



ADMIN PORTAL

<https://eztrak.net/phpr/admin>

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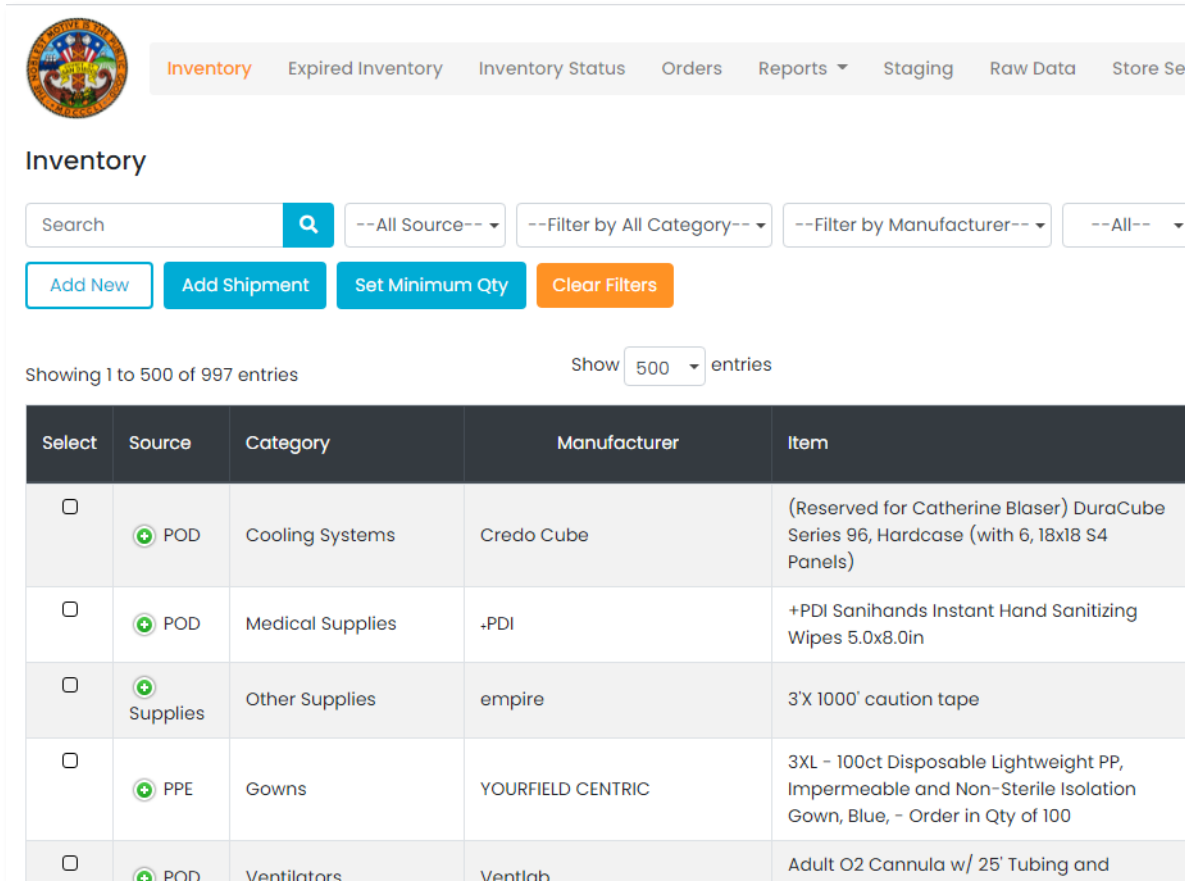


Inventory Page

The inventory page allows you to search and filter to find inventory, add new products and update quantities on existing products.

1. Add New Inventory: To add new products that do not currently exist in the inventory, click the

 button.



The screenshot shows the EZTRAK Inventory page. At the top, there is a navigation bar with a logo on the left and menu items: Inventory, Expired Inventory, Inventory Status, Orders, Reports, Staging, Raw Data, and Store Set. Below the navigation bar, the page title "Inventory" is displayed. A search bar is followed by filter dropdowns for Source, Category, Manufacturer, and a general filter. Action buttons include "Add New", "Add Shipment", "Set Minimum Qty", and "Clear Filters". The page indicates "Showing 1 to 500 of 997 entries" and "Show 500 entries". A table lists inventory items with columns for Select, Source, Category, Manufacturer, and Item.

