.com	 Global Manager	T&TFactory	Active	12/12/2025 12:00 PM	  

- **User Name:** The name of the user.
- **Email:** The user's email address. This is used to verify the user account.
- **Role:** The roll assigned to the user, either Site Operator, Site Manager, or Global Manager.
- **Site(s) Assigned:** The sites within the tenant to which the user is assigned. For Site Operators and Site Managers, there is only a single entry. Global Managers are assigned to all of the sites in the tenant.
- **Status:** Indicates whether the user is active or pending.
- **Last Login Time:** The last time the user logged into the site.
- **Actions:** This column contains icons that enable the dashboard user to:
 -  Disable a user. The user is unable to access the work site, but remains in the system.
 -  Resend the user's invitation.
 -  Delete a user.

A panel displays on the right-hand side of the Users section whenever a user is selected or the **Add User** button is clicked. The controls the panel contains depends on the what is selected.

KPIs

KPIs display at the top of the the User Dashboard page. Their content is determined by the role of the user: a Global Manager sees information for all users; a Site Manager sees only users from their site.

The displayed KPIs are:

- Total Users
- Active Users
- Pending Users
- Disable Users

Managing Users

The User Dashboard page enables Global and Site Managers to control user accounts independently, including creating, editing and deleting users; assigning roles and site access; and tracking key user-related KPIs.

To access the User Dashboard

- From the Console, select **Settings, Track & Trace**, then **Users**.

To add a user

1. In the users list, click **Add User**.
2. In the Add New User panel, enter the user's name and email address.
3. Select the user's role.
4. Select the site to which the user will be assigned.



If a Global Manager is creating another Global Manager user, the site dropdown is disabled; Global Managers have access to all sites in the tenant.

5. Click **Add User**.

Track & Trace sends an email to the user with a link where they can validate their user account.



Once a user is added, they are considered Pending until their email address has been validated.

To activate an account

1. Click the link in the invitation email to go to the activation site.
2. Enter a new password.
3. Log in to Track & Trace.

To resend an invitation

If a user has not responded to an invitation and has a Pending status rather than Active status, the manager can resend the invitation to the user.

1. In the users list, select the user whose invitation you want to resend.

2. Click .

Track & Trace sends an email to the user with a link where they can validate their user account.



If the user has been disabled, the account must be reactivated before the invitation can be resent.

To modify a user

1. In the users list, select the user you want to modify.
2. In the Selected User's Details panel, modify the user's email address.
3. Select the user's new role.



- A Site Manager can only change the role of a Site Operator or another Site Manager assigned to their site.
- A Global Manager can change any user role to any other user role.

4. If the user is a Site Manager or Operator, select the new site to which the user will be assigned.



Only a Global Manager can change the assigned site of a Site Manager or Operator.

5. Click **Save**.

To reset a user's password

1. In the users list, select the user whose password you want to reset.
2. In the Selected User's Details panel, click **Reset Password**.

Track & Trace sends an email to the user with a link where they can reset their password.

3. Click **Save**.

To search for a user

1. In the Search field on the Users panel, enter the name or email address of the user you want to find.


2. Click .

The user is selected in the user list and the list scrolls until the selected user is visible.




When you search for a user, the Search feature looks for the User Name, Email, or assigned Site.

To delete a user

1. In the list of users on the Users panel, select the user you want to delete.
2. In the Actions column, click .
3. Confirm that you want to delete the user.

To disable a user

When a manager disables a user, the user is unable to access the work site, but remains in the system.

1. In the list of users on the Users panel, select the user you want to disable.
2. In the Actions column, click .
3. Confirm that you want to disable the user.



A disabled user can be reactivated if needed.

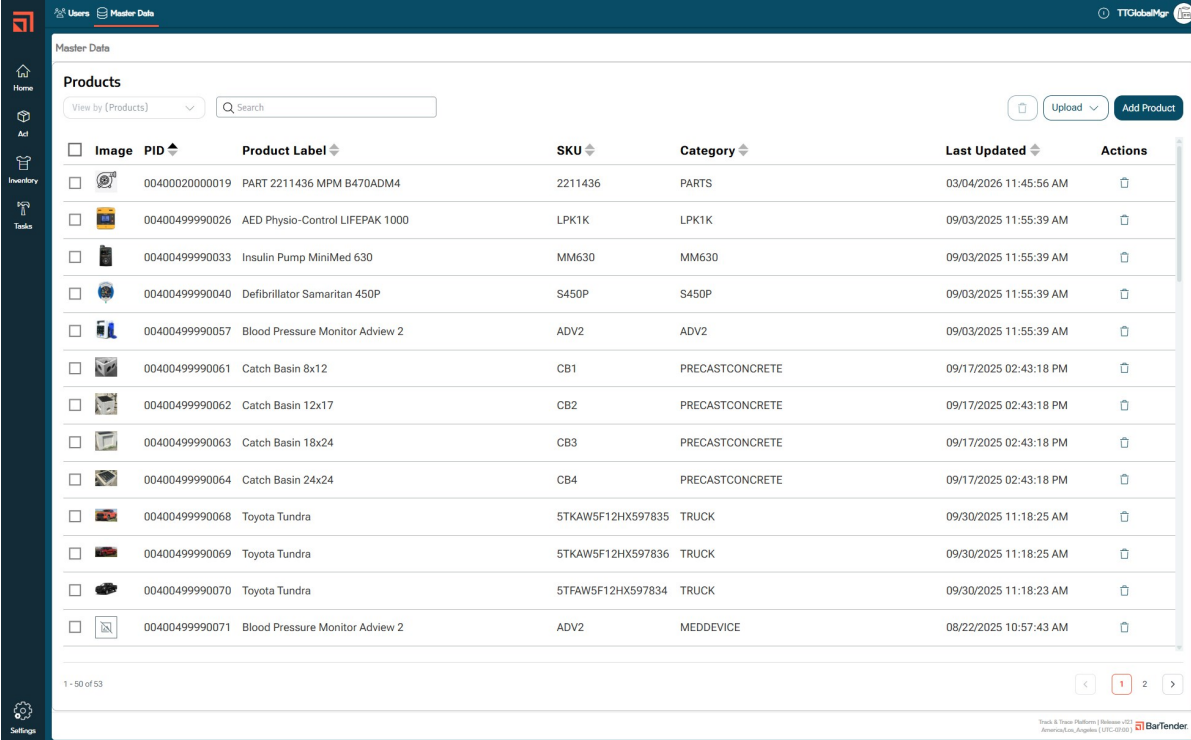
The Master Data Dashboard

Global Managers use the Master Data Dashboard to create, update and delete the site's product catalog.

- Use the dropdown below either Products or Categories to switch between viewing data for your products and your categories.

Products

Product entries represent the physical products available from your site. Browser through the listed products to view them.




