ScanOps user manual

Updated November 2026. Every step uses the names you see on screen. The same steps are in the Help Center at scanops.xyz/help and inside ScanOps under Help.

What's inside

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Where things are

Sidebar	What's there
Dashboard	Today's briefing from ScanOps AI and your key numbers.
QR Codes	Create, Library, Barcodes & UPC, Campaigns.
Orders	Sales & work orders, Pick tasks, Pack & ship.
Warehouse	Inventory, Receive & put away, Move & transfer, Count & adjust, Live overview.
Reports	Analytics and warehouse reports.
Team	Invite people, roles and the floor PIN.
Settings	Branding, Account, Billing, Submit a request.

1. Getting started: sign up and set up your workspace

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Create a ScanOps account and finish the short setup so your dashboard fits your business.

Who does it: The business owner or whoever sets up ScanOps.

Before you start

- An email address you can open.
- Your logo as a PNG, JPG, SVG or WebP file (optional).
- Which plan you want. You can change it later.

Create your account

Step	What to do	Done
1	Go to scanops.xyz and click Start free trial (or pick a plan on the Pricing page).	☐
2	Fill in Business name, Plan, Username, Email, Password and a security question, then click the button at the bottom (Start 14-day free trial, or Create free account on the Free plan). You pick your type of business in the next step.	☐

Set up your workspace

The first time you sign in, a short setup asks for your business name, type, logo and report email.

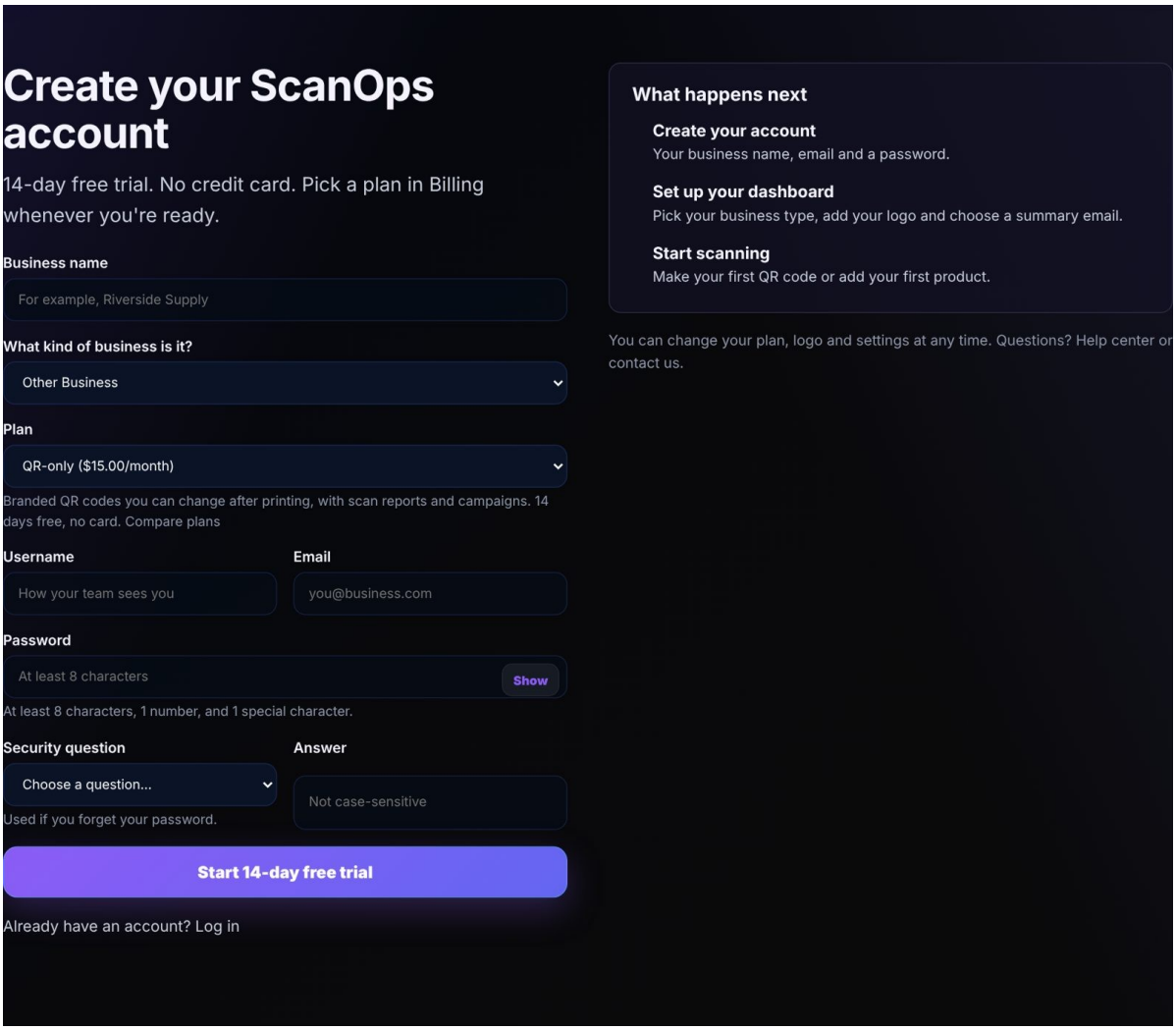
Step	What to do	Done
1	In Set up your dashboard, enter your business name and pick what kind of business it is. This decides which tools you see first.	☐
2	Upload your logo and pick a brand color (Pro plans and up). Your logo goes on QR codes, labels and scan pages.	☐
3	Choose how often you want a summary email: every morning, every Monday, on the 1st, or no emails.	☐
4	Click Save and open my dashboard. You can change all of this later in Settings.	☐

Install ScanOps on your phone

Put ScanOps on your home screen. It opens full screen and keeps scans you make without signal.

