Technical Document
English

BarTender Track & Trace

User Guide

Version 12.2

Contents

>

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.

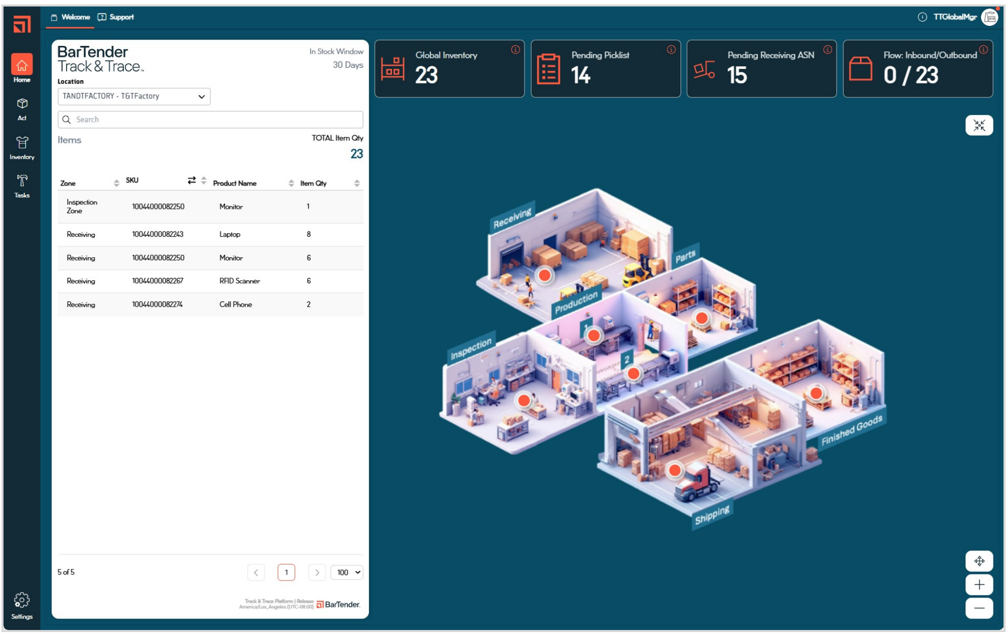
Reviewing Assets in Track & Trace

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

In This Section

The Track & Trace Home Page

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:

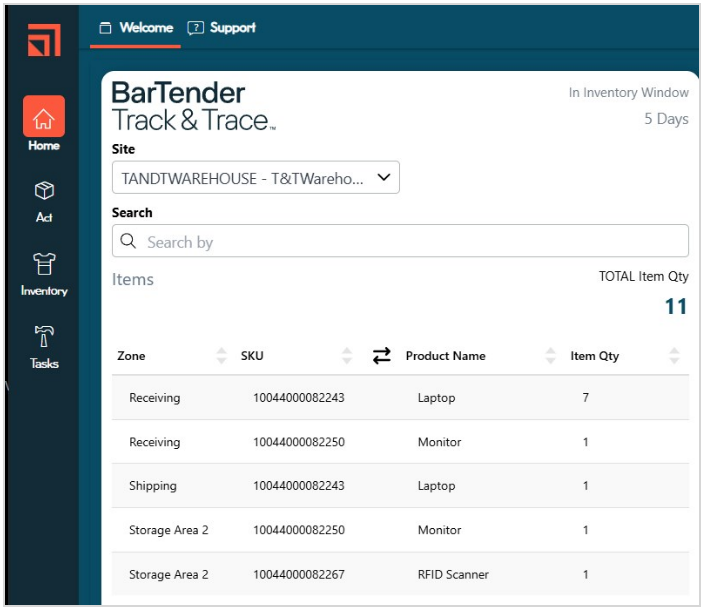
- Monitor what goes in and out of the site to control the flows and the activity.
- Check the level of stock by site and zone at any time.
- Search a specific reference and show it on the map to localize any asset or lack of asset immediately.

> 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.

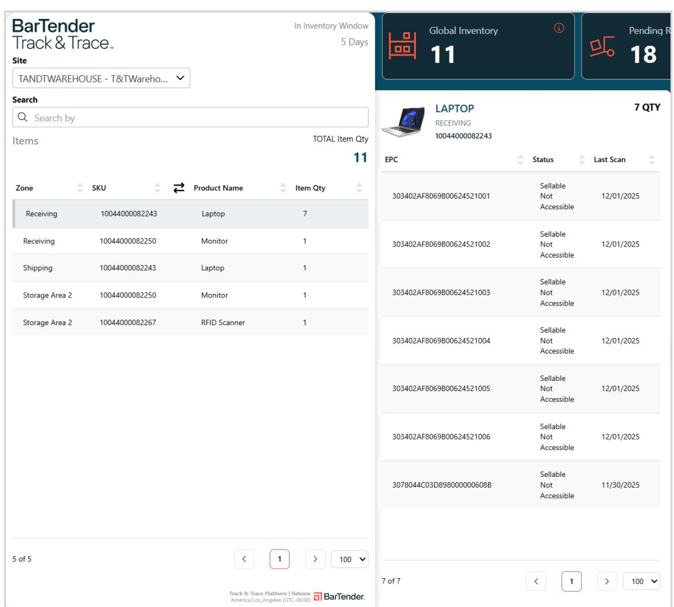
Tracking Assets

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.

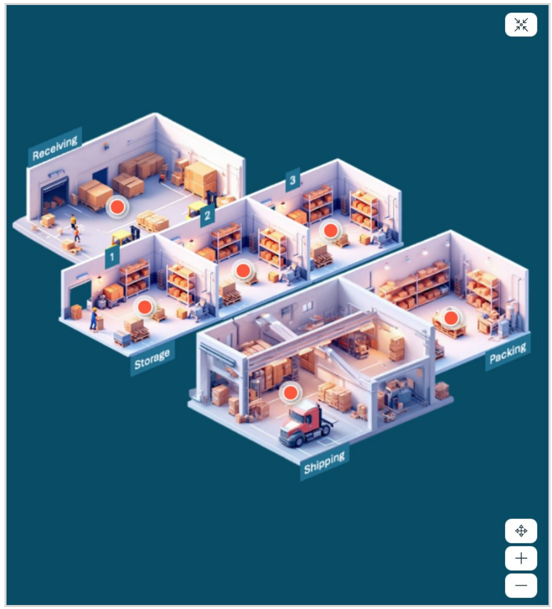


Select an item in the search results to display a detail modal containing additional information about the selected asset.



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.

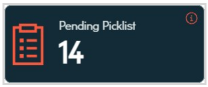
 You can also use the wheel on your mouse to zoom in and out.

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

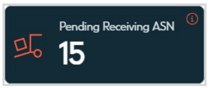
- Displays the total number of items in the selected zone.
- Filters the Items list to show only items from that zone.

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

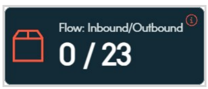
Displays the total number of items available in stock.



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



Displays the number of ASN expected to be received.

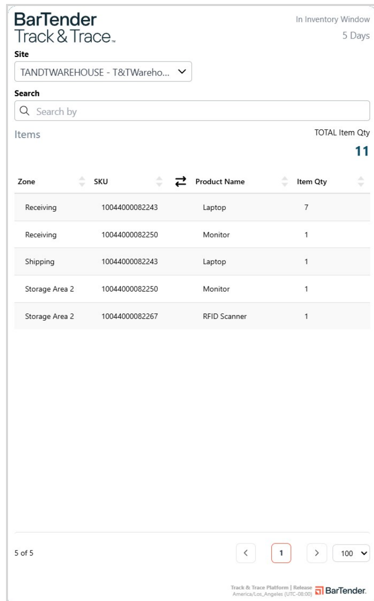


Displays the total number of inbound and outbound items in the past 24 hours.

