Web Asset Tracking Quick Start Guide

Use this guide to set up and use your RedBeam Web Asset Tracking™ software.

Getting Started:

1. Create an account and then log in to the application.
2. Click on the gear icon and *Account*.
3. Click on the Registration tab. If you've already purchased, enter your product serial code and activate your license. If not, simply skip this step and continue to run in demo mode.
4. Click on the Information tab. Add your company information, logo and color theme. Click *Update.*

Adding Locations:

1. Click on the gear icon and *Setup*.
2. Click *Building*, enter a building name under Add New. Click the green *Update* icon.
3. Click *Room*, enter a room ID under Add New and assign the room to a building. Click the green *Update* icon.

Note: While here, you can also pre-populate other system information, rename fields, create custom fields and choose favorites. If you forget something, don't worry. You can always add it later here in *Setup* or on the Assets page using Quick Add buttons.

Adding Assets:

1. Go to the Assets page.
2. Enter a new Asset ID in the Asset field.
3. Add additional relevant information as needed. Click the green *Update* icon.

Note: If you have existing asset information in a spreadsheet, you can import it into the system via the *Import Data* icon on the Assets page. *RedBeam Asset Tracking*™ customers also have the option to migrate their data to *RedBeam Web Asset Tracking*™ via the gear icon under *Account* and *Import Data*. Make sure to import locations first and then assets so that rooms are associated with the correct buildings.

Creating an Inventory:

1. Go to the Inventory page.
2. In Manage Inventory, click on the New Inventory field and name your inventory. Click the green *Update* icon.
3. Select buildings to add to the inventory and click the green *Update* icon.

Taking an Inventory:

1. Go to the Inventory page.
2. In Take Inventory, click on the inventory you want to take. Once open, select your location from the drop down above the green *Scan* button.
3. Put your cursor in the Asset ID field and enter the Asset ID. Hit return or click *Enter*. The Asset ID field will clear to allow you to enter the next Asset ID.

Note: You can alternate between showing found and unfound assets using the U/F toggle switch.

Closing an Inventory:

1. Go to the Inventory page.
2. In Manage Inventory, select the inventory you want to close and click on the blue *Close Inventory* icon.
3. When asked to verify that you want to close the inventory, click *OK*.

Note: Once an inventory is closed it cannot be reopened. In order to ensure that you've fully completed your inventory, you may want to run an *Unfound* report on the Reports page prior to closing it.

Using WM 6.5 Devices:

1. Follow the instructions for [Installation for Windows Mobile Devices](#).
2. Log in using the same credentials used to log in through your browser.
3. Update asset information and take physical inventories as needed.

Note: You must be in a connected environment the first time you access the application. After that, you can work in both connected and disconnected environments.

Using Android and iOS Devices:

1. Get the RedBeam app from [iTunes](#) for iOS or [Google Play](#) for Android.
2. Log in using the same credentials used to log in through your browser.
3. Update asset information and take physical inventories as needed.

Note: You must be in a connected environment to access the application in your browser.

RedBeam Web Asset Tracking™ comes with unlimited free support. Contact us at support@redbeam.com or 877-373-0390 for additional assistance.

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