



XPTrack Inventory User Guide

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By



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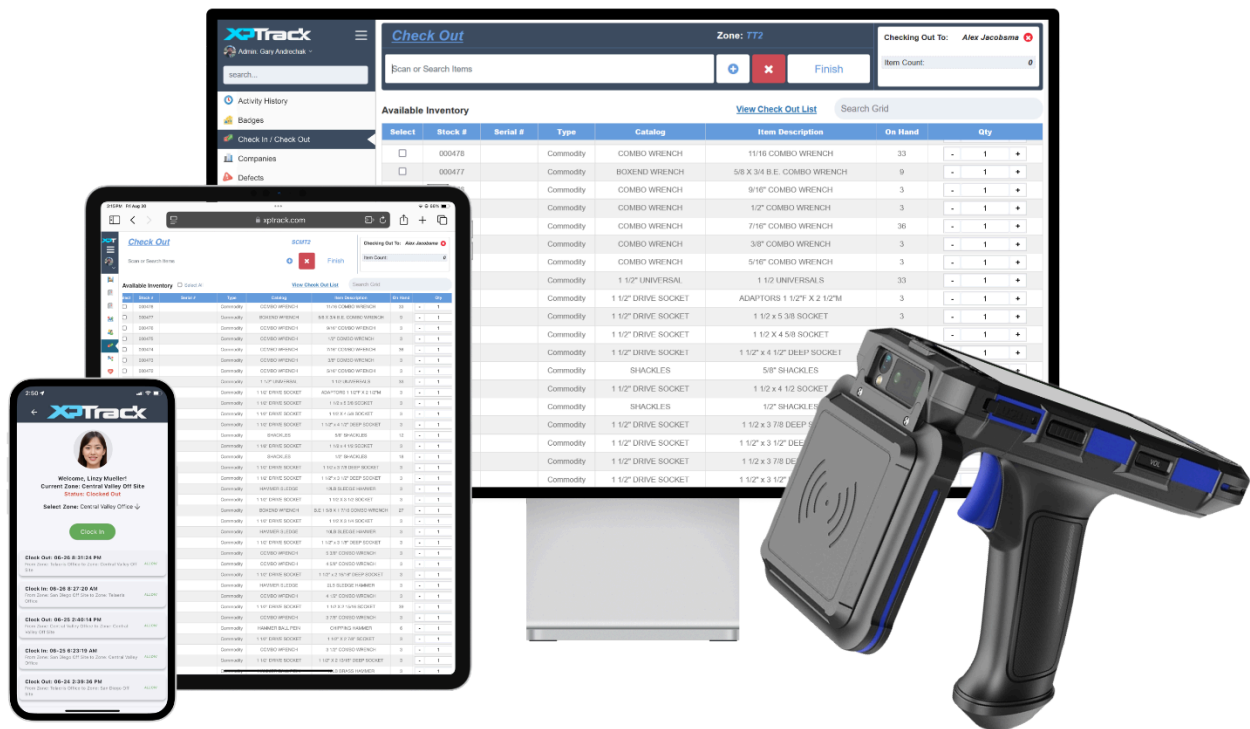
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Purpose

This guide covers everything required to set up and successfully operate XPTrack. It walks through creating an account, configuring users and zones, building out the inventory catalog, and managing daily check-in and check-out activities. It also explains how to run reports that show what is happening across an organization's equipment.

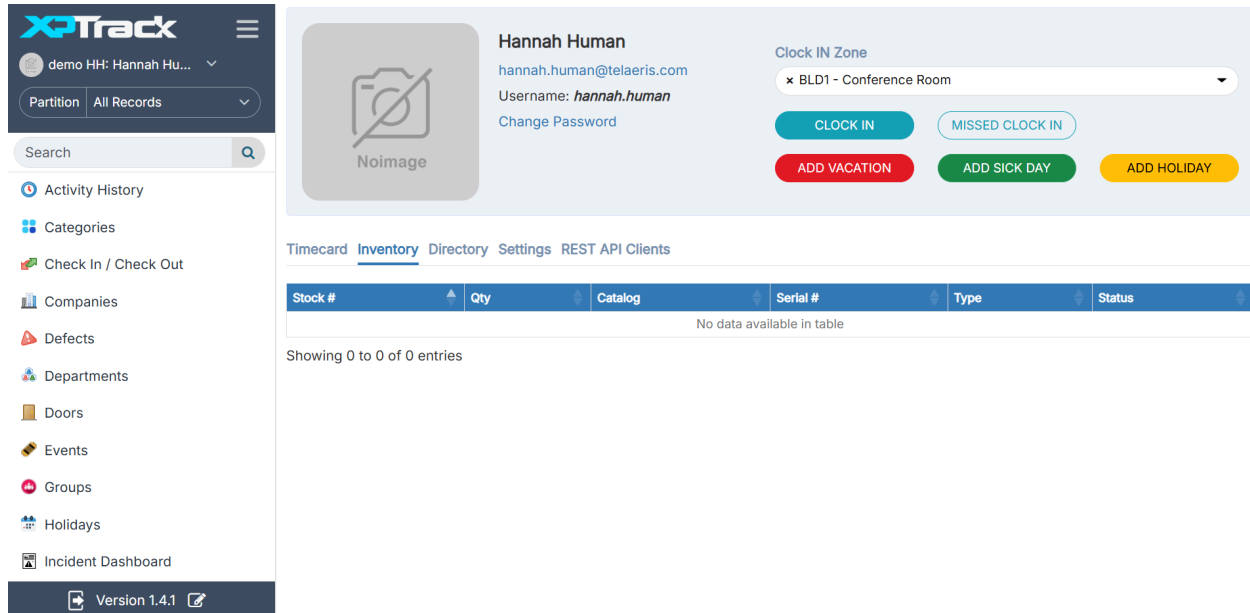
XPTrack is designed to give organizations a clear, accountable view of their inventory — who has what, where it is, and what condition it's in. Whether the organization runs a single warehouse or a multi-site operation, this guide is structured to be followed end-to-end during initial setup or used as a reference for a specific section.



Getting Started

Before XPTTrack can be used, the account must be activated and login credentials set. The setup process is short — most users are signed in and ready to begin configuring their workspace within a few minutes.

- The profile page opens, where the name, email, username, and password can be reviewed.
- Once the profile is confirmed, the XPTrack dashboard opens — the starting point for everything that follows.



Common Symbols

Recognizing the icons used throughout XPTrack helps with navigation. These appear consistently across pages, making the system easier to navigate once they are familiar.

Symbol	Description	Image
Green Plus Sign	Creates a new entry. This appears anywhere a new record can be added — roles, users, zones, items, and more.	
Red X Button	Cancels the current action. This is the button to use to back out of a form that has been started.	
Blue Floppy Disk	Saves changes. Always click Save before navigating away to make sure progress is kept.	
PDF	Exports the current view or report to a PDF file.	
CSV	Exports the current view or report to a CSV file, useful for working with the data in spreadsheets or other tools.	

With these symbols established, the next step is setting up the XPTrack workspace.

Setting Up Your Space

Before inventory can be tracked, a few foundational pieces of XPTrack need to be configured: **roles**, **users**, **companies**, and **zones**. These records form the structure that every other part of the system relies on. Setting them up thoughtfully at the start will save significant time later.

Roles

Roles define the permissions assigned to users within XPTrack. They determine what actions a user can perform and which areas of the system they can access. By assigning roles, administrators control feature access and ensure users have only the permissions they need.

XPTrack comes with two default roles:

Admin — Full access to the system, including configuration, user management, and inventory operations. Only assign the Admin role to people who should be able to do anything within XPTrack.

Standard — Limited access. Standard users can be assigned equipment and interact with basic workflows but cannot modify most system functionality.

Administrators can also create any number of custom roles to match the way the organization works. For example, a role might allow full administrative access, restrict users to read-only data, or enable specific operational functions such as check-in/check-out or inspections.

