OrderBook App Guide

OrderBook is an easy-to-use app built to make inventory management and purchasing much simpler. With the OrderBook app just record the parts you use and parts will be replenished reliably so you keep the parts on-hand that you need to stay efficient.

App Store — Available on the iPhone

The OrderBook app is available in the Apple and Android app stores.

Google play

System Requirements: OrderBook requires access to GPS location services, your device's camera, and flashlight.

Apple: Requires iOS 7.0 or later. Compatible with iPhone and iPad.
Android: Requires Android 4.1 or later. Compatible with Android phones and tablets.

① Use Your Parts - Flexible utility that displays items for your stock location, or allows you to search the entire connected database for unusual requirements. View item details, place one-time orders, or manage items on your stocklist.

② Parts Scanner - Use the scanner on your mobile Apple or Android device to scan barcodes or QR tags on you inventory. The fastest easiest way to record your parts usage.
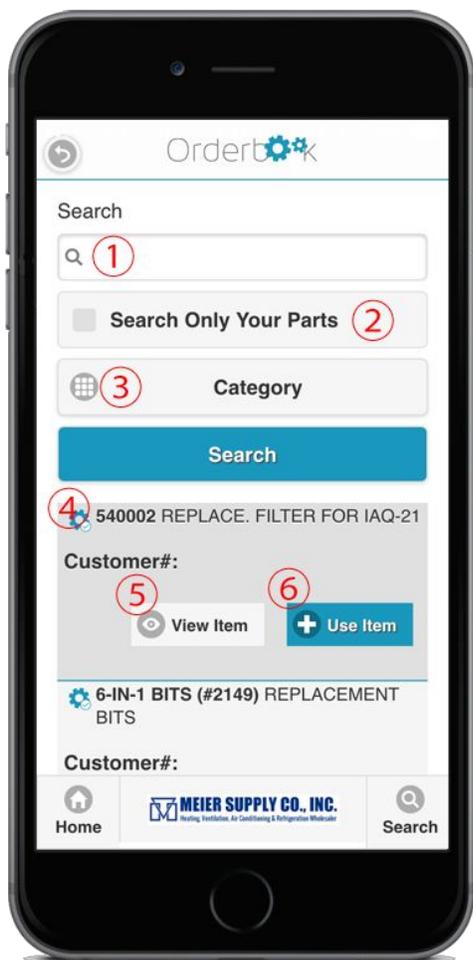
③ Parts Report - Review the quantity and location of parts usage recorded.

④ Re-Order - User Re-Order to review parts usage recorded and initiate a replenishment cycle.

⑤ Library - Access documents for over 360 HVACR manufacturers. Available documents include literature, installation guides, parts lists, MSDS safety sheets and more. Currently includes over 18,000 documents.

⑥ Your Suppliers - Find you local suppliers, access contact information, and get direction for where you are to your closest vender.

① Use Your Parts

① Alpha Numeric Search - You can search your parts list, or the entire database by entering search characters here. Our advance search algorithm allows you to enter multiple search elements: for instance you can enter "3450" to find 3450 RPM motors, or "3450" and "1/2HP" to find 3450 RPM 1/2HP motors.

When a search string is entered we will search the part number, the primary description, saved UPC codes, and saved customer part number for results.

② To search your stock items only, check the "Search Only Your Parts" checkbox. By default this checkbox is unchecked and will search the entire database.
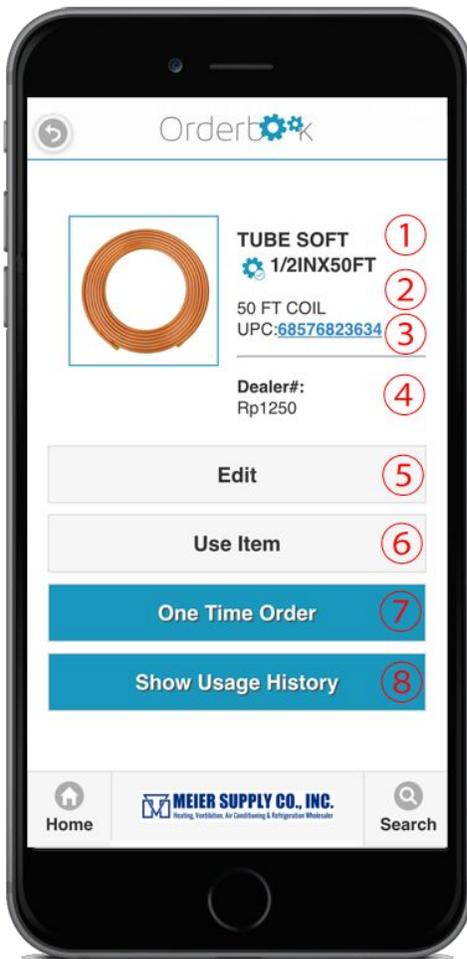
③ Category Search - Most parts databases, including our default database, are organized by category. Examples of categories are "Copper Fittings" or "HVAC Thermostats". When you select a category we will display a list of all parts in that category organized alphanumerically by part number.