The screenshot displays the 'Master Data' dashboard with a 'Products' view. The interface includes a search bar, a 'View by (Products)' dropdown, and an 'Add Product' button. The product list is as follows:

Image	PID	Product Label	SKU	Category	Last Updated	Actions
	0040020000019	PART 2211436 MPM B470ADM4	2211436	PARTS	03/04/2026 11:45:56 AM	
	00400499990026	AED Physio-Control LIFEPAK 1000	LPK1K	LPK1K	09/03/2025 11:55:39 AM	
	00400499990033	Insulin Pump MiniMed 630	MM630	MM630	09/03/2025 11:55:39 AM	
	00400499990040	Defibrillator Samaritan 450P	S450P	S450P	09/03/2025 11:55:39 AM	
	00400499990057	Blood Pressure Monitor Advview 2	ADV2	ADV2	09/03/2025 11:55:39 AM	
	00400499990061	Catch Basin 8x12	CB1	PRECASTCONCRETE	09/17/2025 02:43:18 PM	
	00400499990062	Catch Basin 12x17	CB2	PRECASTCONCRETE	09/17/2025 02:43:18 PM	
	00400499990063	Catch Basin 18x24	CB3	PRECASTCONCRETE	09/17/2025 02:43:18 PM	
	00400499990064	Catch Basin 24x24	CB4	PRECASTCONCRETE	09/17/2025 02:43:18 PM	
	00400499990068	Toyota Tundra	5TKAW5F12HX597835	TRUCK	09/30/2025 11:18:25 AM	
	00400499990069	Toyota Tundra	5TKAW5F12HX597836	TRUCK	09/30/2025 11:18:25 AM	
	00400499990070	Toyota Tundra	5TFAW5F12HX597834	TRUCK	09/30/2025 11:18:23 AM	
	00400499990071	Blood Pressure Monitor Advview 2	ADV2	MEDDEVICE	08/22/2025 10:57:43 AM	

The Products view presents information in the following columns:

- **Image:** Any image attached to the product entry.
- **PID:** The product's identifier, either entered directly in the PID field or generated by Track & Trace. The PID's value has the syntax of a GTIN. Generated PIDs are valid GTINs, but they are for internal use only and cannot be shared with third parties
- **Product Label:** The description of the product entered in the Product Label Short field.
- **SKU:** The SKU assigned to the product.
- **Category:** The Category selected for the product.
- **Last Updated:** The last time the product entry was updated.

- **Actions:** This column contains icons that enable the dashboard user to:
 -  Delete the corresponding product.

The Products view enables a user to:

- Browse the existing list of products.
- Search for specific products.
- Add a new product.
- Modify an existing product.
- Delete a product.
- Import existing lists of products from a .csv file.

Managing Products

The Master Data Dashboard page enables Global Managers to create, update, and delete their product catalog, including creating or changing the Categories hierarchy; creating, editing, and deleting products; assigning pictures to products; and importing bulk product ,csv files.

Browse the existing products and categories on the Master Data Dashboard page.

To access the User Dashboard

- From the Console, select **Settings, Track & Trace**, then **Master Data**.

Working with Products

To add a new product

1. On the Category page, click **Add Product**.
2. In the Add New Product section, upload or drag an image in .jpg or .png format for the product.

The image is stored by Track & Trace and must be a file, not a link to a file.

3. In the PID field, enter or regenerate the product's PID. By default a PID is automatically generated for this field.

The PID is the main identifier for the product. It is a 14-digit numerical Identifier where the last digit is CRC. A PID can be a GTIN-14, an EAN13, or a UPC, but does not have to be.



The PID must be unique; it cannot be a PID currently used by another product.

4. In the SKU field, enter the product's SKU, in alpha-numeric format. This is used mostly for internal purposes and is not necessarily shared with external parties.
5. Select the category to which this product belongs.
Categories are defined in the Category view.
6. In the Vendor Product Number field, enter the optional VPN, in alpha-numeric format. This number is used for storing the product by the supplier's identification.
7. Enter a label for the product.
 - **Short:** Enter a short description of the product to be used on smaller screens.
 - **Long:** Enter a fuller description of the product to be used on larger screens.
8. Enter information about the commercial entity associated with the product. A product's brand is identified by:

- **Code:** An internal, alpha-numeric identifier.
 - **Label:** A descriptive name displayed in user interfaces and reports.
9. Enter information about the model of the product. A model is a common identification for products that differ only by size and color. It has can be used to identify variants of food, tools, home equipment, electronics, etc.

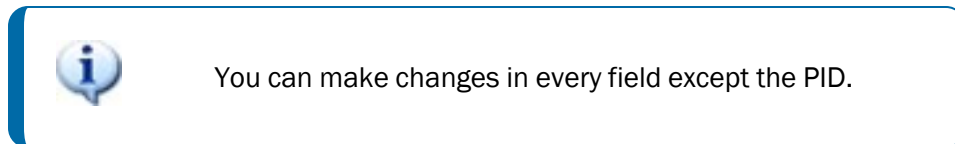
A product's model is identified by:

- **Code:** An internal, alpha-numeric identifier.
 - **Label:** A descriptive name displayed in user interfaces and reports.
10. Enter information about product's size. A product's size is identified by:
- **Code:** An internal, alpha-numeric identifier.
 - **Label:** A descriptive name displayed in user interfaces and reports..

11. Click **Add Product**.

To modify an existing category

1. Select a product from the list by clicking anywhere on the product entry except the checkbox.
2. Modify the product's information.



3. Click **Save**.


To search for categories

1. In the Search field, enter the PID, SKU, or label of the product you want to find.
After entering three characters, Track & Trace begins displaying suggested searches.

2. Click .

Up to 30 search results display.

To removed an product from the list

1. In the Action column of the product you want to remove, click .
2. Click **Confirm** to acknowledge that you want to delete the product.
3. Track & Trace displays a message indicating that the product has been deleted.

To download the template file

The template is a .csv file that provides a reference for users who want to import product information into Track & Trace. It presents the format and fields required to create a category hierarchy .csv file that can be used with Track & Trace.

1. On the Product view's page, click **Upload** and select **Download Template File**.
2. Navigate to where you want the .csv file to be saved, then select the file and click **Save**.

To import a product list from a .csv file

1. On the Product view's page, click **Upload** and select **Upload Products**.
2. Navigate to where the .csv file is located, then select the file and click **Open**.

Track & Trace uploads the .csv file and displays the contents in the view.

To download product information

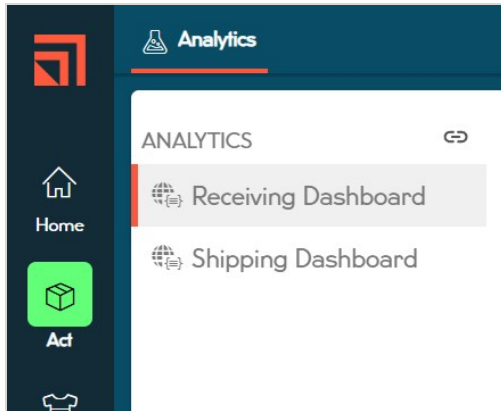
You can download all the information in the Product list for offline use or to upload to another Track & Trace tenant.


1. On the Product view's page, click **Upload** and select **Download Template File**.
2. Navigate to where you want the .csv file to be saved, then select the file and click **Save**.

