CHAPTER 5 INVENTORY

The dynamic link between your Inventory, Customers and Vendors through Sales Orders and Purchase Orders allows rapid access to quantities and statistics as well as future material or product requirements.

Inventory List

- **Access**
  - ◆ Text Menu
  - ◆ Module List
  - ◆ Web Access - Tools > Server Admin (with limited functionality)
- ↻ **Refresh** to load any Inventory that may have been posted by another user since last refresh and that may not be displaying on this list
- **Inventory List Customization:**
  - ◆ ▽ **Filters**
    - ✛ click ▽ **Filters**
    - ✛ choose **Any** or **All** selector
    - ✛ select from the list of fields to set the criteria (ie: Average Margin)
  - ✛ select from the operators ie: 'is', 'is not', etc - this operators list changes based on the field selected in the previous step (ie: 'is less than')
  - ✛ enter the criteria information (ie: '20.00')
  - ✛ if desired click ➕ to add a line of criteria
  - ✛ to remove the criteria line, click ✖
  - ✛ make any column adjustments (see Column Customization page 2)

- select ▼ **Filters** ▼ for save options
    - **Save default** - this filter will load when viewing Inventory
    - **Save preset** - will load this filter when the Filter button is on
    - **Save preset as**… will allow you to name the Filter with the following settings:
        - give this filter a name
        - select ⦿ **User** if this filter it will be used just for this User
        - select ⦿ **Company** if it is to be accessed by all users accessing this Company
        - click OK…this new filter will display in the Filters menu
        - ☑ **Show in module list** to display beneath the module name
        - ☑ **Save column state** if you have removed or added columns, or have sorted the list by one of the columns
        - click **OK**
- click on the ▼ **Filters** button to release the current filter to see entire list or start a new filter
- Search - type any character(s) into the field and the list will narrow to only records containing the character(s) typed, somewhere in the details

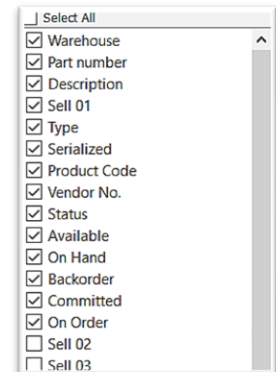◆ open an Inventory record and use the **Navigate** buttons ⏮ ⟨ ⟩ ⏭ to page through Inventory items in the list, filtered or not filtered, in order of the current column sort

◆ **Column Customization**
  ✛ drag and drop columns for desired positioning
  ✛ right-click on any column heading to list to identify which columns you wish to see

◆ ⏶ **Column Sort** - click on any column heading to sort the list by that column
  ✛ further narrow your search by just typing (see the green letters typed here) and the list will highlight the closest match, in currently sorted column ⏶
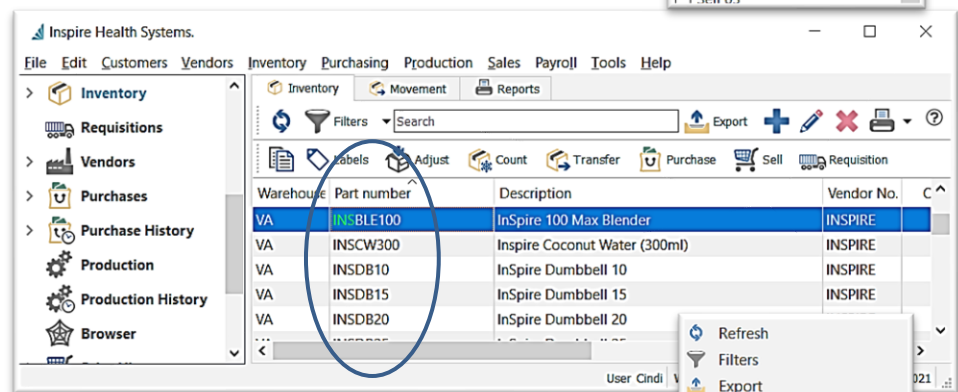
◆ **Icon Menu Customization**
  ✛ hover over the Icon Group handle ⸽ until you see ✛
  ✛ drag the Icon Group to where you want it

◆ Inventory List **Context Menu** - right-click on any line(s) in the list
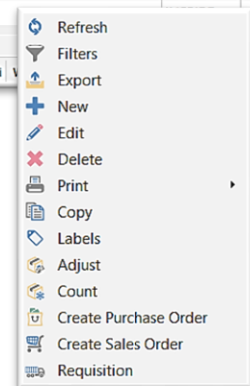
■ 🔼 **Export Inventory Items** from a filtered or unfiltered list (see Filters page 1)