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:

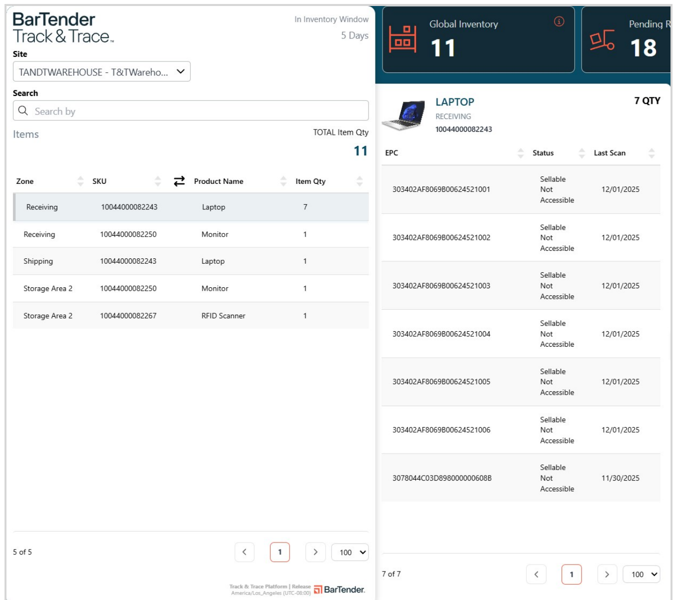
   - **Zone:** Displays the inventory zone where the item is located.
   - **Identifier (SKU or GTIN):** Displays the item's SKU or GTIN. By default, GTIN is displayed.
   - **Product Name:** Displays the name of the item.
   - **Item Quantity:** Displays the number of items in the inventory.
   - **Total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



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.

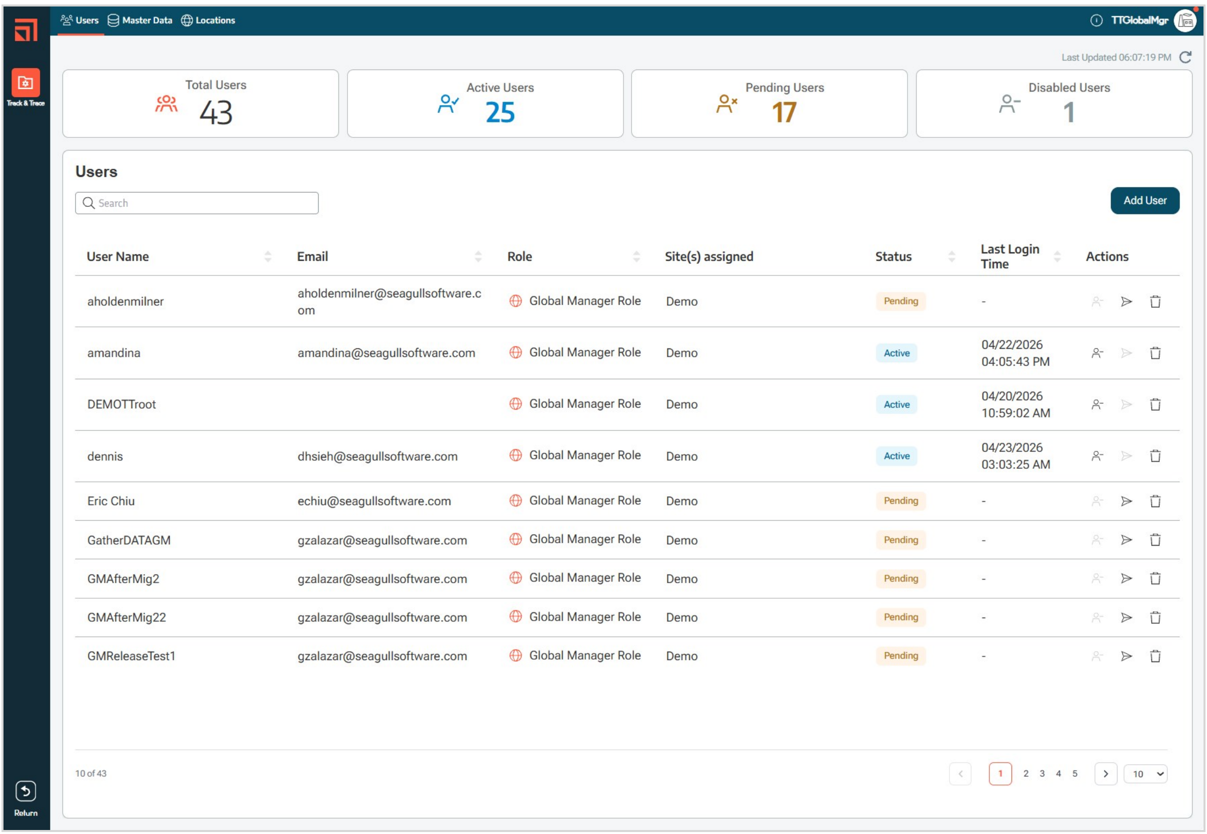
Managing Track & Trace

In This Section

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.



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:

User Name	Email	Role	Site(s) assigned	Status	Last Login Time	Actions
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 Dasboard page. The displayed KPIs are:

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

The content of the KPIs is determined by the role of the user. KPIs for Site Managers are restricted to users from their site only. KPIs for Global Managers include data from all sites.

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 refresh the dashboard's data

- At the top right of the Users page, click ⟳.

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.

> The button is available as soon as the user is created

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 a site's product catalog and category hierarchy. The dashboard facilitates product and category management with

- comprehensive browsing
- search and sort abilities
- product catalog maintenance
- hierarchical category browsing
- controlled category maintenance
- import error visibility
- download capabilities for product and category data.

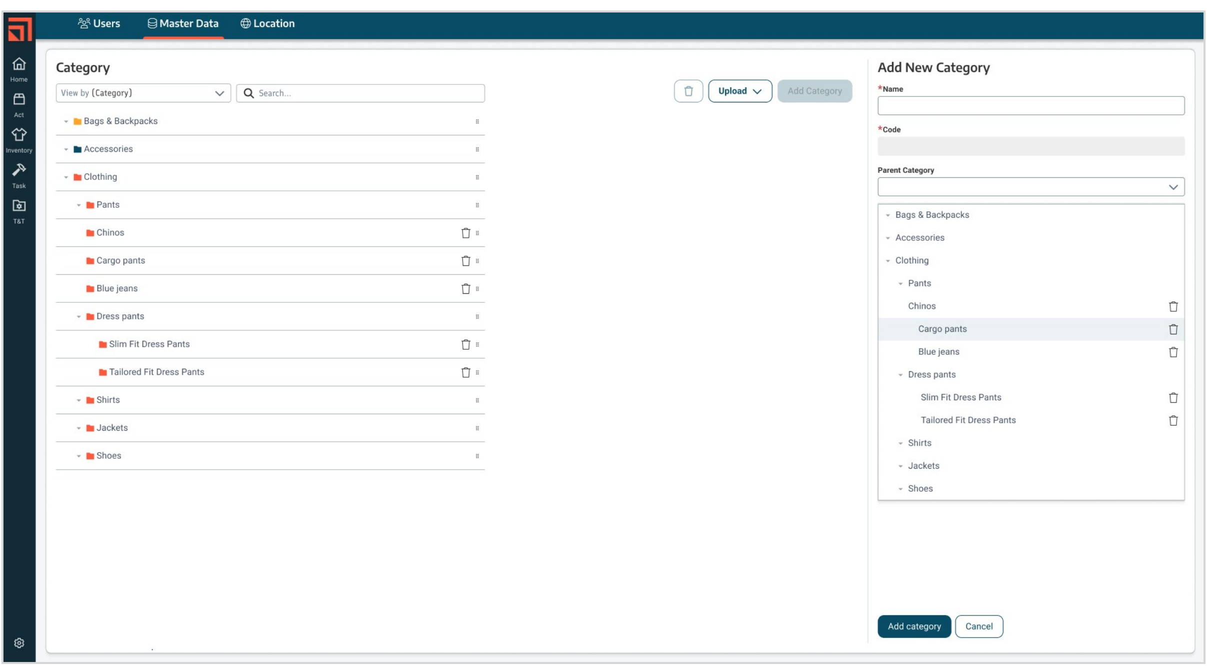
The Track & Trace Master Data Dashboard page provides a centralized and efficient place from which you can control the product catalog.