Tracking Inbound Items (Receiving Dashboard)

The Receiving Dashboard displays detailed information on received orders and items; pending orders and items, including whether there are pending orders older than seven days; average progress; and average accuracy.

1. Open the BarTender Track & Trace Console in your browser.
2. Log in with your Site Manager account.
3. Select **Act**, **Analytics**, then **Receiving Dashboard**.



4. On the Receiving Dashboard page, select  and choose a filter.

Available filters are:

- Sites
- Categories
- Brands
- Models
- Colors
- Product ID
- Order Type
- Order Status



The dashboard saves the last selected filters for the next session.

5. Select one of the date options, then click **Apply**.

The screenshot shows a date selection interface. At the top right, there is a 'Date' dropdown menu currently set to 'Last 30 days'. Below this, there are two input fields for 'Start Date' (07/17/2025) and 'End Date' (08/15/2025). A calendar for August 2025 is displayed, with the date 15 highlighted. On the left side, there is a list of date options: 'Date', 'Today', 'Yesterday', 'Last 7 days', 'Last 30 days' (which is highlighted), 'Last 6 months', and 'Last 12 months'. At the bottom left is a 'Custom' button, and at the bottom right are 'Apply' and 'Clear' buttons.

Available options are:

- Date
- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- Last 6 Months
- Last 12 Months

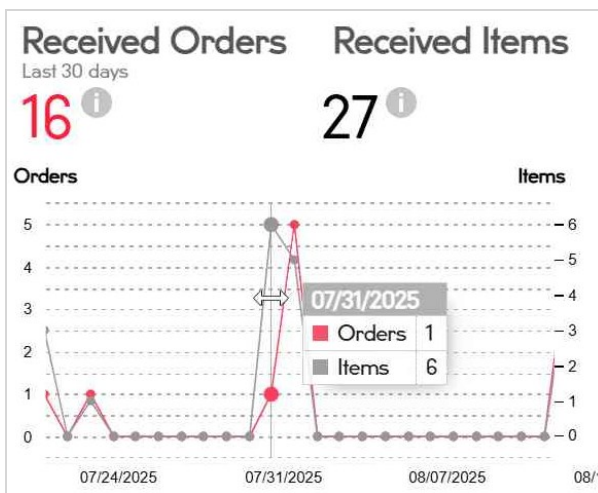
Click **Custom** to customize the option to any preferred time period.

6. Review the information in the upper portion of the page.

- **Pending Receiving:** The upper portion of this section displays the pending orders and items over seven days. The lower portion displays the order and items from the last seven days.


- **Received Orders:** Quantity of receiving orders received over the period set in filters. Does not include the in-progress receiving orders.
- **Received Items:** Quantity of items received over the period set in filters. Does not include the in-progress receiving orders.
- **Average Progress:** Average progress of the receiving orders received over the period set in filters. Does not include the in progress receiving orders.
- **Average Accuracy:** Average accuracy of the receiving orders received over the period set in filters. Does not include the in progress receiving orders.

7. Hold the pointer over specific portions of the charts to display details about the corresponding day.



8. Hold the pointer over the **i** icon to display more information about the corresponding item.



- The Receiving Details per Order section displays a table with the details of the receiving process. Click  in the REC QTY column to display the EPC Detail window.

EPC Detail ✕

Order: receiving_storetraining0009003_1750680628656 Shipping Date: 06/23/2025
 Order Type: tag Receiving Date: 06/23/2025
 Product ID: 07896004730561
 Category Division: PSICOTROPICO


PROGRESS	ACCURACY	EXPECTED	COUNTED	UNDERS	OVERS
-	-	0	3	0	3

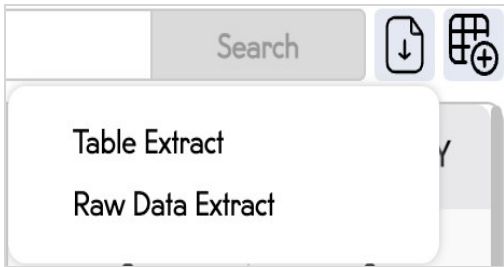
Product ID	EPC Counted	EPC Expected	Type
07896004730561	30325A6AD782FC000000001D		Over
07896004730561	30325A6AD782FC0000000001		Over
07896004730561	30325A6AD782FC000000001E		Over

1 - 3 of 3 Records < 1 > 100 ▾

Downloading Order Details

The Receiving Details per Order table can be downloaded to a .csv file then reviewed in a spreadsheet such as Excel.

- Select  to export the data.



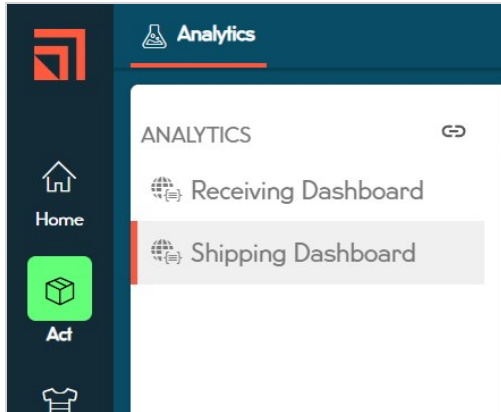
The screenshot shows a table header with a search bar and two icons: a download icon and a table icon with a plus sign. A dropdown menu is open, showing two options: 'Table Extract' and 'Raw Data Extract'.


- Select the type of extract to complete.
 - Table Extract:** The table export contains the information displayed in the columns.
 - Raw Data Extract:** The table export contains all the information in the available columns, even those not displayed.

Tracking Outbound Items (Shipping Dashboard)

The Shipping Dashboard displays detailed information about shipped orders and items, pending orders and items, and accuracy average.

1. Open the BarTender Track & Trace console in your web browser.
2. Log in with your Site Manager account.
3. Select **Act**, **Analytics**, then **Shipping Dashboard**.



4. On the Shipping Dashboard page, select  and choose a filter.

Available filters are:

- Source Site
- Destination Site
- Categories
- Brands
- Models
- Colors
- Product ID
- Order Type
- Order Status

To remove a filter, click .

5. Click on the Source Site dropdown and choose a location to filter the data. Click **Apply Filter** to retrieve the information.

The screenshot shows a dropdown menu for 'Source Site'. At the top, there is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar are three options, each with an unchecked checkbox: 'Select All', 'TANDTFACTORY - T&TFactory', and 'TANDTWAREHOUSE - T&TWarehouse'. At the bottom of the dropdown is a dark grey button labeled 'Apply Filter'.

6. In the Date dropdown, select an option, then click **Apply**.

The screenshot shows a date selection interface. At the top right, there is a 'Date' dropdown menu with 'Last 30 days' selected. Below this is a section titled 'Select a date or time period' with a list of options: 'Date', 'Today', 'Yesterday', 'Last 7 days', 'Last 30 days' (highlighted), 'Last 6 months', and 'Last 12 months'. To the right of this list are two input fields for 'Start Date' (07/17/2025) and 'End Date' (08/15/2025). Below these is a calendar for 'August 2025'. The calendar shows days from 1 to 31, with the 15th highlighted in a dark circle. At the bottom of the interface are two buttons: 'Apply' and 'Clear'.

