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**
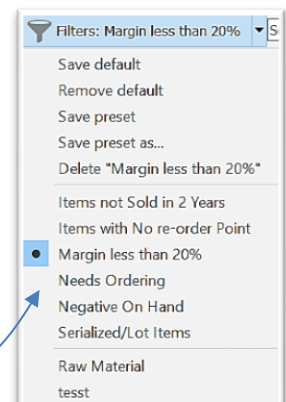 - ◆ Module List > Inventory
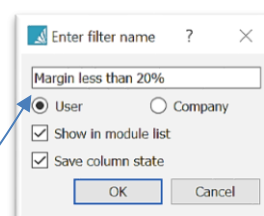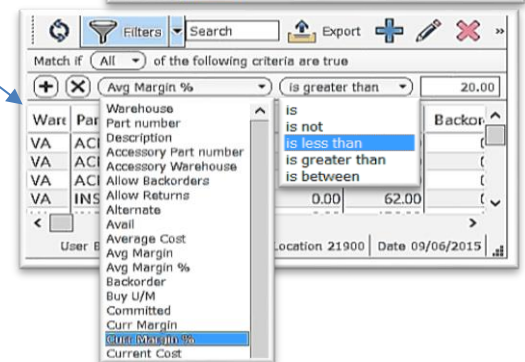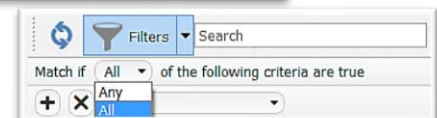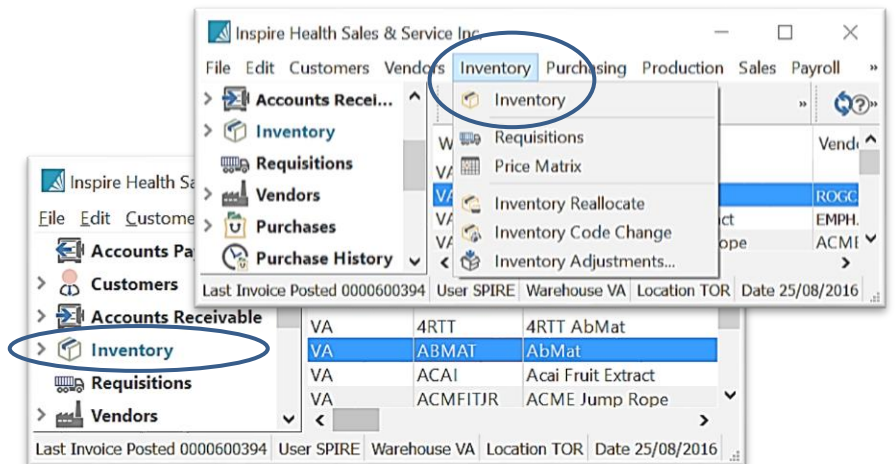 - ◆ Text Menu > Inventory > Inventory List
- **Refresh** to load any Inventory that may have been posted by another user since last refresh and that may not be displaying on this list
- **Inventory List Customization:**
  - ◆ **Filters** - create a filter for this list
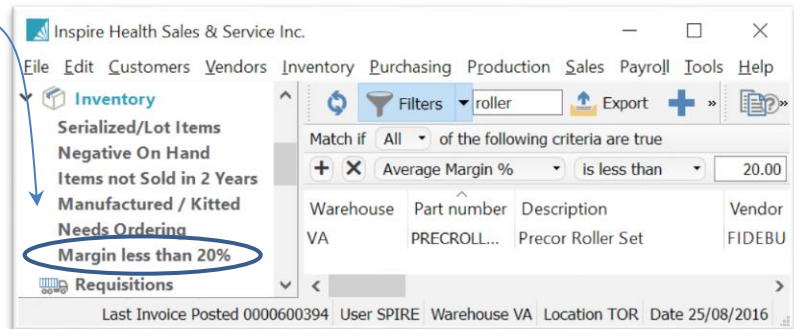   - ⊕ click **Filters**
    - ⊕ select from the **Any** or **All** operators
    - ⊕ select from the list of fields to set the criteria
    - ⊕ select from the functions ie: 'is', 'is not', etc - this function list changes based on the field selected in the previous step
    - ⊕ enter the criteria information
    - ⊕ 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 you click the **Filters** button
      - ○ **Save preset** - will add the current filter to the Filters menu
        - ⌃ 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 in the module list
- ⌃ ☑ **Save column state** if you have removed or added columns, or have sorted the list by one of the columns
- ⌃ click **OK**
  - ○ **Save preset as…** - if you have loaded an existing Filter, changed the criteria set, and want to save this Filter under a different name
    - ✦ 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
- ◆ **Column Customization**
  - ✦ drag and drop columns for desired positioning
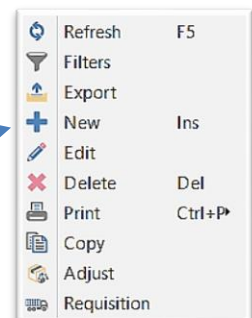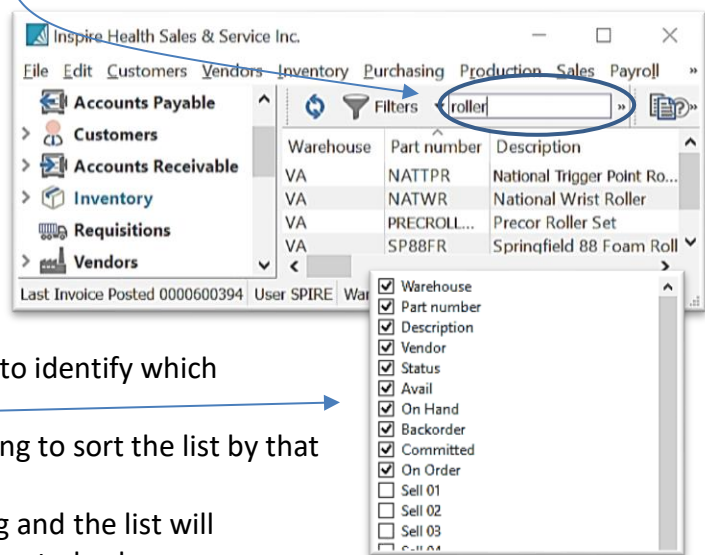 - ✦ right-click on any column heading to list to identify which columns you wish to see in the grid
