Technical Document
English

BarTender Track & Trace

User Guide

Version 12.4

Contents

Introduction to BarTender Track & Trace

BarTender Track & Trace supports inventory visibility, logistics workflows, and item-level tracking for organizations that need better control over operational movement and status.

Use this documentation to learn how to configure Track & Trace, manage inventory and logistics activities, use mobile workflows, review analytics, and connect external systems.

> BarTender Track & Trace can be used as the encoding solution for item-level labeling.

Get Started

Use this section to understand the main areas of BarTender Track & Trace before working with inventory, logistics, configuration, and mobile workflows.

Track & Trace is organized around the following activities:

1. **Understand the product.** Review how Track & Trace supports inventory visibility, logistics workflows, and operational tracking.
2. **Configure the environment.** Set up users, permissions, locations, product data, and operational settings required for daily use.
3. **Review inventory visibility.** Use the home page, inventory panel, site map, and item detail views to monitor stock and item status.
4. **Perform operational workflows.** Use receiving, shipping, transfers, item checks, and mobile workflows to support inventory movement.
5. **Analyze activity.** Review dashboards, KPIs, reports, and stock availability information to monitor operational performance.

After reviewing this section, use Product Areas to find task-specific guidance.

Product Areas

Administration

Administration includes the configuration and management capabilities used to maintain a Track & Trace environment. This area supports user access, product and category data, site configuration, location setup, and tenant-level operational settings.

Key capabilities:

- Manage users, roles, permissions, and site assignments.
- Maintain product catalogs and category hierarchies.
- Configure sites, locations, maps, and operational zones.
- Review tenant-level configuration and operational settings.

[Learn more about Administration]

Inventory

Inventory provides visibility into item status, stock availability, asset location, and inventory activity across configured sites and zones. This area helps users monitor where items are located and how inventory changes as operational workflows are completed.

Key capabilities:

- Review inventory status by site, zone, product, SKU, or GTIN.
- Search for items and view item-level details.
- Check stock availability and inventory movement.
- Use maps and dashboards to review inventory distribution.

[Learn more about Inventory]

Logistics

Logistics supports the movement of inventory into, through, and out of operational locations. This area includes receiving, shipping, transfers, and order-related workflows used to manage inbound and outbound activity.

Key capabilities:

- Track inbound items and receiving activity.
- Track outbound items and shipping activity.

- Transfer items between configured locations.
- Review order details, item quantities, and operational progress.

[Learn more about Logistics]

Analytics and Reporting

Analytics and Reporting provides operational visibility through dashboards, KPIs, reports, and downloadable data. This area helps users monitor receiving, shipping, inventory activity, and operational performance across selected filters and time periods.

Key capabilities:

- Review receiving and shipping dashboards.
- Monitor KPIs for orders, items, progress, and accuracy.
- Use filters to analyze data by site, category, product, or order status.
- Download order details and operational reports.

[Learn more about Analytics and Reporting]

Mobile Applications

Mobile Applications extend Track & Trace workflows to supported mobile devices and connected readers. This area supports item searches, stock checks, synchronization and RFID-enabled operational activities.

Key capabilities:

- Search for items and verify stock from mobile devices.
- Perform Geiger searches to locate items.
- Synchronize one or more items.
- Connect supported RFID readers and mobile devices.

[Learn more about Mobile Applications]

Developer and Integration Resources

Developer and Integration Resources support connections between Track & Trace and external enterprise systems. This area provides access to API documentation and integration guidance for exchanging inventory, logistics, and operational data.

Key capabilities:

- Access API documentation for supported integration scenarios.
- Review authentication and access requirements.

- Integrate inventory and logistics data with external systems.
- Support reporting, ERP, WMS, and enterprise application workflows.

Learn more about Developer and Integration Resources

Feature Walkthroughs

Feature Walkthroughs provide interactive demonstrations of selected Track & Trace capabilities introduced across different product releases. Walkthroughs are organized so they remain easy to find regardless of the release in which the capability became available.

View Feature Walkthroughs

Administration

Administration contains the configuration and management capabilities used to maintain a Track & Trace environment.

This area is primarily intended for Global Managers and Site Managers responsible for user access, operational configuration, product information, location management, and tenant-level settings.

Use Administration to configure the foundation of a Track & Trace deployment, including users, products, categories, locations, and operational settings that support inventory visibility and logistics workflows.

Administration Areas

Users and Access

Manage user accounts, assign roles, control site access, and maintain permissions across the organization. User management also supports account activation, invitation resending, password resets, and user status management.

- Users Dashboard
- Managing Users

Master Data

Maintain the product and category information used throughout Track & Trace operations. Master data helps organize products, define category hierarchies, and support consistent product identification across inventory and logistics workflows.

- Master Data Dashboard
- Managing Products and Categories

Site and Location Configuration

Configure operational locations, maintain site information, and manage the maps used to represent operational environments. Location configuration supports site visibility, zone-based inventory tracking, and operational navigation within Track & Trace.

- Site Configuration Dashboard
- Configuring Site Locations

Typical Administrative Tasks

- Create and manage users.
- Assign roles and site access.