Step	What to do	Done
1	iPhone: open scanops.xyz in Safari, sign in, tap the Share button (square with an arrow), then Add to Home Screen and Add.	☐

Step	What to do	Done
2	Android: open scanops.xyz in Chrome, sign in, then tap Install the ScanOps app on the Dashboard (or in Settings → Account). You can also use the browser menu (⋮) → Install app.	☐
3	Computer: in Chrome or Edge, click the install icon in the address bar, or Settings → Account → Install the ScanOps app.	☐
4	Open ScanOps from the new icon. Press and hold the icon for shortcuts to Scan, Pick tasks and Receive.	☐
5	No signal on the floor? Check In, Check Out, pick confirmations and counts are saved on the phone. A pill shows how many are waiting, and they send by themselves once you're back online. Everything else needs a connection.	☐



The sign-up page.

Check it worked

- You land on the Dashboard with your business name in the sidebar.
- Settings → Account shows the summary email you picked.

Tips

- Paid plans start with a 14-day trial and no card. Pick a plan in Settings → Billing whenever you're ready.
- Want sample data to practise with? On the Dashboard, click Load demo data. Remove it with one click when you're done.

2. Invite your team and set a floor PIN

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Give teammates their own login with the right access, and let shared warehouse phones work with a PIN.

Who does it: Workspace owner.

Before you start

- Each teammate's email address.
- Which role each person needs (see below).

Roles

Role	Can do
Owner	Everything, including billing, branding and team.
Member	Catalog, QR codes, imports and reports.
Worker	Floor work only: receive, move, count, pick, pack.

Invite your team and set a floor PIN

Add teammates with the right access, and let warehouse phones scan without a full login.

Step	What to do	Done
1	Open Team in the sidebar.	☐
2	Under Invite teammate, enter their email and pick a role: Member (catalog, QR, imports), Worker (floor work) or Owner (everything, including billing).	☐
3	Click Create invite link and send it to them.	☐
4	Under Floor PIN, set a PIN. Shared warehouse phones can then receive and check out with the PIN only.	☐

Who can do what: roles, jobs and My work

Owners run everything, Members run the work, Workers see only the jobs you give them. Everyone signs out after 12 hours.

Step	What to do	Done
1	Owner: everything, including Team and Billing. Member: all work and reports, including cancelling orders, but not Team, Billing or branding.	☐
2	Worker: tick their jobs in Team: Receive, Put away, Pick, Pack, Ship, Count, Edit products, or Shift lead.	☐
3	Workers start on My work: a list of their jobs with Start here on the first one, plus checking stock in and out.	☐

Step	What to do	Done
4	Orders: Pickers see the order, items and shelves (no customer address). Packers and shippers also see the ship-to.	☐
5	Only Owners, Members and Shift leads can create, release or hold orders and reassign pickers. Only Owners and Members can cancel.	☐
6	Personal sign-ins end 12 hours after signing in (one shift). Shared phones can use the floor PIN instead.	☐
7	Someone forgot their password? Owners: open Team, click Set password next to the Member or Worker, and give them the new one in person.	☐

Use the scanner in Spanish

Each phone can show the scan and pick screens in English or Spanish.

Step	What to do	Done
1	Open the scan screen or a pick run on the phone.	☐
2	Tap Español at the top (tap English to switch back).	☐
3	The choice is saved on that phone only, so each worker can pick their own.	☐

Scan with no signal

Check In, Check Out, picks and counts are saved on the phone when there's no signal and sent when it's back.

Step	What to do	Done
1	Install ScanOps on the phone (see Install the app) and sign in once while online.	☐
2	Scan as usual. With no signal you'll see that the scan is saved on this phone.	☐
3	A small bar at the bottom shows how many scans are waiting to send.	☐
4	When the phone is back online they send by themselves. Each scan is only ever counted once.	☐
5	If you see Sign in again to send your saved scans, sign in and they'll send.	☐

Use ScanOps on scanners, scanner guns and phones

No app store needed: install ScanOps from the browser on phones, rugged Android scanners and computers, and use a phone camera or any scanner gun.

Step	What to do	Done
1	Phones and tablets: install ScanOps from the browser (see Install ScanOps on your phone). The camera reads QR codes, barcodes and GS1 labels.	☐
2	Rugged Android scanners (Zebra, Honeywell, Datalogic): open scanops.xyz in Chrome and install it the same way. The built-in scan trigger works in any ScanOps scan box.	☐
3	Scanner guns (USB or Bluetooth): they type the code and press Enter. Tap or click the scan box once, then scan. No setup in ScanOps.	☐
4	Zebra devices: if scans don't appear, open the DataWedge app, choose the Chrome profile (or create one), turn on Keystroke output and set it to send Enter after each scan.	☐
5	Shared devices: set a floor PIN in Team so workers can check stock in and out without a personal login. Personal logins end after 12 hours.	☐
6	Spanish: tap Español on the scan or pick screen. Each device remembers its own language.	☐

Check it worked

- The teammate appears in Team after they accept the invite.
- A shared phone can open the floor screens with the PIN.

Tips

- Invite links expire. If one stops working, create a new one.
- Change the floor PIN whenever someone leaves the team.

3. Create and change QR codes

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Make a branded QR code, test it, and change where it goes later without reprinting.

Who does it: Owners and members.

Before you start

- Where the code should go (a web address, menu file, Wi-Fi details and so on).
- Your logo, if you want it on the code.

Create a QR code

Pick what it does, where it goes and how it looks, then add your logo and save.

