ILLUSTRATED TRAINING MANUAL

ScanOps All-Areas Tutorial

A visual, step-by-step guide to QR operations, marketing organization, inventory and warehouse execution, equipment, users, settings, billing, and support.

OPERATING STANDARD

Every workflow ends with a verification: preview, scan, status, balance, confirmation, receipt, or audit event.

Learning path

- Part 1 — QR Codes and Marketing Hub
- Part 2 — Inventory and Warehouse Operations
- Part 3 — Equipment and Team Access
- Part 4 — Workspace Settings, Billing, and Support

How to use this manual

- Follow modules in order during onboarding.
- Use the Control point box to prevent high-impact mistakes.
- Complete the verification bullets before moving to the next module.
- Refer to the individual SOPs for deeper exception and approval procedures.

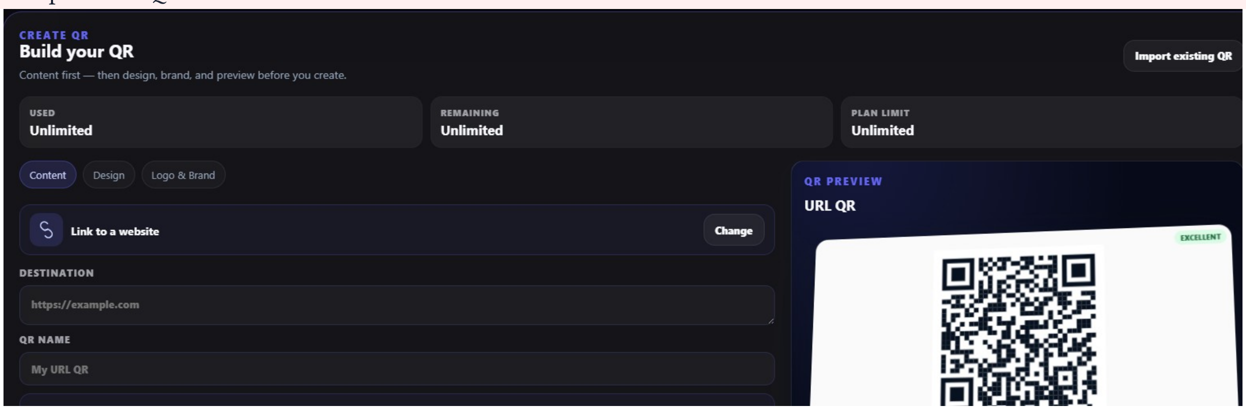
1. Create a QR code

GOAL
Build a tested QR with the correct destination, tracking, design, and language.

Procedure

1. Open QR Codes ⟶ Create.
2. Choose the destination type.
3. Enter the destination and a recognizable QR name.
4. Select trackable/direct mode, domain, and code format.
5. Configure Advanced Language options.
6. Apply template, colors, frame, and logo.
7. Select Test QR, scan with a second device, then Create QR.

CONTROL POINT
Do not publish a QR that has not been scan-tested from the final artwork.



QR Codes: Create a QR code.

Verify before leaving

- Destination opens correctly.
- Printed label and scan experience use the intended languages.
- QR quality is acceptable and the name is searchable.

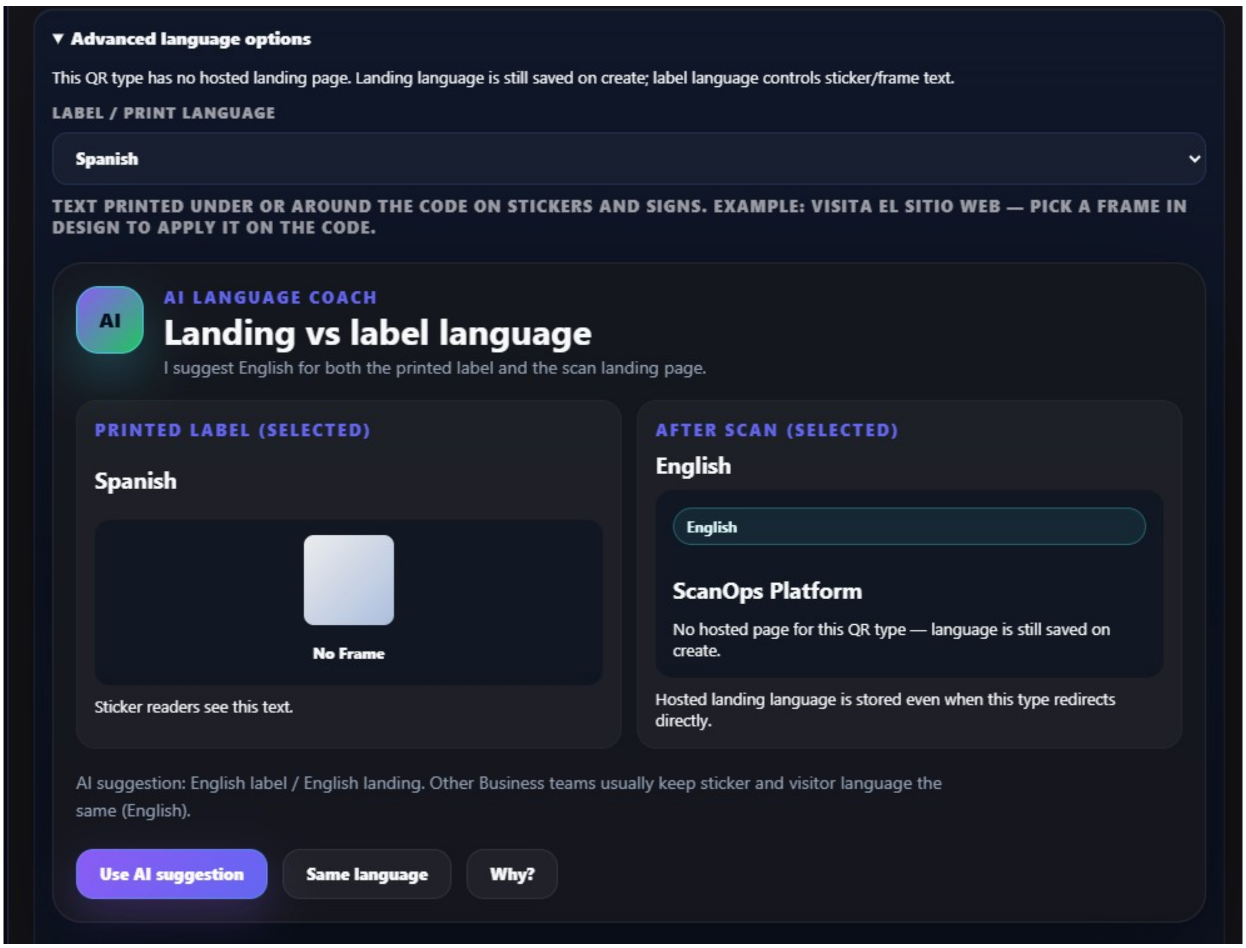
2. Use Advanced Language options

GOAL

Align printed text and the after-scan visitor experience.

