



BOXSTORM[®]

A Fishbowl Solution

ONLINE INVENTORY MANAGEMENT

 **BOXSTORM**[®]
Forever Free[™]

 **BOXSTORM**[®]
Basic[™]

 **BOXSTORM**[®]
Premium[™]

 **BOXSTORM**[®]
Ultimate[™]



**THE FIRST FOREVER FREE INVENTORY MANAGEMENT
SOLUTION TO INTEGRATE WITH QUICKBOOKS ONLINE**



Boxstorm Forever Free is the first free cloud-based solution that both integrates with QuickBooks Online and offers unrestricted access to inventory management features.

Boxstorm Forever Free is enhanced by either the iOS app or Android app, which allows for scanning in and out and simplified views of your inventory. Take it wherever you like and access your inventory data on virtually any mobile device with an Internet connection.



As its name promises, **Boxstorm Forever Free** will always be completely free of charge, and there is no requirement to give your credit card information to obtain access to it. When you're ready to move up to more advanced versions of Boxstorm, you can sign up for paid subscriptions of **Boxstorm Basic, Boxstorm Premium, or Boxstorm Ultimate.**



AUTOMATE MANUAL PROCESSES

Boxstorm Forever Free helps small and medium businesses escape the labor-intensive processes of manual inventory management. There is no reason for any company to rely on spreadsheets or any other manual process to manage and track their inventory. **Boxstorm Forever Free** makes automated inventory management a reality.



Automate your inventory management tasks

by using **Boxstorm Forever Free** to create items, scan inventory in and out, import and export data via spreadsheets, add and remove inventory, move inventory, perform cycle counts, create and assign units of

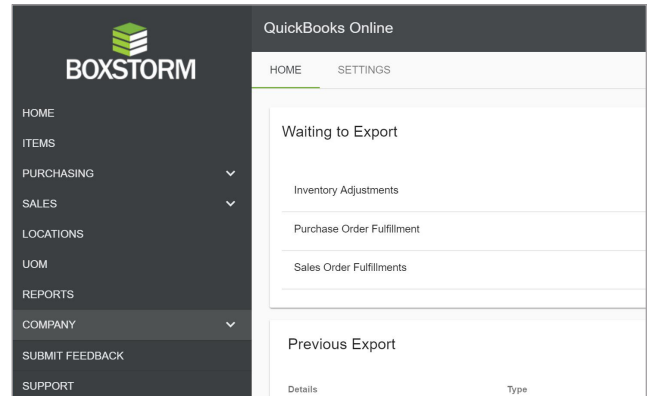
measure, and add locations. Another key feature of **Boxstorm Forever Free** is its audit trail, which means that every time a change is made to your inventory records, the time, date, and user are recorded in conjunction with it so you can tell who is responsible for each update and when it was made.



Here are more detailed descriptions of the features contained in **Boxstorm Forever Free**:

QuickBooks Online Integration

Boxstorm Forever Free integrates with QuickBooks Online to update the accounting solution when you make certain changes to the inventory management solution. Boxstorm transfers the appropriate journal entries to QuickBooks Online when you add, remove, and cycle count inventory.



Reports

Every version of Boxstorm offers several reports to facilitate a variety of inventory management tasks:

INVENTORY VALUATION SUMMARY—A list of the quantities and values of the parts you have on hand.

LOCATION/ITEM BARCODES AVERY—Two separate reports with barcodes that you can print on Avery 8160 labels for each location or item.

CYCLE COUNT—A printable list of current inventory quantities with a space for updating those quantities during a physical check.

INVENTORY ON HAND—A list of all parts currently in stock.