Available options are:

- Date
- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- Last 6 Months
- Last 12 Months

Click **Custom** to customize the option to any preferred time period.

7. Review the information in the upper portion of the page.

- **Pending Shipping:** The upper portion of this section displays the pending orders and items for the specified time period. The lower portion displays the order and items that have more than seven days.



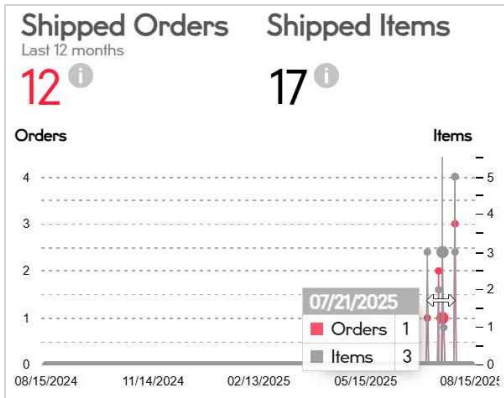
The user can change the information displayed in the lower section by adjusting the number of days shown in the **For more than ___ days** field.

- **Shipped Orders:** Quantity of orders shipped over the period set in filters.
- **Shipped Items:** Quantity of items shipped over the period set in filters.
- **Average Accuracy:** Average accuracy of the orders shipped over the period set in filters.

8. Hold the pointer over the icon to display more information about the corresponding item.



- Hold the pointer over each graph to display details for a specific day.



- Click to expand the graph.
- The Shipping Details per Order section displays a table with the details of the shipping process. Click In the Source Site column expand the details and enable the user to drill down specific information about the source site.

Shipping Details per Order Last 12 months

Source Site: T&TWarehouse | Destination Site: External

Search by: Search

ORDER	SEGMENT	FAMILY	CLASS	BRICK	ATTRIBUTE	PRODUCT	ORDER STATUS
shipping_TT GlobalMgr-1 753134860...	ALL	ALL	ALL	ALL	ALL	ALL	Done
shipping_TT GlobalMgr-1 7527739553...	ALL	ALL	ALL	ALL	ALL	ALL	Done

1 - 2 of 2 Records

- Click in the SHIP QTY column to display EPC details.


EPC Detail

Order: receiving_storetraining0009003_1750680628656 | Shipping Date: 06/23/2025
 Order Type: tag | Receiving Date: 06/23/2025
 Product ID: 07896004730561
 Category Division: PSICOTROPICO

PROGRESS	ACCURACY	EXPECTED	COUNTED	UNDERS	OVERS
-	-	0	3	0	3

Product ID	EPC Counted	EPC Expected	Type
07896004730561	30325A6AD782FC000000001D		Over
07896004730561	30325A6AD782FC0000000001		Over
07896004730561	30325A6AD782FC000000001E		Over


1 - 3 of 3 Records

13. You can add columns by selecting  and moving the columns you want from the Available Columns list to the Columns to Display list.

The available columns are:


- **Source Site:** Site where the product was shipped from.
- **Destination Site:** Site where item was shipped to.
- **Order:** Order reference of the shipping order.
- **Segment:** First level of product categorization.
- **Family:** Second level of product categorization.
- **Class:** Third level of product categorization.
- **Brick:** Fourth level of product categorization.
- **Attribute:** Fifth level of product categorization.
- **Product:** Product ID of the shipping order.
- **Order Status:** Order status of the shipping order.
- **Packing Date:** Date when the packing process was completed.
- **Shipping Date:** Date when the shipping process was completed.
- **Brand:** Brand of the product.
- **Color:** Color of the product.
- **GTIN:** GTIN of the product.
- **Model:** Model of the product.
- **Price:** Price of the product.
- **Product Name:** Name of the product.
- **SKU:** SKU of the product.
- **Size:** Size of the product.
- **VPN:** VPN of the product.
- **Accuracy:** Accuracy is computed from the discrepancies between what is expected and what has been counted.
- **Exp QTY:** Expected quantity of items.
- **Ship QTY:** Shipped quantity of items.

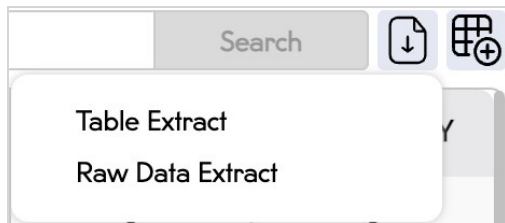
- **Unders QTY:** Missing quantity of items.
- **Overs QTY:** Additional quantity of items shipped.

14. To return to the main page, click .

Downloading Order Details

The Shipping Details per Order table can be downloaded to a CSV file then reviewed in a spreadsheet such as Excel.

1. Select  to export the data.

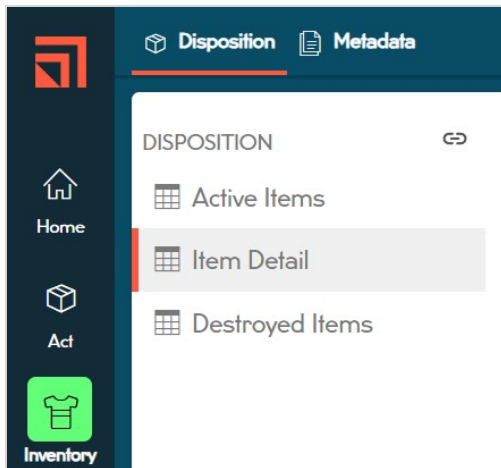



2. Select the type of extract to complete.
 - **Table Extract:** The table export contains the information displayed in the columns.
 - **Raw Data Extract:** The table export contains all the information in the available columns, even those not displayed.

Locating an Item Using the Item Detail Report


Use the Item Detail report to locate an asset in the BarTender Track & Trace console.

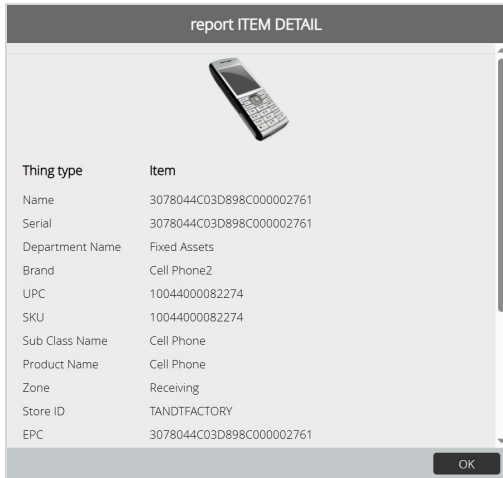
1. Open the BarTender Track & Trace Console in your browser.
2. Log in with your Site Manager account.
3. Select **Inventory**, then **Disposition**.



4. Select the **Item Detail** report. When the Item Detail page displays, enter the information to use as a filter in the search form.
 - Selecting a date is required. All other information is optional.
5. Click .
6. Select **Table View** to display all the items returned by the filter.




