

Inventory Manager

Creating Sub Products for Inventory Tracking

Sub-products can be used to track usage of inventory at a lower level than the product code. For example, some products are stored on rolls or in bins. Sub-products allow the assignment of a roll number or bin number to track the quantities of remaining inventory. The sub products do not appear on estimates or orders.

- ✚ Log in to **Inventory Manager**:



- ✚ Click on **Cycle Counts**:



- ✚ You will see the following on your screen:

	Show Products	Filter
Retrieve by:	<input checked="" type="radio"/> Specific Product Code: <input type="text"/> <input type="radio"/> All product codes <input type="radio"/> By product category <input type="text" value="ACRYLIC"/>	<input type="checkbox"/> At or below desired level

- ✚ Choose which of the three options you would like to search by.
- ✚ Click **Search**

✦ **Inventory Manager** will display a list of matching products:

Date of Count: 6/22/2004 COMMIT ALL COUNTS
 Counted By: Jane Doe
 Date Finalized:
 Total Adjustment: \$0.00

Product Code	Sub Product	Category	UNITS	On-Hand	Counted	Adjustment	Unit Cost	\$ Adjustment
00015	(new sub-item)	Jansport - Lee	Digital Imaging	42 (24)	<input type="text"/>		\$69.50	\$0.00
00015	bin3			15	<input type="text"/>		\$69.50	\$0.00
00015	bin6			3	<input type="text"/>		\$69.50	\$0.00
1/8" Alum	(new sub-item) 	ALUMINUM	SQ. FT.	-80 (-80)	<input type="text"/>		\$2.35	\$0.00
ACRY 1/4"	(new sub-item)	ACRYLIC	SQ. FT.	116,3197 (116,3197)	<input type="text"/>		\$3.25	\$0.00
Ballast T-24	(new sub-item)	Electrical	PER EACH	50 (50)	<input type="text"/>		\$46.00	\$0.00

- ✦ To create a new sub product, click on **new sub-item** next to the original product code.
- ✦ You will be prompted to enter the information for the new sub product.
 - ✦ Enter in the name of the sub product.
 - ✦ Type the number of units you have of this sub product in stock in the **Counted** field.
 - ✦ You can add as many sub products as you want.
- ✦ Once you are finished adding new sub-items, click on the **Commit All Counts** button.
- ✦ **Inventory Manager** will give you a warning telling you that this action cannot be undone. Click **Yes** to save your changes.
- ✦ The new sub-items and all counts will be saved.

View/Edit Inventory Products

Inventory Manager enables you to view and adjust the On Hand levels for your inventory items, the On Order amount, and the Level Desired. This application is in real-time, so as soon as someone saves a transaction at your store, you can see the inventory difference online! To make changes to the On-Hand amount over time and not immediately, use the Current Inventory Count instructions (below).

- + Log on to **Inventory Manager**
- + **Inventory Manager** will display the **Inventory** menu with the following search options:

Show Products		Filter
Retrieve by:	<input checked="" type="radio"/> Specific Product Code: <input type="text"/> <input type="radio"/> All product codes <input type="radio"/> By product category <input type="text" value="ACRYLIC"/>	<input type="checkbox"/> At or below desired level
		<input type="button" value="SEARCH"/>

- + Select one of the search options:
 - + **Specific Product Code** – type in a product code to show it
 - + **All product codes** – this shows all inventory items
 - + **By product category** – choose a product category from the drop down list. This will show all inventory items in the chosen product category.

- Click on **Search**. This will display a list of product codes matching your search criteria:

Product Code	Category	UNITS	On-Hand	Committed	On-Order	Order Level
00015	Jansport - Lee	Digital Imaging	<input type="text" value="24"/>	0	<input type="text" value="0"/>	<input type="text" value="0"/>
bin3			15			
bin6			3			
1/8" Alum	ALUMINUM	SQ. FT.	<input type="text" value="-80"/>	0	<input type="text" value="0"/>	<input type="text" value="0"/>
ACRY 1/4"	ACRYLIC	SQ. FT.	<input type="text" value="116.31"/>	0	<input type="text" value="0"/>	<input type="text" value="200"/>
Ballast T-24	Electrical	PER EACH	<input type="text" value="50"/>	0	<input type="text" value="50"/>	<input type="text" value="0"/>
Bluecurtain	ACRYLIC	LINEAR FT.	<input type="text" value="1000"/>	0	<input type="text" value="0"/>	<input type="text" value="0"/>

- Click in the **On-Hand** column to change the number of units of this product you have in your inventory.