Item	Location	Quantity	Unit Cost	Asset Value
Backpack 4500 - Badlands 4500 Internal Frame Pack	Main	12 ea	210.00	2,520.00
Backpack 50 - Kelly Pack 50 Backpack	Main	5 ea	75.99	379.95
Backpack 70 - Gregory's Youth Wander 70 Backpack	Main	4 ea	50.50	202.00
Cooler 20 - Cabela's Polar Cap® Equalizer Cooler	Main	8 ea	102.98	823.84
Cooler 20 - Cabela's Polar Cap® Equalizer Cooler	Stock 100 (Main)	10 ea	102.98	1,029.80
Cooler 3 - YETI® Hopper™ 30 Tan Soft-Sided Bag Cooler	Main	3 ea	105.99	317.97
Cooler 45 - YETI® Tundra 45 Marine Cooler	Main	12 ea	120.00	1,440.00

Scan In and Out

Boxstorm's scanning feature lets you use barcodes to add, remove, cycle count, and move inventory in and out of your inventory management system. It is accessible via Web browser, and it's optimized for use on smartphones and any other mobile device. You can lock certain fields,

Scan Inventory

Type *

Add

Part *

B201

Location *

Main

Lot Number *

100

Available Qty: 137

Add *

10

UOM *

Each

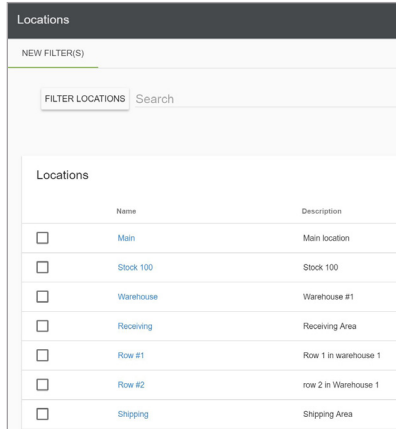
Unit Cost *

5.362319

−

+

so if you want to move inventory to a certain location, just lock the location and everything you scan will be assigned to it.



The screenshot shows the 'Locations' management screen. It includes a search bar and a table of locations. Each location has a checkbox for selection.

	Name	Description
<input type="checkbox"/>	Main	Main location
<input type="checkbox"/>	Stock 100	Stock 100
<input type="checkbox"/>	Warehouse	Warehouse #1
<input type="checkbox"/>	Receiving	Receiving Area
<input type="checkbox"/>	Row #1	Row 1 in warehouse 1
<input type="checkbox"/>	Row #2	row 2 in Warehouse 1
<input type="checkbox"/>	Shipping	Shipping Area

Multiple Warehouses

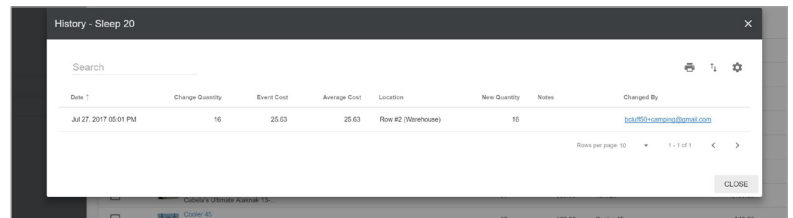
Boxstorm lets you track your inventory in as many warehouses and sub-locations as you need. Check inventory counts by location, so if you ever run low on products at one you can quickly transfer some from another. You can easily find where your parts and products are supposed to be by their aisle and bin number, and you can also organize your

warehouses to maximize efficiency in receiving, storing, and picking.

In-Depth Audits

If your company is in an industry that is highly regulated by the federal government, Boxstorm can be a big

help to you. Every module in Boxstorm has its own audit. This allows you to do a comprehensive and in-depth audit of every part of your inventory system. So when you need to prove you're in compliance with certain government mandates, you can do so with confidence.



The screenshot shows the 'History - Sleep 20' audit window. It contains a table with transaction history.

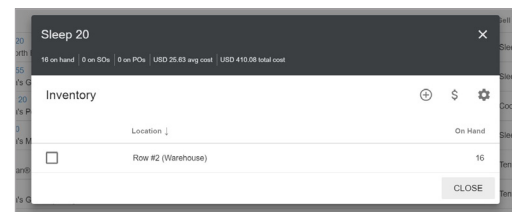
Date	Change Quantity	Event Cost	Average Cost	Location	New Quantity	Notes	Changed By
Jul 27, 2017 05:01 PM	16	25.03	25.03	Row #2 (Warehouse)	16		boxstorm@company.com

Item Cost Tracking

Want to know the total value of your inventory at all times? Boxstorm gives you this information.