- Maintain products and categories.
- Configure operational locations and maps.
- Review tenant-level configuration settings.

Administration Common Workflows

Configure system settings, manage users and roles, and maintain operational access controls.

Recommended topics:

- User management
- Roles and permissions
- System settings
- Configuration management

> Most administrative capabilities are available only to Global Managers and Site Managers, depending on assigned permissions.

Inventory

Inventory provides visibility into item status, stock availability, asset location, and inventory activity across configured sites and zones.

Use this area to review where items are located, search for specific products, view item-level details, check whether items are in stock, and monitor how inventory changes as operational workflows are completed.

Inventory information is supported by the Track & Trace home page, inventory panel, site map, item detail views, stock availability tools, and mobile inventory workflows.

Inventory Areas

Inventory Visibility

Review inventory information by site, zone, SKU, GTIN, PID, product name, and item quantity. The home page provides an at-a-glance view of inventory activity, including what is on site, what has entered the site, and what has left the site.

- Using the Track & Trace Home Page
- Viewing Stock Availability

Item Search and Item Details

Search for items and review detailed information about selected assets. Item details can include product information, zone, identifier, quantity, EPC, status, and last scan information.

- Searching for Items
- Locating an Item Using the Item Detail Report
- Checking an Item

Inventory Activity

Review and update inventory information as items move through operational processes. Inventory activity can include item edits, stock checks, synchronization, and movement between configured locations.

- Editing Items
- Synchronizing
- Transferring Items Between Locations

Typical Inventory Tasks

- Review inventory status by site or zone.
- Search for products by GTIN, SKU, PID, or product name.
- View item-level details and item status.
- Check stock availability.
- Review inventory distribution on the site map.
- Synchronize or update inventory information from supported workflows.

Inventory Common Workflows

Manage inventory visibility, stock status, and item movement across facilities, locations, and operational workflows.

Recommended topics:

- Inventory overview
- Stock visibility
- Inventory movements
- Location-based inventory tracking
- Inventory adjustments

> Available inventory information may vary depending on the user's role and assigned site permissions.

Logistics

Logistics supports the movement of inventory into, through, and out of operational locations.

Use this area to receive inventory, process outbound shipments, transfer inventory between locations, and monitor operational activity throughout the inventory lifecycle.

Logistics workflows help maintain inventory accuracy while providing visibility into inventory movement and order fulfillment activities.

Logistics Areas

Receiving

Receiving workflows support the registration and validation of inbound inventory. These processes help confirm that expected inventory has arrived and has been correctly recorded in the system.

- Inbound Receiving
- Inbound Receiving Configuration

Shipping

Shipping workflows support the preparation, validation, and tracking of outbound inventory. These processes help ensure that inventory is shipped according to operational requirements.

- Outbound Shipping
- Outbound Shipping Configuration

Order Management

Order management workflows provide visibility into inventory requests, fulfillment activities, and inventory movement associated with operational orders.

- Order Management

Inventory Transfers

Transfer workflows support inventory movement between locations while maintaining visibility and traceability throughout the process.

- Transferring Inventory Between Locations

Typical Logistics Tasks

- Receive inventory into a site.
- Validate received inventory against expected quantities.

- Prepare and process outbound shipments.
- Monitor inventory movement between locations.
- Track inventory associated with operational orders.
- Review logistics activity and operational progress.

Logistics Common Workflows

Manage inbound, outbound, and operational logistics workflows that support the movement of goods through operational processes.

Recommended topics:

- Receiving
- Shipping
- Advanced Shipping Notices
- Shipping Orders
- Operational status tracking

> Available logistics workflows may vary depending on the user's role, permissions, and assigned site.

Analytics and Reporting

Analytics and Reporting provides operational visibility through dashboards, KPIs, reports, and downloadable data.

Use this area to monitor receiving and shipping activity, review inventory-related performance, analyze operational progress, and access detailed information about orders, items, and stock availability.

Analytics and reporting capabilities help teams review operational activity across selected sites, filters, and time periods.

Analytics and Reporting Areas

Receiving Dashboard

The Receiving Dashboard displays information about received orders and items, pending receiving activity, average progress, and average accuracy. It also provides filters for reviewing receiving activity by site, category, product, order type, order status, and date range.

- Tracking Inbound Items
- Receiving Dashboard

Shipping Dashboard

The Shipping Dashboard displays information about shipped orders and items, pending shipping activity, average progress, and average accuracy. It supports operational review of outbound activity and shipping details by order.

- Tracking Outbound Items
- Shipping Dashboard

Item Detail Report

The Item Detail Report provides item-level information used to locate items, review item status, and investigate inventory activity. This report supports detailed operational review when users need to locate or verify specific items.

- Locating an Item Using the Item Detail Report

Stock Availability

Stock availability views provide visibility into available inventory and help users confirm whether items are in stock. This information supports operational planning, inventory review, and fulfillment-related decisions.