Select	Source	Category	Manufacturer	Item
<input type="checkbox"/>	POD	Cooling Systems	Credo Cube	(Reserved for Catherine Blaser) DuraCube Series 96, Hardcase (with 6, 18x18 S4 Panels)
<input type="checkbox"/>	POD	Medical Supplies	+PDI	+PDI Sanihands Instant Hand Sanitizing Wipes 5.0x8.0in
<input type="checkbox"/>	Supplies	Other Supplies	empire	3'X 1000' caution tape
<input type="checkbox"/>	PPE	Gowns	YOURFIELD CENTRIC	3XL - 100ct Disposable Lightweight PP, Impermeable and Non-Sterile Isolation Gown, Blue, - Order in Qty of 100
<input type="checkbox"/>	POD	Ventilators	Ventlab	Adult O2 Cannula w/ 25' Tubing and

In the **Add New** popup window, you will see a number of different options when adding a new inventory. Please note that this feature is only for inventory items that do not exist in your warehouse.



Add Inventory ✕

Image
Choose Image

Item Name *
Safety Goggles for John's Team

Category *
Goggles

Manufacturer *
3M

Type
Safety

Source
Supplies

UOM *
Container

UOM Info *
Fragile

Min Qty
10

- **Image** – You can browse to add an image of the inventory item.
- **Category*** – Select the category from the drop-down menu. Categories can also be added separately.
- **Type** – Specify the type of inventory
- **UOM*** – Select the UOM from the drop-down list
- **Min Qty** – Set the re-order minimum quantity threshold
- **Item Name** – Specify the item name. This field is searchable for Shoppers, so provide as much detail as possible and include keywords.
- **Manufacturer*** – Select the manufacturer from the drop-down list
- **Source*** – What is the source of the inventory?
- **UOM Info** – Add in UOM Info. This is required section and cannot be skipped

* These drop-down fields are manageable in the **Store Settings** section.

2. Update Existing Inventory: When a new shipment arrives for a product that already exists on the inventory page, click the button to include the shipment in the product details.



Add Shipment ✕


Product Name	UOM	UOM Info	QTY *	Pallet No *	Bin Location *	Exp. Date	Website Link	Lot Number	Action
Adult O2 Cannula w/ 25' Tubing and Standard Connector - 1125	EA	Case	<input type="text"/>	<input type="text"/>	--	mm/dd/yyyy <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add Line Item](#) [Save](#)

- **QTY** – Specify the quantity of new shipment that you are adding.
- **Pallet No.** – Specify the pallet No. assigned to the shipment.
- **Bin location*** – Specify the bin location by selecting from one in the drop-down menu.
- **Exp. Date** – Enter the expiration date (if applicable). When the expiration date passes, the items(s) will be automatically shifted to the Expired Inventory page










* These drop-down fields are manageable in the **Store Settings** section.

Viewing Shipment Details:




Click the  to expand the inventory and see the products inside. You can see the new shipment products inside that we have recently added. These will include the Expiration Date if any, Bin location, and the quantity added.

[Add New](#)
[Add Shipment](#)
[Set Minimum Qty](#)
[Clear Filters](#)

Expired
Showing 1 to 9 of 9 entries

Select	Source	Category	Manufacturer	Item	OH QTY	UOM	BIN Location	Actions
<input type="checkbox"/>	 POD	Cooling Systems	Credo Cube	(Reserved for Catherine Blaser) Credo Cube 10x10	8	EA	View	 
<input type="checkbox"/>	 POD	Cooling Systems	Credo Cube	(Reserved for Catherine Blaser) Credo Cube, 28168, Cardboard, 6, 12x12 Panels, Series 4, (For Cool Cube)	3	EA	View	 
<input type="checkbox"/>	 POD	Cooling Systems	Credo Cube	(Reserved for Catherine Blaser) DuraCube Series 96, Hardcase (with 6, 18x18 S4 Panels)	11	EA	View	 

Pallet Number	BIN Location	Expiration Date	OH Qty
453355	10-A-4		10
715	15-A-7		1

<input type="checkbox"/>	 POD	Cooling Systems	Credo Cube	(Reserved for Catherine Blaser) Thermal Isolation Chamber Panels series 20M	60	EA	View	 
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Expired Inventory Page

When perishable inventory becomes expired, it will automatically appear on the Expired Inventory page for reference. Expired inventory will still appear and is available to issue as as-needed by issuer.