Every step of the way, from initial order to final

delivery to customers, Boxstorm tracks item costs to ensure you have a clear picture of your inventory's value in real time.



The screenshot shows the 'Sleep 20' inventory value window. It displays the current inventory status and value.

Location	On Hand
Row #2 (Warehouse)	16

Data Imports and Exports

It's a simple process to import and export data in

Boxstorm. You can download data into CSV files and also upload data into Boxstorm via the same means. The data you can give and receive covers a wide variety of things, such as cycle counts, orders, customers, vendors, products, locations, audits, reports, and more.

Upload File

Match Columns

3 Review

Import Items

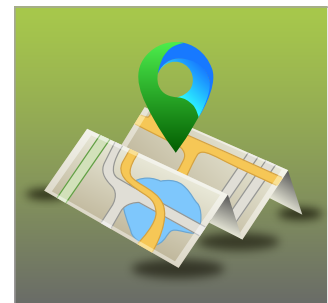
15 rows selected

Id	Name	Description	SKU	UPC	URL	UOM
<input checked="" type="checkbox"/>	5	Sleep 20	The North Face® Wastich 20'F...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	6	Sleep 55	Cabela's Getaway 55'F Sleepin...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	7	Cooler 20	Cabela's Polar Cap® Equalizer...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	4	Sleep 0	Cabela's Mountain Trapper 0'F...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	3	Tent 5	Coleman® Instant Dome™ 5-Pers...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	2	Tent 6	Cabela's Getaway Lodge 6-Pers...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	1	Tent 20	Cabela's Ultimate Alaskan 13-...		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	8	Cooler 45	YETI® Tundra 45 Marine Cooler		http://www.cabelas.com/product...	Each
<input checked="" type="checkbox"/>	9	Cooler 3	YETI® Hopper™ 30 Tan Soft-Sid...		http://www.cabelas.com/product...	Each



ADD SALES FEATURES

Boxstorm Basic includes all of the features in Boxstorm Forever Free plus a number of features that make it easier to sell products to customers, save time, and automate inventory control. These include the ability to scan in and out, add sales orders, sales reports, taxes, default locations, sales representatives, customer management, and item categorization.



➔ **Let's take a closer look at Boxstorm Basic's key features:**

QuickBooks Online Integration – Customers and Sales Orders

Boxstorm's Sales module helps you monitor customers and sales orders. Add tax rates and assign discounts on a per-customer basis, and then print invoices, pick tickets, and much more with this handy module. Sales orders are flexible and can be changed from bids or quotes to a status of accepted and fulfilled. Sales order line items allow you to record a

number of important details, including sales, miscellaneous sales, miscellaneous credits, notes, and discounts. Plus, Boxstorm Basic gives you access to a Sales Order Summary report that lists current sales orders in the system.

Sales Orders

In addition to the data transfers to QuickBooks Online from Boxstorm Forever Free, Boxstorm Basic also allows you to automatically update the online accounting solution with changes to customers' information. Plus, when a sales order is fulfilled in Boxstorm Basic, an invoice is sent to QuickBooks Online. This ensures the two databases match up perfectly.

Customer Management

You can assign a sales representative to each customer in Boxstorm Basic, Boxstorm Premium, and Boxstorm Ultimate. This lets you keep track of who is responsible for working with your customers. You can add their bill to address, email, phone number, and other contact information to their profiles. Plus, you can create parent customers to house individual contacts under if they are connected to the same company you do business with. Boxstorm records each sale a customer makes, which helps you manage your relationships with them.





ADD PURCHASING FEATURES

Boxstorm Premium includes all of the features in both Boxstorm Forever Free and Boxstorm Basic, plus a host of features designed to aid in the purchasing and inventory tracking processes including scanning in and out. You will save even more time by automating additional areas of your inventory control.