To change the **On-Hand** amounts on **Product Codes** with **sub-products**, click on the **Cycle Counts** menu and see the instructions below. Most often, if you are using sub products to represent rolls of material or various shirt sizes, you will have zero on-hand of the main product and have all of your inventory noted on the sub-products.

- Click in the **On-Order** column to note how many units of this product you have ordered from your vendor. Purchase Orders created in **ADVANTAGE** will display their quantities here. If the quantities need to be adjusted, *adjust the purchase order*. Only use this field for adjustments if you are *not* using the Purchase Order module.
- Click in the **Order Level** column to change the number of units that you want to always have on-hand.
- Click **Save Inventory Changes**.

Adjusting Inventory Counts

The **Cycle Counts** function enables employees to adjust the inventory over several days and see the adjustments that are going to be made without actually affecting the Inventory On-Hand amount. This is also where the Sub Products are edited. To edit individual product codes or to make immediate changes, use the View/Edit Inventory Products instructions (above).

- ✚ Log on to **Inventory Manager**
- ✚ Click on the **Cycle Counts** button

	Show Products	Filter
Retrieve by:	<input checked="" type="radio"/> Specific Product Code: <input type="text"/> <input type="radio"/> All product codes <input type="radio"/> By product category <input type="text" value="ACRYLIC"/>	<input type="checkbox"/> At or below desired level
		<input type="button" value="SEARCH"/>

- ✚ Select which products you want to display
- ✚ Click **Search**

✚ A list of matching products will display:

Date of Count: 6/22/2004 COMMIT ALL COUNTS
 Counted By: Jane Doe
 Date Finalized:
 Total Adjustment: \$0.00

Product Code	Sub Product Category	UNITS	On-Hand	Counted	Adjustment	Unit Cost	\$ Adjustment
00015 <small>(new sub-item)</small>	Jansport - Lee	Digital Imaging	42 (24)	<input type="text"/>		\$69.50	\$0.00
00015	bin3		15	<input type="text"/>		\$69.50	\$0.00
00015	bin6		3	<input type="text"/>		\$69.50	\$0.00
1/8" Alum <small>(new sub-item)</small>	ALUMINUM	SQ. FT.	-80 (-80)	<input type="text"/>		\$2.35	\$0.00
ACRY 1/4" <small>(new sub-item)</small>	ACRYLIC	SQ. FT.	116.3197 (116.3197)	<input type="text"/>		\$3.25	\$0.00
Ballast T-24 <small>(new sub-item)</small>	Electrical	PER EACH	50 (50)	<input type="text"/>		\$46.00	\$0.00

- ✚ **Date of Count** – this is the last date that the counts were updated.
- ✚ **Counted By** – this is the person that was logged in to **Inventory Manager** when the last count was committed.
- ✚ For each product that you are counting inventory, type in the number of units in the **Counted** column. If you do not want to change the inventory, leave the field blank. Do NOT type in zero unless you want to show that there is no inventory for this product in stock.
- ✚ Click on the **Save Inventory Changes** button to save your changes.
- ✚ **Inventory Manager** shows the increase or decrease of inventory compared to the current On-Hand amount and the value of the inventory increase or decrease the actual On-Hand count in inventory has not been affected.
- ✚ When all of the inventory has been adjusted and you are ready to finalize the changes, click on **Commit All Counts**.
- ✚ **Inventory Manager** will display a warning that this action cannot be undone. Click **Yes** to save your changes. The on-hand amounts will change to match the counted amounts.



Graphic File for Inventory Manager

When someone is accessing this feature, they will see a banner-type graphic at the top of the screen. You will want to create your own graphic to go in this space. The graphic needs to be the same size as file that you are replacing. The file is in C:\inetpub\wwwroot\Activity\graphics on your computer hosting the web server. You need to modify **imheader.gif**. Simply change the name in one of your graphics programs or create an entirely new banner.