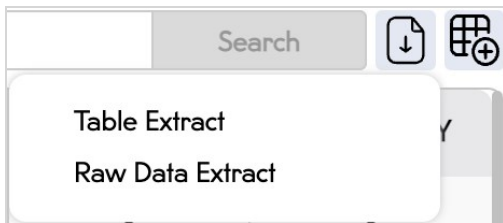
7. Click the  icon to display a pop-up providing further information about the corresponding item.



Downloading the Report

The Item Details table can be downloaded to a CSV file then reviewed in a spreadsheet such as Excel.

1. Select  to export the data.

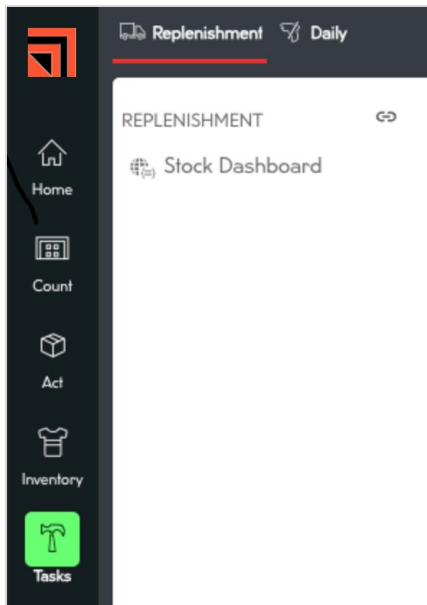



2. Select the type of extract to complete.
 - **Table Extract:** The table export contains the information displayed in the columns.
 - **Raw Data Extract:** The table export contains all the information in the available columns, even those not displayed.

Viewing Stock Availability

The Stock Dashboard displays stock availability on the sales floor.

1. Open the BarTender Track & Trace Console in your browser.
2. Log in with your Global Manager account.
3. Click **Task**, **Replenishment**, then **Stock Dashboard**.



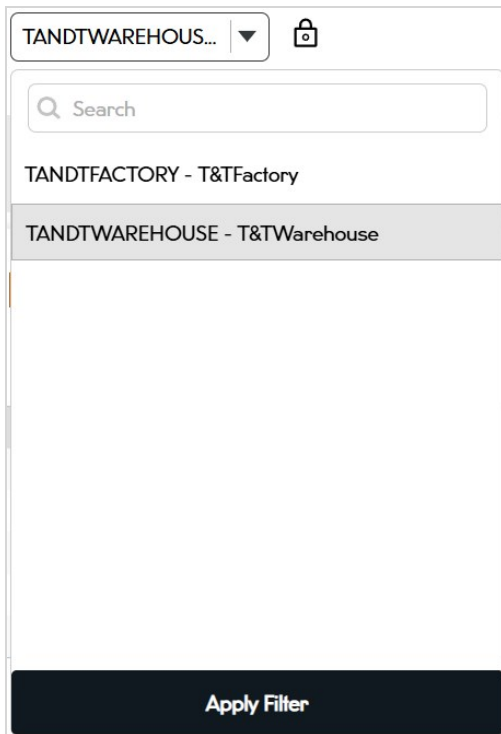
4. On the Receiving Dashboard page, select  and choose a filter.

Available filters are:

- Site Group (by default)
- Site Group Value (by default)
- Site (by default)
- Categories
- Brands
- Models

To remove a filter, click .




5. In the Site dropdown, select the site you want to work with and click **Apply Filter**.



The data displaying in the Stock Availability section is directly related to the Site filter.

6. Tap **All**.



7. You can add columns to the displayed table by selecting  and moving the columns you want from the Available Columns list to the Columns to Display list.
8. Hold the pointer over the  icon to display a pop-up providing further information about the corresponding item.
9. Select  to export the data, then select the type of extract to complete.



- **Table Extract:** The table export contains the information displayed in the columns.
- **Raw Data Extract:** The table export contains all the information in the available columns, even those not displayed.

Working with Track & Trace

An operator scans items for inbound, outbound, cycle count, and searches in the location they work in. And operator can access receiving, shipping, searching, picking, checking, and editing items.

In This Section

Order Management

- [Tracking Inbound Items \(Receiving\)](#)
- [Tracking Outbound Items \(Shipping\)](#)
- [Transferring Items Between Locations](#)
- [Editing Items](#)

Search

- [Searching for Items](#)
- [Checking an Item](#)
- [Checking if an Item Is in Stock](#)
- [Performing a Geiger Search for Items](#)

Inventory

- [Synchronizing](#)
- [Creating New Labels for Products](#)

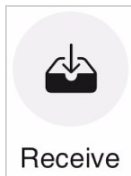
Technical

- [Connecting a Reader](#)

Tracking Inbound Items (Receiving)

The Receive module enables the collection of incoming items for stock inclusion, supporting blind receiving processes to accommodate different operational needs. It facilitates scanning and validation to maintain inventory accuracy and control. This module specifically works with reference lists of type *receiving* and *tag*, ensuring alignment with expected inventory data.

1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. Tap **Receive**.



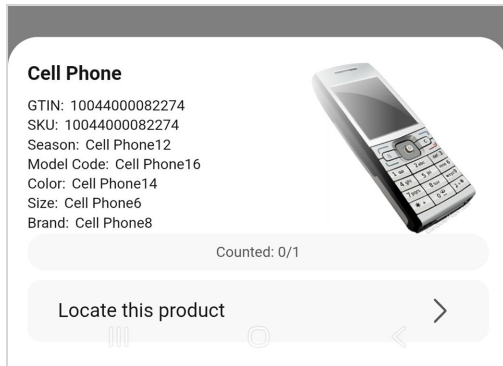
A list of reference orders assigned to the location displays with one of the following statuses:

- **Available** (green label)
- **In Progress** (yellow label)
- **Done** (grey label)

Reference orders are previous receiving that has not yet completed the process. Orders *In Progress* appear first on this list, followed by *Available* orders, and finally those marked as *Done*.

4. Select **Start a Blind Process**.
5. Press the trigger on the device to read items.
 - New Items that are not yet inside the location are read.
 - The order number must not already exist in the platform. It is created upon the first synchronization.

- Details about the new scanned items are available. To view details, tap a product entry to open a modal displaying:



This example is a product entry detail for a cell phone.

- Product name, color, size
- GTIN and SKU
- View Scanned Item
- **Locate This Product** ([Geiger mode](#))

6. Release the trigger or tap **Stop** to end reading.

7. Tap **Sync** to [validate the tag data](#).



Syncing is required to save progress. If the user exits without syncing, all data will be lost.

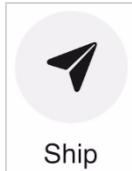
8. Select a status for the order, indicating whether this session is finished (Done), should be resumed (In progress), or cancelled (aborting the synchronization).

Status
Select the status of the current session
In progress
Done
Cancel

Tracking Outbound Items (Shipping)

The Ship module enables the operator to count items for shipment or transfer. Orders can be processed by scanning or entering a reference order, or by initiating a blind shipping process.