Step	What to do	Done
1	Go to QR Codes → Create.	☐
2	Type: pick what the code should do, for example Link to a website.	☐
3	Details: paste the address and give the code a name only you will see, then click Next.	☐
4	Design and Scan page: pick colors and what people see after scanning. The preview updates as you go.	☐
5	Logo & finish: add your logo, click Test QR to scan it with your phone, then Save QR code.	☐

Change where a QR code goes

Codes you create in ScanOps can point somewhere new without reprinting.

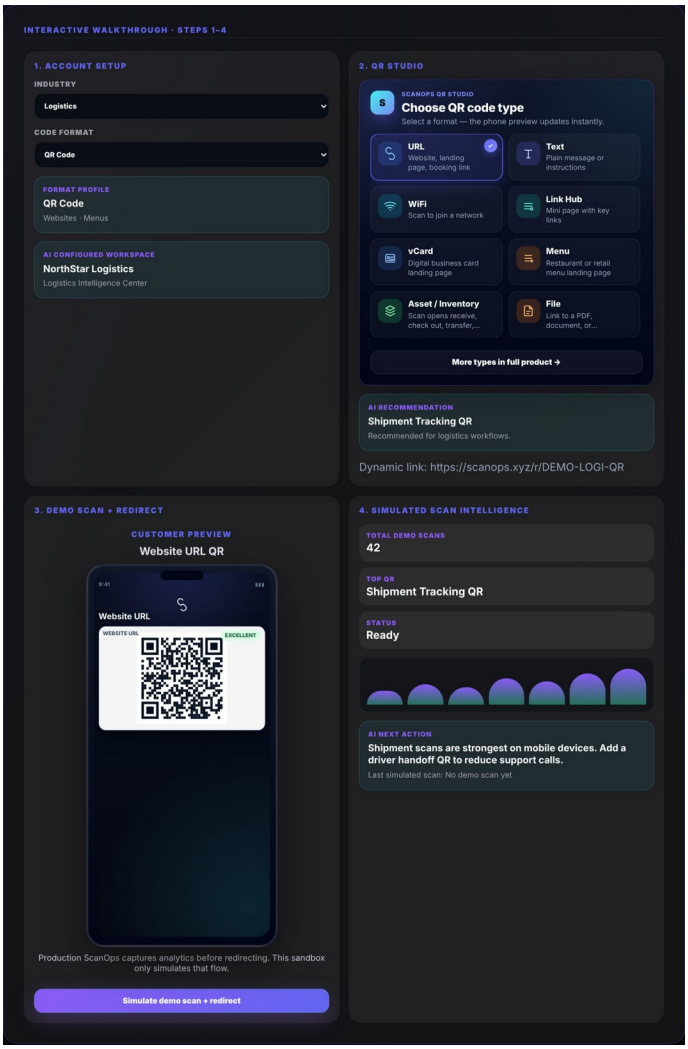
Step	What to do	Done
1	Go to QR Codes → Library and click the code.	☐
2	Use Edit to change the destination or content, then save.	☐
3	Scan the printed code again: it now opens the new destination.	☐

Add a password, scan limit or smart redirect

Control who can open a code, how many times, and send scans to different places by time, day or device.

Step	What to do	Done
1	Go to QR Codes → Library, click the code, then Full analytics.	☐

Step	What to do	Done
2	Find Access and smart redirects.	☐
3	Password: people must type it before the code opens. Scan limit: the code stops after that many scans, or sends people to another page.	☐
4	Smart redirects: click Add a rule and send scans somewhere else by country, phone language, phone type or time of day.	☐
5	Click Save rules. Scans use the new settings right away.	☐



Making a QR code in the live demo. The real screen works the same way.

Check it worked

- Scanning the printed code with your phone opens the right page.
- The code shows in QR Codes → Library with a scan count.

Tips

- Always click Test QR and scan with a real phone before printing many copies.
- Keep a white border around the code when you print it. Codes that are too small or low-contrast scan badly.

4. See who scanned, and group codes into campaigns

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Find out how many people scan each code, where and when, and compare codes in a promotion.

Who does it: Owners and members.

Before you start

- At least one QR code that has been scanned.

See who scanned your codes

Scans, unique visitors, cities and busiest days for every code.

Step	What to do	Done
1	Go to QR Codes → Library to see total and unique scans per code.	☐
2	Click a code, then Full analytics for scans by day, city and device.	☐
3	For all codes together, open Reports → Analytics. Export CSV downloads the numbers.	☐

Group codes into a campaign

Put related codes together to compare how a promotion is doing.

Step	What to do	Done
1	Go to QR Codes → Campaigns.	☐
2	Create a campaign and add the codes that belong to it.	☐
3	Open the campaign to compare scans across its codes.	☐

Check it worked

- Reports → Analytics shows scans for the dates you picked.
- Export CSV downloads a file you can open in Excel.

Tips

- Unique scans count each phone once; total scans count every scan.
- Give each flyer, table or store its own code so you can see which one works best.

5. Make barcodes, UPC labels and shelf labels

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Print barcodes for products and labels for shelves so the team can scan them.

Who does it: Owners and members.

Before you start

- Your products added in Warehouse → Inventory (for product barcodes).
- A label printer or sheet labels.

Make barcodes and UPC labels

Print retail barcodes (UPC-A, EAN-13) or your own codes for products and shelves.

Step	What to do	Done
1	Go to QR Codes → Barcodes & UPC.	☐
2	Pick a product, or type what the barcode should say. Click Make a new code if you need one.	☐
3	Leave the type on Best fit unless you need a specific one.	☐
4	Click Print labels, or Download PNG / Download SVG for your packaging.	☐

Print and scan GS1 barcodes (2027 retail)

Make GS1 DataMatrix or GS1 Digital Link codes that carry the product, lot, expiry and serial, and scan them on the floor.

