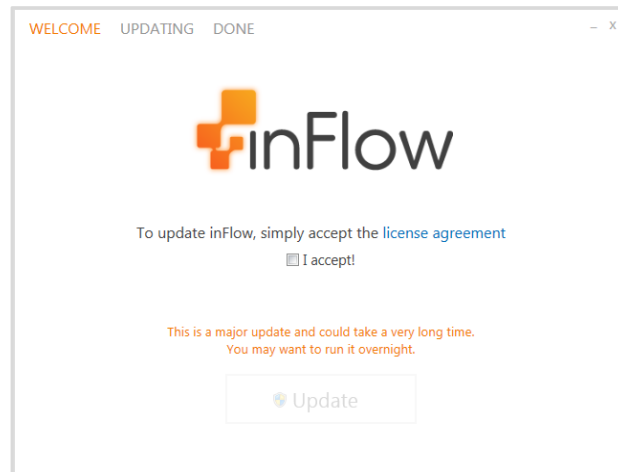




v3 change guide

see what's new for inFlow v3

We're pretty excited to get you into the newest (and greatest) version of inFlow so if you haven't already done so please [download inFlow v3](#) and run it to start the update. inFlow will recognize your existing copy and offer you the chance to update so you don't have to uninstall.



It may take a little time to update your data to the new format...
With that in mind, you might want to grab a cup of coffee or a snack while you wait.
(The development team has recommended TimTams™!)



Once the update is finished, **you'll be logged into the brand new inFlow!**

Now that you're ready to get started, here's a quick overview of what we're going to cover. Feel free to jump to the section (or sections) you're interested in.

- Changes to Calculating Your Numbers
- Product Record
- Changes to Ordering
- Multi-User Mode
- More Flexible Licenses
- Taxing Changes
- Changes to Costing
- Historical Reporting & Dates
- Consistency Checking
- Serial Numbers
- Having trouble?

Changes to Calculating Your Numbers

For version 3, not only did we want to make the calculations more powerful, we also wanted to reduce data-entry errors and ensure that your numbers make sense. As a result, some unusual cases that were valid in v2 are no longer valid in v3, and this may require some extra care when migrating from v2. Examples of these cases include:

- A sales order/purchase order contains at least one item fulfilled/received that is different from what was ordered
- A completed work order caused at least one component to go into negative inventory
- A product's type was changed after it's been received/sold

If your database contains scenarios listed above, inFlow will notify you during the update process and will show you a list of orders that failed to be migrated into inFlow v3.



There were some errors with updating your data. Some records may have been modified or lost. Please review the log for more information.

[View Upgrade Log](#)

[get help](#)

[Start inFlow](#)

These orders will be moved into inFlow v3 with a "Cancelled" status.

Also, since inFlow v3 now respects the date that you specified a transaction took place (rather than the date you entered the order into the system) and can recalculate costs and totals accordingly, you may see some other changes to your historical inventory numbers and costs.

There are two ways that you can deal with these changes to your historical data:

1. Use v3 as-is, and if necessary, rely on inFlow v2's reports for data prior to when you switched to v3.
2. Go through your historical orders and costs and ensure that everything is accurate in v3.

How to use v3 going forward and v2 for historical reports

This method takes less work. inFlow will ensure that your current inventory levels and costs in v3 for the current time match what you had in v2. Based on this, you can continue using v3 as normal, while recognizing that some of the historical information might be different.

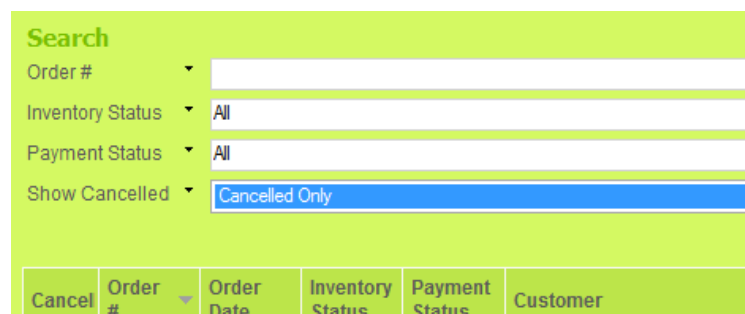
If and when you need a report for information prior to when you switched to v3, you can use the reports from v2 for this purpose. You should store your v2 backup for this purpose so you can revert to it and refer to this information. You can either generate all the reports you might need from v2 now and store them for reference, or reinstall v2 at a later time.