Procedure

8. Expand Advanced Language options.
9. Select the label/print language.
10. Select the landing or after-scan language.
11. Review the AI Language Coach suggestion.
12. Choose Use AI suggestion, Same language, or intentionally keep different languages.
13. Preview the frame and scan experience.



QR Codes: Use Advanced Language options.

Verify before leaving

- Frame/sticker text is correct.
- Hosted page or saved language is correct.
- A bilingual reviewer approves when required.

3. Manage created QR codes

GOAL

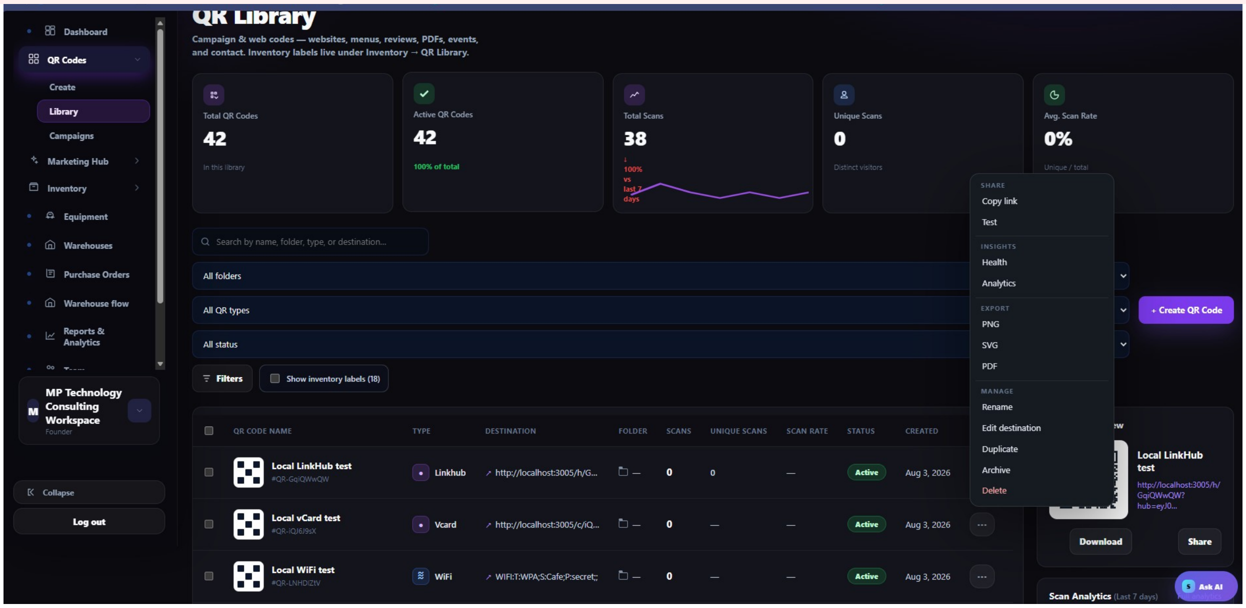
Find, test, analyze, export, edit, and retire QR codes.

Procedure

14. Open QR Codes ⟶ Library.
15. Search or filter by folder, type, or status.
16. Select a row to review the preview and analytics.
17. Use actions for Copy link, Test, Health, Analytics, PNG, SVG, PDF, Rename, Edit destination, Duplicate, Archive, or Delete.

CONTROL POINT

Archive before deletion when history may be needed.



QR Library: Manage created QR codes.

Verify before leaving

- Correct record selected.
- Status and destination match the published use.
- Downloaded format is appropriate for production.

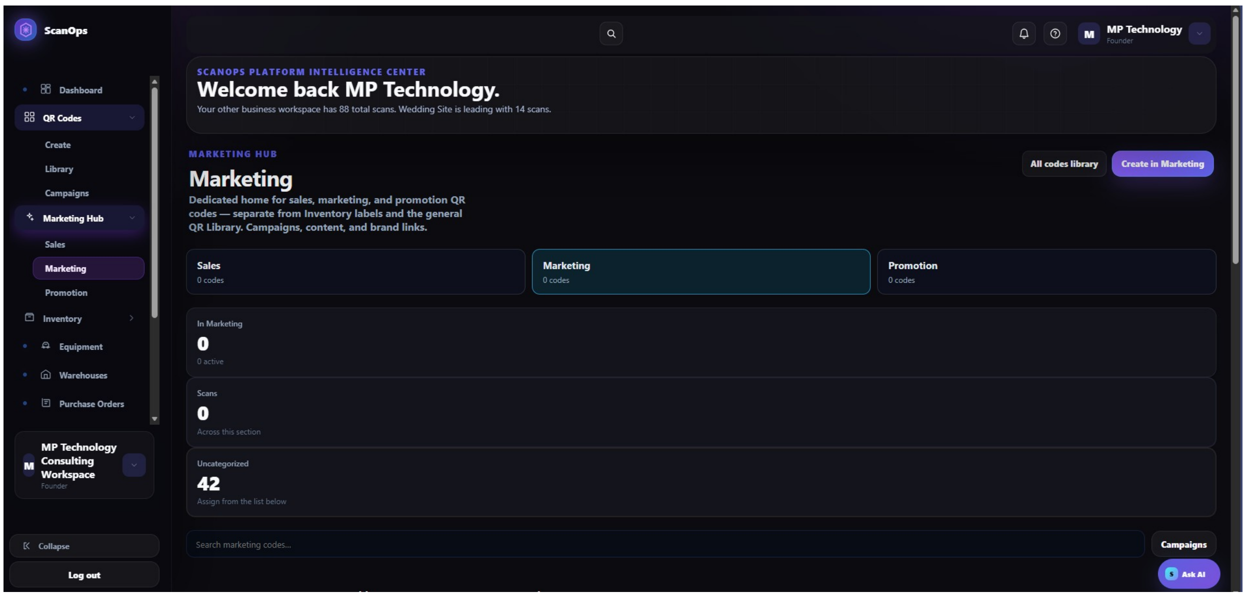
4. Organize Sales, Marketing, and Promotion

GOAL

Keep commercial QR codes in the correct business section.

Procedure

18. Open Marketing Hub.
19. Select Sales, Marketing, or Promotion.
20. Create in the selected section or assign an uncategorized code.
21. Use section counts and search to confirm placement.
22. Open All codes library for cross-section review.



Marketing Hub: Organize Sales, Marketing, and Promotion.

Verify before leaving

- Code appears in the intended section.
- Inventory labels remain separate.
- Campaign owner and purpose are clear.