Step	What to do	Done
1	Go to the barcode creator and pick GS1 DataMatrix or GS1 Digital Link.	☐
2	Enter the product's GTIN (its UPC or EAN), then the expiry, lot and serial if you use them.	☐
3	Print the code on the box or label.	☐
4	When the scanner reads a GS1 code, it finds the product and fills in the lot, expiry and serial for you.	☐
5	For shelf labels, open Warehouse → Live overview, click a shelf, and use Print Location Label. To print many, use Warehouse setup.	☐

Check it worked

- A test print scans with your phone or scanner.
- Retail barcodes (UPC-A, EAN-13) pass the check-digit test ScanOps runs.

Tips

- Use UPC-A or EAN-13 only for products sold in stores; use Best fit for your own codes.
- Print one label first and scan it before printing a full sheet.

6. Add products, keep stock right and catch low stock

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Set up your products and keep the numbers right as stock moves.

Who does it: Owners, members and workers (workers can move and count).

Before you start

- Your product list (a spreadsheet works).
- Where each product is kept.

Add a product

Products can have a SKU, barcode, location, cost and minimum stock.

Step	What to do	Done
1	Go to Warehouse → Inventory and click Add product.	☐
2	Enter the item name, SKU, quantity, warehouse and default location.	☐
3	Add a minimum stock and cost so low stock and stock value work.	☐
4	Type or scan the barcode. ScanOps checks UPC and EAN numbers for typos.	☐
5	Click Add inventory. If the SKU is already used, ScanOps warns you first.	☐

Move, count or adjust stock

Keep numbers right when things move or a count doesn't match.

Step	What to do	Done
1	To move stock between shelves, use Warehouse → Move & transfer and scan from and to.	☐
2	To count a shelf, use Warehouse → Count & adjust and enter what you counted.	☐
3	Every change is logged with who did it and when.	☐

Low stock and reorder points

Get warned before you run out.

Step	What to do	Done
1	Give each product a minimum stock (Add product or Edit).	☐
2	Products at or below their minimum show in the Low stock list on Warehouse → Inventory.	☐

Step	What to do	Done
3	ScanOps AI also lists them in today's briefing on the Dashboard.	☐

Check it worked

- Warehouse → Inventory shows each product with the right quantity and location.
- Products under their minimum appear in the Low stock list.

Tips

- Importing many products? Use Import on the Inventory screen with a CSV or Excel file.
- Never change a quantity by editing a location. Use Count & adjust so the change is logged.

7. Buy and receive stock

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Get quotes approved, send purchase orders, and add arriving stock correctly, from a PO, a packing slip, a file or by hand.

Who does it: Requests and receiving: owners, members and workers. Approval: approvers set in Purchasing.

Before you start

- The packing slip, invoice or a file of what arrived.
- Somewhere to put the stock.

Receive a delivery

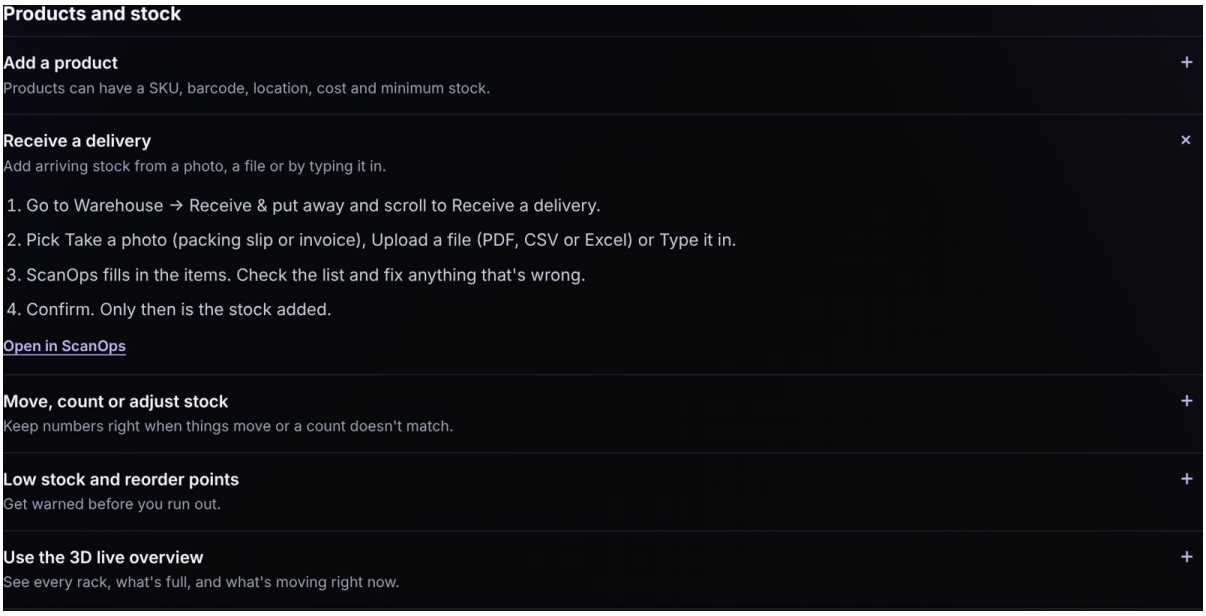
Add arriving stock from a photo, a file or by typing it in.

Step	What to do	Done
1	Go to Warehouse → Receive & put away and scroll to Receive a delivery.	☐
2	Pick Take a photo (packing slip or invoice), Upload a file (PDF, CSV or Excel) or Type it in.	☐
3	ScanOps fills in the items. Check the list and fix anything that's wrong.	☐
4	Confirm. Only then is the stock added.	☐

Buy stock: quotes, approval and purchase orders

Get quotes, have them approved, send a purchase order, then receive the delivery into stock.

