

## 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"> <li>• Lot Controlled</li> <li>• Serial Controlled</li> <li>• Service</li> </ul>	✓
Ability to assign BOM (Bill of Material for Item) <ul style="list-style-type: none"> <li>• Assembly Item</li> </ul>	✓
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"> <li>• override UOM multiplier per Item;</li> <li>• Unit Cost;</li> <li>• Unit Price;</li> <li>• Weight;</li> <li>• Length;</li> <li>• Height;</li> <li>• Width;</li> <li>• Volume</li> </ul>	✓
Ability to assign to Item <ul style="list-style-type: none"> <li>• Quantity UOM Class</li> <li>• Default Purchase UOM</li> <li>• Default Sales UOM</li> <li>• Weight UOM Class</li> <li>• Stocking UOM</li> </ul>	✓
Ability to create and choose Manufacturer	✓
Ability to add Warranty period	✓
Ability to add UCC Quantity	✓
Ability to set a Temperature Range	✓
Support image upload per Item	✓

Item Dashboard <ul style="list-style-type: none"> <li>Item</li> <li>Item flow</li> <li>Item Components</li> <li>Form 5203</li> </ul>	✓
Ability to Print and Export (xls, pdf, doc) <ul style="list-style-type: none"> <li>Item Card</li> <li>Bill of Materials</li> <li>Item Flow Report</li> <li>Form 5203</li> </ul>	✓
<b>Warehouse Topology</b>	
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"> <li>- Default Location</li> <li>- Default Shipping Location</li> </ul>	✓
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	✓
<b>Setup Companies</b>	
Ability to create company as (separately/together): <ul style="list-style-type: none"> <li>- Vendor</li> <li>- Customer</li> <li>- Owner</li> </ul>	✓
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	✓
<b>Inventory</b>	
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"> <li>- Add /Edit /Delete LPN</li> <li>- Add LPN Type</li> <li>- Parent- Child LPN relation</li> <li>- Print/Export LPN List based on what user specified in filter</li> </ul>	✓
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	✓
<b>Owners</b>	
Supporting the following ownership modes: <ul style="list-style-type: none"> <li>- none</li> <li>- stock-level</li> <li>- item-level</li> </ul>	✓
Ability to assign owner to orders	✓
Permissions: ability to assign owner for the user	✓
Search/filter by owner	✓
Invoicing/ Billing	✓
Reports Filter	✓
<b>Cycle Count</b>	
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"> <li>- Approve</li> <li>- Reject</li> <li>- Recount</li> </ul>	✓
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 Native Mobile	✓
Results reconciliation	✓
Blind counts support	✓
Serial numbers support	✓
Manual counting	✓
<b>Receiving Orders</b>	
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"> <li>- Receipts</li> <li>- Receiving Order</li> <li>- Receiving History</li> <li>- Putaway Ticket</li> </ul>	✓
UOMs support	✓
Cross docking	✓
Print/Export Reports	✓
Unexpected Receive	✓
<b>Return Orders</b>	
Same as receiving but can choose customer instead of vendor and return flag is checked	✓
<b>Replenishment Orders</b>	
Generating receiving orders based on projected items for replenishment report	✓
Print/Export Reports	✓
<b>Shipping Orders</b>	
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"> <li>- BOLs</li> <li>- Packing List</li> <li>- Pick Ticket</li> </ul>	✓

- 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	✓
<b>Transfer Orders</b>	
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: - Pick Ticket - Transfer History - Transfer Order - Transfer Document	✓
Reports	✓
<b>Work Orders (Kitting)</b>	
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: - 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	✓
<b>Work Orders (Manufacturing)</b>	
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"> <li>- Build Report</li> <li>- Manufacturing Work History</li> <li>- Manufacturing Work Order</li> <li>- Pick Ticket</li> <li>- Putaway Ticket</li> <li>- Used components</li> </ul>	
Print/Export Reports	✓
<b>Billing for 3PL</b>	
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	✓
<b>Security</b>	
Users	✓
Security Groups	✓
Individual Permissions	✓
HTTPS support	✓
<b>Custom Fields</b>	
Ability to assign up to 15-20 custom fields per every system entity:	✓
<ul style="list-style-type: none"> <li>- Item</li> <li>- Receiving Order</li> <li>- Shipping Order</li> <li>- Transfer Order</li> <li>- Work Order</li> <li>- Shipping Document</li> <li>- Stock</li> <li>- Manufacturing Order</li> </ul>	
Support different type of Custom Fields:	✓
<ul style="list-style-type: none"> <li>- String</li> <li>- Integer</li> <li>- Decimal</li> <li>- Flag</li> <li>- Date</li> <li>- Dictionary</li> <li>- Link</li> <li>- TextArea</li> </ul>	
Ability to search by custom fields	✓