- ◆ ⌃ **Column Sort** - click on any column heading to sort the list by that column
  - ✦ further narrow your search by just typing and the list will highlight the closest match, in currently sorted column
- ◆ **Icon Menu Customization**
  - ✦ hover over the Icon Group handle until you see ✥
  - ✦ drag the Icon Group to where you want it
- ◆ **Inventory List Quick Menu** - right-click on selected line(s) in the list to display
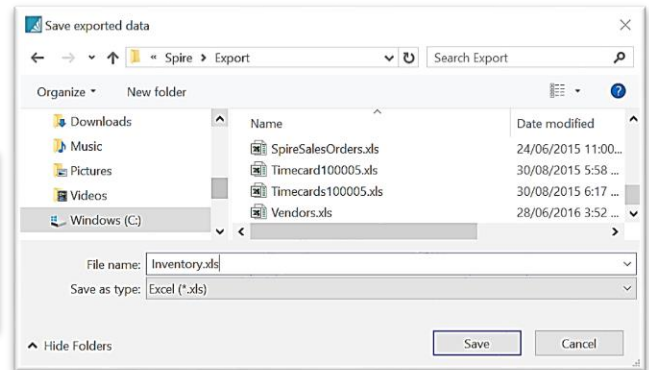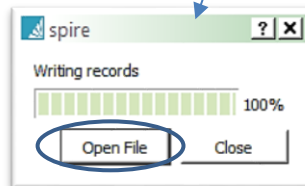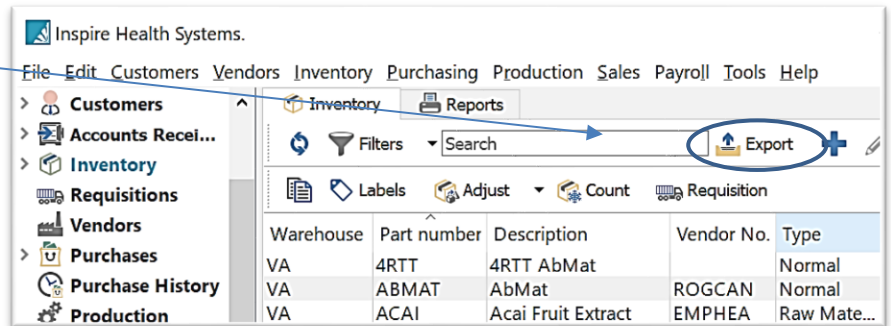
- **Export Inventory**

  - **Access** - Inventory List
  - select Inventory Items from a filtered (will export exact column layout) or unfiltered list (see Filters page 1)
  - click **Export**
  - choose the location **File name**, and **type** it is to be saved in
  - **Save**
  - option to **Open File** right away
  - from excel, make any changes or build any desired formulas

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

  1. **Manually**
     - ✚ click ✚ **New** from the Inventory List window
     - ✚ fill in Inventory information for each tab as described later in this section

  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**
     - ✚ make any adjustments in the information tabs as explained in the following pages
     - ✚ 💾 Save or 💾 Save Close

  3. **Import** Inventory Items (see page 39)

- 🖉 **Edit Inventory Item(s)**
  - ◆ from the Inventory List window scroll to select Inventory item(s) or use the Search or Filters functions (see Filters page 1)
  - ◆ click **Edit** 🖉 - or - double click inventory line(s)
    ! Note - if editing multiple items, only allowable editing options will be presented
  - ◆ make necessary changes
  - ◆ Save 💾 or Save Close 💾

- ✖ **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)