5. Set up inventory master data

GOAL

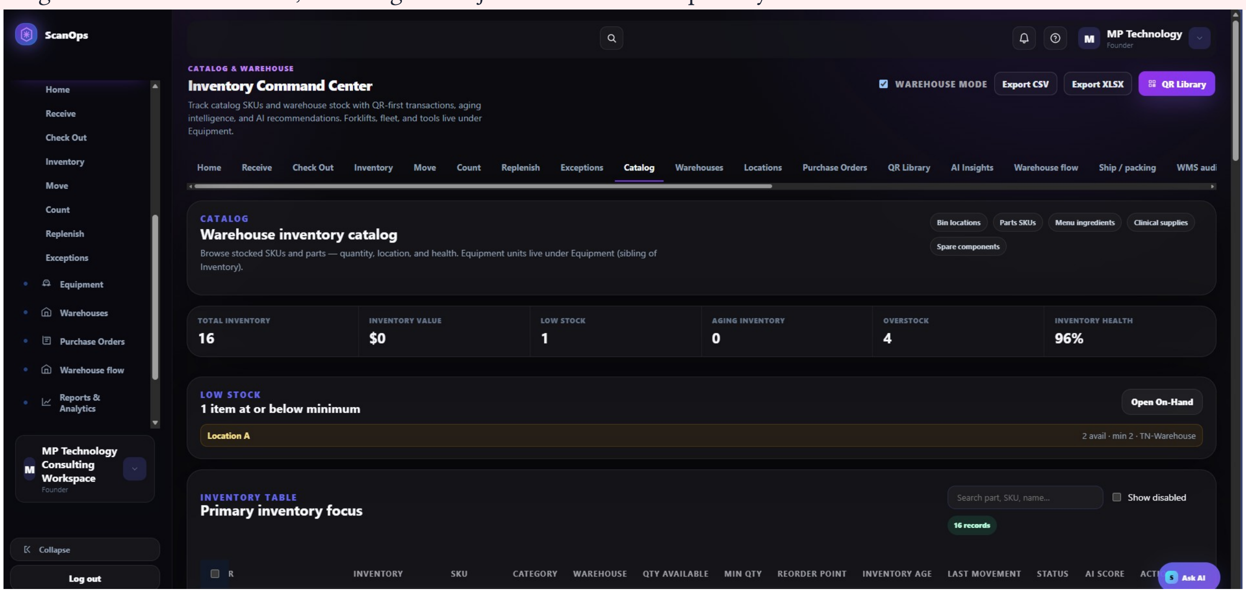
Create reliable warehouses, locations, and catalog records before stock movement.

Procedure

23. Enable Warehouse Mode.
24. Create warehouse names/codes and physical locations.
25. Create the catalog item with unique SKU, category, UOM, min/max, vendor, and status.
26. Import with the tailored template when working in bulk.
27. Preview imports and resolve duplicates before applying.

CONTROL POINT

Catalog fields describe the item; receiving and adjustments establish quantity.



Inventory: Set up inventory master data.

Verify before leaving

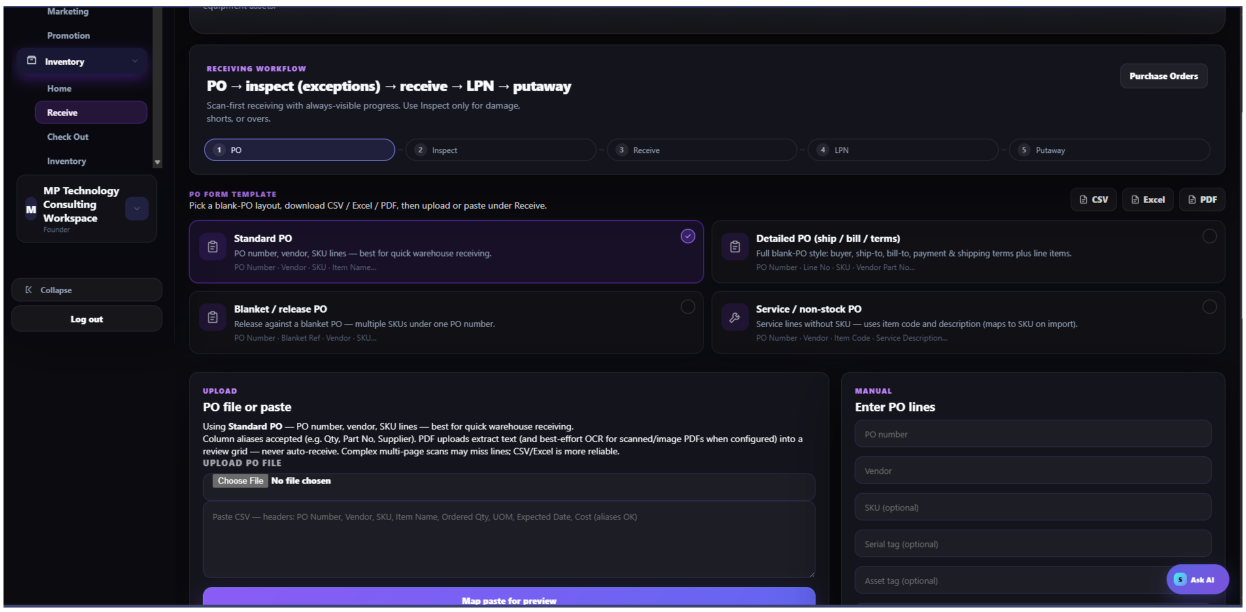
- Warehouse and location codes are unique.
- Catalog record exists before quantity is received.
- Equipment is not mixed into inventory.

6. Receive inventory

GOAL
Convert an approved PO or authorized no-PO receipt into inspected, labeled stock.

Procedure

28. Open Receive.
29. Select/load the PO or use authorized no-PO receive.
30. Inspect identity, damage, shortage, overage, lot, serial, and quantity.
31. Post accepted quantity.
32. Generate the LPN and print its label.
33. Put away to the verified location.



Receiving: Receive inventory.

Verify before leaving

- Receipt matches physical goods.
- Exception is documented.
- LPN scans correctly.
- Location quantity updates after putaway.