Name	Is Admin	Can Login to Workforce	Created At	Updated At
Entrant	No	No	2021-10-08 11:48:41	2021-12-06 18:21:42
Guard	No	No	2024-03-01 15:22:13	2024-03-01 15:22:13
Other Entrant	No	No	2023-08-21 09:29:06	2024-06-03 10:25:19
Visitor	No	No	2024-07-22 09:49:06	2024-07-22 09:49:06
My Role	No	No	2025-04-16 10:53:18	2025-04-16 10:53:18
Admin	yes	yes	2021-10-08 10:43:51	2025-05-04 22:48:42
demo HH	yes	No	2022-08-05 12:53:11	2025-05-04 22:48:42
Occupancy and Muster Only	yes	No	2023-02-28 14:24:53	2025-05-04 22:48:42
Non Default Admin	yes	No	2024-11-27 03:29:19	2025-05-04 22:48:42
Manager	No	No	2024-07-03 21:58:12	2025-09-12 10:48:41
Standard User	No	No	2023-03-28 09:37:38	2025-09-16 12:07:19
NON Admin	No	yes	2024-08-29 10:12:03	2026-01-12 20:16:08

To create a new role

Follow these steps:

1. **Navigate** to **Roles** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a **name**.
4. **Configure** the permissions for each **feature** by clicking the feature in the grid. An X signifies that the Role now has permission to that feature.
5. **Click Save**.

Roles > Create New

Name: Employee Level 4

Is Admin
 Can Sync A Handheld Device
 Receives Registration Email
 Receives Item Notification Email
 Is Inspector
 Can Log In to Workforce
 Can Access All Timecard Groups

Enabled Features

Feature	View	Add	Update	Delete	Advanced
API Documentation		N/A	N/A	N/A	N/A
Activity History	X	N/A	N/A	N/A	Advanced actions
Antenna Dashboard		N/A	N/A	N/A	N/A
Categories	X	X	X	X	N/A
Check In / Check Out	X	N/A	N/A	N/A	N/A
Checkpoints					N/A
Companies	X	X	X	X	N/A
Defects	X	X	X	X	N/A
Departments	X	X	X	X	N/A
Doors	X	X	X	X	N/A
Events	X	X	X	X	N/A

Permissions that can be configured per feature include **View** (access records), **Add** (create new records), **Update** (modify existing records), **Delete** (remove records), and **Advanced** (feature-specific permissions). By clicking the feature in the grid, an X will appear. This signifies that the Role now has permission to that feature.

Users

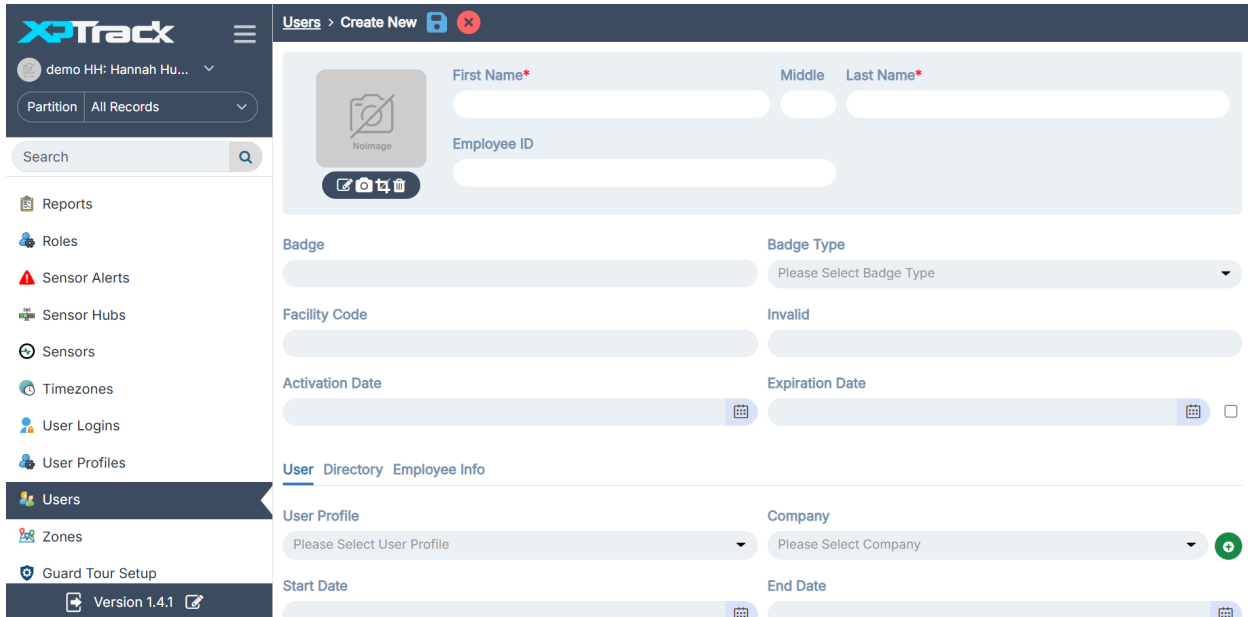
Users represent individuals who interact with the XPTrack system. This typically includes employees, administrators, contractors, and technicians. User records ensure that every action in XPTrack is tied to a specific person, which is essential for accountability and traceability.

Name	Photo	Employee Id	Company	List of Badges
Aarona Cohen		111222		7418529647, 1450955345, 7418529637, 7418529636, 7418529635, 963, 6547, 756788, 4846516, 41
Abbie Underwood		32343		7418529662, 4179920457
Abbott DEV		A150255	Company4	
Abby Clayton				156786464, 0155507018
Abdul Davenport				0389659447
Abe Hammond				3922108745
Abel DEV		A150255	Company4	
Abner Jiang				
Abner Jiang			Telaeris Inc.	

To create a new user

Follow these steps:

1. **Navigate** to **Users** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** the user's information — **name, email address, phone number, assigned company, and role**.
4. **Click Save** to create the user.



The action can be canceled at any point by clicking the **red X**, which prompts a confirmation before discarding changes.

Once created, the user can begin interacting with the system based on their assigned permissions. User records are displayed in a table where administrators can search, sort, edit information, and update assigned roles or departments. XPTrack records all changes to user records, which can be reviewed from the User main page.

Companies

The **Companies** section is used to create and manage the organizations that exist within XPTrack. A company can be a corporate headquarters, a regional office, a contractor organization, or any other business unit that needs to be tracked. Once a company is created, it can be assigned to users and referenced in other records throughout the system.

To create a new company

Follow these steps:

1. **Navigate** to **Companies** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** the company information — **name, address, city, state, country, contact information, notes**, and any **stock** or **vendor numbers**.
4. **Assign** the type of company by checking the boxes found at the bottom of the input field. The options include:

- **Has Users:** The company can be assigned to user records on the Users page.
- **Can Have Items:** The company can own or be associated with inventory items.
- **Is Manufacturer:** The company appears in the Manufacturer dropdown when creating catalog entries.
- **Is Vendor:** The company appears as a selectable vendor when receiving inventory or recording stock sources.

5. **Click Save** to create the record.

The **Companies** page displays all existing records in a table. From here, records can be sorted by column, searched by name, opened to edit their information, and saved. These tools make it easy to keep company records up to date as the organization evolves.