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

Categories

Categories represent the structure imposed on products to keep them organized within the system. Build the category structure by starting with broad classifications such as Accessories or Clothing, then drill down to more tightly defined groups.

Browse through the displayed heirarchy to view the categories it contains.



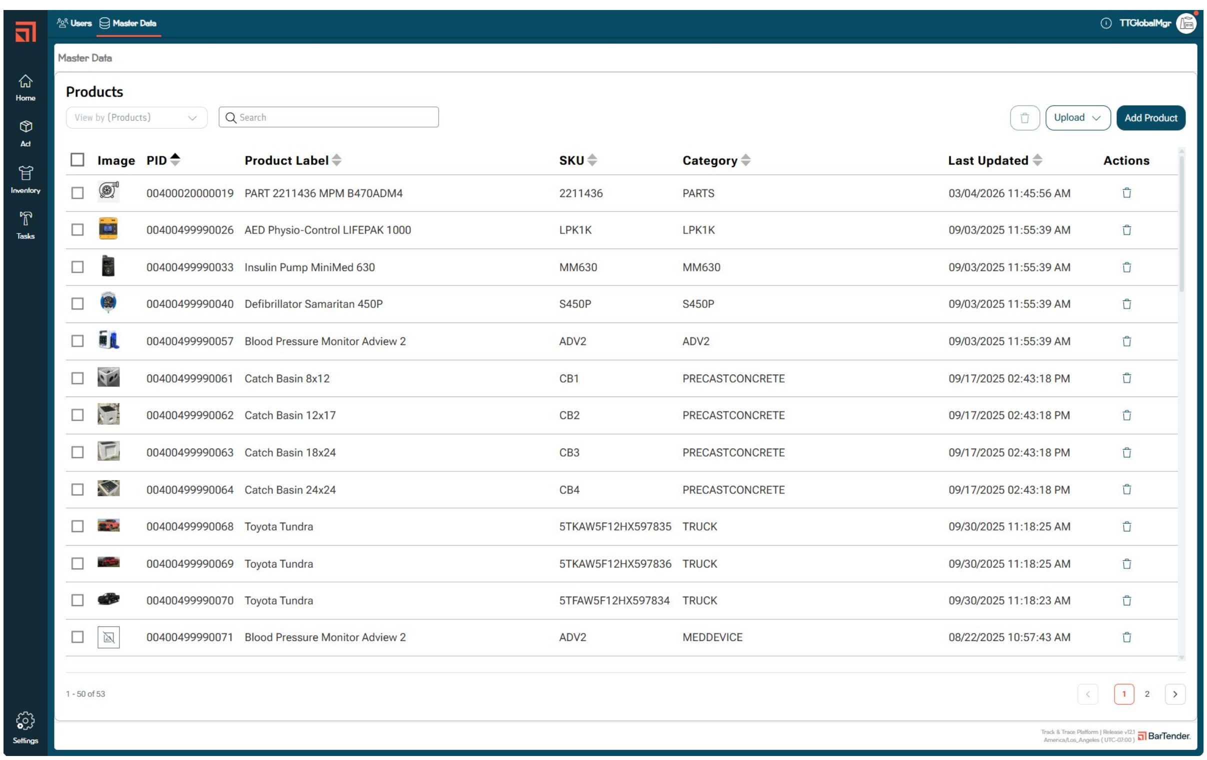
The Category view enables a user to:

- Browse the hierarchy of defined categories.
- Search for existing categories.
- Add new categories to the hierarchy.
- Modify existing categories.
- Move items around within the hierarchy.
- Remove items from the hierarchy.
- Import existing categories from a *.csv file.

> Currently, the hierarchy is capped at three levels deep, though this will be expanded in future releases.

Products

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



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 enables 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 and Categories

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 Master Data Dashboard

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

To switch between product and category data

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

Working with Categories

> Currently, the Category hierarchy is capped at three levels deep, though this will be expanded in future releases.

To add a new category

Add categories to build the heirarchy to which you assign products on the Products page.

1. On the Category page, click **Add Category**.
2. In the Add New Category panel, enter a name for the category.

   Track & Trace automatically generates the category's code based on the name.
3. In the Parent Category list, select the parent category for the new entry.

   In the dropdown list, click to open a category and expose any descendants it may have.

   If this is a root category, leave this field blank.
4. Click **Add Category**.

   The Add New Category panel closes and the new category is added below the parent item.

To modify an existing category

1. Select a category in the hierarchy on the left side of the page.

   Track & Trace opens the Edit Selected Category panel.

2. Modify the name of the category.

> When you change a category's name, the code remains the same and cannot be modified.

3. In the Parent Category, click ✕ to remove the old parent category, then, if needed, select a new parent category. Alternatively, simply select a new category to replace the old one.
4. Click **Save**.

   The Edit Selected Category panel closes and the modified category displays below the parent item.

To move a category within the hierarchy

Repositioning a category moves the category and any descendant categories to the new position. Any relationships that require revision are handled automatically by Track & Trace. You cannot move a category beneath one of its descendants.

- Click ⠿ for the category you want to move and drag it to a new position.

To search for categories

1. In the Search field, enter the name of the category you want to find.

   After entering three characters, Track & Trace begins displaying suggested searches.

2. Press Enter.

   Track & Trace filters out all items that do not match the search and displays up to 30 search results.

3. Click ✕ to close the search and display the entire hierarchy again.

To removed an category from the hierarchy

You can only delete categories that do not have descendants.

1. Click 🗑 beside the category you want to remove.
2. Click **Delete** to confirm that you want to delete the category.
3. Track & Trace displays a message indicating that the category has been deleted.

> If you attempt to delete a category with descendants, as soon as you click **Delete** Track & Trace displays a message indicating that the category cannot be deleted.

To download the category template file

The template is a *.csv file that provides a reference for users who want to import a category hierarchy 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 Category 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 download category information

You can download all the category information in your Track & Trace instance for offline use.

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

To import a category hierarchy from a *.csv file

Rather than creating the category hierarchy one entry at a time, you can import a prepared *.csv file and create the heirarchy all at once.

1. On the Category view's page, click **Upload** and select **Upload Categories**.
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.

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.

   > You can make changes in every field except the PID.

3. Click **Save**.

To sort the Products list

You can sort the Products list by PID, Product Label, SKU, Category, or Last Updated using the control in the column heading.

- In the column heading you want to sort by, click either the up or down arrow.

  Track & Trace sorts the list by the values in that column, either in ascending or descending order

  The column that the list is currently sorted by displays either ▲ or ▼, depending on how it is sorted. The rest of the columns display ⬍.

To search for products

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. Press Enter.

   Track & Trace filters out all items that do not match the search and displays up to 30 search results.

3. Click × to close the search and display the entire Products list again.

To removed an product from the list

1. In the Action column of the product you want to remove, click 🗑.
2. Click **Delete** 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 product 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 product catalog *.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 click **Save**.

To download product information

You can download all the information in the Product list for offline use.

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

To import a product list from a *.csv file

Rather than creating the list of products one entry at a time, you can import a prepared *.csv file and create the Products list all at once.