Step	What to do	Done
1	Go to Purchasing and click New request. Pick the product from your catalog and enter how many you need.	☐
2	Add your supplier quotes (3 by default; change this under Lists & approvers). The request then waits for an approver.	☐
3	An approver clicks Approve. Then click Create purchase order, check the lines and save the draft.	☐
4	Click Issue to send it. The PDF and Excel buttons give you a copy for the supplier, and the part's unit cost is updated.	☐
5	When the delivery arrives, click Receive on the PO, enter what arrived on each line, then Add to stock and mark received. Stock goes up and the PO is noted in the stock history.	☐
6	Put the stock away: scan the item, then scan the shelf it goes on (Warehouse → Receive & put away).	☐



The same steps in the Help Center.

Check it worked

- The products show the new quantities in Warehouse → Inventory.
- The delivery shows in the receiving history with your name and the time.

Tips

- Count what actually arrived. If it's short or damaged, change the number before you confirm.
- A clear, flat photo of the packing slip gives the best results.

8. Orders: create, release, pick, pack and ship

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Take an order from the office to the truck with every item checked by scan.

Who does it: Owners and members create and release orders. Workers pick and pack.

Before you start

- The products are in stock in ScanOps.
- The customer's ship-to address.

Create and release an order

Orders wait in the Release queue until you send them to the floor.

Step	What to do	Done
1	Go to Orders → Order Management and click New order. (Kitchens see Requests, and some businesses see Supply requests or Event kits instead.)	☐
2	Pick the order type. The types match your business, for example Online order or Store pickup for a shop, Job or Customer delivery for field service, Production job for manufacturing. Owners can switch types off or rename them in Settings → Account → Order types you use.	☐
3	Enter the customer and address (or job site, department or kitchen station), add the products and quantities, then Create & queue.	☐
4	Pick who should pick it (or leave Auto-assign), then click Release & print pick ticket or Release only. ScanOps sets the stock aside and creates the pick tasks.	☐
5	To change who picks a released order, use Change picker on the order. Choose Anyone can pick to open it to the whole team.	☐
6	Auto-assign gives the work to the least busy person with the Pick job (set jobs in Team). If nobody has it, floor workers get it.	☐

Pick an order by scanning

The pick screen walks you to each shelf and checks every scan.

Step	What to do	Done
1	Go to Orders → Pick tasks.	☐
2	Go to the shelf shown and scan the shelf label, then Check shelf.	☐
3	Scan the item, then Check item. Scan the pallet tag too if it asks.	☐
4	Click I took … — next item. A wrong scan is stopped with a message telling you what to scan instead.	☐

Pack and ship

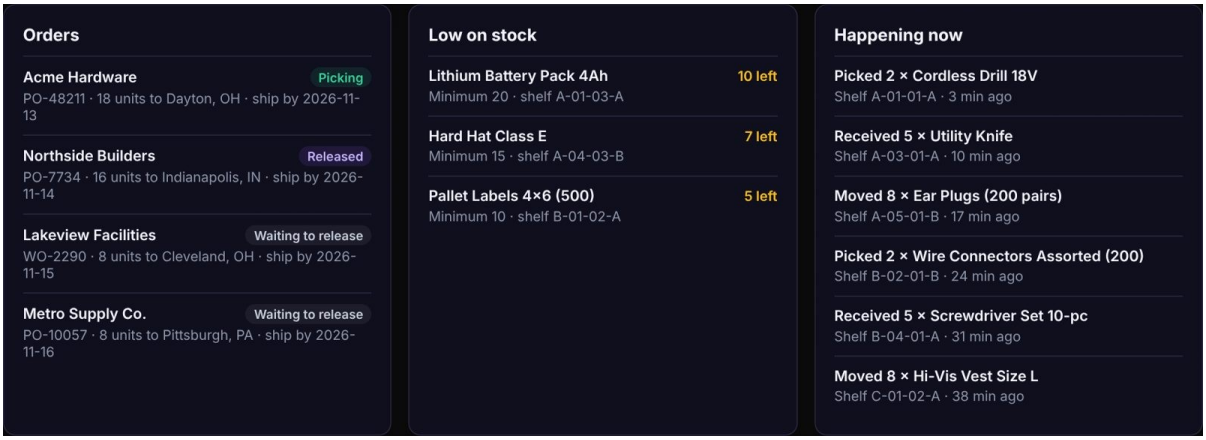
Check the items, pack, and print the paperwork.

Step	What to do	Done
1	Go to Orders → Pack & ship and pick the order.	☐
2	Under Scan & pack, scan each item, enter the number of boxes and click Verified — confirm pack.	☐
3	Choose the carrier and service, click Create BOL, then Confirm shipment & print packing sheet.	☐
4	Open the packing sheet, box labels and BOL from Shipment / BOL history. Stock goes down automatically.	☐

Buy shipping labels with your Shippo account

Connect your own Shippo account to compare rates and buy labels from the packing screen. Labels are billed by Shippo, not ScanOps. On the Advanced WMS plan.

Step	What to do	Done
1	Create a Shippo account at goshippo.com and copy an API key from its settings (a test key makes free sample labels).	☐
2	In ScanOps, open Settings → Orders & shipping connections, find Shipping labels, paste the key and click Connect Shippo.	☐
3	When packing an order, enter the package size and weight to see rates, then buy the one you want.	☐
4	The label and tracking number are saved on the order. Use Disconnect to remove your key at any time.	☐



Orders, low stock and live activity in the sample warehouse.

Check it worked

- Orders → Order Management shows the order as Shipped.

- Stock went down by the shipped amounts.
- The packing sheet, box labels and bill of lading open from Shipment / BOL history.

Tips

- If a scan is wrong, the screen stops you and says what to scan instead. Don't skip it.
- Ship quantities start from what was packed. Change them only if you're really sending less.