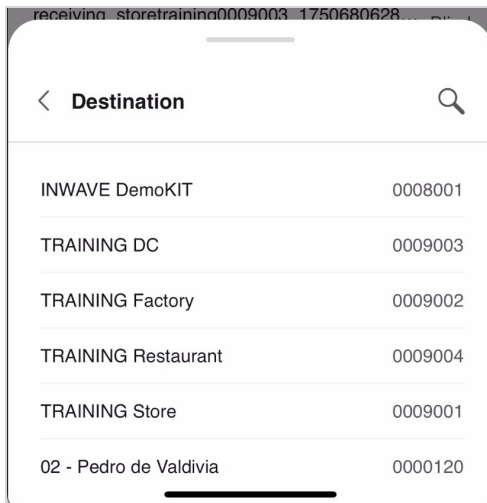
1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. Tap **Ship**.



Orders assigned to the current location display, including packing and receiving orders.

4. Select **Start a Blind Process**.
5. Select a destination for shipment.

The destination can be one of the organization's other sites or it can be external: for example, a customer's site.




Specifying a destination is mandatory unless the destination has been previously set, in which case the application does not prompt for it again.

6. Press the trigger on the device to read items.
 - New items that are not yet inside the location are read.
 - The order number must not already exist in the platform. It is created upon the first synchronization.

- Details about the new scanned items are available. To view details, tap a product entry to open a modal displaying:
 - Product name, color, size
 - GTIN and SKU
 - View Scanned Item
 - **Locate This Product** ([Geiger mode](#))

7. Release the trigger or tap **Stop** to end reading.

8. Tap **Sync** to [validate the tag data](#).



Syncing is required to save progress. If the user exits without syncing, all data will be lost.

A confirmation message prompts the operator to select the shipping status.

9. Select a status for the order, indicating whether this session is done (the process is ready to be completed), in progress (save to Work in Progress), or cancelled (stay on the same screen).

<p>Status</p> <p>Select the status of the current session</p>
<p>In progress</p>
<p>Done</p>
<p>Cancel</p>

Transferring Items Between Locations

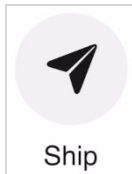
Transferring items between locations involves both the shipping and receiving processes.



Transferring items between locations (as illustrated here) is different than transferring items between zones. Transferring between zones (using Edit Items or the Cycle Count) moves the item to a new zone within the inventory.

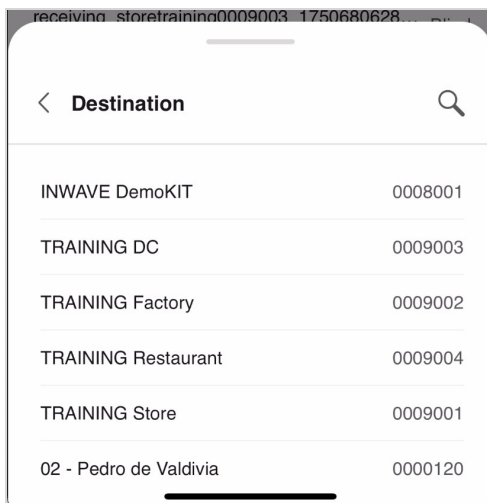
Shipping the Items

1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. Tap **Ship**.



4. Tap **Start a Blind Process**.
5. Select the destination.

A destination can be one of the organization's other sites or it can be external, like a customer's site.



Specifying a destination is mandatory unless the destination has been previously set, in which case the application does not prompt for it again.

6. Press the trigger on the device to read items.
 - New Items that are not yet inside the location are read.
 - Details about the new scanned items are available.
7. Release the trigger or tap **Stop** to end reading
8. Tap **Sync** to [validate the tag data](#).



Syncing is required to save progress. If the user exits without syncing, all data will be lost.

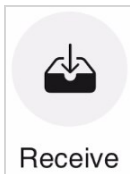
Receiving the Items

1. Open the BarTender Track & Trace application and log in as a user of the destination site.



You cannot switch sites in the application and must, instead, log in as a different user.

2. [Connect your RFID hand-held](#) to the application.
3. Tap **Receive**.



The screen should display a pending ASN coming from the source site with the items that have been sent.

4. Select this ASN and start the scanning process.

The device displays the progress, comparing what is scanned with what is expected.

5. Release the trigger or tap **Stop** to end reading.

Editing Items

The Edit Items module enables updating the status of tagged items and moving items between zones, either individually or in bulk. This functionality supports operational processes that require status adjustments due to inventory movement, auditing, or correction scenarios.

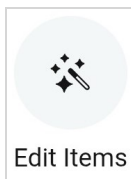
The module provides two distinct modes:

- **Single mode:** Used to edit the status of individual items
- **Bulk mode:** Used to edit the status of multiple items at once

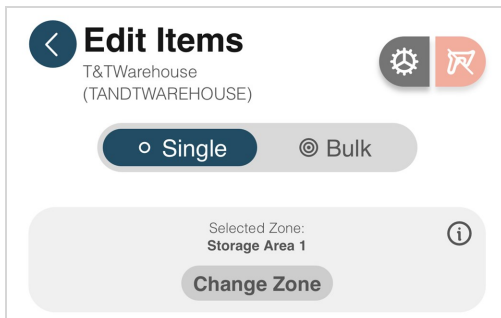
Single Mode

This mode is ideal for isolated status changes or exceptions that require individual attention.

1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. Tap the **Edit Item** Icon.



4. Toggle to **Single**.



5. If the current zone is not the one the operator needs to work in, the operator must change to the correct zone.
6. Enter the item's EPC manually or press the trigger on the device and scan.
7. Tap the **Status** dropdown to display the available status options.



Status options are defined elsewhere and may reflect stages such as Available, Damaged, On Hold, or Recalled.

8. Select the new status for the item.

After the update is processed, a confirmation message displays.

9. Release the trigger or tap **Stop** to end reading.
10. Tap **Sync** to [validate the tag data](#).



Syncing is required to save progress. If the user exits without syncing, all data will be lost.



Once this process has been synchronized, you cannot receive feedback on the device; you must go to the main console to view any feedback.

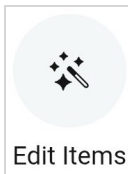
Bulk Mode

Use this option to apply the same status update to a group of items. Bulk mode is recommended for operational scenarios such as updating multiple items during inventory preparation, restocking, or handling exception-based movements.

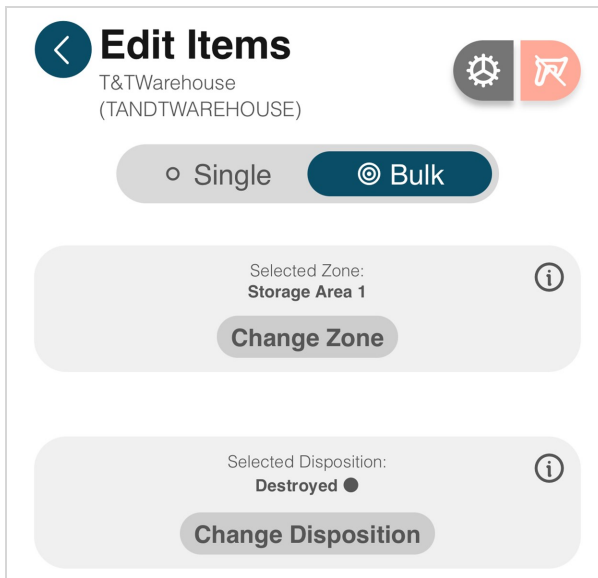


To use Bulk mode, BarTender Track & Trace must have a hand-help reader connected.