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.

Site Configuration Dashboard

Managing operational locations across multiple facilities requires clear visibility, accurate classification, and controlled editing capabilities. The Simplified Tenant Site Configuration Dashboard addresses this challenge by providing a centralized view of locations, supporting consistent site definitions and improving control over how operational environments are represented in Track & Trace.

The dashboard enables tenants to manage essential site settings in a single location.

Site Locations

This panel provides a place to add and maintain the different locations within the tenant.

- **Add Location:** Click to add a location to the dashboard manually.
- **Location Type**: Filter the Site Locations list by location type. Only locations of the selected type display.
- : Click to edit the location.

KPIs

The dashboard presents two KPIs across the top of the page.

- **Total Locations**: Displays the total number of locations within the tenant.
- **Location Types:** Breaks down the total locations number by location type and provides a key for the map below. It also displays how many locations of each location type have been created.

The Map

The map is an interactive image of the location. When you create the location, you upload the map.

- **Map:** A visual representation of the site. Used for intuitive navigation, searches, and investigations.

Configuring Site Locations

To access the Site Configuration Dashboard

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

Adding Locations

To add a location manually

You must have the Global Manager role to add a location.

1. In the Site Locations panel, click **Add Location.**
2. In the Basic Information section of the Add New Location dialog, add:
    - **Name:** Enter the name that will be used as a reference for the location. *Required*.
    - **Type:** Select the location category. This is used to drive operational workflows. *Required*.
    - **SGLN:** Enter the SGLN. The SGLN represents a plain GLN (Global Location Number) or a GLN plus extension. The SGLN can be used for any location identifier based on the GLN.
3. In the Location Coordinates section, enter the latitude and longitude coordinates for the location. *Required*.

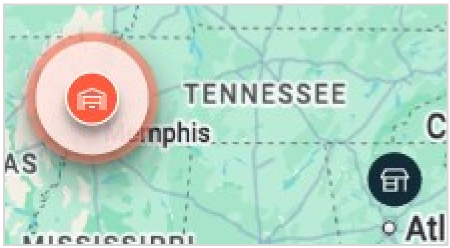
    When you enter the latitude and longitude, Track & Trace automatically fills in the address.
4. The System Information section displays the internal code for the location. Once defined, this value cannot be changed.
5. In the Add New Location dialog, click **Add Location.**
6. In the following dialog, click **Upload Map** to upload an image of the location.
7. In the Open dialog, navigate to the location containing the map you want to use, select the file, then click **Open.**
8. On the Location Map page,

Configuring Locations

To edit a location

1. Select the location you would like to edit in the Site Locations panel.

   When you select a location, the corresponding site is highlighted on the map.

2. Click .

3. In the Edit Location: {Site} dialog, you can modify the following information:

   - **Name** *Required.*
   - **SGLN**
   - **Latitude** *Required.*
   - **Longitude** *Required.*
   - **Address**
   - **City**
   - **Zip Code**
   - **State**
   - **Country** *Required.*

4. Click **Save.**

To display information about a location

- Hover over the icon for the location you want to view.

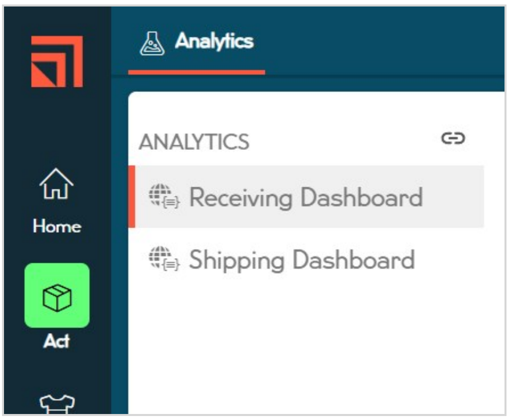
  Track & Trace displays a KPI containing the location's type, name, and address.

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 

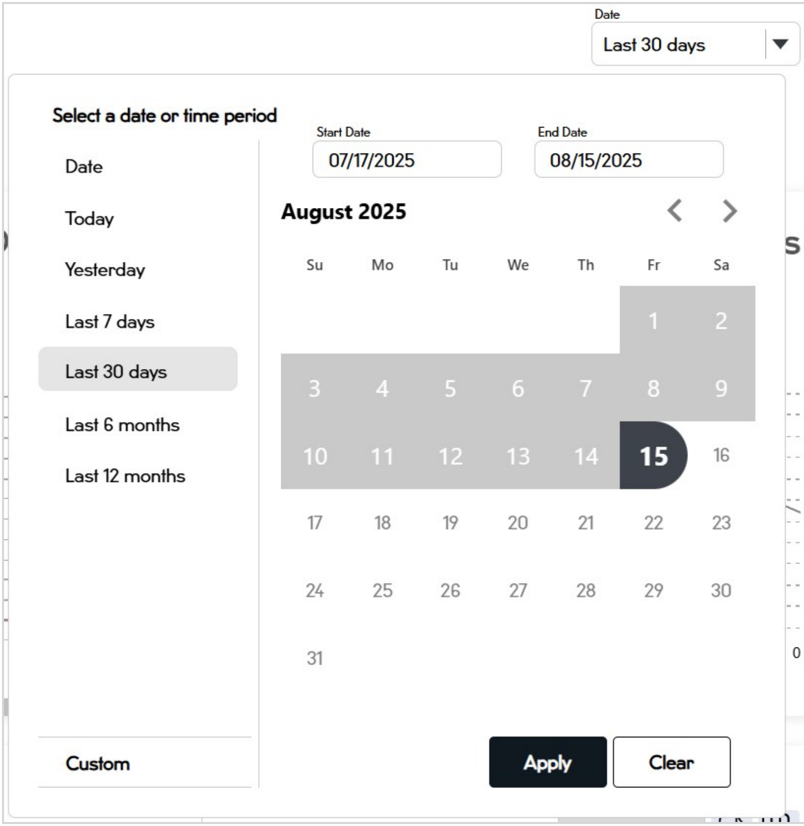
and choose a filter.

   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**.



Available options are:

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

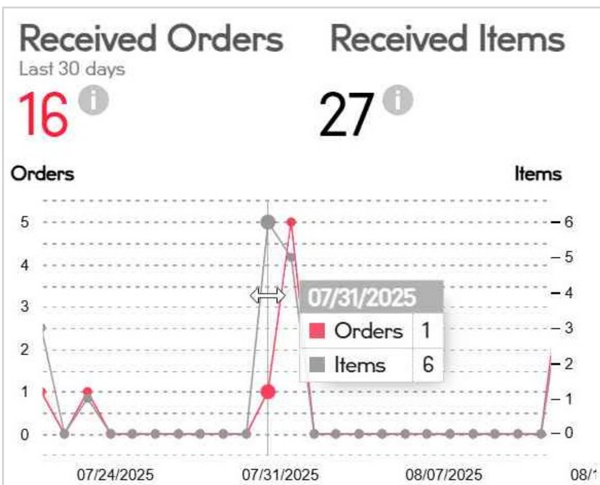
Click **Custom** to customize the option to any preferred time period.

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

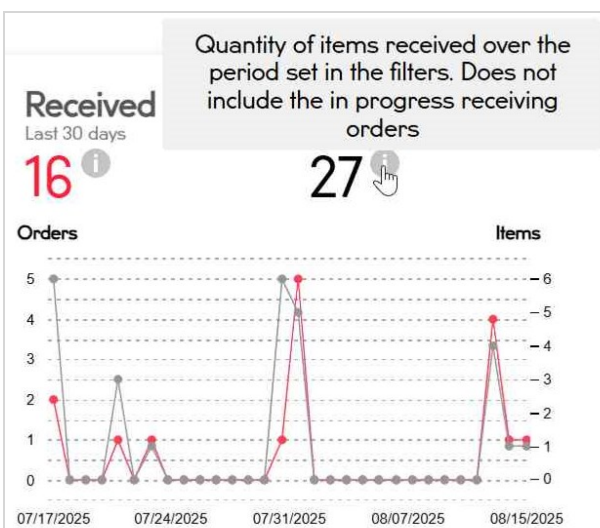
    - **Pending Receiving:** The upper portion of this section displays the pending orders and items over seven days. The lower portion displays the order and items from the last seven days.