④ Search Results List - In this area we display a list of your parts alphanumerically by part number. The default display is of your stock parts. If you have used our search features the results will be displayed here. You can scroll up and down this list to find and select an inventory item.

⑤ Use this link to view details of an item. Click View Item to open item details page and record parts usage, view parts images or connected files, view a ledger of parts usage, add or update UPC codes or customer part numbers, or add items to your stock list.

⑥ Use Item QuickLink - Click this link to rapidly record the usage of the selected part. When a item from your stock list is used we will add it to your used items replenishment report, and record quantity used and location (if available) in the item ledger.

Part Detail Page

Back Page Button - Universally used to return to previously viewed page.

① Database Part Number from Vendor - not editable.

"MyStock" Symbol - Universally used indicated that the stock item viewed is on your stock list.

② Database Part Description from Vendor - not editable.

③ Primary UPC code for on item barcode reading. Secondary UPC codes can be added in "Edit" link on this page.

④ Contractor Part Number - Custom part numbers may be added to OrderBook to reflect part numbers used by the contractor's accounting or administrative systems. "Search" function will query entered Contractor part numbers. To add or edit Custom Part numbers in "Edit" link on this page.
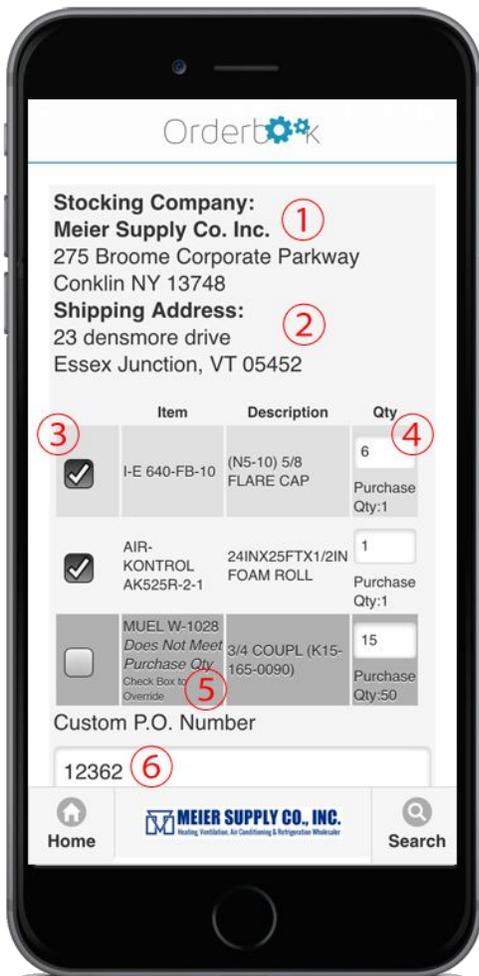
⑤ Edit Item - Click this item to add or update Contractor part number or add alternate UPC codes to be used with barcode based stock searches.

⑥ Use Item - Click this link to record the usage of the selected part. When a item from your stock list is used we will add it to your used items replenishment report, and record quantity used and location (if available) in the item ledger.

⑦ One Time Order - Create an instant PO for selected part. This will immediately initiate a PO of item(s) desired. This will not interface with "replenishment" stock lists or replenishment orders.

⑧ Show Usage History - A parts ledger to show details of past parts usage.

④ Re-order Parts

In the browser based administration dashboard, all supplier locations are set-up, and default Suppliers are set-up for each part. In addition ship-to are established for and orders generated.

① Supplier Name and Fulfillment Address - Based on the part use recorded, this is the default supplier for material to be replenished. More than one supplier list can be managed with the app re-order area.

② Ship-to Address for Order Placed - In admin the default ship-to address is designated for each stock location.

③ Order Check-box - If this box is checked (which is the default setting) this item will be included in the replenishment order. If un-check, item will not be ordered and usage will be carried into the next re-order cycle.

④ Used / Order Quantity - the quantity of parts used by item since the previous purchase order is displayed here, and may be edited to change order quantity.

⑤ Programmed Order vs. Use Quantities - Some items, such as refrigerant, are used in one quantity, (for instance pounds) and purchase in another quantity (for insrance 25 pound cylinders). This programming will flag items that have usage quantities that are not an exact factor of the purchase quantity. To resolve either: 1. leave the reorder box unchecked and usage will get carried in the next reorder cycle, 2. change the order quantity to become a factor of the purchase quantity, or 3: check the re-order box without changing the purchase quantity which will included the item on the replenishment order but may result in a supply error or higher cost per unit ordered.

⑥ PO Options - Based on user settings set by OrderBook administrators, users can either submit an order to administrators for approval, or place a replenishment order

directly and immediately. OrderBook can generate a system PO number, or one can be manually entered here.