- Viewing Stock Availability

Typical Analytics and Reporting Tasks

- Review received and shipped orders.
- Monitor pending receiving and shipping activity.
- Analyze order progress and accuracy.
- Filter operational data by site, category, product, order type, order status, or date range.
- Locate specific items using detailed item reports.
- Download order details and operational data for additional review.

Analytics and Reporting Common Workflows

Review operational data, inventory activity, and business metrics that support visibility and decision-making.

Recommended topics:

- Dashboards
- Inventory analytics
- Logistics metrics
- Reports

> Available analytics and reporting information may vary depending on the user's role, assigned sites, and selected filters.

Mobile Applications

Mobile Applications extends Track & Trace workflows to supported mobile devices and connected readers.

Use this area to search for items, check stock availability, perform inventory activities, synchronize inventory data and connect supported RFID readers.

Mobile workflows support inventory visibility and operational activities directly from supported mobile devices, helping teams access and update information at the point of work.

Mobile Application Capabilities

Item Search and Stock Checks

Mobile item search tools help users locate items, review item information, and confirm whether items are available in stock.

- Searching for Items
- Checking an Item
- Checking Whether an Item Is in Stock

RFID Item Location

RFID-enabled search workflows help users locate items in operational environments by using supported readers and mobile devices.

- Performing a Geiger Search for Items

Inventory Updates and Synchronization

Inventory update workflows support item edits and synchronization activities from the mobile application. These workflows help keep item information aligned with operational activity.

- Editing Items
- Synchronizing

Reader Connection

Mobile application workflows support reader connectivity for supported iOS and Android devices.

- Connecting a Reader

Typical Mobile Application Tasks

- Search for items from a supported mobile device.
- Check whether an item is in stock.
- Locate items using RFID search workflows.
- Edit item information in single or bulk mode.
- Synchronize one or more items.
- Connect supported readers to mobile devices.

> Available mobile workflows may vary depending on the device, connected reader, user role, and assigned operational permissions.

Developer and Integration Resources

Developer and Integration Resources provides information for connecting Track & Trace with external systems, business applications, and enterprise platforms.

Use this area to access API documentation, review integration guidance, and understand how Track & Trace inventory and logistics data can support external reporting, ERP, WMS, and enterprise application workflows.

These resources are intended for developers, solution architects, system integrators, and technical administrators responsible for connecting Track & Trace with other business systems.

Developer and Integration Areas

API Documentation

API documentation provides developer-focused reference information for supported Track & Trace integration scenarios.

- Track & Trace API Repository

Inventory Data Access

Inventory data access supports external visibility into inventory snapshots and analytics data. These capabilities help integrated systems review inventory information using calculations aligned with Track & Trace inventory views.

- Inventory API: Public Inventory Snapshot and Analytics Access

Integration Scenarios

Integration resources support data exchange between Track & Trace and external enterprise systems such as ERP, WMS, reporting platforms, and custom applications.

- Inventory visibility and reporting integrations.
- Operational data exchange with external systems.
- Enterprise application and reporting workflows.

Typical Developer and Integration Tasks

- Access Track & Trace API documentation.
- Review integration requirements for external systems.
- Use inventory data in reporting and analytics platforms.

- Connect Track & Trace data with ERP, WMS, or custom applications.
- Review release-specific API enhancements.

> API availability, access requirements, and integration options may vary depending on the tenant configuration and enabled Track & Trace capabilities.

Feature Walkthroughs

Feature walkthroughs provide interactive guidance for selected Track & Trace capabilities introduced across different product releases.

Walkthroughs are organized by feature rather than release version. Additional walkthroughs will be added as supporting guidance becomes available.

- Walkthrough - Track & Trace Platform Lifecycle
- Walkthrough - Track & Trace Platform Master Data Settings
- Walkthrough - Track & Trace Platform Site Configuration Dashboard Enhancements
- Walkthrough - Track & Trace Dashboard Settings Configuration
- Walkthrough - Track & Trace Map and Zone Management
- Walkthrough - Category Hierarchy Management – Global Manager Workflow
- Walkthrough - Track & Trace Global Manager Creates and Manages Products
- Walkthrough - Track & Trace Site Manager Browses the Product Catalog
- Walkthrough - Track & Trace Platform Site Manager and Operator Flow
- Walkthrough - Track & Trace Homepage

Guided Walkthroughs

Guided walkthroughs provide step-by-step product tours for common Track & Trace setup and operational activities.

- Track & Trace Installation Guide: Review the installation process and initial system setup workflow.
- Track & Trace Configuration and Reset Setup: Review configuration settings and reset procedures used during system setup and maintenance activities.
- Track & Trace RFID Connection Guide: Review the RFID connection workflow and supported configuration process for RFID operations.
- Track & Trace App: Inventory and Define the Count Scope:Review how to create an inventory session and define the scope of items to include in the inventory count.
- Track & Trace App: Check: Review how to perform item verification and validate item information using the Check workflow.
- Track & Trace App: Search: Review how to search for items and view their details using the Search workflow.
- Track & Trace App: Edit Items to Move and Change Disposition of an Item: Review how to update item locations and change item dispositions using the Edit Items workflow.

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.

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