Zones

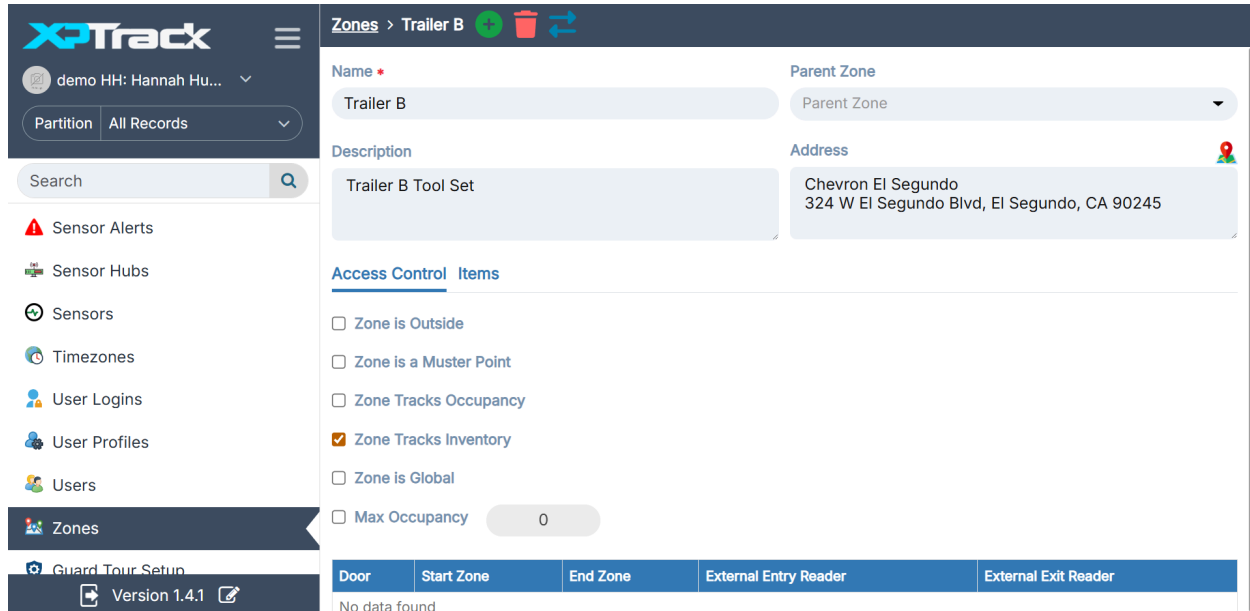
Zones define the physical locations where items live in XPTrack. A zone can be as large as a whole building or as small as a single drawer in a filing cabinet — whatever level of granularity makes sense for the operation. Zones must be set up before items can be checked in or out, because every transaction is tied to a zone.

Name	Description	Parent	Zone Outside	Muster Point
Campus Zone			No	No
Confined Space Location A	8 Person Maximum		No	No
Engineering Zone			No	Yes
Lorenzo Sold Inventory	Items Sold and Invoiced		No	No
Lorenzo Warehouse Inventory	Lorenzo's For Sale Inventory		No	No
Main Entrance 2	Trucks only compound entrance/exit		No	No
Muster Area A			No	Yes
Muster Area B			No	Yes
Outside			Yes	Yes
Row 1 Left, Shelf 2	In Warehouse on left side of row 1	Lorenzo Warehouse Inventory	No	No
Santa's Tool Room	Gary's test zone		No	No
SD Zone 1			No	Yes
SD Zone 2			No	Yes
Storage Area D			No	Yes
Tool Zonee			No	No
Trailer B	Trailer B Tool Set		No	No
TT1			No	Yes

To create a zone

Follow these steps:

1. **Navigate** to **Zones** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a name, description, and address.
4. From the access-control perspective, label the zone as outside, a muster point, occupancy-tracking, inventory-tracking, or global, and set a maximum occupancy if applicable.
5. **Click Save**.



For example, a warehouse on a construction site might be named "Warehouse," described as the central tool storage area, and marked as a zone that tracks inventory.

Repeat the process until every zone that needs to be tracked has been created. With roles, users, companies, and zones in place, the system is ready for organizing inventory.

Organizing Inventory

Before inventory can be tracked, it needs structure. XPTrack uses a combination of **zones**, **item catalogs**, and **item statuses** to define where items are stored, how they are categorized, and what condition they are in. Together these create a clear, organized inventory system that lets users locate items quickly, understand their status, and manage them efficiently.

Item Catalog

The **Item Catalog** organizes the different types of equipment XPTrack tracks. It acts as a template system: each catalog entry defines what an item is, and individual items represent specific physical instances of that type. For example, a catalog entry might be "Motorola Radio XTS5000," while the individual items would be Radio #101, Radio #102, and Radio #103. Using the catalog this way keeps inventory consistent and ensures items are created the same way across the system.

Catalog entries can be grouped into broader categories — Radios, Safety Equipment, Hand Tools, Vehicles, and so on. Categories make it easier to filter, search, and report on inventory. A well-organized catalog reduces duplicate or inconsistent entries, improves search and reporting, and makes inventory easier to manage as it grows.

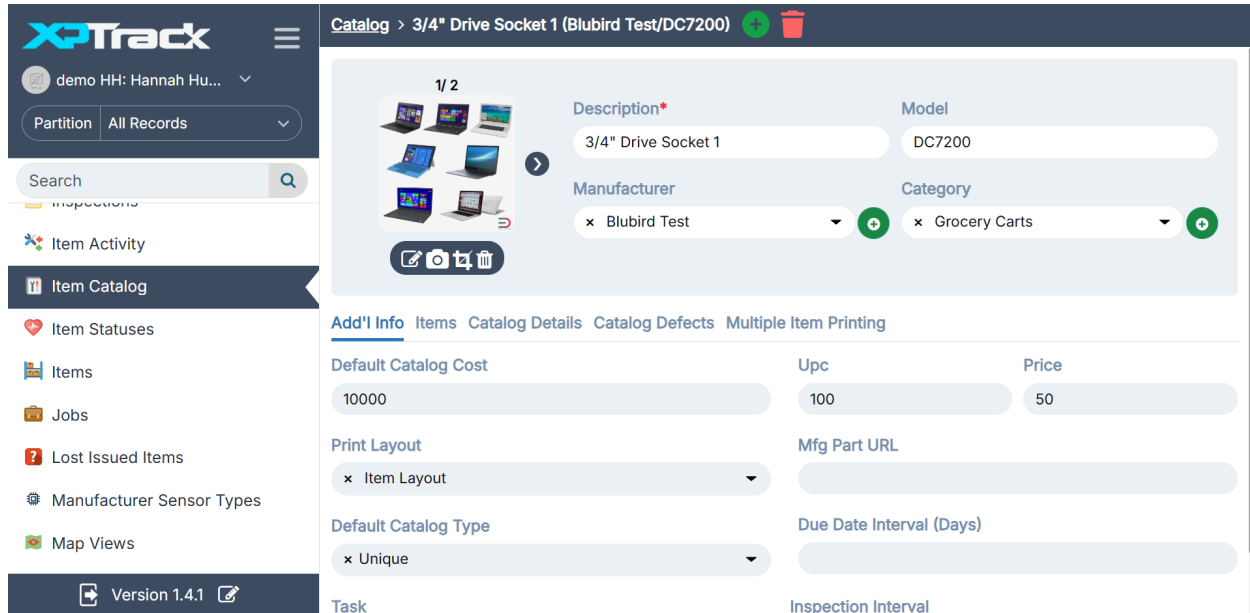
The screenshot shows the XTrack Item Catalog interface. The left sidebar contains navigation options: Item Activity, Item Catalog (selected), Item Statuses, Items, Jobs, Lost Issued Items, Manufacturer Sensor Types, and Map Views. The main area displays a table with the following columns: Description, Manufacturer, Manufacturer Model, msrp, and Mfg Part Uri. The table contains 16 entries, with the first 16 rows visible. A status bar at the bottom indicates 'Showing 1 to 16 of 42 entries' and includes a 'Select Columns' button.

Description	Manufacturer	Manufacturer Model	msrp	Mfg Part Uri
1" Drive Socket new	Blubird Test			
3/4" Drive Socket 1	Blubird Test	DC7200	50	
4" GRINDER				
40 COVERALLS NAVY	Company 1	2022-23	100	www.upc.com
Alex's Test Gauge			0	
Backhoe				
Bench Lathe	Jet	321378 BDB-919	3716	Bench Lathe
CA Cat 1	CA Company 1	2022-23		
Cargo Container-Mixed Content	Generic		0	
Cargo Container-Single Commodity	Generic		0	
Combo Screw Driver	Telaeris Inc.		0	
Combo Wrench				
Coveralls	Terrell's Coveralls	1111		
Drill	Dewalt			
Electromagnetic Interference (EMI) Receiver	R & S Receiver	ESIB2000	41000	
Flashlight			0	
Fleet Truck	Generic		0	

To create a new catalog entry

Follow these steps:

1. **Navigate** to **Item Catalog** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a description, manufacturer, model, category, item type, and an optional cost.
4. **Click** the **blue floppy disk** to save.



The new entry can then be used when adding individual items.

