

# ezItemizer - Inventory Control

## Quick-Start Guide

A one-page guide to signing in and running daily inventory work in ezItemizer. Covers all three roles: **Admin**, **Warehouse Staff**, and **Viewer**.

### 1. Sign in

- 1 Open **ezitemizer.com**, or tap the ezItemizer icon on your home screen if you've installed it as an app (recommended on phones).
- 2 Enter your **email** and **password**.
- 3 Tap **Sign in**.

**Forgot password?** Tap *Forgot password?* on the sign-in screen. The email reset link expires in 60 minutes.

**5 wrong attempts** in a row locks the account for 15 minutes.

**Add to home screen** — *iPhone (Safari):* Share → Add to Home Screen. *Android (Chrome):* menu → Install app.

### 2. Roles & what each can do

Action	Admin	Staff	Viewer
View parts, categories, transactions	✓	✓	✓
Add a new part	✓	✓	✓
Edit part details (name, SKU, location, threshold)	✓	✓	✓
See / edit unit cost & inventory value	✓	✓	—
Log stock IN / OUT / adjustment	✓	✓	—
Camera barcode + QR scanning	✓	✓	—
Delete / restore parts	✓	—	—
Add or remove users	✓	—	—
Manage billing / subscription	✓	—	—
Export CSV / PDF reports	✓	✓	✓

*Camera scanning is on the Team and Pro plans only — Basic plan has it disabled.*

### 3. The Dashboard

When you sign in you land on the Operations Dashboard. At a glance:

- **Total Parts** — distinct SKUs in your active inventory.
- **Inventory Value** — units × unit cost across all parts (*hidden for Viewer*).
- **Low Stock** — count of parts at or below their threshold.
- **Categories** — active part categories.
- **Low-stock alerts** — table of parts that need reordering.
- **By category** — value-by-category breakdown.
- **Send feedback** — top-right of the hero, opens an in-app form.

## 4. Daily workflows

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### A. Add a new part (*Any role*)

- 1 Go to **Parts** in the sidebar.
- 2 Tap the orange **Add Part** button (top-right).
- 3 Fill in SKU (must be unique), Part #, Name, Category, Initial stock, Low-stock threshold. Optional: Unit cost (Admin/Staff), Location, Supplier.
- 4 Tap **Save**.

### B. Log stock movement (*Admin / Staff*)

- 1 On the Parts page, tap the **In/Out adjust** icon on a row.
- 2 Pick **IN** (received), **OUT** (used / shipped), or **Adjustment** (set to count after a physical recount).
- 3 Enter quantity, optional unit cost (IN only), optional note, then Save.

### C. Scan a barcode (*Admin / Staff · Team or Pro plan*)

- 1 On the Parts page, tap the **camera icon** in the search bar.
- 2 Allow camera access on first use.
- 3 Aim at the barcode or QR code — the matching part is filtered automatically.

### D. Find a part fast (*Any role*)

Type into the search bar — it searches SKU, Part #, name, location, supplier. Filter by Category or 'Low stock only' in the toolbar.

### E. Pull a report (*Any role*)

Sidebar → **Reports**. Inventory or Movements as CSV/PDF for any date range. Financial reports (by-category value) require the Pro plan.

### F. Sign out

Top-right of the header, right next to your email — tap **Sign out**.

## 5. Admin tasks

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## Add or remove a user

Sidebar → **Users** → **Add user**. Enter name, email, role, and a starting password. The user gets a welcome email automatically. Remove with the trash icon on the row.

## Manage categories

Sidebar → **Categories** → Add / Edit / Delete. A category with active parts can't be deleted until those parts are reassigned.

## Restore a deleted part

Parts page → toggle **Show deleted**. Tap the **Restore** icon on the row. *Restore fails if another active part has since taken the same SKU.*

## Billing

Sidebar → **Billing**. Upgrade or change plan, or open the Stripe Customer Portal for invoices and payment methods.

## 6. Plan-aware features

Feature	Basic	Team	Pro
Unlimited parts, audit trail, alerts	✓	✓	✓
Users included	2	5	10
Warehouse Staff role	—	✓	✓
Camera barcode / QR scanning	—	✓	✓
Daily digest emails	—	✓	✓
Financial reports	—	—	✓

## 7. Troubleshooting

Issue	Try this
Locked out of your account	Wait 15 minutes or use Forgot password.
Reset email never arrived	Check spam; the link expires in 60 minutes.
"SKU already exists" when adding	That SKU is in use. Pick a different one or restore the existing part.
Camera button not showing	Either your role isn't Admin/Staff, or your plan is Basic — upgrade to Team.
Cost columns are missing	You're signed in as a Viewer — cost is hidden by design.
Low-stock email not arriving	Check spam; verify Notifications preferences (Admin).

## 8. Getting help

- **In-app:** Send feedback button on the Dashboard hero.
- **Email:** [support@ezitemizer.com](mailto:support@ezitemizer.com) — we reply within 1 business day.
- **FAQ:** [ezitemizer.com/faq](https://ezitemizer.com/faq)

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