These features let you generate purchase orders, purchasing reports, payments, lot numbers, batch numbers, expiration dates, unit of measure conversion, and vendors.

→ ***Here is a more detailed explanation of the features found in Boxstorm Premium:***

QuickBooks Online Integration—Vendors and Purchase Orders

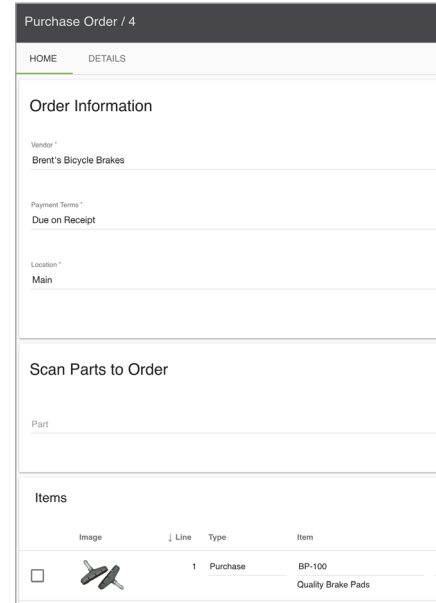
Adding to the QuickBooks Online integration features of Boxstorm Forever Free and Boxstorm Basic, Boxstorm Premium also automatically transfers any changes you make to vendor



information to QuickBooks Online. When a purchase order is fulfilled in Boxstorm Premium, a corresponding bill is sent to QuickBooks Online to be recorded.

Purchase Orders

Boxstorm's Purchasing module lets you keep track of many important areas pertaining to ordering. Create and track purchase orders, generate PO reports to stay on top of trends, and print receiving tickets to ensure every part and product that arrives at your warehouse matches up with what you ordered. This module also helps you track vendors' performance. It's important to compare vendors and see which ones are consistently on time and giving you the best price. In addition, Boxstorm Premium offers a Purchase Order Summary report that lists all available purchase orders.



Purchase Order / 4

HOME DETAILS

Order Information

Vendor *
Brent's Bicycle Brakes

Payment Terms *
Due on Receipt

Location *
Main

Scan Parts to Order

Part

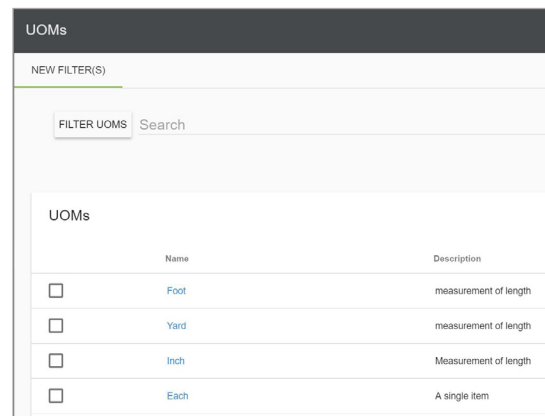
Items

Image	J. Line	Type	Item
<input type="checkbox"/>	1	Purchase	BP-100 Quality Brake Pads

Unit of Measure Conversions

Converting units of measure is a snap in

Boxstorm. There are many reasons you'd want to be able to convert from one unit of measure to another. You might be a whole pallet of a certain product, but prefer to store it by cases, and then sell it individually. Boxstorm lets you separate or combine your inventory into whatever unit of measure you wish. This ensures that you won't count individual items as cases or vice versa. You increase the accuracy of your inventory counts and valuations.



UOMs

NEW FILTER(S)

FILTER UOMS Search

UOMs

	Name	Description
<input type="checkbox"/>	Foot	measurement of length
<input type="checkbox"/>	Yard	measurement of length
<input type="checkbox"/>	Inch	Measurement of length
<input type="checkbox"/>	Each	A single item



ADD ADVANCED AUTOMATION FEATURES

Boxstorm Ultimate includes all of the features in each of the Boxstorm versions listed above including scanning in and out, plus many other features that come in handy when it comes to setting up auto reorder points and even customizing the solution to better meet your requirements. These include

auto ordering, stock alerts, Stripe payment processing, item-based unit of measure conversions, default vendors, and API access.