Each catalog entry requires an item type. **Unique** items are tracked individually — serialized assets like radios or laptops. **Commodity** items are tracked in quantity rather than individually, such as gloves or safety glasses. **Consumable** items are one-time-use and will not be returned, such as earplugs or nails. Choosing the correct type ensures inventory is tracked appropriately.

Manage catalog entries by searching, sorting by name, category, or manufacturer, and editing existing records as needed.

Item Statuses

Item statuses describe the current condition or availability of an item — Available, Checked Out, Out of Service, Lost, and any custom statuses that are configured. Statuses give everyone in the system a quick way to see whether an item is ready for use, in someone's hands, undergoing maintenance, or missing. Statuses can be updated manually when editing an item, or automatically through workflows like check-in/check-out and inspections.

The screenshot shows the XTrack Item Status list view. The left sidebar contains navigation options: Inspections, Item Activity, Item Catalog, Item Statuses (selected), Items, Jobs, Lost Issued Items, Manufacturer Sensor Types, and Map Views. The main content area displays a table with columns for Name, Created At, and Updated At. The table lists 14 different item statuses. At the bottom, it shows 'Version 1.4.1', 'Showing 1 to 14 of 14 entries', and a 'Select Columns' button.

Name	Created At	Updated At
Checked Out	2022-09-14 17:06:35	2022-09-14 17:06:35
Damaged and Not Repairable	2025-08-27 16:48:29	2025-08-27 16:48:29
Defective	2024-05-02 09:38:29	2024-05-02 09:38:31
Disposed	2025-08-27 16:49:06	2025-08-27 16:49:06
Exclusive Items	2025-01-06 22:27:38	2025-01-06 22:27:38
Exited	2023-12-02 17:08:48	2023-12-02 17:08:48
In Lorenzo Warehouse	2025-09-08 10:36:43	2025-09-08 10:36:43
In Service	2024-01-19 14:18:05	2024-01-19 14:18:05
In Trailer	2023-11-06 18:52:16	2023-11-06 18:52:16
Missing in Action	2025-08-27 16:48:46	2025-08-27 16:48:46
Out of Service for Repair	2025-08-27 16:48:00	2025-08-27 16:48:00
Received	2023-12-02 17:08:37	2023-12-02 17:08:37
Sold Lorenzo Warehouse	2025-09-08 10:37:21	2025-09-08 10:37:46
Trending	2025-01-06 22:27:38	2025-01-06 22:27:38

The screenshot shows the XTrack Item Status detail view for the 'Checked Out' status. The left sidebar is identical to the previous view. The main content area shows the breadcrumb 'Item Status > Checked Out', a search bar with 'Checked Out' entered, and a checked checkbox for 'Display Error Status'. Below this is a 'Checked Out' status card with a camera icon and a 'Checked Out' label.

Managing Items

The **Items** section is where individual pieces of equipment are created, tracked, and managed. While the Item Catalog defines what something is, the Items section represents the actual physical assets being tracked. Using the earlier example, the catalog entry might be "Motorola Radio XTS5000" while the items are Radio #101, Radio #102, and Radio #103. Each item record contains the details needed to identify and track that asset through its full lifecycle.

Understanding Items

An **item** represents a single physical asset within XPTrack. Each item is typically associated with a catalog entry (what the item is), a zone (where the item is located), and a status (its condition or availability). Items may also carry identifying information such as a barcode or asset tag, serial number, description, and assigned user if currently checked out.

Items are the core of the system. They are what makes it possible to track assets in real time, assign responsibility to users, monitor location and condition, and maintain accurate inventory records. Without properly configured items, the rest of XPTrack's tracking and reporting features cannot function effectively.

Creating an Item

To create a new item

Follow these steps:

1. **Navigate to Items** in the left navigation and click the **green plus sign**.
2. **Enter** the required information — the catalog entry the item belongs to, a description or name, the barcode or asset tag, a serial number if applicable, the zone where the item will be stored, and its starting status (typically Available).
3. **Click Save**.

The screenshot shows the XPTrack web interface for adding a new item. The breadcrumb trail is 'Items > 1" Drive Socket new (Blubird Test) (00002)'. The form includes the following fields and options:

- Item ID:** 1 / 2
- Catalog:** 1" Drive Socket new (with Edit and Change buttons)
- Mfg/Model:** Blubird Test (with Print Label button)
- Description:** CORDED 4" DEWALT GRINDER
- Type:** Unique
- Stock #:** 00002
- Serial #:** 3232
- Zone:** BLD1 (with Transfer button)
- Status:** Exclusive Items (with Change button)
- Equipment #:** 1326546
- Company:** 5675554
- Region:** (empty field)
- Cost Center:** (empty field)

The left sidebar shows the navigation menu with 'Items' selected. The top left shows the user 'demo HH: Hannah Hu...' and the version 'Version 1.4.1'.

Once created, the item is ready for tracking and operations such as check-in and check-out.

Many identical items can be created one at a time or through bulk entry using the import or receive-inventory workflows. Bulk entry is particularly useful for large inventories where many similar assets need to be added at once.

Managing Item Records

The Items page displays all inventory in a table. From here, item details, current location, and status are visible, along with whether an item is assigned to a user. To find a specific item, use the search bar or sort by columns such as name, status, location, or catalog type — especially helpful when managing large inventories.

Stock #	photo	Description	Catalog Details	Serial #
00001		Cars were equipped with range of engines of 1395 - 2480 cc	4" GRINDER	M45332
00002		CORDED 4" DEWALT GRINDER	1" Drive Socket new	3232
00003			4" GRINDER	
0001				
0002			1" Drive Socket new	
0003				
0005				
000544		shamoly map area	4" GRINDER	

To edit an item

Follow these steps:

1. **Select** the item from the list.
2. **Update** the desired fields (zone, status, description, and so on).
3. **Click Save.**

Keeping item records current is what makes XTrack's reporting accurate.

Receiving and Managing Inventory

Receiving inventory is the process of adding new items into XTrack. It is typically the first step when bringing equipment onboard, and it ensures that inventory is recorded, categorized, and assigned to a location from the start. Items can be

added individually or in bulk depending on volume and type. Once received, items are available for assignment, inspection, and the rest of XPTrack's operational workflows.

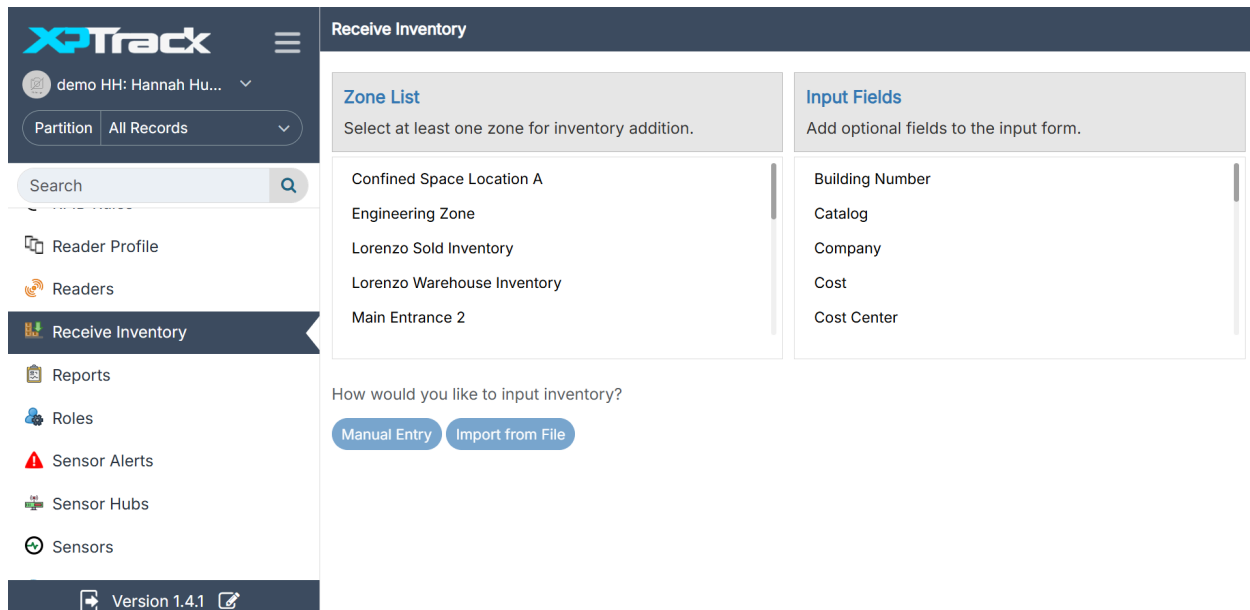
Receiving Inventory

The **Receive Inventory** feature adds new items into the system and assigns them to a zone. This is most used when new equipment is purchased, when inventory is delivered to a site, or when items are entered into XPTrack for the first time.