7. Configure and create LPNs

GOAL

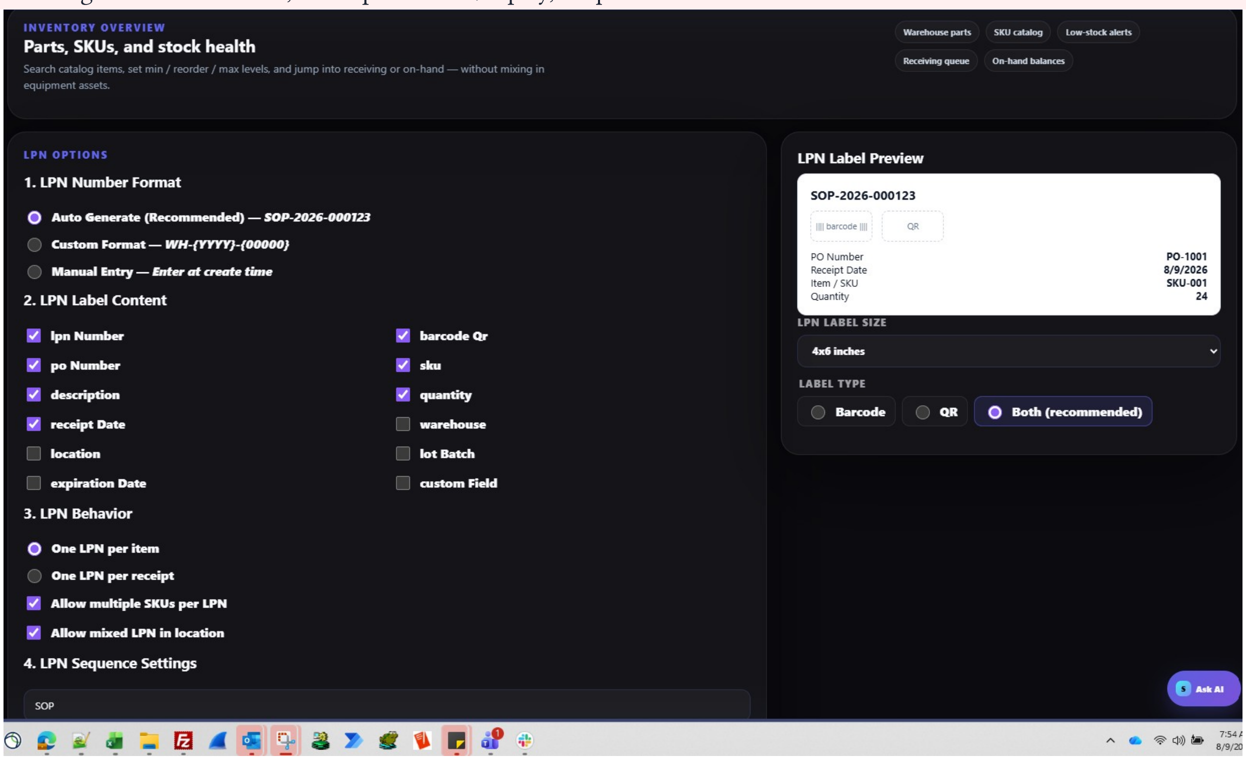
Identify inventory containers with controlled numbering and scannable labels.

Procedure

34. Open LPN Settings.
35. Use Auto Generate unless another format is approved.
36. Choose label content, behavior, size, and barcode/QR symbols.
37. Create the LPN with SKU and verified quantity.
38. Print and scan-test the label.
39. Use Merge/Split only for compatible stock.

CONTROL POINT

Never merge different statuses, incompatible lots/expiry, or quarantined and available stock.



LPN: Configure and create LPNs.

Verify before leaving

- Identifier is unique.
- Quantity and lot/serial are correct.
- Both barcode and QR work when selected.

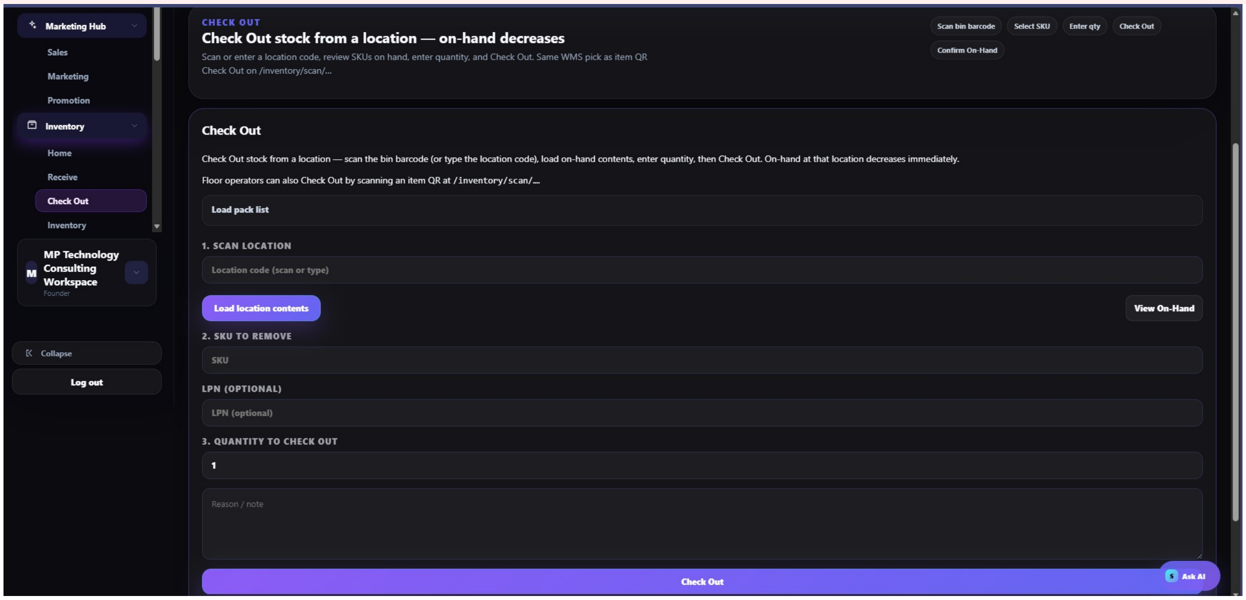
8. Put away, move, and check out

GOAL
Keep system location and physical location synchronized.

Procedure

40. For putaway, scan LPN then location and confirm.
41. For moves, verify item/LPN, source, destination, and quantity.
42. For Check Out, scan location, select SKU/LPN, enter quantity and reason, then confirm.
43. Review On-Hand after the transaction.

CONTROL POINT
Do not use catalog edits as a substitute for a stock transaction.



Inventory: Put away, move, and check out.