- will export all visible records in the current column layout and sort order, to Excel

◆ **Access** - Inventory List
◆ choose the location **File name**, and **Save as type** (.xlsx)
◆ **Save**
◆ option to **Open File** right away
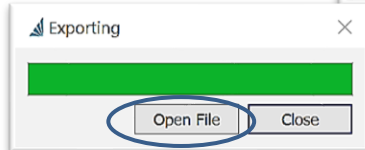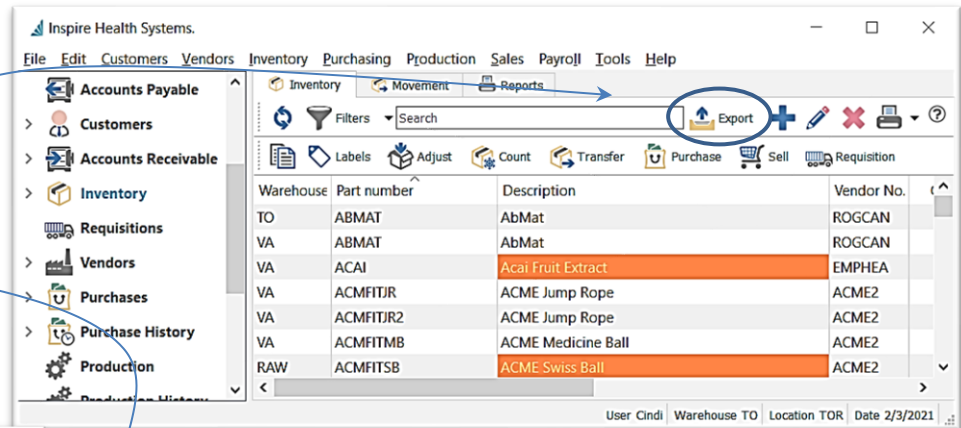
◆ from excel, make any changes or build any desired formulas

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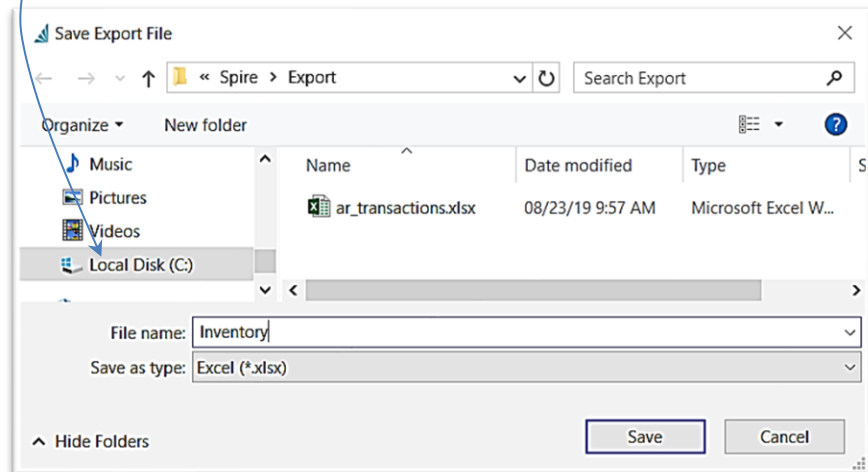
- ✚ **Add New Inventory Item** in one of 3 ways:

