

Core IMS 4.0 Desktop Application

Item Card	
Setup Items (add/modify/delete)	✓
Ability to setup Item Class/Category/Type	✓
Ability to setup ABC Class for Item	✓
Support FPL and Preferred Locations per Item	✓
Ability to setup replenishment settings per Site	✓
Ability to setup cycle count settings per Site	✓
Support multiple barcodes per one Item	✓
Ability to predefine Item as: <ul style="list-style-type: none"> • Lot Controlled • Serial Controlled • Service 	✓
Ability to assign BOM (Bill of Material for Item) <ul style="list-style-type: none"> • Assembly Item 	✓
Ability to override picking sequence (FIFO/LIFO/FEFO) per Item	✓
Ability to assign to Item per UOM the following attributes: <ul style="list-style-type: none"> • override UOM multiplier per Item; • Unit Cost; • Unit Price; • Weight; • Length; • Height; • Width; • Volume 	✓
Ability to assign to Item <ul style="list-style-type: none"> • Quantity UOM Class • Default Purchase UOM • Default Sales UOM • Weight UOM Class • Stocking UOM 	✓
Ability to create and choose Manufacturer	✓
Ability to add Warranty period	✓
Ability to add UCC Quantity	✓
Ability to set a Temperature Range	✓
Ability to set Quantity Increment for RF scanner for non-serial-controlled Items	✓

Support image upload per Item	✓
Item Dashboard <ul style="list-style-type: none"> Item Item flow Item Components Form 5203 	✓
Ability to Print and Export (xls, pdf, doc) <ul style="list-style-type: none"> Item Card Bill of Materials Item Flow Report Form 5203 	✓
Warehouse Topology	
Ability to create/modify/delete Sites (Warehouse) with address, contact information (Phone, fax, E-mail)	✓
Ability to set Default values for the Site: <ul style="list-style-type: none"> - Default Location - Default Shipping Location 	✓
Ability to create/modify/delete Zones with different types (Putaway/Cannot Ship etc.)	✓
Ability to create/ modify/delete Zone Types (OnHold/Receiving/Shipping etc.)	✓
Ability to create /modify/delete Locations (support multi bins) for different Zones of the Site	✓
Setup Companies	
Ability to create company as (separately/together): <ul style="list-style-type: none"> - Vendor - Customer - Owner 	✓
Ability to modify and delete companies	✓
Ability to add/modify/delete several addresses per one company	✓
Ability to add/modify/delete contact persons per company	✓
Inventory	
Add stocks	✓
Ability to track and auto calculate Expiration Date, Warranty	✓
Support different statuses for stocks	✓
Add serialized stocks	✓

Move/Group Move	✓
	✓
Hold/Group Hold	
Release	✓
Adjust Qty /Attributes	✓
Break UOM	✓
Transfer Ad-Hoc /Group Transfer Ad-Hoc	✓
Receive transferred stocks /Group Receive	✓
Support 3 view modes for Inventory List (Detail/Location/LPN)	✓
Support LPN	✓
<ul style="list-style-type: none"> - Add /Edit /Delete LPN - Add LPN Type - Parent- Child LPN relation - Print/Export LPN List based on what user specified in filter 	
Track Transaction History	✓
Print/Export Transaction History report based on what user specified in filter	✓
	✓
Print/Export Ad-hoc inventory report based on what user specified in filter	
Owners	
Supporting the following ownership modes:	✓
<ul style="list-style-type: none"> - none - stock-level - item-level 	
Ability to assign owner to orders	✓
	✓
Permissions: ability to assign owner for the user	
	✓
Search/filter by owner	
	✓
Invoicing/ Billing	
Reports Filter	✓
Cycle Count	
Create/modify/delete cycle count request	✓
Print/ Export cycle count request	✓
Print/ Export cycle count requests List	✓
Generate/Edit Cycle Count Sheet	✓
<ul style="list-style-type: none"> - Approve - Reject - Recount 	
Print/ Export cycle count Sheet	✓