Inventory Expired Inventory Inventory Status Orders Reports Staging Raw Data Store Settings Account Tickets Logout

Expired Inventory

Search [Q] [Export] [Export All] [Clear Filters]

Showing 1 to 13 of 13 entries Show 500 entries Previous 1 Next

Select	Product Name	Expiration Date	Qty	Unit of Measure	Pallet Number	BIN Location
<input type="checkbox"/>	Gauze Bandage Roll Sterile 4.5 x 4.1" (Expired)	09/01/2012	3000	EA	671	14-A-15
<input type="checkbox"/>	Hand Sanitizer, 4oz	01/01/2012	500	EA	Trailer 5284	Trailer 5284
<input type="checkbox"/>	Sensicare Ortho Surgical Gloves, Synthetic Polyisoprene, Sterile & Powder-Free, Size 6 1/2	02/01/2019	400	EA	4863	15-A-10
<input type="checkbox"/>	Viral Transport Medium (Requires Refrigeration)	10/29/2020	800	EA	FRIDGE 1, LEFT, BOTTOM	Test Kit Room
<input type="checkbox"/>	Viral Transport Medium (Requires Refrigeration)	11/01/2020	1700	EA	FRIDGE 1, LEFT, BOTTOM	Test Kit Room
<input type="checkbox"/>	Viral Transport Medium (Requires Refrigeration)	11/04/2020	200	EA	FRIDGE 1, LEFT, BOTTOM	Test Kit Room
<input type="checkbox"/>	Viral Transport Medium (Requires Refrigeration)	10/25/2020	132	EA	FRIDGE 1, LEFT, TOP	Test Kit Room

Orders Page


The Orders Page allows Administrators to view, edit, delete, and update orders. The Admin will be responsible for fulfilling orders accurately and selecting which pallets to pull product from to complete the order.

1. Search Orders: Use the Search bar and filters to view orders by **Status, Priority, Location and User.**

Orders

Search [Q] --Filter by Status-- --Filter by Priority-- --Select Delivery Location-- --Filter By User-- [Export Page]

[Export All] [Clear Filters]

2. View and Manage Orders: To make changes to the order, click the  button next to the order and a new popup window will appear.



Order Status : #9158 Edit Print

Order Number: 9158
Status: Ordered
Need By: 05/21/2021
Priority: Normal
Account: Kelly Bateson (Kelly.Bateson@sdcounty.ca.gov)
User name: Bateson, Kelly
Contact Information: 619-315-7407
Destination: Abigail's Homes III
Destination Address: 2505 Arcadia ave Lemon grove 91945

Order Submitted: 05/20/2021
Warehouse Received:
POC Name: Brenda Abigail Gonzalez
POC Contact: 619-315-7407
Order Delivered:

Pickup Note:
Order Note:
Delivery Note:

Source	Category	Manufacturer	UOM	Item	QTY	ISSUED QTY	Pallet#	BIN	Lot Number	Action
PPE	Gloves	Dongtai	EA	L Nitrile Gloves, Powder Free, Latex Free - Order in Qty of 100	800	0				Issue
PPE	Disinfectant	CaviWipes	EA	CaviWipes Disinfecting Wipes	4	0				Issue
PPE	Hand Sanitizer Gel	BYD	EA	Hand Sanitizer Gel, 72%, 8 fl oz	25	0				Issue
PPE	Face-Surg-Proc Masks	BYD	EA	Surgical Mask	800	0				Issue

To update delivery information submitted by the Requestor during checkout, press the Edit button.

Order Status : #9158 ×

POC Name * **POC Contact ***

Needed By * **Destination ***

Order Number * **Order Shipped**

Order Delivered **Received By**

Order Note

Delivery Note

Save Order Details

To update product submitted by the Requestor during checkout, press the Edit button next to the product you wish to change.