- **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.

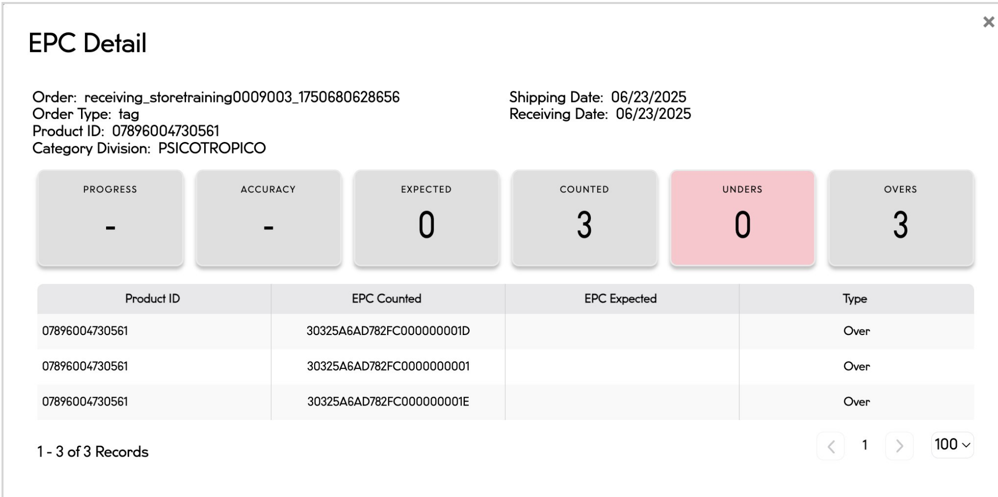
7. Hold the pointer over specific portions of the charts to display details about the corresponding day.



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



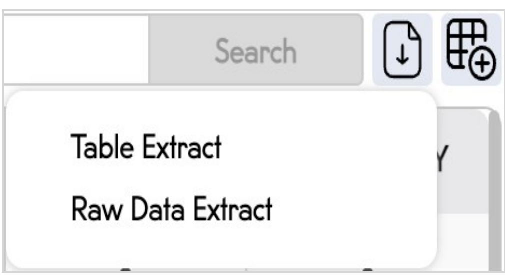
9. The Receiving Details per Order section displays a table with the details of the receiving process. Click in the REC QTY column to display the EPC Detail window.



Downloading Order Details

The Receiving 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.



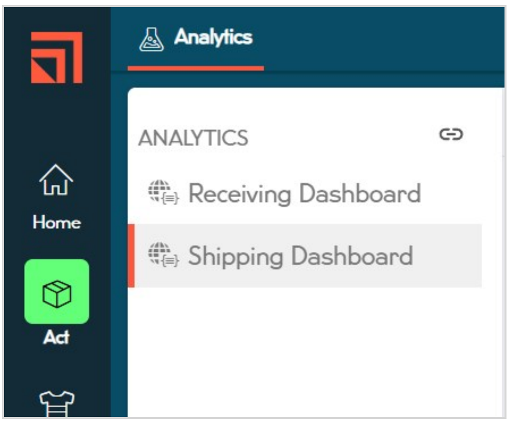
2. Select the type of extract to complete.

   - **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.

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 

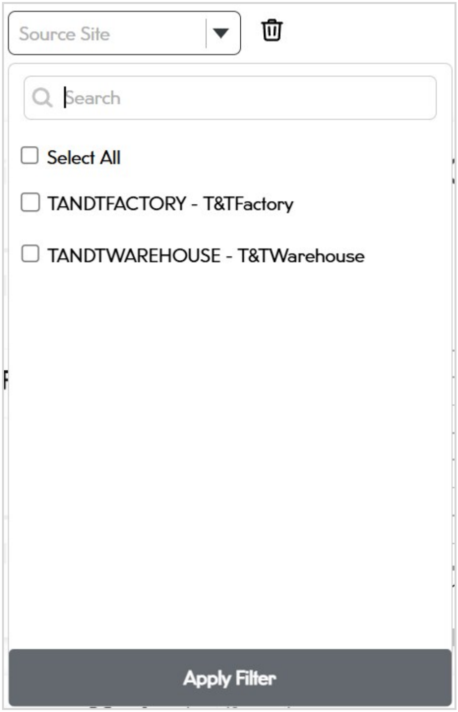
and choose a filter.

   Available filters are:

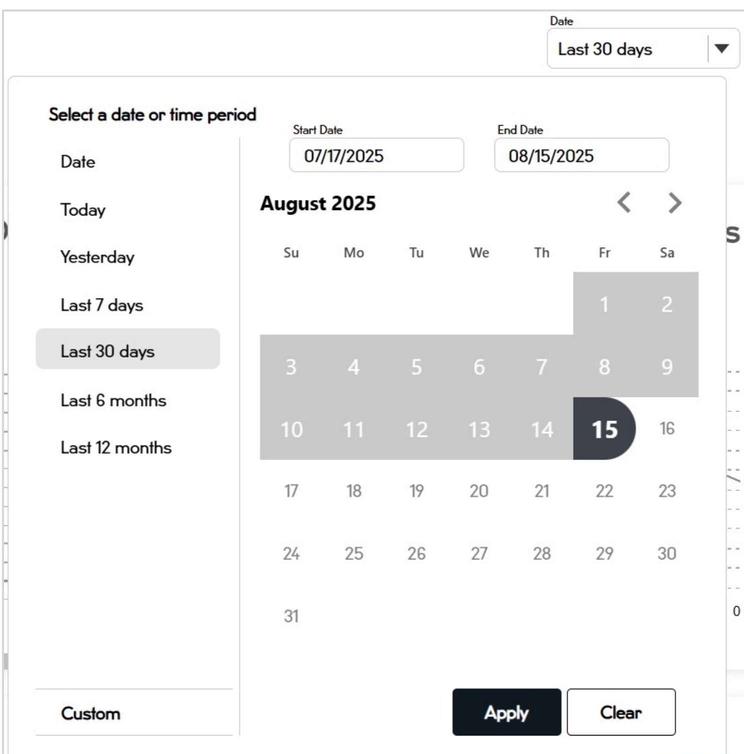
   - Source Site
   - Destination Site
   - Categories
   - Brands
   - Models
   - Colors
   - Product ID
   - Order Type
   - Order Status

   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.



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



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.

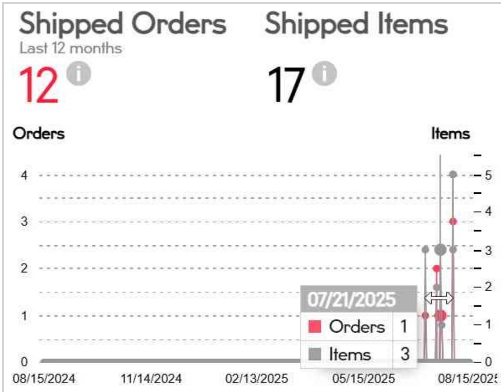
    - **Pending Shipping:** The upper portion of this section displays the pending orders and items for the specified time period. The lower portion displays the order and items that have more than seven days.

    > 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.