For example, if you switched to inFlow v3 on September 1, 2014 and need a report for your total sales for 2014, you can use inFlow v2 to generate a report on sales from January 1, 2014 to August 31, 2014, and inFlow v3 to generate a report on sales from September 1, 2014 to December 31, 2014.

How to go through your version 3 database to ensure historical data is accurate

Since inFlow v3 now allows you to change old orders and will recalculate costs and totals accordingly, it's possible to go through old orders and ensure everything is correct. Of course, this may be time consuming.

If you had orders that couldn't be migrated to v3, they will show up as cancelled orders. To see these cancelled orders, navigate to the order list and click on any one of the filters to change it to "Show Cancelled". Change the dropdown to show "Cancelled only".



The screenshot shows a search interface with the following elements:

- Search** header
- Order #**: A text input field.
- Inventory Status**: A dropdown menu set to **All**.
- Payment Status**: A dropdown menu set to **All**.
- Show Cancelled**: A dropdown menu set to **Cancelled Only**.
- Table Headers**: A table with columns: **Cancel**, **Order #**, **Order Date**, **Inventory Status**, **Payment Status**, and **Customer**.

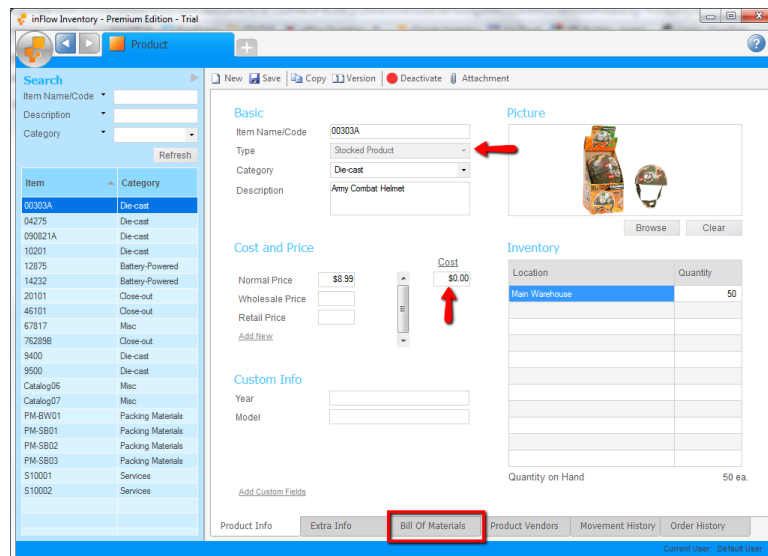
Another important thing to note is that as part of the migration process after adjusting any problematic orders, inFlow may have automatically created a stock adjustment to ensure that your final inventory numbers matched what you had in v2. You can find this adjustment in the "Adjust Stock" window under the name "v2-v3-Migration".

As inFlow has already done this adjustment for you, note that if you decide to re-open and correct the orders, it will be another adjustment on top of the previous one, so you should cancel the stock adjustment if you wish to proceed with correcting the orders. Otherwise, leave the cancelled orders and stock adjustment intact.

You can also go through other old sales and purchase orders to correct any inventory amounts, prices, etc., and inFlow will recalculate costs, profits, and totals accordingly.

Product Record

inFlow now supports a new type of product: Serialized. This enables you to track unique serial numbers, instead of just the overall quantity. So, you will need to pay special attention to which product type you choose, since it can't be changed after the first time you save the product.



If you're adding a product from an order screen, inFlow will make it "Stocked Product" by default. If you need to create a product of another type, you should first create it from the Product screen before adding it to your order.

The "Cost" field has moved to the left of your product screen, next to your sales prices, making it easier to understand the markup on your items.

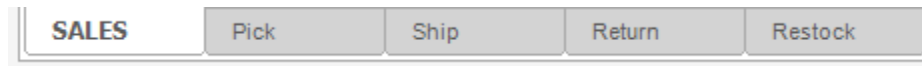
For you manufacturers out there, we've moved the Bill of Materials to its own tab, so you'll have more space to work with!