Print/ Export cycle count Sheet List	✓
Adding stocks to request by item/location/lpn	✓
Inventory freeze	✓
Initiate cycle count	✓
Ability to perform actual cycle counting on RF	✓
Ability to perform actual cycle counting on Native Mobile	✓
Results reconciliation	✓
Blind counts support	✓
Serial numbers support	✓
Manual counting	✓
Receiving Orders	
Create/modify/cancel/close/receive	✓
Assign to All	✓
Partial receipts and overreceive	✓
Receive Assembly	✓
Create a group of details automatically	✓
Unreceive	✓
Receipt documents	✓
Print/export Receiving Documents: <ul style="list-style-type: none"> - Receipts - Receiving Order - Receiving History - Putaway Ticket 	✓
UOMs support	✓
Cross docking	✓
Print/Export Reports	✓
Unexpected Receive	✓
Return Orders	
Same as receiving but can choose customer instead of vendor and return flag is checked	✓
Replenishment Orders	
Generating receiving orders based on projected items for replenishment report	✓
Print/Export Reports	✓
Shipping Orders	
Create/modify/cancel/close/ship	✓
Assign to All	✓
Partial shipments and overship	✓
Add Kit Components to the orders	✓
Create a group of details automatically	✓
Unship	✓
BOL/ BOL Signable	✓
Print/Export Shipping Documents: <ul style="list-style-type: none"> - BOLs 	✓

<ul style="list-style-type: none"> - Packing List - Pick Ticket - Shipping History - Shipping Order 	
UOMs support	✓
Reports	✓
Unexpected Shipping	✓
Cross docking	✓
Allocation (allocate all, allocate line, allocate stock – manual allocate, allocate LPN)	✓
B2B / B2C Business Type	✓
Transfer Orders	
Create/modify/cancel/close/transfer	✓
Auto Receive	✓
Allocation (allocate all, allocate line, manual allocate – Allocate Stock, Allocate LPN)	✓
Partial transfer and overtransfer	✓
Add Kit Components to the orders	✓
Untransfer	✓
Print/Export Transfer Documents: <ul style="list-style-type: none"> - Pick Ticket - Transfer History - Transfer Order - Transfer Document 	✓
Reports	✓
Work Orders (Kitting)	
Allocation (allocate all, allocate line, manual allocate – stock, LPN)	✓
Create/modify/cancel/close	✓
Build KWO	✓
Un-build KWO	✓
Work kitting order receipts – create, print/export: <ul style="list-style-type: none"> - Bill of Materials - Pick Ticket - Putaway Ticket - Work History - Work Order - WO Document 	✓
Sub product support	✓
Override BOM	✓
Create a group of details automatically	✓
Print/Export Reports	✓
Work Orders (Manufacturing)	
Create build/modify/cancel/close	✓
Allocate Components (manual – stock, LPN, Location)	✓
Specify Products	✓

UOMs Support	✓
Set Defaults	✓
Create a queue for Ordered Products	✓
Work Manufacturing order receipts – create, print/export: <ul style="list-style-type: none"> - Build Report - Manufacturing Work History - Manufacturing Work Order - Pick Ticket - Putaway Ticket - Used components 	✓
Print/Export Reports	✓
Billing for 3PL	
Create/modify/cancel/extend/copy/delete contract	✓
Different types of rates supported	✓
Auto generate charges/invoices	✓
Export invoices to Accounting	✓
Print/Export Invoices List	✓
Manual charge for existing invoices	✓
Print/Export Contract List	✓
Print/Export Contract	✓
Security	
Users	✓
Security Groups	✓
Individual Permissions	✓
HTTPS support	✓
Custom Fields	
Ability to assign up to 15-20 custom fields per every system entity: <ul style="list-style-type: none"> - Item - Receiving Order - Shipping Order - Transfer Order - Work Order - Shipping Document - Stock - Manufacturing Order 	✓
Support different type of Custom Fields: <ul style="list-style-type: none"> - String - Integer - Decimal - Flag - Date - Dictionary - Link 	✓

- TextArea	
Ability to search by custom fields	✓
Create/modify/delete Custom Dictionary	✓
UOM	
Supports several Unit of Measure Classes	✓
Supports two Unit of Measure Categories: Item Quantity, Weight	✓
Ability to add/modify/delete UOM class	✓
Ability to define UOM multiplier	✓
Override UOM multiplier at the Item level	✓
Specify cost and price at the Item level for specific UOM	✓
Extended system settings	
Autonumbering settings	✓
Add/Edit Dictionaries:	✓
- Adjustment Reasons	
- Hold Reasons	
- Order Type	
- Carriers	
- Ship Method	
- LPN Types	
- Country, State	
Ability to customize grids look & feel	✓
Toggle hide/unhide search filters for all orders	✓
Themes	✓
Stock Status colors	✓
Login background image	✓
Hold reason colors	✓
Email notification	
Ability to create/modify/delete templates	✓
Ability to schedule email notifications	✓
Ability to assign template to specific stored procedure with placeholders	✓
Ability to create/modify/delete Template group	✓
Multi-level data supported for template	✓
Licenses	
Desktop: per-device licensing	✓
RF: per-device licensing	✓
Mobile: per-device licensing	✓
Front End	✓
Accounting Bridge	✓
BarTender	✓
Billing	✓
Ability to view/delete claimed licenses	✓