Verify before leaving

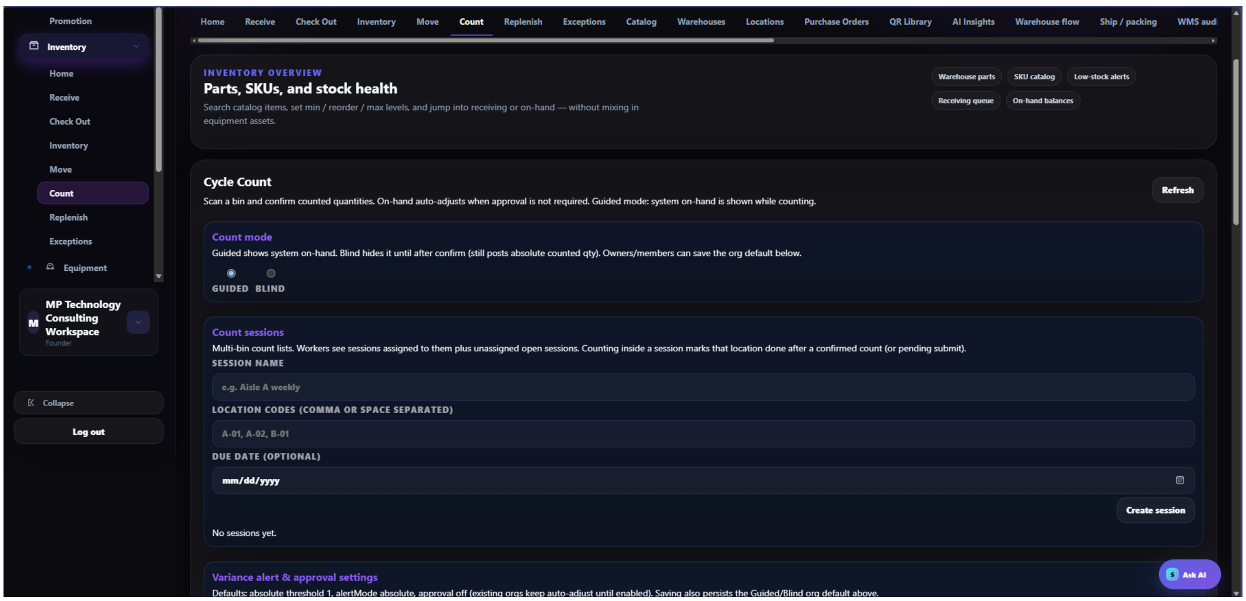
- Physical and system location agree.
- Available quantity is correct.
- Movement appears in history.

9. Count and adjust inventory

GOAL
Confirm physical stock and control every variance.

Procedure

44. Choose Guided or Blind mode.
45. Create/open a location count session.
46. Scan the location and count each SKU/LPN.
47. Submit the observed quantity.
48. Review pending variance approval when enabled.
49. Use Adjustments with an exact reason and preview.



Cycle Count: Count and adjust inventory.

Verify before leaving

- Count session is complete.
- Approved on-hand equals physical stock.
- Variance reason and actor are auditable.

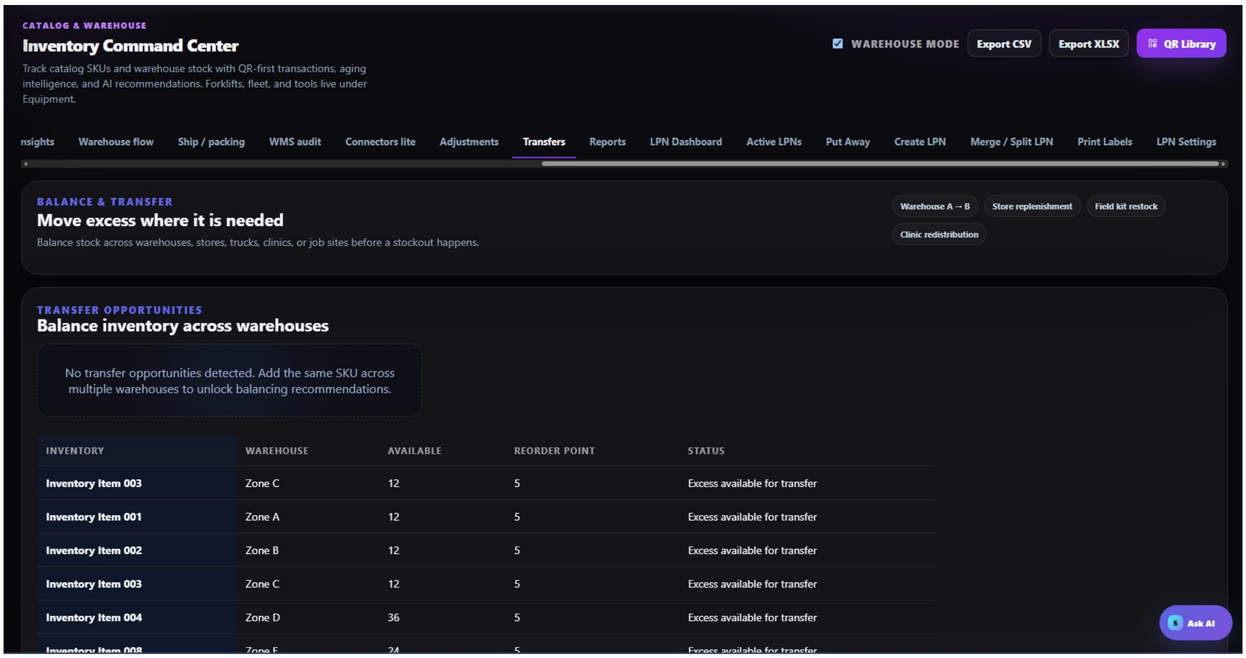
10. Replenish and transfer stock

GOAL

Move available stock to where it is needed without creating hidden shortages.

Procedure

50. Review minimum/target and transfer opportunities.
51. Confirm source available quantity and destination capacity.
52. Create the task/transfer with exact quantity and reference.
53. Pick/ship from source and receive/put away at destination.
54. Reconcile in-transit exceptions.



Inventory Control: Replenish and transfer stock.

Verify before leaving

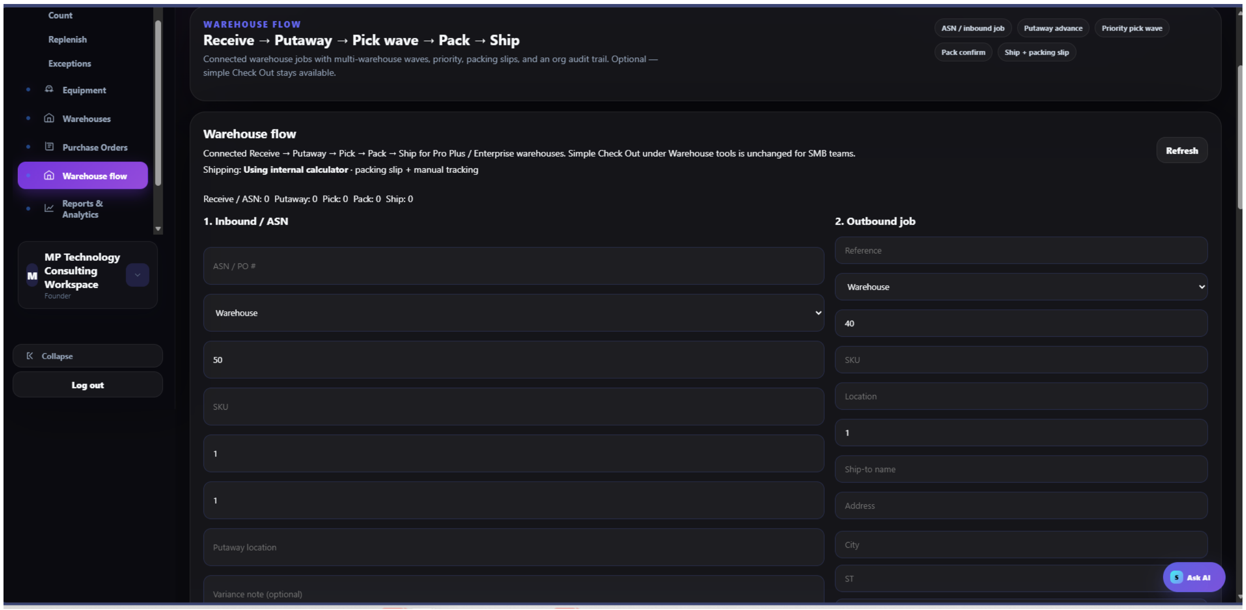
- Source and destination balances reconcile.
- Task/transfer is closed.
- No duplicate adjustment was used.