9. Use the 3D live overview

Updated November 2026. Names in the steps match what you see on screen.

What this is for: See every rack and shelf, what's full, what's reserved and where work is happening now.

Who does it: Everyone with warehouse access.

Before you start

- Your shelves set up in Warehouse setup (or the demo data loaded).

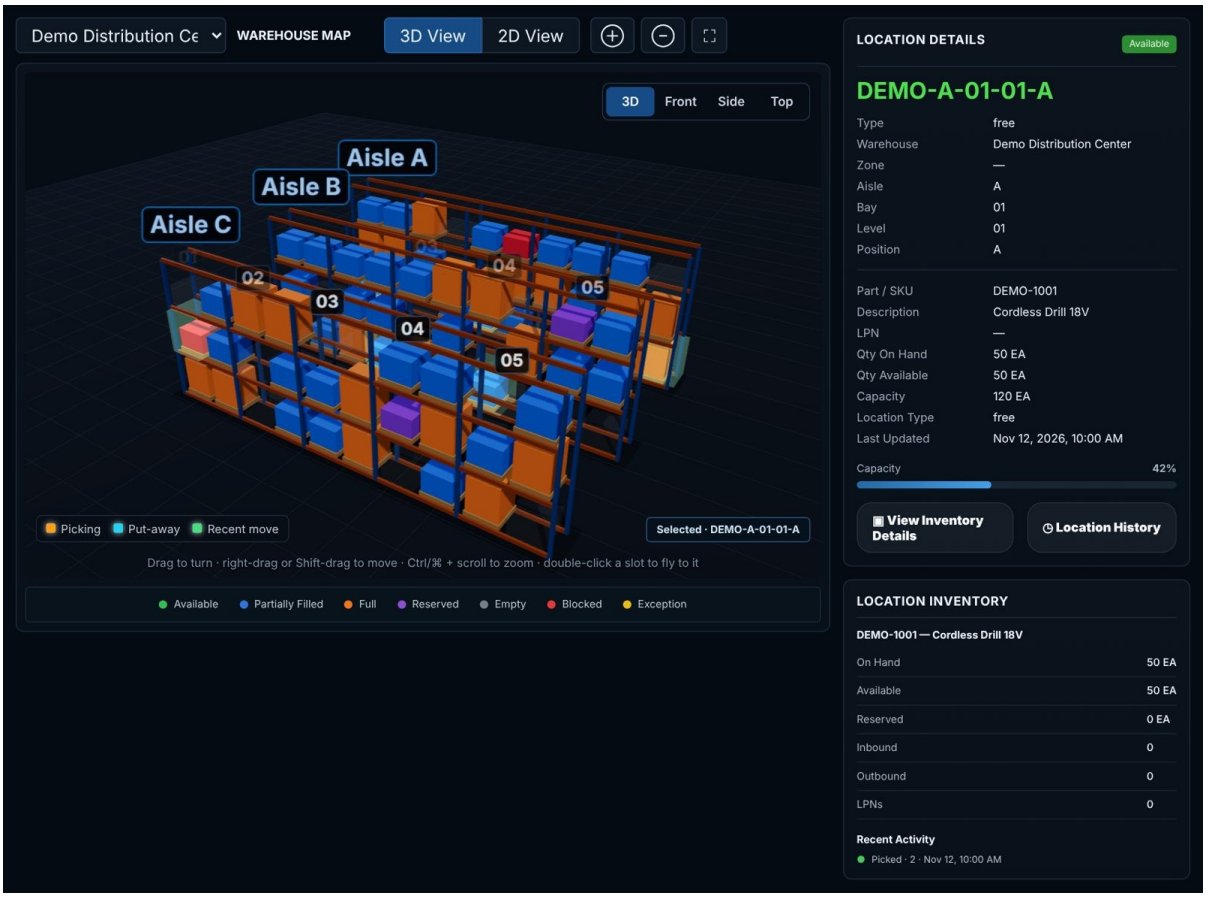
What the colors mean

Color	Meaning
Blue	Partly full
Orange	Full
Purple	Some stock is set aside for an order
Red	Blocked, don't use
Glow	Work is happening on this shelf now

Use the 3D live overview

See every rack, what's full, and what's moving right now.

Step	What to do	Done
1	Go to Warehouse → Live overview.	☐
2	Drag to turn, right-drag to move, and hold Ctrl (⌘ on Mac) while scrolling to zoom.	☐
3	Use 3D, Front, Side and Top to change the view. Side looks down the aisles.	☐
4	Colors: blue partly full, orange full, purple reserved, red blocked. Glowing slots have work happening.	☐
5	Click a slot to select it and see what's stored there.	☐



The 3D live overview with the sample warehouse.

Check it worked

- Clicking a shelf shows what's on it on the right.
- Front, Side and Top change the view.

Tips

- Plain scrolling scrolls the page. Hold Ctrl (⌘ on Mac) while scrolling to zoom the 3D view.
- Use the filters above the view (Empty, Full and so on) to find space fast.

10. Reports, summary emails and ScanOps AI

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Know how the business is doing without digging: a daily briefing, a summary email and quick answers.

Who does it: Owners and members.

Before you start

- Some products, orders or scans in ScanOps.

Ask ScanOps AI

Your daily briefing, plus answers about your stock and orders.

Step	What to do	Done
1	Open the Dashboard for today's briefing: a score and the first thing to fix.	☐
2	Click Ask AI (bottom right) and ask, for example: "How many drills do I have?", "What is low on stock?" or "Which orders are waiting?"	☐
3	ScanOps AI only reads your data. It never changes stock, orders or settings on its own.	☐

Get a summary email

Stock value, low stock, what moved, orders and purchases, sent on your schedule.