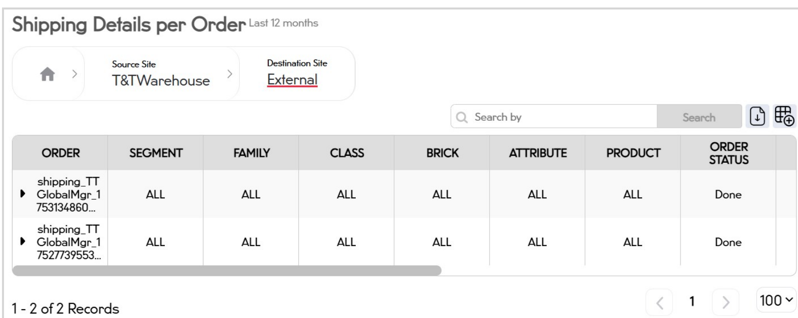
8. Hold the pointer over the icon to display more information about the corresponding item.

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



10. Click to expand the graph.

11. 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

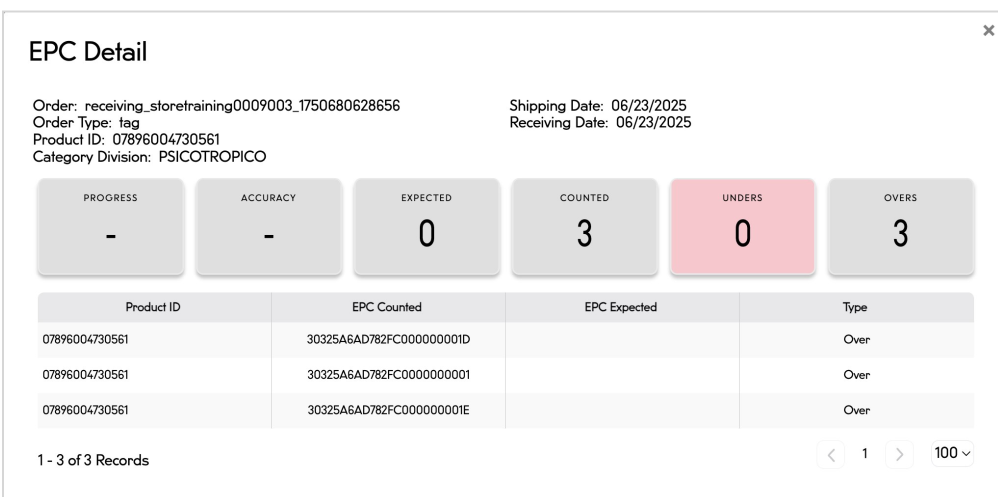
Source Site T&TWarehouse > Destination Site External

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 1 100

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



EPC Detail

Order: receiving_storetraining0009003_1750680628656
Order Type: tag
Product ID: 07896004730561
Category Division: PSICOTROPICO

Shipping Date: 06/23/2025
Receiving Date: 06/23/2025

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

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.

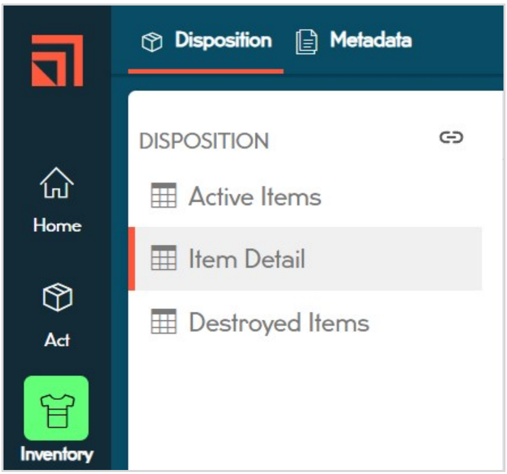
1. Select to export the data.

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.

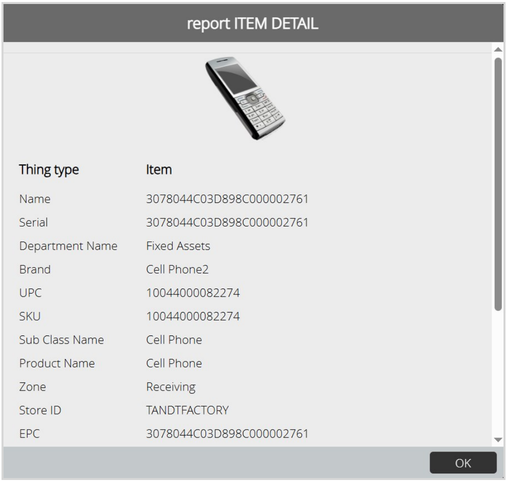
1. Open the BarTender Track & Trace Console in your browser.
2. Log in with your Site Manager account.
3. Select **Inventory**, then **Disposition**.



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.

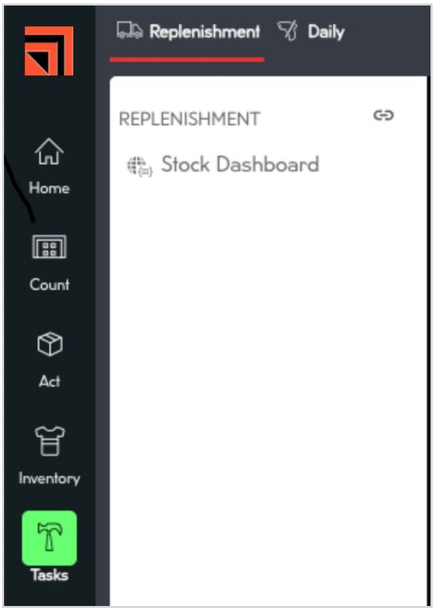
1. Select to export the data.

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**.



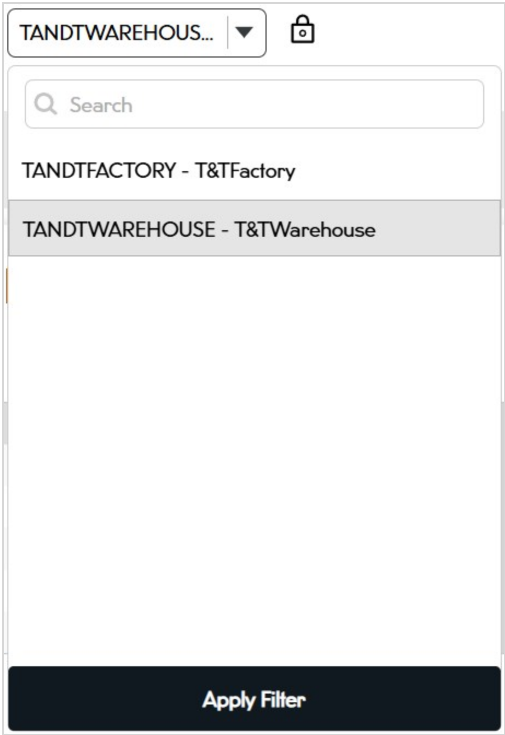
4. On the Receiving Dashboard page, select **Add Filters** and choose a filter.

   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

Search

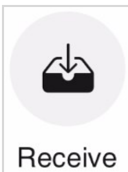
Inventory

Technical

Tracking Inbound Items (Receiving)

The Receive module enables the collection of incoming items for stock inclusion, supportingblind 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**.