Changes to Ordering

We've streamlined the sales and purchase orders so that you can handle all but a few details from the main tab. The main tab now shows you the status of the order in one place, including what's been shipped, received, or returned, using the new Status Icons.

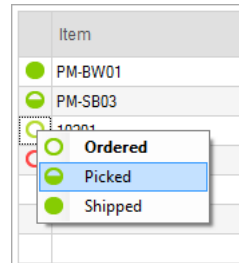
The Main Tab

The main tab (titled either "SALES" or "PURCHASE") now covers your entire workflow, making it easy to control your order from one screen. Details like how many boxes you're shipping (Sales) or where you put the items you receive (Purchasing) can be entered into the other tabs.



Status Icons

You can now see the status of an order on the main tab by looking at the status icons next to each line. What's more, you can control the status line-by-line by clicking on the icons. Of course, if you're shipping the entire order, you can just click "Fulfilled" at the bottom of the order.




e.g. In the example above, the first item has been shipped, the second has been picked but not yet shipped (see the half-full circle) and we are about to pick the third item too.

Returns

You can now handle returns right from the main tab by entering a negative quantity. Once listed on the order, you can either Restock the returned item or Discard it by selecting the appropriate Status Icon.

20101	1:24 California Highway Patrol	8
9400	Police Basket	-1

e.g. The Police Basket in the image above has been returned by entering -1 into the quantity field and also restocked. You can also discard returned items, indicated by this status icon .

Two Streams (Fulfillment & Payment)

Orders now have two status streams: fulfillment related actions (picking, shipping, receiving) and payment related actions (invoicing, paying). This makes orders more flexible and means that you can control both sides of things independently.



Save-As-Default Icons

It's now easier to manage which changes made on an order are one-time exceptions and which changes should be recorded in your product or customer information.

inFlow will automatically save the details for new products and customers, but if you're updating existing details, a save icon will appear next to the change. Clicking this icon will save those changes to be used in future orders.

6" X 14" X 10" Shipping Boxes	1	\$15.00
700 Die Cast Battleship	1	\$15.00
my Combat Helmet	1	\$8.99

e.g. In the example above, we've changed the price of the Battleship. We can update the price for future Battleship orders by clicking the save icon. Or not, if this is a one-time change.

Multi-User Mode

We've made connecting multiple computers running inFlow almost magical! inFlow will now automatically recognize your server on the network and ask you permission to connect.

So if you're working with others in your company, once v3 is loaded you'll be asked what server you should connect to:



Once you're connected, if your company has set up user passwords, you'll be asked to enter yours to gain access to inFlow.

More Flexible Licenses

In response to your feedback, we've made inFlow licensing more flexible. Your licenses can now be used from any computer, and the number of licenses you have determines how many people can use inFlow (to edit data) at once.

You can control which users get which edition of the program through Main Menu > Options > Settings > Users > Target Edition.

The screenshot shows the 'User' configuration window. The 'Target Edition' dropdown menu is highlighted with a red arrow. The window includes fields for 'Administrator', 'Active', 'User Name', 'User Password', 'Confirm Password', and 'Target Edition'. Below these are three columns of 'Access Rights' with checkboxes for various functions like 'Sales Order', 'Customers', 'Purchase Order', 'Vendors', 'Work Order', 'Reorder Stock', 'Count Sheet', 'Transfer Stock', 'Adjust Stock', 'Current Stock', 'History', 'Products', 'Cost Info', 'Product Category', 'Reports', 'Company', 'Customization', 'Import', 'Export', 'Backup', and 'Restore/Reset'. 'Save & Close' and 'Cancel' buttons are at the bottom.

Taxing Changes

You can now assign special tax rates to products in inFlow, not just specify which products are tax-exempt.

The screenshot shows the 'Taxing Schemes' window. A table lists tax schemes with columns for 'Taxing Scheme Name', 'Tax Name', 'Tax Rate', 'Tax On Shipping', 'Secondary Tax', 'Secondary Tax Rate', 'Secondary Tax On', 'Compound Secondary', and 'Special Tax Rates'. The 'AR Tax' row is selected and has a star icon. A red box highlights the text 'To control tax codes' above the 'Special Tax Rates' column. A 'Preview' section on the right shows a calculation: Sub-Total (\$100.00), Freight (\$20.00), State Tax (\$7.20), City Tax (\$0.60), and Total (\$127.80). 'Show Secondary Tax Rates' and 'Show Inactive' checkboxes are at the bottom.