11. Complete warehouse flow and shipping

GOAL
Move an order from inbound or outbound job through verified shipment.

Procedure

55. Create or receive the warehouse job.
56. Put away inbound stock or release the outbound pick wave.
57. Scan pick source and item/LPN.
58. Confirm pack, weight, rates, label, and packing slip.
59. Enter tracking and select Ship complete.
60. Record shift handoff and review audit.



Warehouse Flow: Complete warehouse flow and shipping.

Verify before leaving

- Job status matches physical state.
- Tracking and label match the package.
- Audit and handoff are complete.

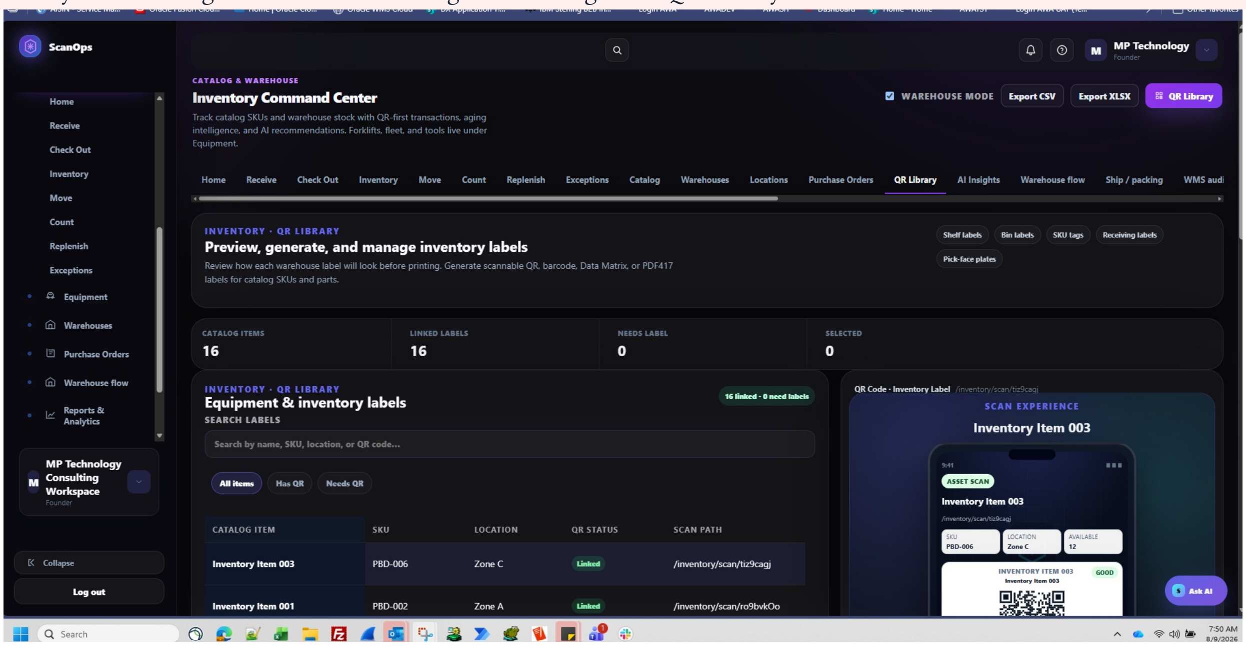
12. Create inventory QR labels

GOAL
Generate labels tied to SKU, location, and available stock.

Procedure

61. Open Inventory → QR Library.
62. Filter All items, Has QR, or Needs QR.
63. Select assets/items.
64. Choose the approved template.
65. Preview each label.
66. Generate, export, print, apply, and scan-test.

CONTROL POINT
Inventory labels belong here—not in Marketing Hub or the general QR Library.



Inventory QR Library: Create inventory QR labels.

Verify before leaving

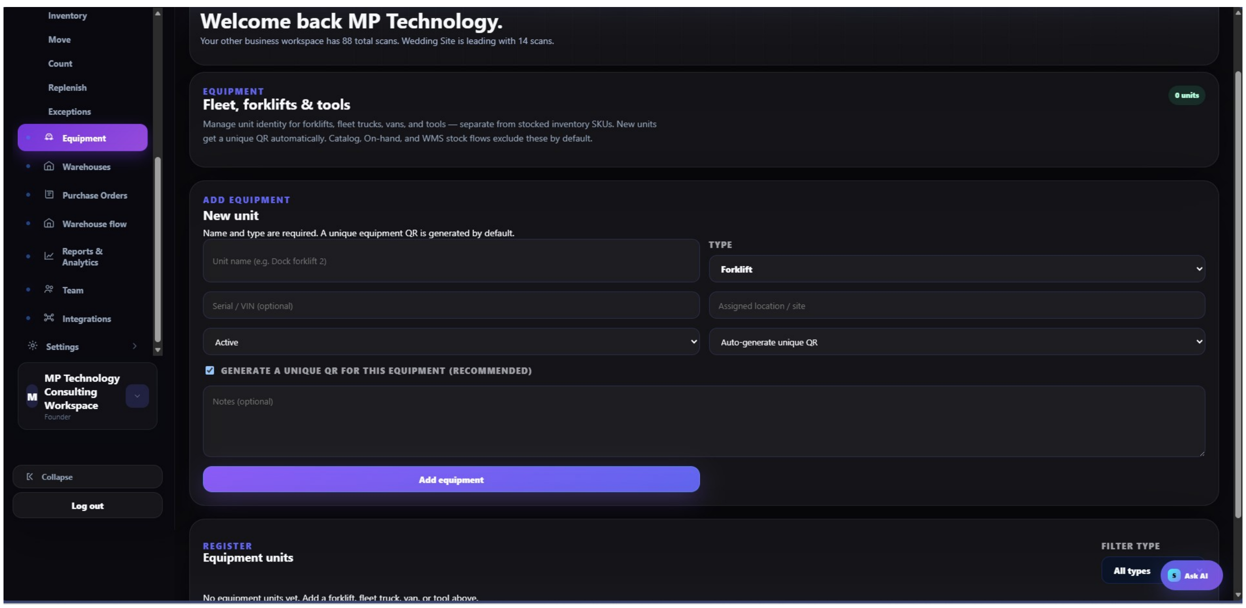
- Label opens the correct inventory record.
- SKU and location match the physical item.
- Selected count matches the work order.