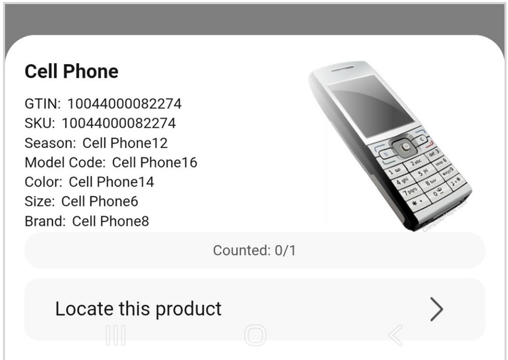
   

   A list of reference orders assigned to the location displays with one of the following statuses:

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

   Reference order 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:



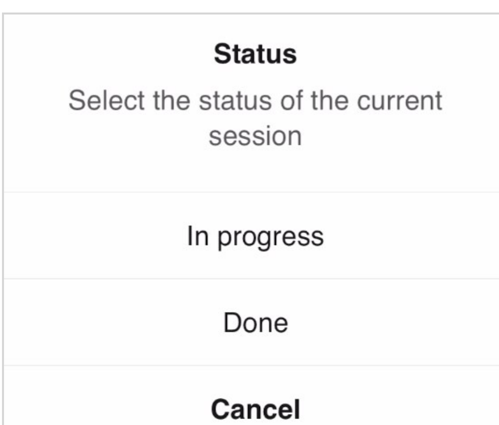
This example is a product entry detail for a cell phone.

  - 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.

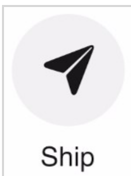
8. Select a status for the order, indicating whether this session is finished (Done), should be resumed (In progress), or cancelled (aborting the synchronization).



Tracking Outbound Items (Shipping)

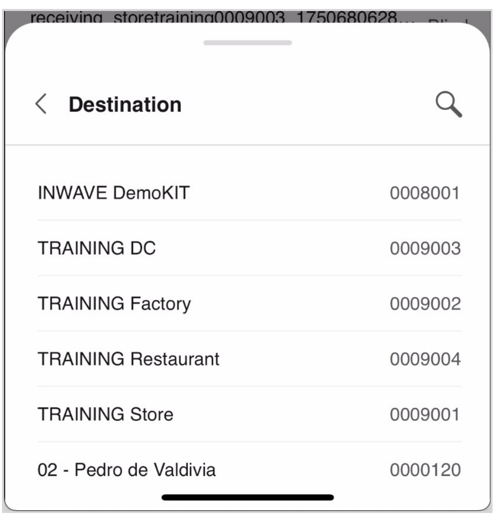
The Ship module enables the operator to count items for shipment or transfer. Orders can be processed by scanning or entering a reference order, or by initiating a blind shipping process.

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.

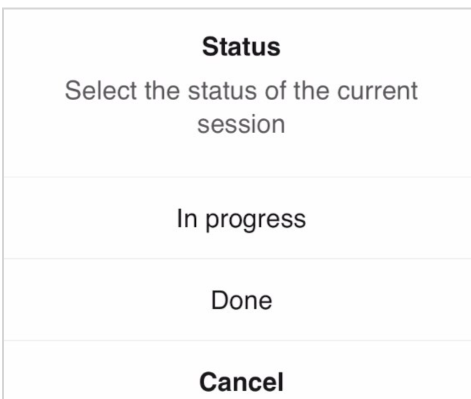
- Details about the new scanned items are available. To view details, tap a product entry to open a modal displaying:
    - Product name, color, size
    - GTIN and SKU
    - View Scanned Item
    - **Locate This Product** (Geiger mode)

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).



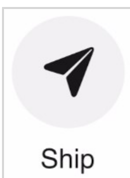
Transferring Items Between Locations

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.

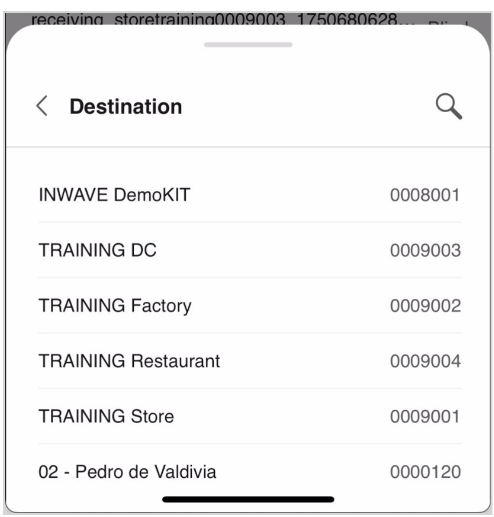
Shipping the Items

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.

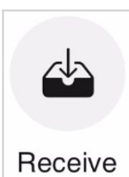
Syncing is required to save progress. If the user exits without syncing, all data will be lost.

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.

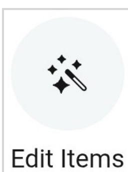
The module provides two distinct modes:

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

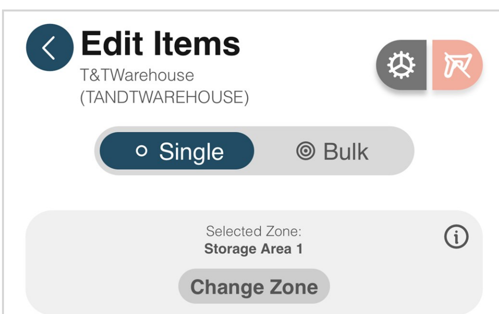
Single Mode

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

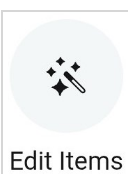
Use this option to apply the same status update to a group of items. Bulk mode is recommended for operational scenarios such as updating multiple items during inventory preparation, restocking, or handling exception-based movements.

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

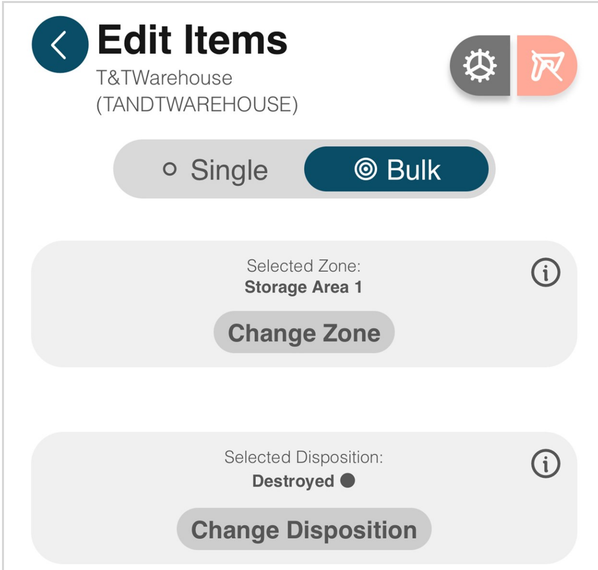
1. Open the BarTender Track & Trace application and log in.

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.

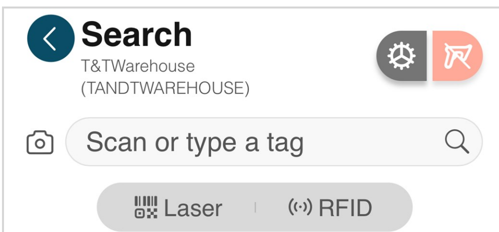
Searching for Items

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**.

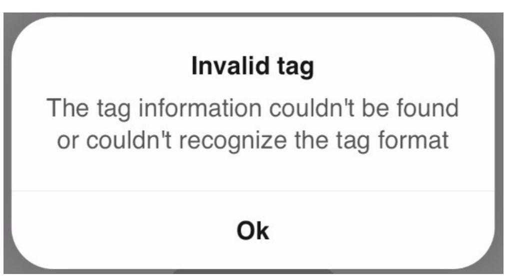
3. Enter an SKU or GTIN, or scan one with the phone camera or RFID hand-held.

   - **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.