Document Signing	
Ability to sign BOL with certificate from windows storage	✓
Ability to Print/Print and Email/Email signed document	✓
Ability to store signed PDF document on disk in configured folder	✓
Reports	
Ability to Print/Export Reports:	✓
<ul style="list-style-type: none"> - Shipping Orders Open - Receiving Order Open - Total Summary by Site - Item Flow Report - Summary by Location - and 50 more reports 	
Ability to Create/modify/ delete a group of Reports	✓
Ability to add/modify/delete your own Custom Report	✓
Setup	
Automated setup for Server and client machines	✓
Auto update	✓

Core IMS 4.0 Web-based Application

Dashboard	
Display CoreIMS Graphs: visual reports and overall warehouse statistics	✓
Graphs are provided for Inventory, Receiving, and Shipping activities	✓
Custom view: user can select graphs from multiple categories and view them in a separate screen	✓
Dashboard API service	✓
Item Card	
Setup Items (add/modify/delete)	✓
Setup Item Images (Add/modify/delete/download)	✓
Ability to setup Item Class/Category/Type	✓
Ability to setup ABC Class for Item	✓
Support FPL and Preferred Locations per Item	✓
Ability to setup replenishment settings per Site	✓
Ability to setup cycle count settings per Site	✓
Support multiple barcodes per one Item	✓
Ability to predefine Item as:	✓
<ul style="list-style-type: none"> • Lot Controlled • Serial Controlled • Service 	

Ability to assign BOM (Bill of Material for Item) <ul style="list-style-type: none"> Assembly Item 	✓
Ability to override picking sequence (FIFO /FEFO) per Item	✓
Ability to assign to Item per UOM the following attributes: <ul style="list-style-type: none"> override UOM multiplier per Item; Unit Cost; Unit Price; 	✓
Ability to assign to Item <ul style="list-style-type: none"> Quantity UOM Class Default Purchase UOM Default Sales UOM Weight UOM Class 	✓
Ability to set Quantity Increment for RF scanner for non-serial-controlled Items	✓
Ability to Print and Export (xls, pdf, doc) <ul style="list-style-type: none"> Item Card Item Flow Report 	✓
20 Custom Fields	✓
Warehouse Topology	
Ability to create/modify/delete Sites (Warehouse) with address, contact information (Phone, fax, E-mail)	✓
Ability to set Default values for the Site: <ul style="list-style-type: none"> - Default Location - Default Shipping Location 	✓
Ability to create/modify/delete Zones with different types (Putaway/Cannot Ship etc.)	✓
Ability to assign Item Class/ABC Class to Zone	✓
Ability to create/ modify/delete Zone Types (OnHold/Receiving/Shipping etc.)	✓
Ability to create /modify/delete Locations (support multi bins) for different Zones of the Site	✓
Setup Companies	
Ability to create company as (separately/together): <ul style="list-style-type: none"> - Vendor - Customer - Owner* (shall be version with ownership level) 	✓
Ability to modify and delete companies	✓

Ability to add/modify/delete several addresses per one company	✓
Ability to add/modify/delete contact persons per company	✓
Inventory	
Add stocks	✓
Ability to track and auto calculate Expiration Date	✓
Support different statuses for stocks	✓
Traceability <ul style="list-style-type: none"> • Lot number • Serial number 	✓
Move/Group Move	✓
Hold/Group Hold	✓
Release/ Group Release	✓
Adjust Qty /Adjust Attributes	✓
Break UOM	✓
Transfer Ad-Hoc /Group Transfer Ad-Hoc	✓
Receive transferred stocks /Group Receive	✓
Support LPN <ul style="list-style-type: none"> • Search/Add /Edit /Delete LPN • Add LPN Type • Parent- Child LPN relation 	✓
Print/Export inventory report based filtered values	✓
15 Custom Fields	✓
History	
Track Transaction History	✓
Print/Export Transaction History by filtered values	✓
Owners* (shall be version with Ownership)	
Supporting the following ownership modes: <ul style="list-style-type: none"> - none - stock-level - item-level 	✓
Ability to assign owner to orders	✓