1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. Tap **Edit Item**.



4. Toggle to **Bulk**.



Disposition describes the assigned status of an item that defines its current condition. Dispositions provide operational visibility and support decision-making by categorizing assets according to their usability, compliance, or business rules.

5. If the current zone is not the one the operator needs to work in, the operator must change to the correct zone.
6. Select the disposition.
7. Press the trigger on the device and scan.
8. Tap the **Status** dropdown and select the status to be applied to all scanned items.
9. Tap the **Next** button to proceed to a list view of all scanned items, where each entry can be reviewed.
10. Release the trigger or tap **Stop** to end reading.
11. Tap **Sync** to [validate the tag data](#).



Syncing is required to save progress. If the user exits without syncing, all data will be lost.

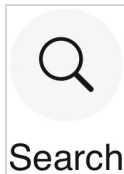


Once this process has been synchronized, you cannot receive feedback on the device; you must go to the main console to view any feedback.

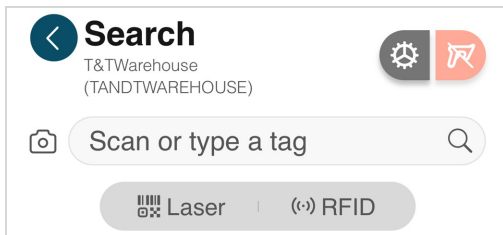
Searching for Items

The Search module enables users to locate items and view their positions on the store map. Items can be found by entering a product reference, scanning a barcode (EAN/GTIN/SKU), or reading an RFID tag (if available).

1. Open the BarTender Track & Trace application and log in.
2. Tap **Search**.

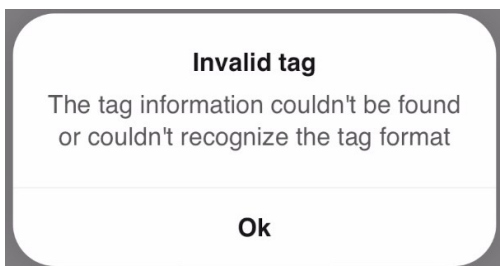


3. Enter an SKU or GTIN, or scan one with the phone camera or RFID hand-held.



- **Laser:** Used for scanning barcodes, QR codes, etc.
 - **RFID:** For reading RFID tags (if supported).
 - If RFID is selected, [connect your RFID hand-held](#) to the application.
4. Verify the scan is successful.

If the scan is not successful:



- Check whether the GTIN correct.
- Check whether the SKU correct.
- Have the Site Manager search for the item on the console.

5. Tap the map icon to use the connected reader to assist in finding the item and displaying the item's location.

An animation indicates proximity using [Geiger mode](#).

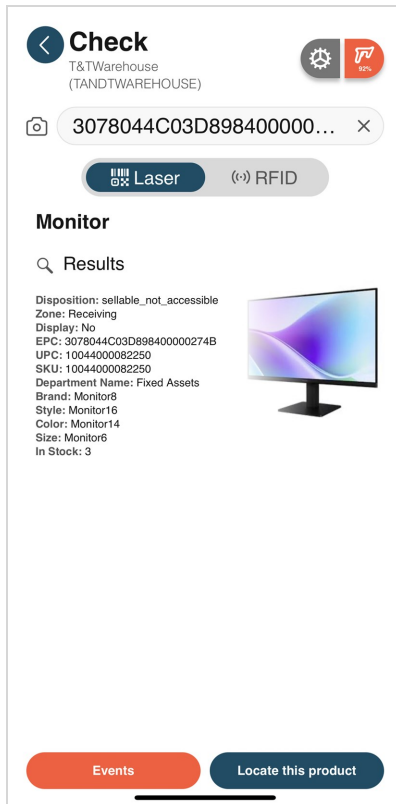
- **Red:** Far
- **Yellow:** Nearby
- **Green:** Very close

When scanning, the focus is limited to the selected row. The system tracks only items marked as *In Stock*.

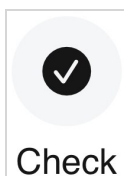
6. Press the trigger on the RFID hand-held and move closer to the asset.

Checking an Item

Use the Check module to retrieve detailed product or item information by scanning an identifier using a phone's camera, Laser, or RFID technology.



1. Open the BarTender Track & Trace application and log in.
2. [Connect your RFID hand-held](#) to the application.
3. In the Verify panel, tap **Check**.



4. For an item with an RFID tag:

- Tap **RFID**.

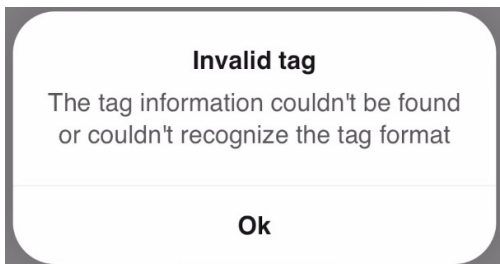


- View the on-screen result.

5. For an item with a 2D Barcode:

- Tap **Laser**.
- Scan the barcode.
- View the on-screen result.

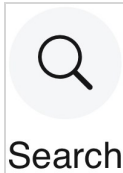
6. If a scan is not successful, Track & Trace displays:



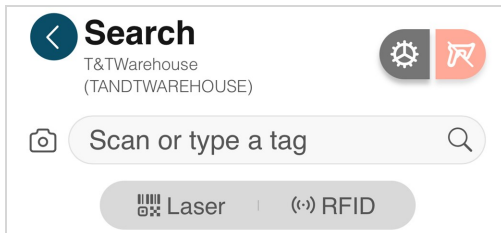
Checking Whether an Item Is in Stock

Use the Check module to retrieve detailed product or item information and the Geiger mode to locate the item in a zone.

1. Open the BarTender Track & Trace application and log in.
2. To locate an item, [connect your RFID hand-held](#) to the application.
3. In the Verify panel, tap **Search**.



4. Enter an SKU or GTIN, or scan one with the phone camera or the RFID hand-held.



5. If entering an SKU or GTIN:
 - Enter the SKU or scan a barcode with the phone's camera.
 - View the product and available stock.
6. If using the connected reader to assist with item location in the selected zone, select **RFID**.
7. Tap **Locate in Zone** to use [Geiger mode to locate an item](#).