13. Add equipment

GOAL
Register one physical unit with one unique equipment identity and QR.

Procedure

67. Open Equipment.
68. Enter unique unit name and type.
69. Add serial/VIN, assigned site, status, and notes.
70. Keep Auto-generate unique QR selected.
71. Add equipment, print/apply the label, and scan-test.



Equipment: Add equipment.

Verify before leaving

- No duplicate unit exists.
- Record matches the manufacturer plate and site.
- QR opens the correct equipment unit.

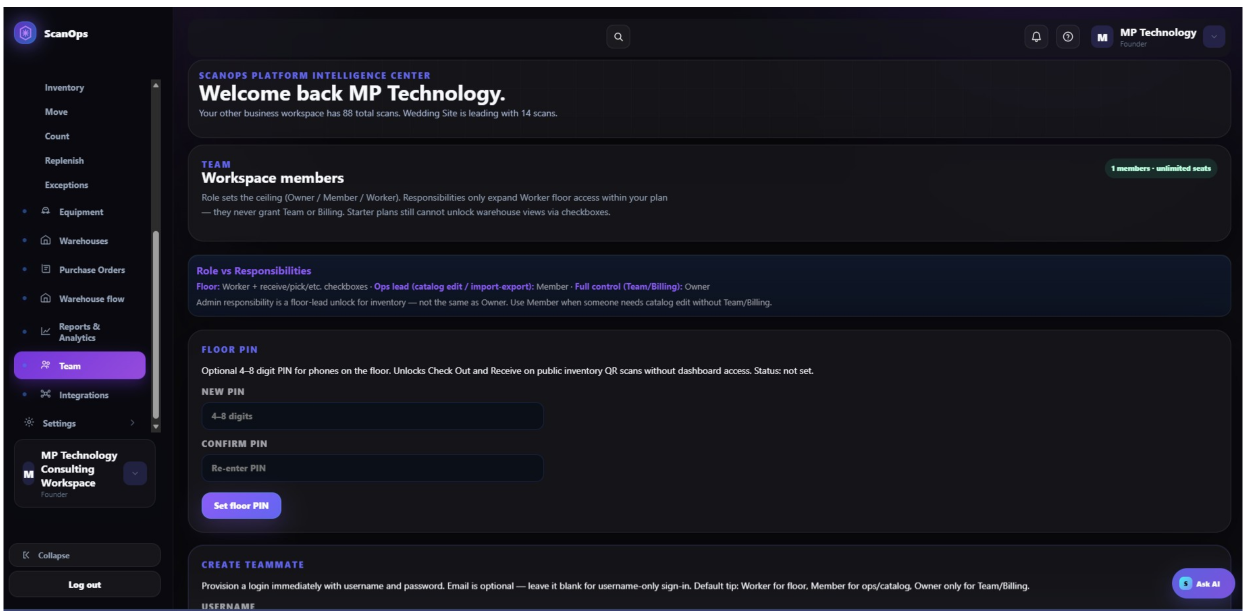
14. Add teammates and floor devices

GOAL

Provide least-privilege access with individual accountability.

Procedure

72. Choose Worker, Member, or Owner.
73. Add only required Receive, Putaway, Pick, Pack, Ship, Cycle count, or Admin responsibilities.
74. Create a named login or send an invite to a verified email.
75. Use Floor PIN only on approved shared phones for limited QR actions.
76. Test required access and confirm excess access is blocked.



Team: Add teammates and floor devices.

Verify before leaving

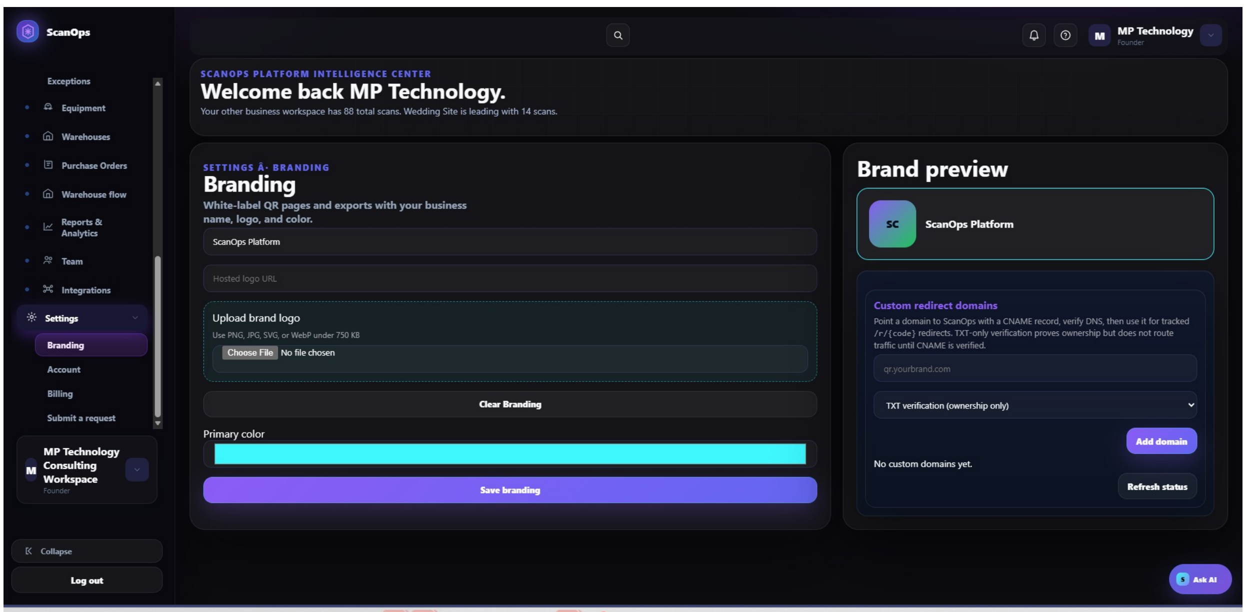
- Active member/invite status is correct.
- Seat capacity is available.
- Credentials were delivered securely.
- Review/offboarding date is recorded.

15. Configure branding

GOAL
Apply approved business identity to QR pages and exports.

Procedure

77. Open Settings ⟶ Branding.
78. Enter approved business name.
79. Upload approved logo or hosted URL.
80. Select primary color and review contrast.
81. Save and verify a live QR page/export.
82. For custom domain, verify ownership and CNAME routing.



Settings: Configure branding.

Verify before leaving

- Preview and live sample match.
- Logo is undistorted and readable.
- Custom domain routes without warnings.

16. Update profile and workspace names

GOAL

Keep personal and workspace identity accurate without altering ownership or records.

Procedure

83. Use the profile menu to update the personal display name.
84. Use Settings ⟶ Account to update the approved workspace name.
85. Save once and refresh.
86. Verify members, records, permissions, billing, branding, and QR content remain in the same workspace.
87. Document old/new names and rollback.