Ability to assign owner to Stock/Item (version Stock-level/ Item-level accordingly)	✓
Permissions: ability to assign owner for the user	✓
Search/filter by owner	✓
Invoicing/ Billing	✓
Reports Filter	✓
Cycle Count	
Reports	✓
Receiving Orders	
Search/create/modify/cancel/close/receive	✓
Assign to All	✓
Partial receipts and overreceive	✓
Unreceive	✓
Create LPN during the receiving	✓
Receipt documents	✓
Print/export Receiving Documents: <ul style="list-style-type: none"> - Receipts - Receiving Order - Receiving History - Putaway Ticket 	✓
UOMs support	✓
Print/Export Reports	✓
Unexpected Receive	✓
20 Custom Fields	✓
Return Orders	
Same as receiving but can choose customer instead of vendor and return flag is checked	✓
Replenishment Orders	
Print/Export Inventory for Replenishment Report	✓
Shipping Orders	
Create/modify/cancel/close/ship	✓
Assign to All	✓
Partial shipments and overship	✓
Unship	✓
BOL	✓
Print/Export Shipping Documents: <ul style="list-style-type: none"> - BOL - Packing List 	✓

<ul style="list-style-type: none"> - Pick Ticket - Shipping History - Shipping Order 	
UOMs support	✓
Reports	✓
Unexpected Shipping	✓
Allocation (allocate all, allocate stock)	✓
20 Custom Fields	✓
Transfer Orders	
Create/modify/cancel/close/transfer	✓
Auto Receive	✓
Allocation (allocate all, Allocate Stock)	✓
Partial transfer and overtransfer	✓
Untransfer	✓
Print/Export Transfer Documents: <ul style="list-style-type: none"> - Pick Ticket - Transfer History - Transfer Order - Transfer Document 	✓
Reports	✓
15 Custom Fields	✓
Security	
Users	✓
Security Groups	✓
Individual Permissions	✓
HTTPS support	✓
Custom Fields	
Ability to assign up to 15-20 custom fields per every system entity: <ul style="list-style-type: none"> - Item - Receiving Order - Shipping Order - Transfer Order - Shipping Document - Stock 	✓
Support different type of Custom Fields: <ul style="list-style-type: none"> - String - Integer - Decimal - Flag - Date 	✓

- Dictionary	
- Link	
- TextArea	
Ability to search by custom fields	✓
Create/modify/delete Custom Dictionary	✓
UOM	
Supports several Unit of Measure Classes	✓
Supports two Unit of Measure Categories: Item Quantity, Weight	✓
Ability to add/modify/delete UOM class	✓
Ability to define UOM multiplier	✓
Override UOM multiplier at the Item level	✓
Extended system settings	
Autonumbering settings	✓
Add/Edit Dictionaries:	✓
- Adjustment Reasons	
- Hold Reasons	
- Order Type	
- Carriers	
- Countries and States	
- Ship Method	
- LPN Types	
Ability to customize grids look & feel	✓
Stock Status colors	✓
Login background image	✓
Hold reason colors	✓
Licenses	
Desktop: per-device licensing	✓
RF: per-device licensing	✓
Mobile: per-device licensing	✓
Front End	✓
Accounting Bridge	✓
BarTender	✓
Billing	✓
Ability to view/delete claimed licenses	✓
Reports	
Ability to Print/Export Reports:	✓
- Shipping Orders Open	

<ul style="list-style-type: none">- Receiving Order Open- Shipping Orders Closed- Receiving Orders Closed- Allocated Inventory by Shipping Orders- Allocated Inventory by Transfer Orders- Open Transfer Orders with Available Inventory- Transfer Orders Closed- Transfer Orders Open- Shipping Totals- Return Orders Open- Return Orders Closed- Return Orders by Companies- Item by Return Orders- Inventory Detail by Item- Summary by Categories- Inventory Detail by Item Extended- Inventory Demand- Inventory Summary by Item Alternative#- Total Inventory by Item- Summary by Location- Inventory Detail by Location- Inventory Summary by Negative Quantities- Inventory Detail by LPN- Items for Replenishment- Overstocked Items- Projected Items for Replenishment- Cycle Counting Settings- Cycle Counting Schedule- FPL Replenishment- Expired Inventory	
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Setup	
Automated setup client machines	✓
Auto update	✓
Labels	
Ability to specify a default label printer	✓

