

NON-INVENTORY ITEM TYPE

STOCK ITEM FLOW

QUICKBOOKS

TRACKNICITY

CREATE PURCHASE ORDER
(OPTIONAL) AND PURCHASE ITEMS

RECEIVE ITEMS IN THE TRACKNICITY
MOBILE APP BY GOING TO ADMIN -
> RECEIVE PARTS TO LOCATION

CHECK ITEMS OUT FROM MOBILE
APP - ITEMS ARE NOW QUEUED UP
IN THE APPROVALS REPORT

JOB COST ADJUSTMENT SYNCs TO
QUICKBOOKS

ON THE TRACKNICITY WEB
DASHBOARD, APPROVE THE
PREVIOUS TRANSACTION - THIS
QUEUES THE COST ADJUSTMENT TO
BE SYNCED TO QUICKBOOKS



NON-INVENTORY ITEM TYPE

ITEMS BOUGHT SPECIFICALLY FOR CUSTOMER FLOW

QUICKBOOKS

CREATE PURCHASE ORDER
(OPTIONAL) AND PURCHASE ITEMS
-
IF YOU DON'T CREATE A PO, YOU
WILL NOT BE ABLE TO GENERATE A
PICK LIST

RECEIVE ITEMS IN QB BY
ENTERING A BILL OR AN EXPENSE
-
THIS MARKS ITEMS RECEIVED ON
PURCHASE ORDERS AND
TRACKNICITY

TRACKNICITY

IN THE MOBILE APP, SELECT
STAGING AREA IN THE FROM
SECTION OF THE TRANSACTION
PAGE AND CHOOSE THE CLIENT.
THIS WILL POPULATE A PICKLIST
FROM RECEIVED PO'S

FROM THE POPULATED PICKLIST,
SELECT THE ITEMS YOU'RE
DELIVERING TO THE CUSTOMER AND
ADJUST QTY AS NEEDED. ONCE YOU
HIT CHECKOUT, THIS WILL MARK THE
SELECTED ITEMS AS DELIVERED