Order Status : #9158 Edit Print ✕

Order Number: 9158
Status: ● Delivery Scheduled
Need By: 05/21/2021
Priority: Normal
Account: Kelly Bateson (Kelly.Bateson@sdcounty.ca.gov)
User name: Bateson, Kelly
Contact Information: 619-315-7407
Destination: Abigail's Homes III
Destination Address: 2505 Arcadia ave Lemon grove 91945

Order Submitted: 05/20/2021
Warehouse Received: 05/21/2021 01:47 AM
POC Name: Brenda Abigail Gonzalez
POC Contact: 619-315-7407
Order Delivered:

Pickup Note:

Order Note:

Delivery Note:

Source	Category	Manufacturer	UOM	Item	QTY	ISSUED QTY	Pallet#	BIN	Lot Number
PPE	Gloves	Dongtai	EA	L, Nitrile Gloves, Powder Free, Latex Free - Order in Qty of 100	800	800	6949	6-A-9	
PPE	Disinfectant	CaviWipes	EA	CaviWipes Disinfecting Wipes	<input type="text" value="9"/>	0			
PPE	Hand Sanitizer Gel	BYD	EA	Hand Sanitizer Gel, 72%, 8 fl oz	25	0			
PPE	Face-Surg-Proc Masks	BYD	EA	Surgical Mask	800	0			

Showing 1 to 4 of 4 entries Previous 1 Next

Created By: Kelly.Bateson@sdcounty.ca.gov
 Created Date: 05/20/2021 05:09 PM

Updated By: iinfo@precisionmaterial.net
 Updated Date: 05/21/2021 01:47 AM

Delete Complete Delivery

To issue an order, you must choose which pallets to pull the desired quantity of each pallet from. The pop-up box will notify you of the pallet numbers and Bin location they are stored to choose from.

Issuing Material ✕

M Nitrile Exam Gloves, Powder Free - Order in Qty of 100 (Medical Use) MFR# W86545M **Order Qty: 5,000**

Available Quantities:

Pallet No.	Location	Expiry Date	Avail	QTY
20570	6-D-14		60,000	<input type="text"/>
20580	6-D-11		24,500	<input type="text"/>
20581	6-D-12		56,000	<input type="text"/>

Save



Once all requested items have been marked issued, the Order Details page can be printed to be used as a Pick Ticket for warehousemen to begin pulling the order. The Pick Ticket has fields at the bottom to collect signatures from the Recipient, which officially completes the order.

The image shows a printed form for a Pick Ticket. It is divided into two columns by a vertical line. The left column contains three fields: 'Name: _____', 'Sign: _____', and 'Date & Time: _____'. The right column contains two fields: 'Courier: _____' and 'Date & Time: _____'. The form is otherwise blank.

Once the order has been delivered, the Pick Ticket signed and returned, the Admin may now mark the order “Complete” in the system to update the status in EZTRAK. The Courier Name and Recipient are traceable fields for future reports. The Pick Ticket and notes can be added for recordkeeping and future reference.

The image shows a screenshot of a web form titled 'Delivery Details' with a close button (X) in the top right corner. The form contains the following fields and controls:

- Courier Name ***: A text input field.
- Received By**: A text input field.
- Upload Pdf File**: A section containing a 'Choose file' button and a 'Browse' button.
- Notes**: A text area for entering notes.
- Save**: A blue button at the bottom right of the form.

Tickets Page

The Tickets page is a way of providing and assistance to EZTRAK shoppers and documenting system updates. Tickets include support category, description, Requestors name, date submitted and attachments submitted by the Requestor.



Tickets

Search --Filter by All Category-- --Filter by Status-- Clear Filters Create Ticket

Show entries

Status: ● Open ● Pending ● Completed ● Canceled

Status	Ticket No.	Category	Description	IT Response	Date Submitted	Submitted By	Action
●	009	Goggles	asdq3wdawdawdasd		05/18/2021 08:26 AM	testshopper01@test.com	Cancel Ticket
●	006	A FRAME	Request #202199 for CalFIRE is not showing on the 'orders' tab; however, the delivery confirmation is in SharePoint showing that it was delivered. As you can see from the attached form, the order was generated within EZTrak. Thank you.	Order has been marked as delivered.	05/06/2021 08:24 AM	LOGS.TESTING.HHSA@sdcounty.ca.gov	
●	002	Other Supplies	Hi this is a test ticket :)	Thank you.	04/19/2021 11:59 AM	MOC.LOGS.HHSA@sdcounty.ca.gov	

To respond to a Ticket, the admin must select the button to view the details submitted. Once all concerns have been resolved, the Admin may update the status and provide a response that will be visible on the Shoppers section.