Create/modify/delete Custom Dictionary	✓
<b>UOM</b>	
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	✓
<b>Extended system settings</b>	
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	✓
<b>Email notification</b>	
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	✓
<b>Licenses</b>	
Desktop: per-device licensing	✓
Mobile: per-device licensing	✓
Front End	✓
Accounting Bridge	✓
BarTender	✓
Billing	✓
Ability to view/delete claimed licenses	✓
<b>Document Signing</b>	
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"> <li>- Shipping Orders Open</li> <li>- Receiving Order Open</li> <li>- Total Summary by Site</li> <li>- Item Flow Report</li> <li>- Summary by Location</li> <li>- and 50 more reports</li> </ul>	✓
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"> <li>• Lot Controlled</li> <li>• Serial Controlled</li> <li>• Service</li> </ul>	✓
Ability to assign BOM (Bill of Material for Item) <ul style="list-style-type: none"> <li>• Assembly Item</li> </ul>	✓
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"> <li>• override UOM multiplier per Item;</li> <li>• Unit Cost;</li> <li>• Unit Price;</li> </ul>	✓
Ability to assign to Item <ul style="list-style-type: none"> <li>• Quantity UOM Class</li> <li>• Default Purchase UOM</li> <li>• Default Sales UOM</li> <li>• Weight UOM Class</li> </ul>	✓
Ability to Print and Export (xls, pdf, doc) <ul style="list-style-type: none"> <li>• Item Card</li> <li>• Item Flow Report</li> </ul>	✓
20 Custom Fields	✓
<b>Warehouse Topology</b>	
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"> <li>- Default Location</li> <li>- Default Shipping Location</li> </ul>	✓
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	✓
<b>Setup Companies</b>	
Ability to create company as (separately/together): <ul style="list-style-type: none"> <li>- Vendor</li> <li>- Customer</li> <li>- Owner* (shall be version with ownership level)</li> </ul>	✓
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	✓
<b>Inventory</b>	
Add stocks	✓

Ability to track and auto calculate Expiration Date	✓
Support different statuses for stocks	✓
Traceability <ul style="list-style-type: none"> <li>• Lot number</li> <li>• Serial number</li> </ul>	✓
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"> <li>• Search/Add /Edit /Delete LPN</li> <li>• Add LPN Type</li> <li>• Parent- Child LPN relation</li> </ul>	✓
Print/Export inventory report based filtered values	✓
15 Custom Fields	✓
<b>History</b>	
Track Transaction History	✓
Print/Export Transaction History by filtered values	✓
<b>Owners* (shall be version with Ownership)</b>	
Supporting the following ownership modes: <ul style="list-style-type: none"> <li>- none</li> <li>- stock-level</li> <li>- item-level</li> </ul>	✓
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	✓
<b>Cycle Count</b>	
Reports	✓
<b>Receiving Orders</b>	
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"> <li>- Receipts</li> <li>- Receiving Order</li> <li>- Receiving History</li> <li>- Putaway Ticket</li> </ul>	✓
UOMs support	✓
Print/Export Reports	✓
Unexpected Receive	✓
20 Custom Fields	✓
<b>Return Orders</b>	
Same as receiving but can choose customer instead of vendor and return flag is checked	✓
<b>Replenishment Orders</b>	
Print/Export Inventory for Replenishment Report	✓
<b>Shipping Orders</b>	
Create/modify/cancel/close/ship	✓
Assign to All	✓
Partial shipments and overship	✓
Unship	✓
BOL	✓
Print/Export Shipping Documents: <ul style="list-style-type: none"> <li>- BOL</li> <li>- Packing List</li> <li>- Pick Ticket</li> <li>- Shipping History</li> <li>- Shipping Order</li> </ul>	✓
UOMs support	✓
Reports	✓
Unexpected Shipping	✓
Allocation (allocate all, allocate stock)	✓