Taxing Scheme Name	Tax Name	Tax Rate	Tax On Shipping	Secondary Tax	Secondary Tax Rate	Secondary Tax On	Compound Secondary	Special Tax Rates
★ No Tax		0 %	<input type="checkbox"/>		0 %	<input type="checkbox"/>	<input type="checkbox"/>	Special Tax Rates
★ AR Tax	State Tax	6 %	<input checked="" type="checkbox"/>	City Tax	0.5 %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Tax Rates

The Taxing Schemes window has the following changes:

- Clicking “Special Tax Rates” lets you add variations on your tax percentages to be applied to certain products
- You can now select your Default taxing scheme by clicking the star icon
- If you charge two types of taxes at once, click the Show Secondary Tax Rates checkbox at the bottom of the screen

Changes to Costing

In the past, inFlow kept track of your product costs, but there was no way to change the costs of old orders. Now with inFlow v3, you can update old orders, and all the other costs and inventory numbers will be updated accordingly.

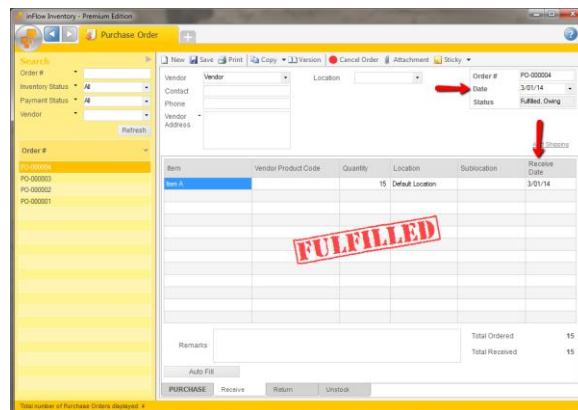
By popular demand, we've added two new costing methods: FIFO (First In, First Out) and LIFO (Last In, First Out).

We've also simplified the costing method by making it a company-wide choice, rather than forcing you to make the selection on each product.

Historical Reporting & Dates

We've improved the way numbers are calculated in v3 so that changes to historical orders will update your inventory movements, costs, and profit. These changes also improve historical reporting since inFlow can now tell what you had on hand based on your orders, even if one of them was filled out well after the fact.

So let's say you're all ready to pull your end-of-year report but are shocked to discover that one of your orders from the end of December wasn't keyed in (oh George, so busy, so forgetful). It's already mid-January but that's okay! Once you enter your order and select the date it was completed, inFlow will be able calculate what you had in stock on Dec 31st (including the order you just entered).



Remember that if you're backdating an order, you'll want to make sure you backdate the receiving or shipping dates as well.

Consistency Checking

inFlow will now give you an error if you try to ship something different than what was originally ordered by your customer. This will help reduce mistakes. If you do want to ship the other items, you can modify the order -- don't worry, the original order will still be available clicking "Versions" (at the top of your screen).

To ensure that your costs are accurate, Work Orders can no longer be completed if you don't have enough in stock, preventing items from going into negative inventory. This means you'll have to adjust your stock to correct the inventory issues before completing a work order.

Serial Numbers

If you've been tracking serial numbers using version 2 of inFlow, the good news is that the new features should make your life much easier! The bad news is that it'll take some work to migrate your existing data.

We have been recommending two ways of tracking serial numbers in version 2, as outlined [here](#). The first way is to track each serialized unit in a separate product in inFlow, and the second way is using the sublocation work around. Please see below instructions for migrating to the new serial number feature for the method you've been using below.

Ready? Alright, here we go!

Currently using: "Item Name/Code" field

You will need to export your existing inventory and make it inactive but before doing so you'll also need to set everything to zero quantity. Here are the steps to make that happen:

1. Export your "Stock Levels" (formerly Inventory) from the system so that you have a full list of what serials you have in stock (Main Menu > General > Export Data > Stock Levels, click "Export").
2. Open the resulting file in Excel and change the stock quantity to zero for all items that are serialized.
3. Use "Save As..." to save this file as a CSV (comma delimited) file named "ZeroQuantities.csv" and then close it.
4. You'll want to import the file as the data type "Stock Levels" and let inFlow automatically match your columns.
5. Click to Import and you're done zeroing out your stock.