 1. **Manually**
     - ✚ click ✚ **New** from the Inventory List window
     - fill in Inventory details for each tab as described in the following pages
     - 7 💾 **Save**, 💾 **Save and Close** or 💾 **Save and Create New**
     - select which additional Warehouse(es) to add this item to as well or **Cancel** to copy into none
       - ○ this prompt will pop up only if Multi-Warehouses (see Multiple Warehouses page 7) is active and if User Settings are established - Edit > User Settings > Inventory - **Add New Items to All Warehouses**
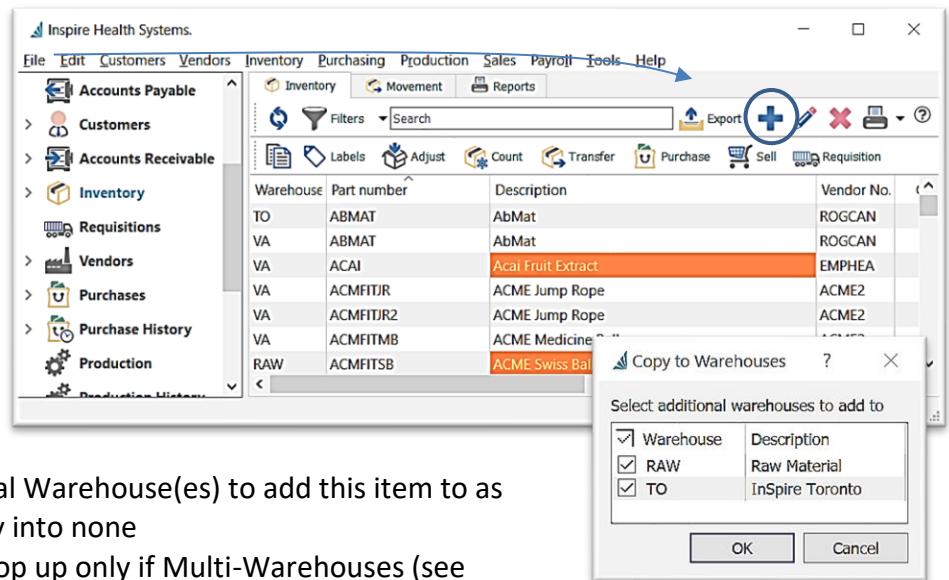
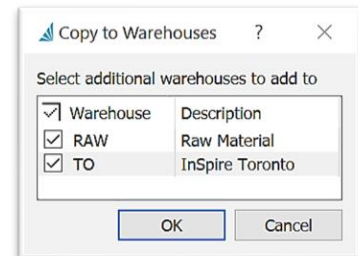 2. 📋 **Copy** Inventory Item
     - select Inventory item(s) from the list and click 📋 **Copy** - or - double-click the Inventory item(s) you wish to copy and click 📋 **Copy**
     - give this new part a unique **Part Number** and **Description**
     - check the desired Copy options or **Select All / None**
     - make any adjustments in the information tabs as explained in the following pages
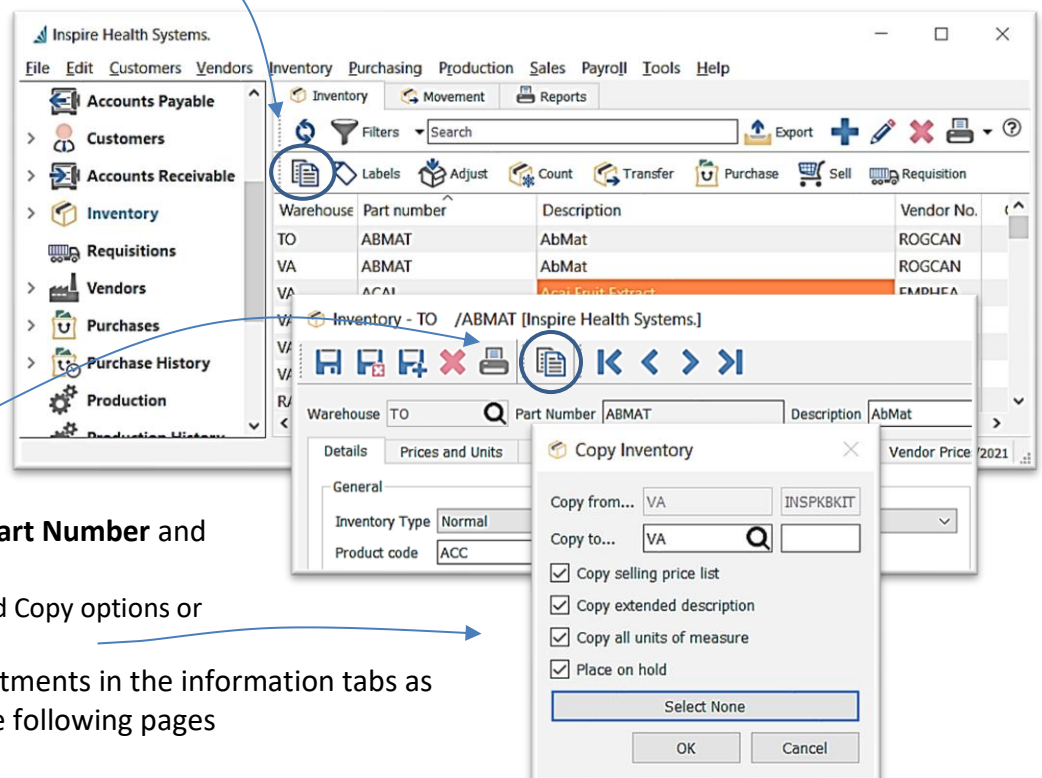
- ✛ 💾 **Save,** 🗗 **Save Close** or 🖳 **Save and Create New**
- ✛ select which additional Warehouse(es) to add this item to as well or **Cancel** to copy into none
  - o this prompt will pop up only if Multi-Warehouses is active (see Multiple Warehouses page 7) and if User Settings are established - Edit > User Settings > Inventory - **Add New Items to All Warehouses**