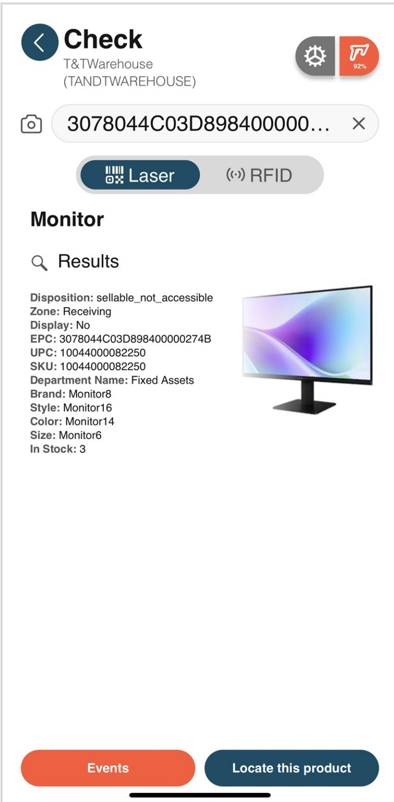
   - **Red:** Far
   - **Yellow:** Nearby
   - **Green:** Very close

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

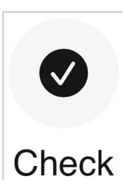
6. Press the trigger on the RFID hand-held and move closer to the asset.

Checking an Item

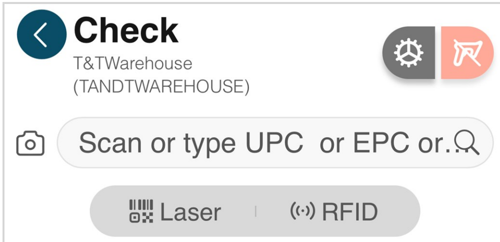
Use the Check module to retrieve detailed product or item information by scanning an identifier using a phone's camera, Laser, or RFID technology.



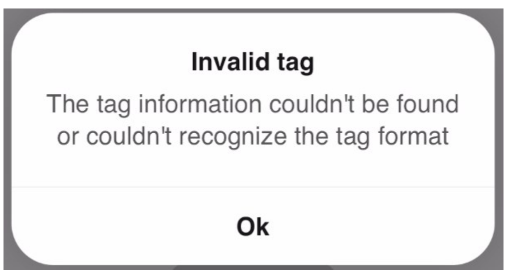
1. Open the BarTender Track & Trace application and log in.
2. Connect your RFID hand-held to the application.
3. In the Verify panel, tap **Check**.



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:

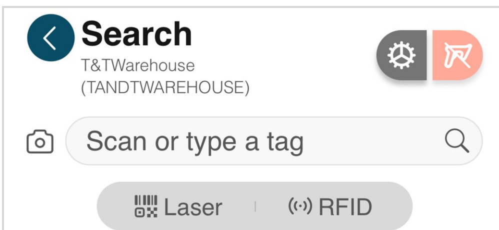


Checking Whether an Item Is in Stock

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

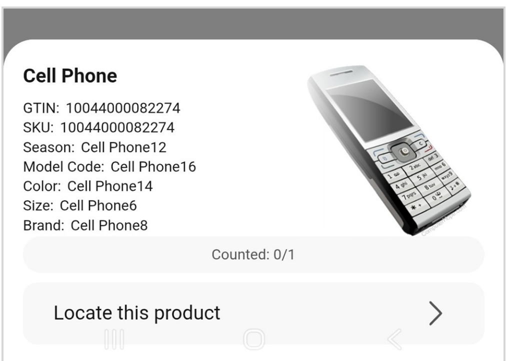
Geiger mode is an optional feature that requires a connected RFID reader. While not mandatory for standard operations, it can be used, when available, to assist in locating tagged items.

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:

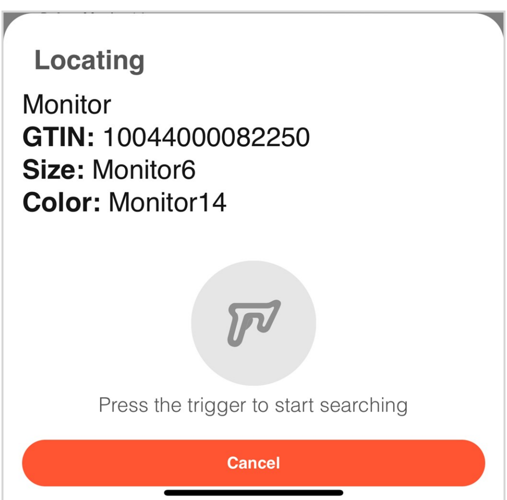
- **View Scanned Items**: Displays scanned tags with a green checkmark if the item has already been read.
- **Locate This Product:** Starts Geiger mode to detect the hand-held's proximity to the specified item using visual cues.

To use Geiger mode to locate a product

1. Tap **Locate This Product**.

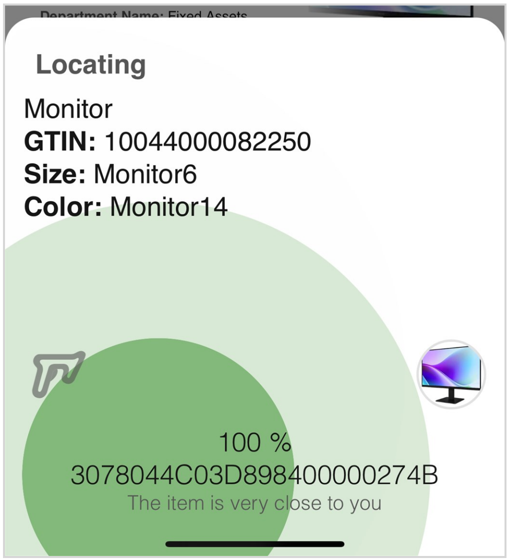


2. Tap the map icon to use the connected reader to assist with item location and display the item's location.



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

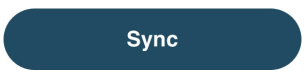
Synchronization is required to save progress. If the user exits without syncing, all data will be lost.

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.

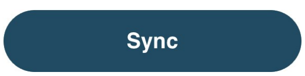
Synchronizing Multiple Items

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



Synchronizing a Specific Item

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



  - 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.

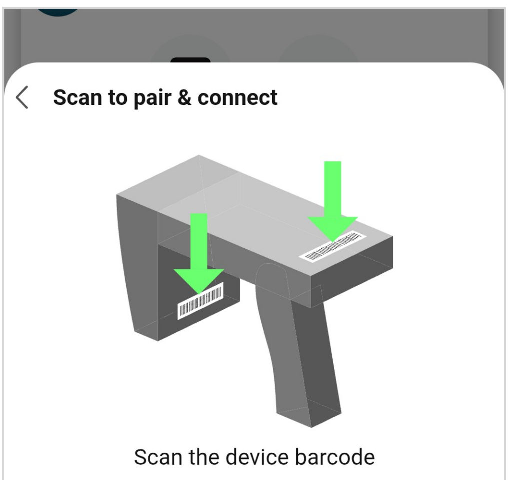
Connecting a Reader

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).

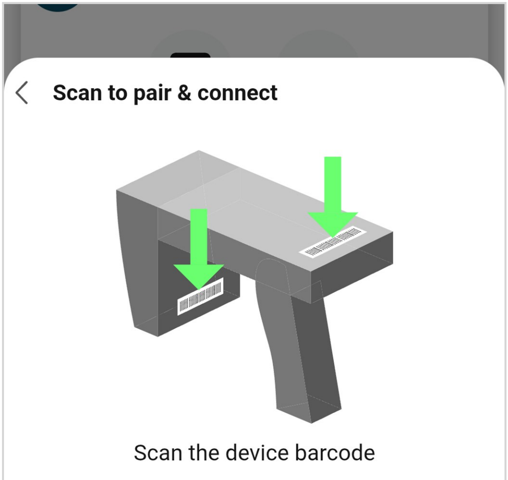


5. After connecting, tap the icon for reader details.

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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