Application for RF scanners

Inventory	
Ability to add stock	✓
Ability to move stock/LPN	✓
Ability to hold stock/LPN	✓
Ability to adjust qty/attributes	✓
Supports cycle count	✓
Receiving Orders	
Search Receiving Orders	✓
Receive Orders	✓
Shipping Orders	
Search Shipping Orders	✓
Ship orders	✓
Unallocated stock from order	✓
Parsing Barcodes	
UPC barcodes	✓
GS1 standard barcodes	✓

Mobile application (IOS/Android)

Inventory	
Ability to search by keyword filter	✓
Ability to move/group move stock	✓
Ability to move LPN	✓
Ability to hold/group hold stock	✓
Ability to release/group release stock	✓
Cycle Count	
Ability to search by keyword filter	✓
Ability to view sheet information	✓
Ability to make manual counting	✓
Receiving Order	
Ability to search by keyword filter	✓
Ability to receive against LPN	✓
Support for the Owner attribute	✓
Ability to view order details	✓
Ability to Receive Details	✓
Shipping Orders	
Ability to search by keyword filter	✓
Ability to Pick allocated details and move them to Shipping location	✓
Ability to Allocate stocks manually (Pick to Allocate)	✓

Ability to Verify Lines before the shipping	✓
Ability to Ship Stocks	✓
- fully	
- partially	

Front-End application

Inventory information	
Ability to search by keyword filter	✓
Displays detailed inventory information about stocks that are allowed to be visible by user	✓
Quickly navigate from individual allocated stock to corresponding shipping order	✓
Dashboard	
Summary of inventory information across entire warehouse, including Quantity:	✓
- Available,	
- On Hand,	
- Due In,	
- Due Out values,	
- Value (cost)	
Quickly drill down from dashboard to detailed stock view and back	✓
Shipping Orders	
Ability to browse all relevant shipping orders	✓
Ability to search shipping orders by extended statuses	✓
Ability to create/cancel shipping order	✓
Ability to create/edit Lines	✓
Receiving Orders	
Ability to browse all relevant receiving orders	✓
Ability to search receiving orders by extended statuses	✓
Ability to create/cancel receiving order	✓
Ability to create/edit Lines	✓
Return Orders	
Ability to browse all relevant return orders	✓
Ability to search return orders by extended statuses	✓
Ability to create/cancel return order	✓
Ability to create/edit Lines	✓
Settings	
Supports user permission settings, like can view/modify orders etc.	✓
Responsive design that looks good on both desktop and mobile devices	✓
Supports HTTPS for transport level security	✓
508 Compliant	✓
Works on all modern browsers	✓

WorldShip (UPS) integration

Features	
Autogenerate package number	✓
Ability to assign statuses per package from CoreIMS desktop	✓

Import Packages to Worldship	✓
Export from Worldship Tracking # and shipping charge back to CoreIMS	✓

Core IMS Accounting Bridge (Integration with Quick Books/Sage 50 US/Sage 50 Canadian)

Import	
Item List	✓
UOM List	✓
Company List	✓
Purchase Orders	✓
Sales Orders	✓
Export	
Receipts	✓
Shipments	✓
Return Receipts as Credit Memo	✓
Build/Unbuild assembly transaction	✓
Adjustment transaction	✓
Synchronize Totals	✓
Billing Invoices	✓
Settings	
Auto import/export	✓
Ability to assign Account per every adjustment reason	✓
Ability to On/Off certain entities from auto import/export process	✓
Ability to set time range for auto import/export	✓

Core IMS Barcode module (integration with Bartender/Zebra)

Print Labels	
Ability to print stock labels from inventory and all orders	✓
Ability to print labels in 2 modes: - per Stock - per Item	✓
Ability to print Labels for: - Item - LPN	✓
Ability to print Labels under all Orders in 3 other modes: - Details - Lines - All Lines	✓
Ability to connect any available printer	✓
Create Labels (in Bartender app)	

Rest API

Rest API	✓
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