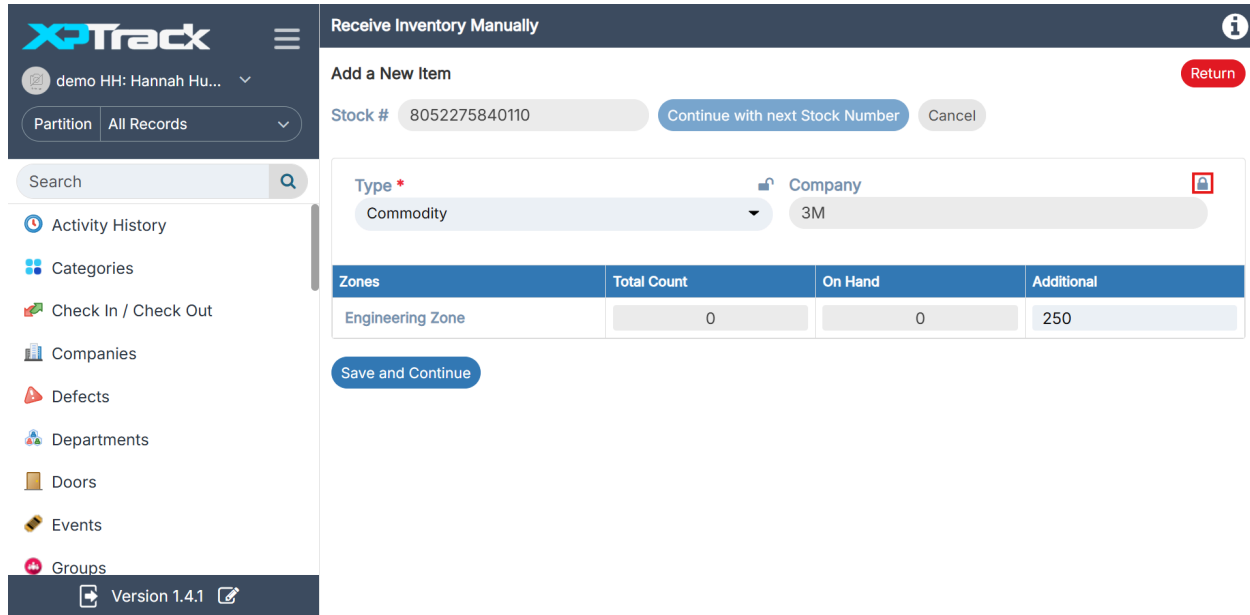
To receive inventory

Follow these steps:

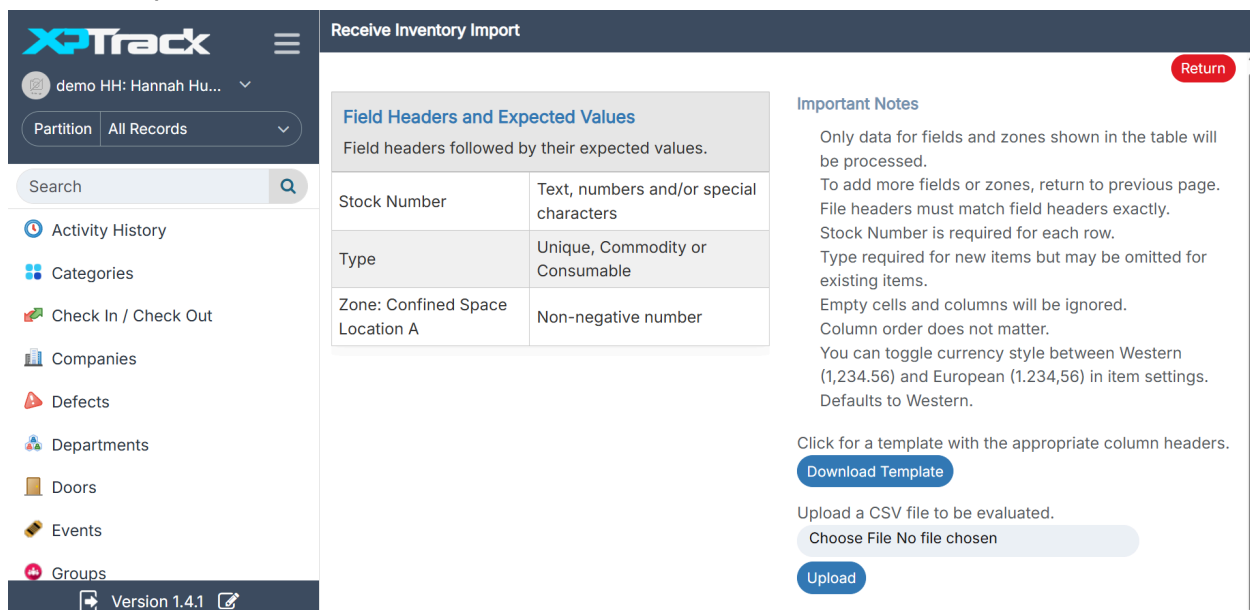
1. **Navigate** to **Receive Inventory** in the left navigation.
2. **Select** at least one zone from the Zone List for inventory addition.
3. **Select** Input Fields to optionally add fields to the input form. Input Fields are especially useful when adding many of the same item. More on Input Fields in Step 5.
4. **Select** whether to input inventory through Manual Entry or through Import from File.



5. When inputting manually, scan or enter a Stock Number, select Item Type, input Total Count and count On Hand, and any other additional information needed. For the Input Fields selected in Step 3, a value (such as Company, Building Number, and Cost) can be set and locked in so it carries over to each new row instead of being re-entered every time. To lock an input field value, enter the value and click the lock symbol.



- When uploading inventory from a file, follow the instructions on the following page. A template with appropriate column headers can be downloaded; click **Choose File** to select the completed CSV and click **Upload** to import it. (Note: there is no Save button on the file import form — **Upload** completes the action.)



Each item will then appear in the Items list and be ready for use in operational workflows.

Check In / Check Out

Checking items in and out is one of the most common day-to-day tasks in XPTTrack. Think of it as the digital equivalent of a sign-out sheet, only much smarter. When a user checks out an item, XPTTrack records who took it, when, and where it came from. When the item is returned, that record is closed and the item is marked available again.

To check out an item

Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Check Out** by clicking on the text in the top left side of the screen.
2. **Search** for or scan the item.
3. **Select** the user it is being assigned to and confirm the zone the item is leaving from.
4. **Click Finish.**

The screenshot displays the XPTTrack application interface in 'Check Out' mode. On the left is a navigation sidebar with 'Check In / Check Out' selected. The main content area features a search bar with the placeholder text 'Scan or Search Employee, Company, Or Job', a blue plus icon, a red 'X' icon, and a green 'Finish' button. In the top right corner, it says 'Zone: Not Set'. A white callout box on the right contains the text: 'Scan or Search for User Badge, Company Tag, Job Tag, or Work Order'. Below the interface, four steps are provided: Step 1: Search & select entity from input field. Step 2: Search items from input field. Step 3: Select required items from Available Inventory to Check Out / Check In. Step 4: Press Finish Button to complete transaction.