20 Custom Fields	✓
<b>Transfer Orders</b>	
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"> <li>- Pick Ticket</li> <li>- Transfer History</li> <li>- Transfer Order</li> <li>- Transfer Document</li> </ul>	✓
Reports	✓
15 Custom Fields	✓
<b>Security</b>	
Users	✓
Security Groups	✓
Individual Permissions	✓
HTTPS support	✓
<b>Custom Fields</b>	
Ability to assign up to 15-20 custom fields per every system entity: <ul style="list-style-type: none"> <li>- Item</li> <li>- Receiving Order</li> <li>- Shipping Order</li> <li>- Transfer Order</li> <li>- Shipping Document</li> <li>- Stock</li> </ul>	✓
Support different type of Custom Fields: <ul style="list-style-type: none"> <li>- String</li> <li>- Integer</li> <li>- Decimal</li> <li>- Flag</li> <li>- Date</li> <li>- Dictionary</li> <li>- Link</li> <li>- TextArea</li> </ul>	✓
Ability to search by custom fields	✓
Create/modify/delete Custom Dictionary	✓
<b>UOM</b>	
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	✓
<b>Extended system settings</b>	
Autonumbering settings	✓
Add/Edit Dictionaries: <ul style="list-style-type: none"> <li>- Adjustment Reasons</li> <li>- Hold Reasons</li> <li>- Order Type</li> <li>- Carriers</li> <li>- Countries and States</li> <li>- Ship Method</li> <li>- LPN Types</li> </ul>	✓
Ability to customize grids look & feel	✓
Stock Status colors	✓
Login background image	✓
Hold reason colors	✓
<b>Licenses</b>	
Desktop: per-device licensing	✓
Mobile: per-device licensing	✓
Front End	✓
Accounting Bridge	✓
BarTender	✓
Billing	✓
Ability to view/delete claimed licenses	✓
<b>Reports</b>	
Ability to Print/Export Reports: <ul style="list-style-type: none"> <li>- Shipping Orders Open</li> <li>- Receiving Order Open</li> <li>- Shipping Orders Closed</li> <li>- Receiving Orders Closed</li> <li>- Allocated Inventory by Shipping Orders</li> <li>- Allocated Inventory by Transfer Orders</li> <li>- Open Transfer Orders with Available Inventory</li> </ul>	✓

<ul style="list-style-type: none"> <li>- Transfer Orders Closed</li> <li>- Transfer Orders Open</li> <li>- Shipping Totals</li> <li>- Return Orders Open</li> <li>- Return Orders Closed</li> <li>- Return Orders by Companies</li> <li>- Item by Return Orders</li> <li>- Inventory Detail by Item</li> <li>- Summary by Categories</li> <li>- Inventory Detail by Item Extended</li> <li>- Inventory Demand</li> <li>- Inventory Summary by Item Alternative#</li> <li>- Total Inventory by Item</li> <li>- Summary by Location</li> <li>- Inventory Detail by Location</li> <li>- Inventory Summary by Negative Quantities</li> <li>- Inventory Detail by LPN</li> <li>- Items for Replenishment</li> <li>- Overstocked Items</li> <li>- Projected Items for Replenishment</li> <li>- Cycle Counting Settings</li> <li>- Cycle Counting Schedule</li> <li>- FPL Replenishment</li> <li>- Expired Inventory</li> </ul>	
<b>Setup</b>	
Automated setup client machines	✓
Auto update	✓
<b>Administration</b>	
Data upload: <ul style="list-style-type: none"> <li>- Sites, Zones, Locations,</li> <li>- Companies, Addresses, Contacts,</li> <li>- Items, Barcodes.</li> </ul>	✓
<b>Assistance</b>	

Customer Support Dashboard: <ul style="list-style-type: none"> <li>- Help Desk,</li> <li>- Getting Started,</li> <li>- User Guides.</li> </ul>	✓
<b>Labels</b>	
Ability to specify a default label printer	✓

### Mobile application (IOS/Android)

<b>Inventory</b>	
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	✓
<b>Cycle Count</b>	
Ability to search by keyword filter	✓
Ability to view sheet information	✓
Ability to make manual counting	✓
<b>Receiving Order</b>	
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	✓
<b>Shipping Orders</b>	
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 <ul style="list-style-type: none"> <li>- fully</li> <li>- partially</li> </ul>	✓

### Front-End application

<b>Inventory information</b>	
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	✓
<b>Dashboard</b>	
Summary of inventory information across entire warehouse, including Quantity: <ul style="list-style-type: none"> <li>- Available,</li> <li>- On Hand,</li> </ul>	✓

- Due In, - Due Out values, - Value (cost)	
Quickly drill down from dashboard to detailed stock view and back	✓
<b>Shipping Orders</b>	
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	✓
<b>Receiving Orders</b>	
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	✓
<b>Return Orders</b>	
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	✓
<b>Settings</b>	
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

<b>Features</b>	
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)

<b>Import</b>	
Item List	✓
UOM List	✓
Company List	✓
Purchase Orders	✓
Sales Orders	✓
<b>Export</b>	
Receipts	✓
Shipments	✓
Return Receipts as Credit Memo	✓
Build/Unbuild assembly transaction	✓



Adjustment transaction	✓
Synchronize Totals	✓
Billing Invoices	✓
<b>Settings</b>	
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)

<b>Print Labels</b>	
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	✓
<b>Create Labels (in Bartender app)</b>	

### Rest API

Rest API	✓
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