→ **Let's go in depth on three of the most important features Boxstorm Ultimate offers:**



API Access

Boxstorm Ultimate gives you access to the Boxstorm API. This API allows you to create your own integrations with third-party solutions, generate custom reports to help with data

analysis, and even customize other parts of the online inventory management solution.

People with the technical knowledge to navigate an API can use this feature to make Boxstorm fill their needs even better.

Stock Alerts

Boxstorm Ultimate is the only Boxstorm version that gives you the ability to create reorder points and alert levels. For every item in your inventory, you can set up a parent location, minimum quantity, maximum quantity, and alert level. When an item reaches the alert level, you will be automatically notified about it by text message or email. That way, you don't have to hunt through your inventory data to see what you need to reorder. Boxstorm tells you in real time!

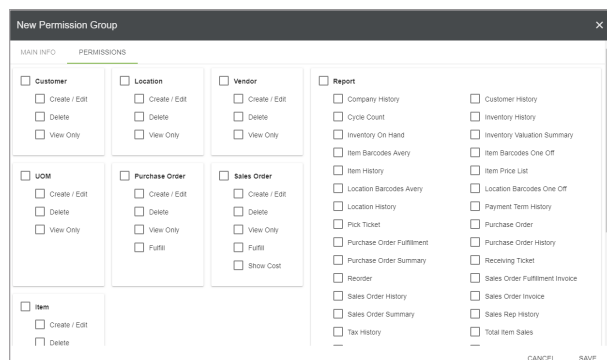
Stripe Payment Processing

Boxstorm Ultimate integrates with Stripe, an e-commerce solution. When you accept payments from customers, their credit card or debit card numbers, expiration dates, etc. can be



stored with Stripe and accessed later in Boxstorm when those same customers make another purchase from you. So you won't have to ask for their payment information a second time.

Permissions



You can assign permissions to users by creating Permission Groups in Boxstorm and adding modules and individual features to the groups. This allows you to control what users can see and do within Boxstorm.

Boxstorm Forever Free	Boxstorm Basic	Boxstorm Premium	Boxstorm Ultimate
Create Items	Create Items	Create Items	Create Items
Import/Export Data	Import/Export Data	Import/Export Data	Import/Export Data
Scan In and Out	Scan In and Out	Scan In and Out	Scan In and Out
Add/Remove Inventory	Add/Remove Inventory	Add/Remove Inventory	Add/Remove Inventory
Move Inventory	Move Inventory	Move Inventory	Move Inventory
Cycle Count	Cycle Count	Cycle Count	Cycle Count
QuickBooks Online Integration	QuickBooks Online Integration	QuickBooks Online Integration	QuickBooks Online Integration
Units of Measure	Units of Measure	Units of Measure	Units of Measure
Locations	Locations	Locations	Locations
Audit Trail	Audit Trail	Audit Trail	Audit Trail
iOS App	iOS App	iOS App	iOS App
Android App	Android App	Android App	Android App
	Sales Orders	Sales Orders	Sales Orders
	Sales Reports	Sales Reports	Sales Reports
	Taxes	Taxes	Taxes
	Default Locations	Default Locations	Default Locations
	Sales Representatives	Sales Representatives	Sales Representatives
	Customer Management	Customer Management	Customer Management
	Item Categorization	Item Categorization	Item Categorization
		Purchase Orders	Purchase Orders
		Purchasing Reports	Purchasing Reports
		Payments	Payments
		Lot/Batch Number Tracking	Lot/Batch Number Tracking
		Expiration Date Tracking	Expiration Date Tracking
		UOM Conversions	UOM Conversions
		Vendor Management	Vendor Management
			Auto Ordering
			Stripe Payment Processing
			Item-Based UOM Conversions
			Stock Alerts
			Default Vendors
			API Access
			Permissions
			Shippo Integration

To learn more about Boxstorm and get started with it, visit www.boxstorm.com or call 1.800.380.9786.