Add a New Set

1. Click the menu option **Inventory**
2. Select **Add**
3. Type all of the required information about the set in the **Set name** tab
4. Click **Save**
5. Go to the **Countsheet** tab to add items to your set
6. In the blue box, type the catalog number in the **Catalog #** box (if the number is already in your catalog, the vendor and description boxes will automatically populate)
7. Type the number of items in the **Quantity** box
8. Select if the item is required
9. Select the item placement from the **Placement** dropdown list
10. Click **Save**
11. Repeat the above steps to add additional items
12. Click **Done**
**IMPRESS® System**

**Inventory – Add, Edit, & Delete Sets & Countsheets**

**Cheat Sheet**

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**Add a Physical Set**

1. Once the countsheet has been built (see *Add a New Set*), click **Task**
2. Select **Add New Physical Set**
3. Select the **Default Location** where the set lives
4. If creating multiple physical sets:
   a. Enter a set name in the **Set Prefix** field
      
      **NOTE:** Choose a consistent pattern, use all capital letters, and include a dash at the end (ex. for a minor tray, you may want to use MINOR-)
   b. Enter the **Sequence Width** (leaving the default is recommended)
   c. Enter the **Quantity** of physical sets to be created
   d. Click **Create**
5. If creating a single set:
   a. Select the **Single Name Only** radio button
   b. Enter the **Set #** (this might be a unique serial # attached to a set from the manufacturer)
   c. Click **Create**
6. Once the physical sets have been created, you will see the **Last Created Physical Set** towards the top of the page (ex. MINOR-004)
7. Click **Close**

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**IMPRESS System Support:** 877.858.8822, option 1
**Edit Set Name Information**

1. Click the menu option **Inventory**
2. Select **Search**
3. Select the **Set name** search type
4. In the **Set name** box, enter at least 3 characters of the set name (ex. MAJ for a Major Basic set)
5. Click **Find**
6. Click the set name (blue text in the first column) you wish to edit
7. Adjust the information as necessary
8. Click **Save**

**Add Set Specific Notes**

1. Click the menu option **Inventory**
2. Select **Search**
3. In the **Set name** box, enter at least 3 characters of the set name (ex. MAJ for a Major Basic set)
4. Click **Find**
5. Click the set number (blue text in the first column) of the set needing a note
6. In the **Set # list** tab, select the line of the set needing a note (will be purple)
7. In the blue box, type the applicable note(s) in the **Set # Notes** and/or **Set # Assembly Notes** boxes
8. Click **Save**
Edit a Countsheet

1. Click the menu option **Inventory**
2. Select **Search**
3. In the **Set name** box, enter at least 3 characters of the set name (ex. MAJ for a Major Basic set)
4. Click **Find**
5. Click the set number (blue text in the first column) of the set you wish to edit
6. In the **Countsheet** tab, select the line of the item to be edited (will be purple)
7. To change the item’s details:
   a. In the blue box, adjust the quantity of the item, if it is required, and/or its placement within the set
   b. Click **Save**
8. To delete the item, click **Delete** in the blue box
9. To replace the item:
   a. In the blue box, click **Replace**
   b. In the **Catalog #** box, type the new catalog number and/or select from the drop-down selections (which adjust as the catalog number is entered)

NOTE: The catalog number must exist in order to be used as a replacement
c. Click **Search** (the vendor and description will automatically populate)
d. Click **Replace**

10. To adjust placement order:
   a. In the blue box, click the **Placement** tab
   b. In the top left box, click the placement you wish to move
c. Click **Up** or **Down** to move the placement
d. Click **Save**

11. To adjust an item location within its placement:
   a. In the blue box, click the **Item move** tab
   b. In the top left box, click the item you wish to move
c. Click **Up** or **Down** to move the item
d. Click **Save**

12. Click **Done**
Delete Sets

1. Click the menu option **Inventory**
2. Select **Search**
3. In the **Set name** box, enter at least 3 characters of the set name (ex. MAJ for a Major Basic set)
4. Click **Find**
5. Click the set number (blue text in the first column) of the set you wish to delete
6. To delete physical sets:
   a. Select the line of the set to be removed (will be purple)
   b. In the blue box, click **Delete**
   c. Click **OK** to confirm deletion
   d. Repeat steps a, b, & c above to delete additional physical sets
7. To delete a set name
   NOTE: All associated physical sets must be deleted first:
   a. Go to the **Set name** tab
   b. Click **Delete**