3. **Import** Inventory Items
   (see page 47)

- ■ ✏ **Edit Inventory Item(s)**
  - ◆ select the Inventory Item from the list
  - ◆ click **Edit** ✏
    - or - double click the line(s)
    ! Note - if editing multiple items, only allowable editing options will be presented
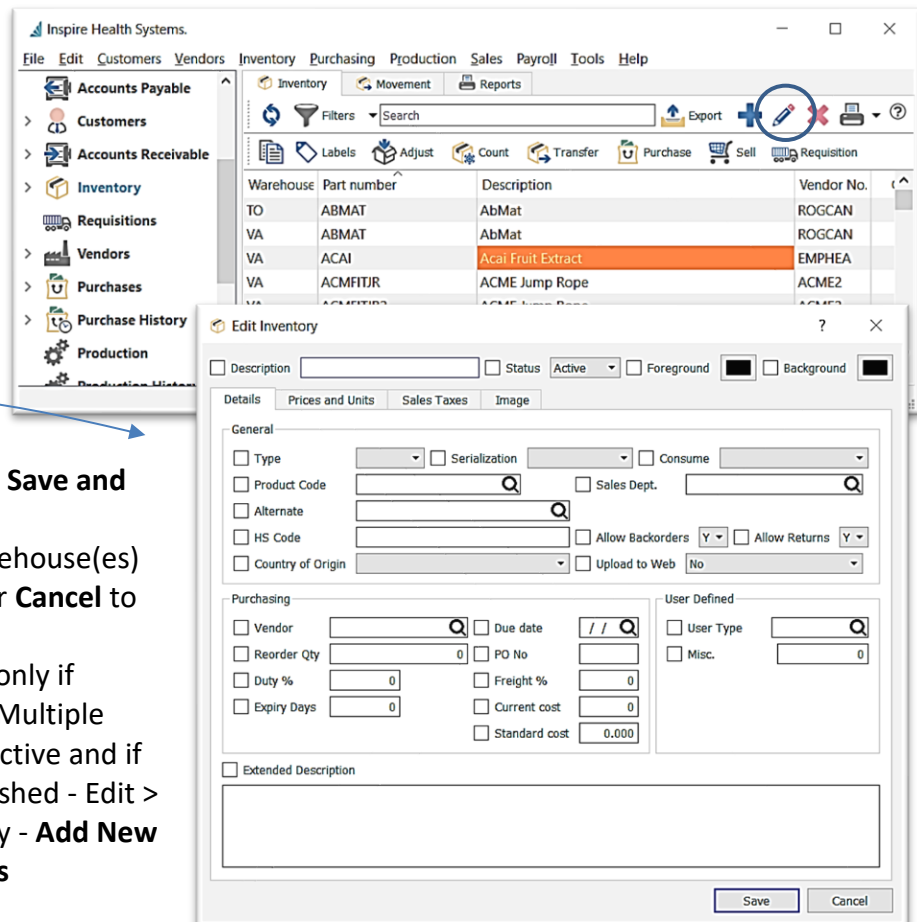 - ◆ make necessary changes
  - ◆ Save 💾, Save Close 🗗 or 🖳 **Save and Create New**
  - ◆ select which additional Warehouse(es) to add this item to as well or **Cancel** to copy into none
    - ✛ this prompt will pop up only if Multi-Warehouses (see Multiple Warehouses page 7) is active and if User Settings are established - Edit > User Settings > Inventory - **Add New Items to All Warehouses**

- ■ ✖ **Delete Inventory Item**
  - ◆ select Inventory item(s) from list and click ✖ **Delete** (item will not delete if there are any quantities On Hand, Committed, Backordered or On Order)
- ■ 🖨 **Print** reports (see Reports page 55) on the selected lines from the filtered or unfiltered list (see Filters page 1)