Step	What to do	Done
1	Go to Settings → Account.	☐
2	Under Summary report, enter the email address and choose daily, weekly or monthly.	☐
3	Save. The first email arrives on the next scheduled day.	☐

Export reports

Download scan, stock and warehouse reports as files.

Step	What to do	Done
1	For scans, go to Reports → Analytics and click Export CSV.	☐
2	For stock, go to Warehouse → Inventory and use Export CSV or Export Excel.	☐
3	Reports → Warehouse reports shows stock value, movements, low stock and overstock.	☐

Questions to try

- What should I fix first?
- Which orders are waiting?
- Any late orders?
- What is low on stock?
- How many drills do I have?

Check it worked

- The Dashboard shows today's briefing.
- The summary email arrives on the day you picked.

Tips

- ScanOps AI only reads your data. It never changes stock, orders or settings.
- The briefing refreshes every few hours, so a fix you just made may take a little while to drop off.

11. Add your logo and colors

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Put your brand on scan pages, labels and exports.

Who does it: Workspace owner.

Before you start

- Your logo (PNG, JPG, SVG or WebP, under 750 KB). A square logo works best.
- Your brand color.

Add your logo and colors

Your brand on QR pages, labels and exports.

Step	What to do	Done
1	Go to Settings → Branding.	☐
2	Enter your brand name and upload your logo (PNG, JPG, SVG or WebP under 750 KB).	☐
3	Pick your primary color and save. New labels and scan pages use it right away.	☐
4	Check the preview on the right: it shows the page people see after scanning and a printed label.	☐
5	Optional: add your own web address under Custom redirect domains so QR links use it.	☐

Check it worked

- A newly made QR code and its scan page show your logo and color.

Tips

- Pick a dark enough color so white text on buttons stays easy to read. The preview shows you.

12. Connect ScanOps to your other systems

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Keep your store, ERP or accounting system in step with ScanOps: stock out every hour, orders in, and API keys you control.

Who does it: Workspace owner, with whoever runs the other system. Advanced WMS plan.

Before you start

- The web address of your system that will receive stock (from its developer or settings).
- The API key your system expects.
- Which system will send orders in, if any.

Connect ScanOps to your other systems

Send your stock to your own system every hour, take in orders, or read your data with an API key.

Step	What to do	Done
1	Go to Settings → Orders & shipping connections (Advanced WMS). Each card says what it does and how to set it up.	☐
2	For hourly stock sync, click Stock sync settings, enter your system's address and API key, tick Send stock every hour, save, then click Run sync now to test.	☐
3	To take orders in, set a webhook secret in the same place. Your system signs each order with it (details on the Developers page).	☐
4	To let another system read your data, open Settings → Account and create a key under Inbound API keys. Name it after that system and copy it straight away; it's only shown once.	☐
5	If a system stops being used or someone with access leaves, revoke its key and make a new one.	☐

Take orders from any platform

Get a private web address that turns orders sent from your store, Zapier or any system into ScanOps orders. On the Advanced WMS plan.

Step	What to do	Done
1	Open Settings → Orders & shipping connections and find Orders from any platform.	☐
2	Click New address, give it a name (for example Shopify store) and click Copy address.	☐
3	Paste the address into your store's order webhook, or a Zapier / Make step that sends new orders.	☐
4	New orders show up in Orders, ready to pick. The same order sent twice is only created once.	☐

Send scans to Google Analytics or Meta

Every QR scan can also show up in your own Google Analytics 4 or Meta Pixel.

Step	What to do	Done
1	Open Settings → Account and find Send scans to Google Analytics and Meta.	☐
2	Enter your GA4 Measurement ID (G-…) and GA4 API secret, and/or your Meta pixel ID and Meta Conversions API token.	☐
3	Click Save. New scans are sent within a few seconds.	☐

Let another system change stock or create QR codes

API keys are read-only unless you turn on write access. The developer docs list every endpoint.

Step	What to do	Done
1	Open Settings → Account, find Inbound API keys and create a key.	☐
2	Tick Also allow creating QR codes and/or Also allow checking stock in and out only if the other system needs them.	☐
3	Give the key to your developer with the link to scanops.xyz/developers.	☐
4	Stock changes need an Idempotency-Key, so a retry never moves stock twice.	☐

Check it worked

- Run sync now says how many products were sent, and your system shows the same quantities.
- A test order from your system appears as a draft in Orders → Order Management.
- Settings → Orders & shipping connections shows the last sync time and result.

Tips

- Use one API key per system and name it after that system, so you can turn one off without breaking the others.
- Replace keys every 12 months, and straight away if someone with access leaves.
- Developer details, sample messages and signature-check code: scanops.xyz/developers.

13. Billing, sign-in security and getting help

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Manage your plan and payments, protect your sign-in, and get help when something isn't right.

Who does it: Billing: workspace owner. Two-step sign-in and support requests: anyone.

Before you start

- For billing: a card or bank details ready if you're paying.

Plans, invoices and payment

See your plan, what's due and change your plan.

Step	What to do	Done
1	Go to Settings → Billing to see your plan, status and anything due.	☐
2	Use Manage billing to update your card or download invoices.	☐
3	To change plans, pick a new one under Change plan.	☐

Turn on two-step sign-in

A sign-in code on new devices, so a stolen password alone can't get in. It's optional and you can turn it off any time.

Step	What to do	Done
1	Go to Settings → Account and find Two-step sign-in.	☐
2	Click Turn on with email codes. From then on, when you sign in on a new device we email you a 6-digit code that works for 10 minutes.	☐
3	Prefer an app? Click Use an authenticator app instead, scan the QR code with Google Authenticator, Microsoft Authenticator or 1Password, and type the 6-digit code it shows. The code changes every 30 seconds.	☐
4	When you sign in, tick Remember this device for 30 days so you aren't asked again on that phone or computer.	☐
5	No code? Click Send a new code. Can't use your authenticator? Click Email me a code and use the code from your email instead.	☐
6	Lost a phone or laptop? Click Forget remembered devices so every device needs a code again. Resetting your password does this too.	☐

Sign in with Microsoft, Google or Okta (SSO)

Enterprise and Advanced WMS workspaces can let staff sign in with their company login.