Check Out Zone: *Engineering Zone*

Scan or Search for User Badge, Company Tag, Job Tag, or Work Order

Hannah

Finish

Submit

Search Results

Photo	Stock/Badge/Code #	Name	Type	Total Issued
		Hannah Human	User	0

Check Out Zone: *Engineering Zone*

Checking Out To: *Hannah Human*

Item Count: 1

Scan or Search Items

Finish

Available Inventory Select All [View Check Out List](#) Search Grid

Select	Stock #	Serial #	Type	Due Date	Catalog
<input type="checkbox"/>	8052275840100		Commodity	Select due date	
<input type="checkbox"/>	8052275840099		Commodity	Select due date	
<input checked="" type="checkbox"/>	6767		Commodity	2026-06-07	1" Drive Socket new
<input type="checkbox"/>	500006		Unique	Select due date	
<input type="checkbox"/>	500005		Unique	Select due date	
<input type="checkbox"/>	123456		Commodity	Select due date	3/4" Drive Socket 1
<input type="checkbox"/>	123		Unique	Select due date	
<input type="checkbox"/>	11111111		Unique	Select due date	
<input type="checkbox"/>	10005		Commodity	Select due date	
<input type="checkbox"/>	10004		Commodity	Select due date	
<input type="checkbox"/>	10003		Commodity	Select due date	

Item Added Successfully.

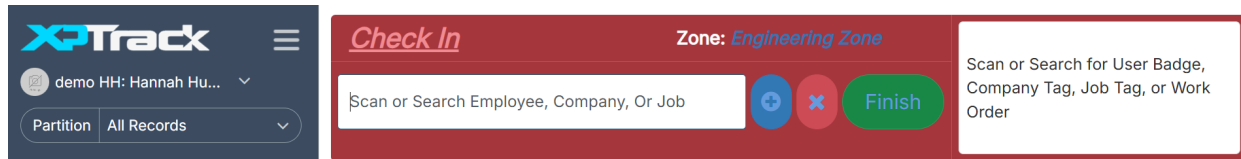
The item will reflect the assigned user and its status will update accordingly. XPTrack automatically timestamps every transaction, providing a clear record of when the item left.

To check an item back in

Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Check In** by clicking on the text in the top left side of the screen.
2. **Search** for or scan the item.

3. **Select** the user it is being assigned to and confirm the zone the item is returning from.
4. **Click Finish.**



To change transaction mode, click on the blue text in top left side of screen and select an option. Default mode is Check Out.

To Change Zone, click on the blue text in top right side of screen and select an option.

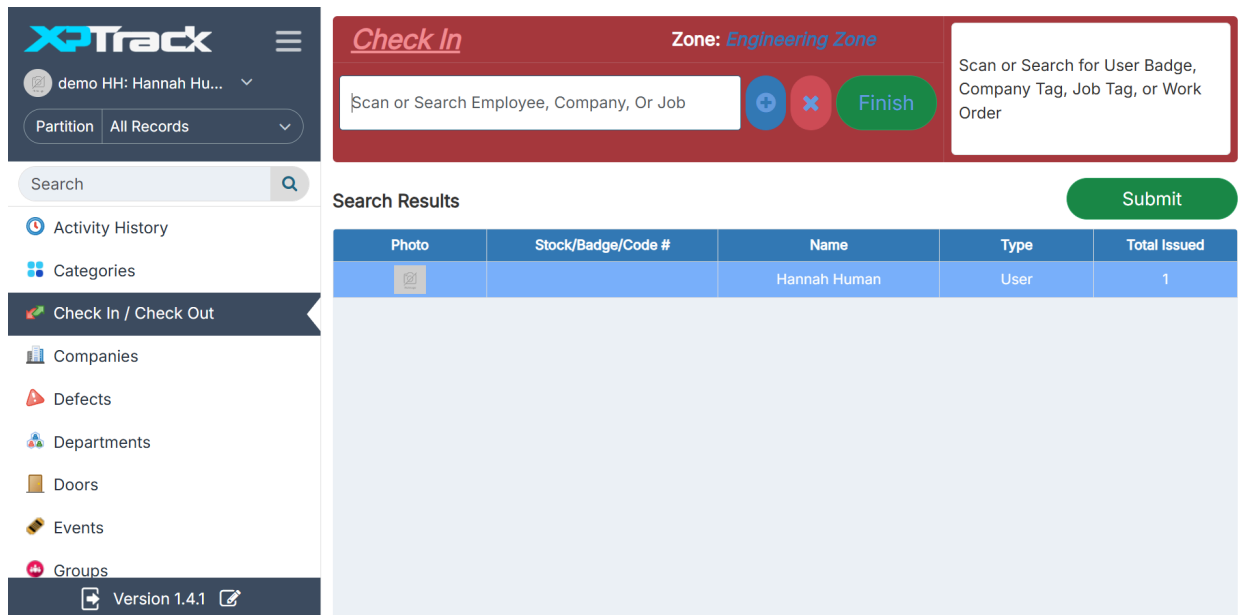
Please follow the instructions below to Check Out / CheckIn items

Step 1: Search & select **entity** from input field.

Step 2: Search items from input field.

Step 3: Select required items from **Available Inventory** to Check Out / Check In.

Step 4: Press **Finish Button** to complete transaction.



Check In Zone: *Engineering Zone* Check In From: *Hannah Human* ✖
 Scan or Search Items + ✖ **Finish** Item Count:

Search Q **Check In List** [View Available Inventory](#)

Stock #	Serial #	Type	Catalog	Item Description	Qty	Action
6767		Commodity	1		<input type="text" value="1"/>	✖

✓ Item Added Successfully.

The item will now show as available in its assigned zone, ready to be checked out again or used in other workflows.

Transferring Inventory

Sometimes items need to move between zones without being checked out to an individual — equipment moving from the warehouse to a job site, or tools being reorganized between storage rooms. The **Transfer** feature handles this.

Transferring an item updates its zone assignment without creating a personal check-out record, keeping location data accurate so anyone looking up the item will find it in the right place.

To transfer an item

Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Transfer** by clicking on the text in the top left side of the screen.
2. **Select** the Zone, or other Entity, by selecting the text in the top center of the screen.
3. **Search** for the entity to transfer the item to.
4. **View** the Inventory Lists and drag Inventory between zones and input quantity to be transferred.
5. **Click Finish.**

The screenshot shows the XPTrack application interface. The top left corner features the XPTrack logo and a user profile for 'demo HH: Hannah Hu...'. Below this is a 'Partition' dropdown menu set to 'All Records'. A search bar is located below the menu. The left sidebar contains several menu items: Activity History, Categories, Check In / Check Out (highlighted), Companies, Defects, Departments, Doors, Events, and Groups. At the bottom of the sidebar, it shows 'Version 1.4.1' and a URL: 'https://demo.xptrack.com/companies'.

The screenshot shows the 'Transfer' modal window. The title is 'Transfer' and the current zone is 'Engineering Zone'. There is a text input field labeled 'Transfer To Zone' which is currently empty. To the right of this field are two circular buttons: a blue one with a plus sign and a red one with an 'X'. A 'Finish' button is located to the right of these. On the far right of the modal, there is a box labeled 'Select Entity To Transfer To'.

To change transaction mode, click on the blue text in top left side of screen and select an option. Default mode is Check Out.

Please follow the instructions below to Transfer items

Step 1: Search & select a zone or entity to **Transfer From**.

Step 2: Search & select a zone or entity to **Transfer To**.

Step 3: Search items from input Field.

Step 4: Select Required Items From **Available Inventory** Or Simply **Drag & Drop** From Left Table To Right Table.

Step 5: Press **Finish Button** to complete transaction.

This screenshot is identical to the one above, showing the XPTrack application interface with the 'Check In / Check Out' menu item highlighted in the sidebar.

The screenshot shows the 'Transfer' modal window with the 'Transfer To Zone' field now containing the text 'Storage'. The rest of the interface, including the buttons and the 'Select Entity To Transfer To' box, remains the same.

Search Results

Submit

Photo	Stock/Badge/Code #	Name	Type	Total Issued
		Storage Area D	Zone	

The screenshot shows the XTrack interface for a transfer operation. At the top, a green bar displays 'Transfer' and 'Zone: Engineering Zone'. Below this is a 'Transfer To Zone' input field and a 'Finish' button. To the right, a box shows 'Transfer To: Storage Area D' and 'Item Count: 20'. Below the transfer bar are two inventory lists: 'Engineering Zone's Inventory' and 'Storage Area D's Inventory', each with a table of stock items.