CONTROL POINT

Changing a name does not transfer ownership or move records.

Verify before leaving

- Profile and workspace names are not reversed.
- Correct workspace was edited.
- Access and records remain intact.

17. View and pay invoices

GOAL

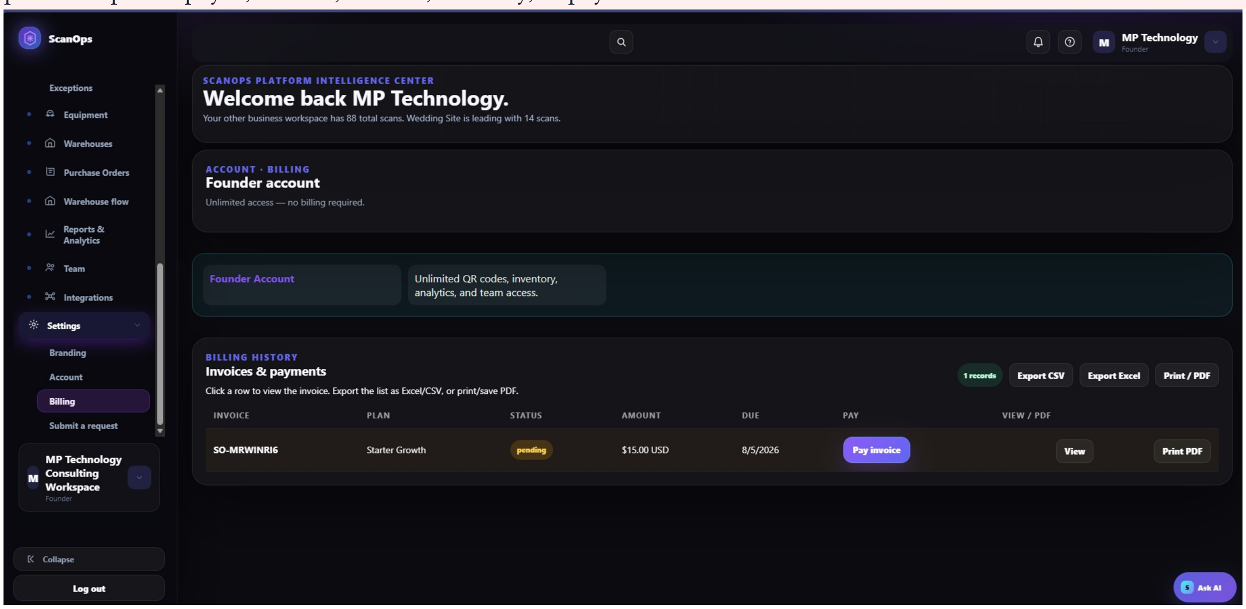
Validate, authorize, securely pay, and reconcile invoices.

Procedure

88. Open Settings ⟶ Billing.
89. Review invoice number, plan, status, amount, currency, and due date.
90. Open View and compare with approval.
91. Use Pay invoice only through the authenticated workflow.
92. Submit once, capture receipt, and confirm Paid status.
93. Download/print and reconcile.

CONTROL POINT

Stop for unexpected payee, domain, amount, currency, or payment instructions.



Billing: View and pay invoices.

Verify before leaving

- Invoice was not already paid.
- Receipt and billing status agree.
- Financial record is securely filed.

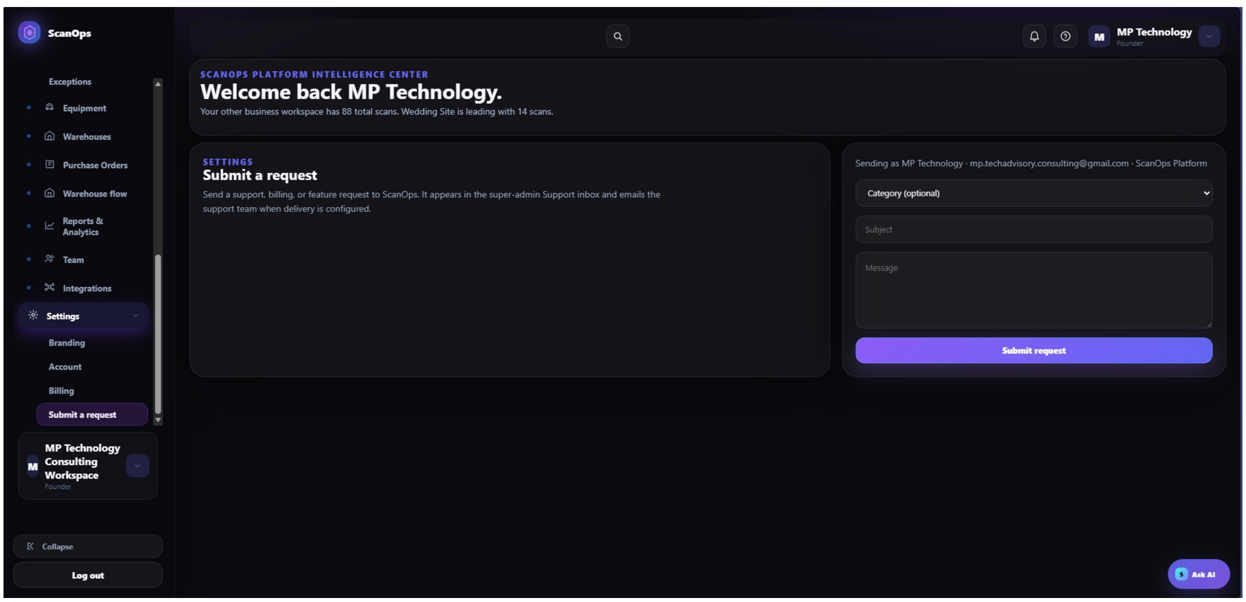
18. Submit a support ticket

GOAL

Send a specific, reproducible, and secure request.

Procedure

94. Open Settings ⟶ Submit a request.
95. Verify sender/workspace and choose category.
96. Write Area – Issue – Impact in Subject.
97. Describe expected vs. actual, steps, time/timezone, scope, environment, non-sensitive IDs, and workaround.
98. Remove secrets and regulated data.
99. Submit once, record the reference, and track through verified closure.



Support: Submit a support ticket.

Verify before leaving

- Ticket reference is recorded.
- No duplicate exists.
- Resolution is retested in the affected workflow.

19. Universal completion checklist

☐ Correct workspace and record selected

☐ Required permission and approval confirmed

☐ Data verified before submission

☐ Action completed once

☐ Preview, scan, status, balance, or receipt confirms the result

☐ Exception or variance documented

☐ Sensitive information protected

☐ Handoff or audit record complete

TRAINING STANDARD

A learner is ready for independent work only after completing representative tasks in the correct workspace and explaining the verification and escalation point for each assigned module.