Step	What to do	Done
1	Open Settings → Account and find Single sign-on (SSO).	☐
2	Enter your company email domain (for example acme.com) and your identity provider's metadata link (Microsoft Entra, Okta or Google Workspace).	☐
3	Click Request single sign-on. ScanOps support checks the domain and turns it on.	☐
4	Staff then click Single sign-on on the login page and enter their work email. New staff join with the role you chose, up to your seat limit.	☐

Get help from support

Send a ticket and follow the replies in one place.

Step	What to do	Done
1	Go to Settings → Submit a request.	☐
2	Pick the type, add a subject and describe what happened. Screenshots help.	☐
3	Send. The ticket appears right away under Ticket history, where you can read and answer replies.	☐

Check it worked

- Settings → Billing shows the right plan and nothing overdue.
- Settings → Account → Two-step sign-in says On (recommended for owners and admins).
- Your request appears under Ticket history right away.

Tips

- If a payment is late, your printed codes keep working for 10 days while you sort it out.
- Tick Remember this device on your own phone and computer so you're only asked for a code on new devices. Never tick it on a shared computer.
- Add a screenshot and the steps you took to a support request. It gets you an answer faster.

14. Lots, expiry dates, serial numbers and recalls

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Record lots, expiry dates and serial numbers as stock moves, and find where a lot went.

Who does it: Owners and members set it up; workers record lots and serials when scanning.

Before you start

- Products added in Inventory.
- The lot numbers, expiry dates or serials printed on your boxes.

Track lots and expiry dates

Record the lot and expiry when stock comes in. Check Out takes the soonest-expiring lot first, and the owner gets a reminder before lots expire.

Step	What to do	Done
1	Scan the item's QR code and pick Check In. For warehouse items it's under More actions → Receive Inventory.	☐
2	Fill in Lot number and Expiry date (both optional), or scan the GS1 case label to fill them in for you.	☐
3	On Check Out, ScanOps shows which lot to pick first (soonest expiry) and records which lots were used.	☐
4	Open the Inventory page (Warehouse → Inventory; Inventory → Home on Simple Inventory) to see Expiring soon: lots that expired or expire in the next 30 days.	☐
5	The owner gets an email 30 days and 7 days before a lot expires, and on the day. Use Turn off emails in Expiring soon to stop them.	☐

Record serial numbers

Scan or type a serial number for each unit on Check In and Check Out, then look up any serial's history.

Step	What to do	Done
1	Scan the item's QR code and pick Check In or Check Out (warehouse items: More actions → Receive Inventory to check in).	☐
2	In Serial numbers, type or scan one serial per unit (one per line). The count must match the quantity.	☐
3	ScanOps stops a serial from being checked in twice, or checked out when it isn't in stock.	☐
4	To see a unit's history, open the Inventory page, find Serial number lookup, enter the serial and click Look up.	☐

Find where a lot went (recalls)

Look up a lot number to see when it came in, where it is now and which orders it shipped on.

Step	What to do	Done
1	Open the Inventory page (Warehouse → Inventory; Inventory → Home on Simple Inventory) and find Lot lookup (recalls).	☐
2	Type the lot number and search.	☐
3	You'll see every receipt, check-out and order pick for that lot, with dates, quantities and who did it.	☐
4	Click Download as spreadsheet (CSV) to send the list to a supplier or regulator.	☐

Check it worked

- The Inventory page shows Expiring soon when a lot is within 30 days of expiry.
- Serial number lookup shows the right status for a serial you just checked in or out.
- Lot lookup (recalls) lists every movement for a test lot.

Tips

- Scan the GS1 barcode on the box instead of typing: it fills in the lot, expiry and serial.
- Check Out always suggests the soonest-expiring lot first. Follow it to cut waste.

15. Handle returns and build kits

Updated November 2026. Names in the steps match what you see on screen.

What this is for: Bring returned items back into stock the right way, and make kits from the parts you stock.

Who does it: Owners and members.

Before you start

- The order number for the return, if you have it.
- For kits: the kit and each part added as items in Inventory.

Handle a return

Log what came back, decide whether it goes back on the shelf, and close the return.

Step	What to do	Done
1	Open Orders → Returns (Inventory → Returns on Simple Inventory) and click New return.	☐
2	Enter the order number if you have it, then search for each item and how many came back.	☐
3	Add the bin or shelf it will go to and click Save return.	☐
4	For each line, pick its condition (Resellable, Opened, Damaged or Defective).	☐
5	Open the return and click Restock items to put resellable items back in stock, then Close return.	☐

Build and take apart kits

A kit is a product made from other products. Building kits takes the parts out of stock and puts the kits in.

Step	What to do	Done
1	Add the kit itself as an item in your inventory first.	☐
2	Open Warehouse → Kits (Inventory → Kits on Simple Inventory) and click New kit.	☐
3	Pick the kit item, then add each part and how many go in one kit. Click Save kit.	☐
4	Each kit shows how many more you can build from the parts on hand.	☐
5	Enter How many, then click Build kits (or Take apart), and click again to confirm.	☐

Check it worked

- Returns lists the return as closed, with resellable items back in stock.
- Kits shows the kit's stock up by the number you built and each part down.

Tips

- Mark damaged or defective items honestly: they stay out of stock and show in the return's record.
- Build kits only when you are actually putting them together, so part counts stay right.