Stock #	Type	On Hand	Total Count
Z10007	Consumable	100	100
Z10002	Commodity	100	100
Z10012	Commodity	100	100
Z10010	Unique		
Z10006	Consumable	100	100
Z10005	Commodity	100	100
Z10004	Commodity	100	100
Z10003	Commodity	100	100
R103	Commodity	100	100
R102	Commodity	100	100
R101	Commodity	100	100

Stock #	Type	On Hand	Total Count
Z10012	Commodity	100	100
Z10007	Consumable	100	100
Z10006	Consumable	100	100
Z10007	Consumable	- 10 +	
Z10005	Commodity	100	100
Z10002	Commodity	- 10 +	
Z10004	Commodity	100	100
Z10003	Commodity	100	100
Z10002	Commodity	100	100
6767	Commodity	10	10
10005	Commodity	100	100

XTrack updates the item's zone and logs the transfer with a timestamp, providing a complete audit trail of where items have been.

Item Inspections

Keeping equipment in good working order is essential, and XTrack makes it easy to stay on top of it. The **Inspections** feature lets designated users document the condition of items on a regular cadence, creating a record that can be reviewed over time. Inspections are particularly valuable for safety-critical equipment that requires regular checks, high-value assets that need condition monitoring, equipment shared across many users, and anywhere a documented maintenance history is required.

Inspections are configured at the Catalog level. For any Catalog entry whose default Item Type is Unique, a Task and an Inspection Interval can be added — once that is set, every item belonging to that catalog entry will automatically appear in the Inspections grid when it's due. This means setup happens once per catalog entry, not once per item. In the Inspections grid, items that are overdue turn red and appear at the top; items that are upcoming are highlighted yellow.

To set up inspections for a catalog entry

Follow these steps:

1. **Navigate** to **Item Catalog** in the left navigation and open a catalog entry with an Item Type of Unique.
2. **Add** a Task describing what the inspection should cover.
3. **Set** the Inspection Interval (how often the item needs to be re-inspected).

4. Click Save.

All items associated with that catalog entry will now appear in the Inspections grid when their interval comes due.

Alert	Item Name	Task Name	Next Inspection	Manufacturer	Status
Red	Reed Hex Sockets Thru-Bolt 32mm (Global Industrial, RW48) (100004)	Inspect for Wear	2024-09-30		In Service
Red	Welder (Vulcan, MIGMax 215) (100007)	Calibration Re-certification	2024-11-02	Vulcan	In Service
Red	Grocery Carts Unarco Chrome Red (Unarco, TJ2024A) (PF0002)	Full Observational Inspection	2026-02-27	Unarco	In Service
Green	Drill (Dewalt) (9647885005)	Basic Inspection	2026-07-30		In Service
Green	Grocery Carts Unarco Chrome Red (Unarco, TJ2024A) (PF0001)	Full Observational Inspection	2026-12-04	Unarco	In Service
Green	1" Drive Socket new (Blubird Test) (9434606232)	Inspection	2027-06-05	Blubird Test	In Service
Green	Inspection Test (8052275840117)	Test	2027-06-05		In Service
Green	Laptop (Telaeris, 487) (8052275840111)	Inspection	2027-06-16	Telaeris	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999991)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999992)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999993)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999995)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999996)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999977)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999978)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999979)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999980)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999981)	long	2028-07-03	Company 1	In Service
Green	40 COVERALLS NAVY (Company 1, 2022-23) (99999982)	long	2028-07-03	Company 1	In Service
Green	Coveralls (Terrell's Coveralls, 111) (QA137)	5 Year	2030-06-10	Terrell's Coveralls	In Service

To perform an inspection

Follow these steps:

1. **Navigate to Inspections** in the left navigation.

2. **Select** an item that is due for inspection from the grid. Overdue items appear in red at the top; upcoming items are highlighted yellow.
3. **Set** a Zone for the inspection and assign a Status and **Result** from the dropdown options.
4. **Add** a comment describing the condition or any observations.

5. **Click Save** to record the inspection.

Once saved, the item's inspection clock resets and it will next appear when the interval expires again. All inspection records are stored and can be reviewed at

any time, giving the organization a clear maintenance history for every piece of equipment.

Lost Issued Items

Sometimes an item can't be located. Rather than leaving its status ambiguous in the system, XTrack provides a way to formally flag an item as **lost**. This keeps inventory records accurate and ensures the right people know about the situation. Lost items are managed from the Items page. If an item is currently checked out to a user, locate it in the checked-out grid at the bottom of the item's page and **select Lost** — this removes the item from active inventory and moves it into the Lost Items section. Marking an item as lost does not delete it — the record remains, along with the full history of who last had it and when it was last seen. That information can be invaluable if the item turns up later or if an investigation is needed.

To mark an item as lost

Follow these steps:

1. **Navigate** to **Items** in the left navigation.
2. **Locate** the item using the search bar or by browsing, then open the record.
3. **Scroll** down to the checked-out grid at the bottom of the item's page.
4. **Find** the user the item is currently checked out to by scrolling or using the search bar.
5. **Select Lost** to mark the item as lost.

The screenshot shows the XTrack interface for an item named '4" GRINDER (00001)'. The left sidebar contains navigation options like 'Item Catalog', 'Item Statuses', 'Items', 'Jobs', 'Lost Issued Items', 'Manufacturer Sensor Types', 'Map Views', and 'Mapping Dashboard'. The main content area displays item details: '1 / 1' items, 'Image From Catalog' (a yellow and black grinder), 'Catalog: 4" GRINDER', 'Mfg/Model: 4" GRINDER', 'Description: Cars were equipped with range of engir', 'Type *', 'Commodity', 'Stock # *: 00001', and 'Serial #: M45332'. Below the details is a 'Checked Out' section with a search bar and a 'Check Out' button. A table lists checked-out records with columns: To, Zone, Due Date, Checked Out Quantity, Lost Quantity, and Action. The 'Action' column contains 'Checkin', 'Transfer', and 'Lost' buttons. The 'Lost' button for the record 'User : Abby Clayton, BBIL Zone 2, 2025-05-10, 5' is highlighted with a red box.

To	Zone	Due Date	Checked Out Quantity	Lost Quantity	Action
User : Abby Clayton	BBIL Zone 1	2025-05-10	20	0	Checkin Transfer Lost
User : Abby Clayton	BBIL Zone 2	2025-05-10	5	5	Checkin Transfer Lost Four
User : Abby Clayton	BBIL Zone 1	2025-05-08	10	0	Checkin Transfer Lost
Company : Blubird Test	BBIL Zone 1	2025-05-10	10	0	Checkin Transfer Lost
Job : #1455	BBIL Zone 1	2025-05-10	40	0	Checkin Transfer Lost

If the item is later recovered, it can be updated back to an active status. XPTrack retains the full history of all status changes, providing a complete picture of the item's journey.

Reports

After all the work of setting up zones, users, and inventory — and using XPTrack day in and day out — the Reports section is where everything comes together. Reports pull meaningful information out of the system to show what is actually happening with the equipment. Whether the need is to see what items are currently checked out, review a history of transactions, audit item movements across zones, or track inspection results, XPTrack's reporting tools provide the necessary visibility.

Title	Created By	Report Type	View Permission Type	Created At	Updated At
25 Nov Badge activity	Mifta, Haris	advanced report	my organization	2025-10-30 22:25:58	2025-10-30 22:25:58
Another Report	Jacobsma, Alexander	dynamic report	roles users	2026-05-28 16:31:43	2025-06-19 14:35:30
Another Report Yay	Jacobsma, Alexander	dynamic report	roles users	2026-05-28 16:31:43	
badge 1	Mifta, Haris	dynamic report	only owner	2026-05-28 16:31:43	
Badge Activity Report	Mifta, Haris	advanced report	my organization	2025-09-26 06:06:24	2025-09-26 06:06:24
Checkout Data	Ehshan, Amimul	advanced report	my organization	2025-05-20 21:40:24	2025-06-04 22:01:41
item	Mifta, Haris	advanced report	my organization	2025-09-25 05:41:29	2025-09-25 05:41:29
Item Activity Report	Jacobsma, Alexander	dynamic report	only owner	2026-05-28 16:31:43	
My Hammer Report	Jacobsma, Alexander	dynamic report	my organization	2026-05-28 16:31:43	
r1	Ehshan, Amimul	advanced report	my organization	2026-02-13 21:36:44	2026-02-13 21:36:44
test	Jacobsma, Alexander	advanced report	my organization	2026-04-27 13:06:23	2026-04-27 13:06:32
Test report	Jacobsma, Alexander	dynamic report	my organization	2025-05-21 11:52:22	2025-05-21 11:52:22
Test Report 1	Ehshan, Amimul	dynamic report	roles users	2026-05-28 16:31:43	
user details		dynamic report	only owner	2026-05-28 16:31:43	
Users	Jacobsma, Alexander	advanced report	my organization	2025-07-08 12:15:39	2025-07-08 12:15:39

Types of Reports

The Reports page lists every report saved in the workspace, showing its title, who created it, its type, view permissions, and when it was created and last updated. From here, reports can be searched, filtered, sorted by any column, displayed by chosen columns, and exported to PDF or CSV.