Next you're going to take the originally exported file ("inFlow_Inventory.csv") and import it in as stock levels as well but this time you'll match your columns like so:

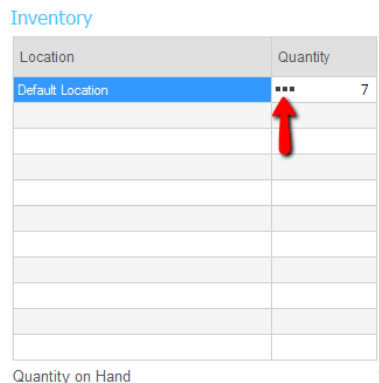
inFlow Field Name	Your Column of Info
Name	Description
Location	Location
Sublocation	Sublocation
Serial	Item Name/Code
Quantity	Quantity

6. The results should be that you end up with a serialized item using your description as its name with all the serial numbers you had in stock, to check this header over to your product list and double click, you should see an ellipsis in your Inventory section to indicate there are serials.

Inventory

Location	Quantity
Default Location	*** 7

Quantity on Hand 7



Currently using: sublocation field

It's important to note that you'll have to rename your old items, set your current stock to zero and create new serialized items in this system.

1. Export your "Stock Levels" (formerly Inventory) from the system so that you have a full list of what serials you have in stock (Main Menu > General > Export Data > Stock Levels, click "Export").
2. Open the resulting file in Excel and change the stock quantity to zero for all items that are serialized.
3. Use "Save As..." to save this file as a CSV (comma delimited) file named "ZeroQuantities.csv" and then close it.
4. Open the originally exported file (inFlow_Inventory.csv) again, you'll have to give these serialized items a new name, since inFlow can't create new items with the same name. The final product of these steps might look something like this:

	A	B	C	D	E	F	G	H
1	Item	Location	Sublocation	Serial	Quantity	ItemType	TrackSerials	New Name
2	Item A	Default Location	3987654321			1 Stockable	TRUE	Item AN
3	Item A	Default Location	1234567890			1 Stockable	TRUE	Item AN
4	Item A	Default Location	2345678901			1 Stockable	TRUE	Item AN
5	Item A	Default Location	3456789012			1 Stockable	TRUE	Item AN
6	Item A	Default Location	4567890123			1 Stockable	TRUE	Item AN
7	Item A	Default Location	5678901234			1 Stockable	TRUE	Item AN
8	Item A	Default Location	6543210987			1 Stockable	TRUE	Item AN
9	Item A	Default Location	6789012345			1 Stockable	TRUE	Item AN
10	Item A	Default Location	8901234567			1 Stockable	TRUE	Item AN
11	Item A	Default Location	9012345678			1 Stockable	TRUE	Item AN
12	Item A	Default Location	9876543210			1 Stockable	TRUE	Item AN
13	Item B	Default Location	8983458938			1 Stockable	TRUE	Item BN
14	Item B	Default Location	2347623487			1 Stockable	TRUE	Item BN
15	Item B	Default Location	2347658927			1 Stockable	TRUE	Item BN
16	Item B	Default Location	2454987346			1 Stockable	TRUE	Item BN
17	Item B	Default Location	3523786345			1 Stockable	TRUE	Item BN
18	Item B	Default Location	9872354687			1 Stockable	TRUE	Item BN

- Once you've created that file and re-saved it you should be able to import that into your new copy of inFlow and set up your serial numbers.
- You'll want to import the file as the data type "Stock Levels" and match your columns like so:

inFlow Field Name	Your Column of Info
Name	Item
Location	Location
Sublocation	Blank
Serial	Sublocation
Quantity	Quantity

- That's it! Going forward inFlow should be able to track your serial numbers for you using the stock you had and the brand new serials feature!

Having trouble?

If you're having trouble getting set up, or you have questions please visit the support centre: support.inflowinventory.com which answers all your questions about inFlow and lets you contact us if you don't find the answer you're looking for!

Now that you've finished updating to v3 you REALLY deserve a snack!

Head over to our [Facebook Page](#) and introduce yourself and your business; you could be featured in a future post!