Performing a Geiger Search for Items

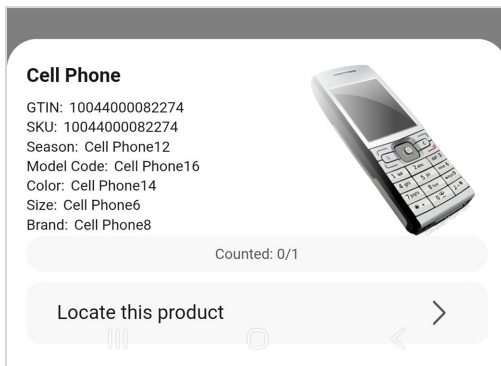
Geiger mode is an optional feature that requires a connected RFID reader. While not mandatory for standard operations, it can be used, when available, to assist in locating tagged items.

To locate items physically, select an order from the main screen, then tap the product to open a window containing the product details as well as:

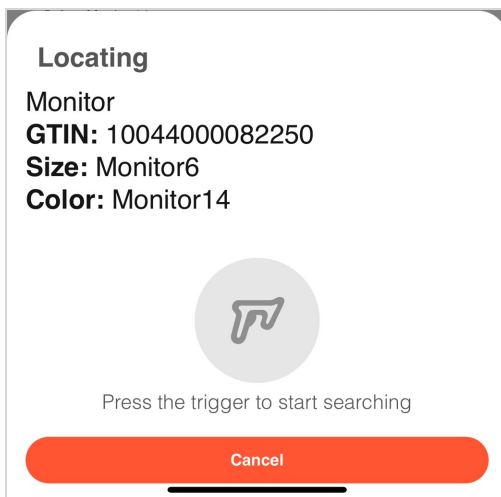
- **View Scanned Items:** Displays scanned tags with a green checkmark ✓ if the item has already been read.
- **Locate This Product:** Starts Geiger mode to detect the hand-held's proximity to the specified item using visual cues.

To use Geiger mode to locate a product

1. Tap **Locate This Product**.

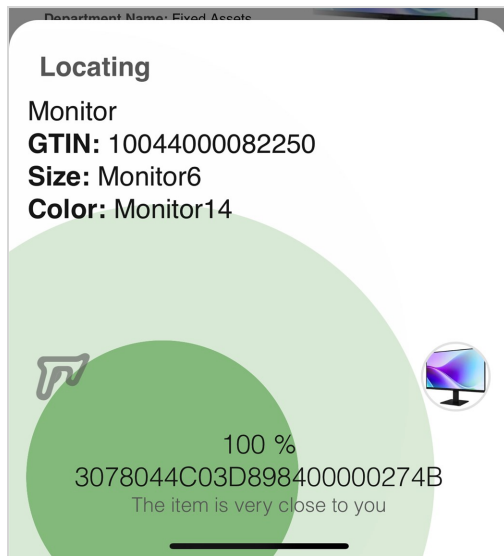


2. Tap the map icon to use the connected reader to assist with item location and display the item's location.



An animation indicates proximity using Geiger mode.

- **Red:** Far
- **Yellow:** Nearby
- **Green:** Very close





When scanning, the focus is limited to the selected row. The system tracks only items marked as *In Stock*.

3. Press the trigger on the RFID hand-held and move closer to the asset.

Synchronizing

Synchronization is required to save progress. If the user exits without syncing, all data will be lost.

While syncing:

- A green checkmark ✓ indicates the orders that have successfully synchronized with a *Done* status.
- A blue icon  indicates which products have mates. These products are marked with the blue icon until all associated tags are read, then the icon changes to a green checkmark ✓.
- A red icon  indicates an unexpected item.
- Orders marked as *Done* appear at the end.
- Orders with at least one read item are prioritized at the top of the list.

Synchronizing Multiple Items

- On the main screen, tap **Sync** to send all fully read (100%) orders to the server.



Sync

Synchronizing a Specific Item

- Tap the order to sync in the list, then tap **Sync** to submit its data.



Sync

- If the order is 100% read, it automatically changes to *Done* status.
- Orders with 0% or partial reads trigger a warning pop-up to display.
- Orders can be synchronized even if no items were read (0%).

Creating New Labels for Products

Use BarTender On-Prem or BarTender Cloud to create labels for your products and entries for them on the Track & Trace platform.

1. Open Bartender On-Prem or Bartender Cloud and sign in.
2. In the Librarian, select a BarTender Track & Trace-supported label.
3. Print labels for your products.
 - This creates the products on the Track & Trace platform and places them in *Active* status.

Connecting a Reader

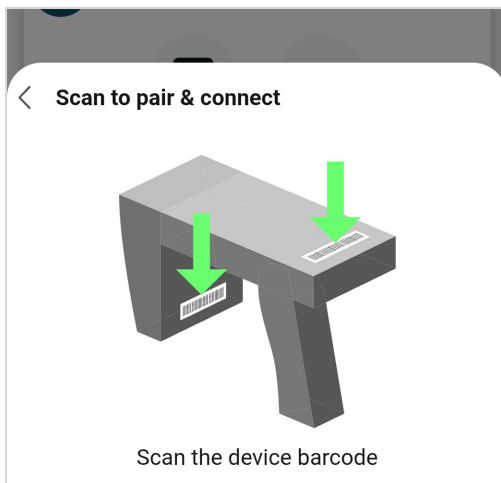
Use the following steps to connect a reader to your device using Bluetooth.



If the user is not using a Bluetooth-enabled reader, the device must be physically connected to perform scans through the application.

iOS Devices

1. Open Settings, then Bluetooth.
2. When the reader's LED blinks rapidly, press the trigger to pair and connect.
3. In the application, tap the icon to access Devices.
4. Tap **Connect a new device** (ensure Bluetooth is enabled).

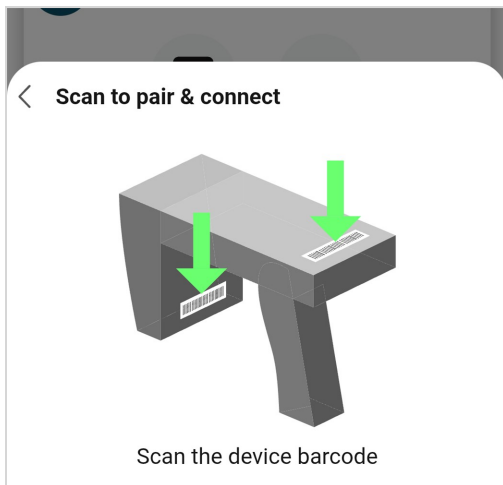


5. After connecting, tap the icon for reader details.

Android Devices

1. Open Settings, then Bluetooth.
2. Pair and connect the reader.
3. In the application, tap the icon to access Devices.

4. Tap **Connect a new device**.



5. After connecting, tap the icon for reader details.

Related Documentation

Technical Documents

To view and download technical documents, visit:

<https://www.bartendersoftware.com/resources/library>

User Guides

- [Getting Started with BarTender](#) (Support Article)
- [Getting Started with BarTender Cloud](#) (Support Article)

BarTender Help System

- [Getting Started with BarTender Cloud](#)

Other Resources

Please visit the BarTender website at <https://www.bartendersoftware.com>.

bartendersoftware.com

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