Update Support Ticket ✕

Status

IT Response

Cancel Update Ticket

Store Settings

Store Settings allow the Admin the ability to pre-populate drop down menus that appear in the Inventory, Shopping Cart, Issuing and Tickets pages.

1. Categories: Appear in Inventory section where products can be assigned to a category type (i.e. Gowns, Needles, Masks, Gloves, etc.)




SetUp / [Categories](#) / Add

Add Category

Name Category Group

2. Unit of Measure (UOM): Appear in Inventory section where product quantities can be assigned a standard unit of measure (i.e. Each, Box, Pack, etc.)



Inventory Expired Inventory Inventory Status Orders Reports Staging Raw Data Store Settings Account Tickets

SetUp / UOMs

Showing 1 to 7 of 7 entries Show 500 entries 1

Select	UOM	Actions
<input type="checkbox"/>	Box	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Pack	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Roll	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Sheet	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Case	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Container	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	EA	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

3. Manufacturer: Compile a list of Manufacturers for all products.

Add Manufacturer

Name



4. Facilities: Create a list of Facilities. These entries appear in Step Two of the checkout process where Shoppers select a delivery location for their orders to be shipped to.

Add Facility

Facility Name *	Facility Address *
<input type="text" value="The Humanity Foundation"/>	<input type="text" value="11911, Claire Drive, Santa Clara,"/>
ZipCode *	Contact Name 1
<input type="text" value="19876"/>	<input type="text" value="Chloe"/>
Contact Telephone 1	Contact Email 1
<input type="text" value="615-554-9876"/>	<input type="text" value="dummycontactdetails2@emailhere.com"/>
Contact Name 2	Contact Telephone 2
<input type="text" value="John Peters"/>	<input type="text" value="615-554-9877"/>
Contact Email 2	
<input type="text" value="dummycontactdetails@emailhere.com"/>	

5. Bin Locations: These entries identify staging locations located throughout the warehouse. This list appears on the New Shipment popup box when assigning a location to incoming pallets.

Add Bin Location

Name

6. Courier Services: These entries appear during the Mark Complete step to change the status of processed orders from Pending to Complete.



Add Courier Service

Name

7. Requestors: Requestors appear in the User section of Step Two of the Checkout process. Requestors are responsible for submitting orders and serve as the point of contact for order adjustments and inquiries.

Add Order User

First Name *

Last Name *

Email *

Christine	Tham	Christine.Tham@sdcounty.ca.gov
Diane	Bovey	Diane.Bovey@sdcounty.ca.gov
Genevieve	Fong	Genevieve.Fong@sdcounty.ca.gov

8. Accounts: The Accounts section lists all users with their respective rights of managing the EZTRAK admin panel. As an Admin, you can add and/or edit the user's permission level. Add First Name, Last Name, Email and Password for the new user. From the **Account Type**, you can select the level of privileges you want for the account. Remember, the admin account will have the same set of access and privileges as yours. Once you are done adding in all the details, click the Add button.



Inventory Expired Inventory Inventory Status Orders Reports Staging Raw Data Store Settings Account Tickets

SetUp / Users / Add

Add User

FirstName: John LastName: Peter

Email: dummyjohn@dummymail.com Password:

Account Type
 Admin (PMM / Employee) Client (Shopper) Shopper Readonly (Shopper Read Only) Client Admin (Shopper Admin)

Receive email Notifications?

Account Status
 Active Disabled

Add Cancel

Account

The Account Settings page allows you to update your password.

You will need to know and enter the current password and then provide a new password. Make sure it is at least 8 characters long, containing at least 1 CAPITAL, 1 small, 1 special character and 1 numeric. Once you have entered the password, click Change Password.

Change Password

Current password:

New password:

Confirm new password:

Change password