XPTrack supports two kinds of reports:

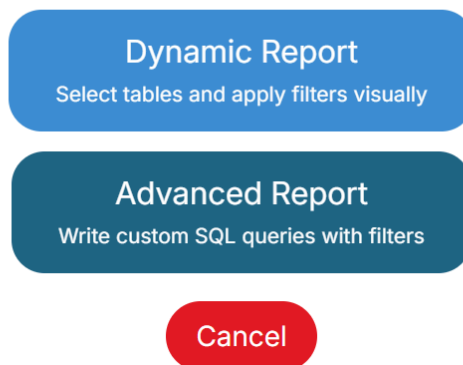
Report Type	Description
Dynamic Report	A visual, no-code report builder. Choose a data source such as Item Activity, Badge Activity, Muster

	Activity, Event Activity, Issued Item, Item Zone, Catalog Item, Item, or User — then drag fields into Table Fields, Conditions, and Sort to shape the output. Click Result to preview the data on the right.
Advanced Report	A SQL-based report builder for custom queries. Pick from the list of available views (badge_activities_view, badges_view, catalog_items_view, categories_view, companies_view, devices_view, doors_view, and more), write a SELECT statement in the editor, optionally bind filter parameters such as :PUSERID or :PZONEID, and click Run Query to preview the results. An Insert AI Prompt option is available to help draft queries.

Running a Report

To create a new report, navigate to **Reports** in the left navigation and click the **green plus sign**. A dialog prompts for a report type — **Dynamic Report** or **Advanced Report** — then follow the steps below.

Select Report Type



Building a Dynamic Report

A **Dynamic Report** uses a visual builder — no SQL required.

1. Click the **green plus sign** on the Reports page and select **Dynamic Report**.
2. From the Select dropdown at the bottom, choose a **data source** — **Item Activity, Badge Activity, Muster Activity, Event Activity, Issued Item, Item Zone, Catalog Item, Item, or User**. The available fields appear on the left.
3. **Drag** fields into **Table Fields** to set the columns.
4. **Drag** fields into **Conditions** to filter rows.
5. **Use** the **Sort** dropdown to choose a sort field.
6. **Click Result** to preview the data on the right.
7. **Enter a report title** at the top, then click the **blue floppy disk** to save.

The screenshot displays the 'Reports > Create New' interface in XTrack. On the left is a navigation sidebar with options like 'RFID Readers', 'Reports', and 'Roles'. The main area is divided into three sections: 'Table Fields' (with fields like ID, Item Stock, and Vendor Part No), 'Conditions' (with a condition 'Item Is Rented'), and 'Sort' (with a 'Select field' dropdown). A 'Result' button is at the bottom of the configuration area. On the right, a preview table shows data for 17 items, with a total of 500 rows.

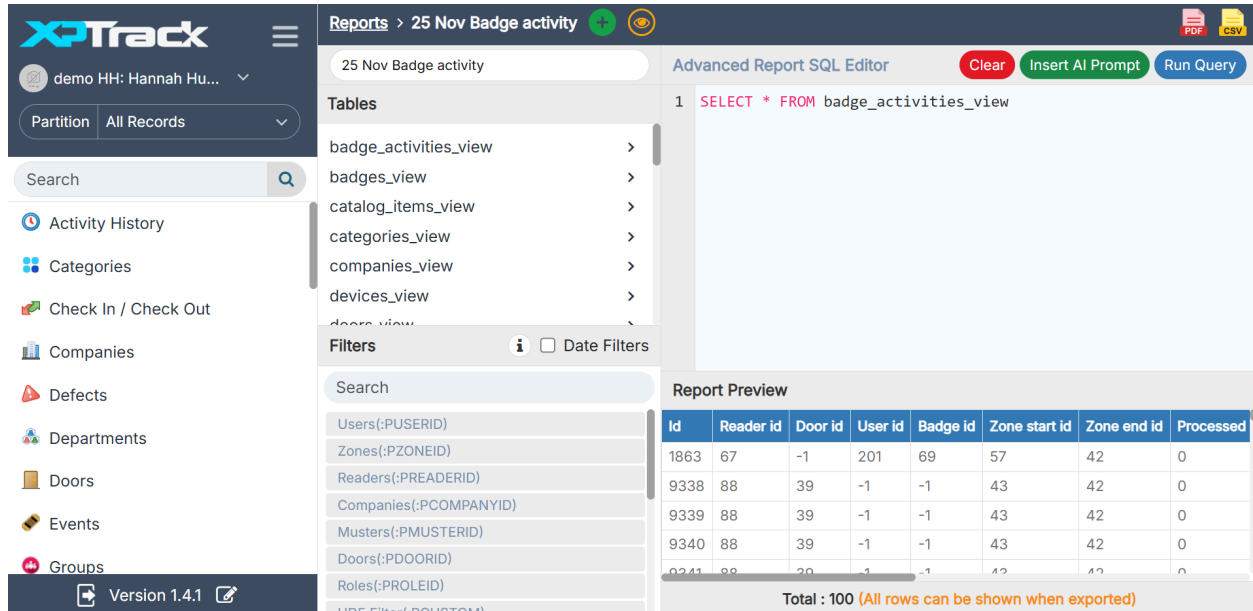
ID	Item Stock
6725	
6726	
6727	
6728	
6729	
6730	
6731	
6732	
6733	
6734	
6735	
6736	
6737	
6738	
6739	
6740	
6741	
6742	100002

Total : 500 (All rows can be shown when)

Building an Advanced Report

An **Advanced Report** supports custom SQL against the XTrack views — useful when the Dynamic builder does not provide the required joins or aggregations.

1. Click the **green plus sign** on the Reports page and select **Advanced Report**.
2. **Pick** a table or view from the **Tables** list on the left (badge_activities_view, badges_view, catalog_items_view, companies_view, devices_view, doors_view, and others).
3. **Write a SELECT** statement in the **SQL editor** on the right.
4. To make the report interactive, drag **filter** parameters such as Users(:PUSERID), Zones(:PZONEID), or Companies(:PCOMPANYID) from the **Filters** panel into the query.
5. Optionally click **Insert AI Prompt** for help drafting the query.
6. **Click Run Query** to preview results in the Report Preview pane below.
7. **Enter a report title** at the top, then click the **blue floppy disk** to save.



To run a saved report, click its title on the Reports list. Apply any available filters, then review the results on screen.

To export the results, use the **red PDF button** or the **yellow CSV button** in the top right. Because XTrack tracks everything automatically, reports always reflect real activity — no manual data entry required.

Handheld and Mobile Client

XTrack is not just a desktop experience — it is designed to work in the field too. The XTrack **handheld and mobile client** lets users perform the same core functions from a mobile device or handheld scanner, which is especially useful in warehouses, on job sites, and anywhere being at a desk is not practical.

With the handheld client, users can scan barcodes and asset tags to quickly locate items, check items in and out on the spot, transfer items between zones, conduct inspections in the field, and view item details and current status.

Please refer to the XTrack Inventory Handheld Guide for installation and setup walkthrough.

Congratulations!

This guide has covered everything needed to get the most out of XTrack. From setting up roles and users, to receiving and tracking inventory, to running reports, XTrack is designed to make operations more organized, accountable, and

efficient. For questions along the way, contact an administrator or the XPTrack support team.