

Inventory Control Guide

Managing Inventory


AdvancePro is designed to provide you with total control and visibility into your inventory. In this guide, you will learn how to review inventory, perform inventory adjustments and how to transfer inventory between locations.

Reviewing Product Inventory

1. Access the “Manage Inventory” Screen from the “Products” tab

The screenshot displays the AdvancePro 10.00.0.1000* Admin interface. The top navigation bar includes tabs for Admin, Customers, Vendors, Products (highlighted with a red box), Warehouse, Sales Rep, Returns, Reports, QuickBooks, Web, MFG, and MCR. The left sidebar contains a menu with sections for Customers, Vendors, and Products. The Products section is expanded, showing options like Add New Product, Manage Inventory, and View All Products. The main content area is titled 'Products' and features a table with three columns: Product Info, Inventory Info, and Other. The 'Manage Inventory' option in the Inventory Info column is highlighted with a red box. The footer includes a Logout button and a copyright notice: © 2015, AdvancePro Technologies. All rights reserved.

Product Info	Inventory Info	Other
Add Product	Manage Inventory	Manage Categories
Edit Product	New Cycle Count	Global Pricing
View All Products	View All Cycle Counts	Variant Manager
Item Kit	Product Re-order Alert Report	New Raw Material
		View All Raw Materials
		Build Finished Product
		View All Promotions

- 1) While in this screen, you can:
 - i. Subset your list by clicking on “Variants”, “Assembly Item” and “Drop Ship Item” at the bottom left of the screen.
 - ii. Use the search fields at the top of the screen to find a specific product or products.
 - iii. Use the checkboxes at the top right of the screen to “Combine Variants”, “Display Advanced UOM”, and “Display Inactive” products.
 - iv. Click on a product name to view further details about that product
 - v. Click on any column header to sort by that column
 - vi. Access the “Manage Picking Locations” screen by clicking the  button
- 2) From this screen you can also view “Reserved Quantity” and “In Stock” quantity.
 - i. Reserved Quantity is the quantity of the product on order for a customer that has not yet been shipped
 - ii. In Stock is the total quantity of the product, including Reserved Quantity
- 3) You will notice that the final 4 columns on the page are not editable and/or are empty. These will be enabled once you select a warehouse.

3. In order to enable further inventory management functionality within a specific warehouse, you must select the warehouse in which you want to manage inventory.

Manage Product Inventory

Use Uppercase letter to find all words starting with that letter.

Use lowercase to find the letter anywhere within word.

Total Records: 58

Per Page: 39

Total Pages: 2

Current Page: 1

☒ Combine Variants
 ☐ Display Advanced UOM
 ☐ Display inactive (View Only)

SKU #

UPC

Product Name

Picking #

Warehouse:

Warehouse1

No	SKU #	UPC	Product	Unit	Picking #	Reserve...	In Stock	New Qty.	Cust. Res...			
<input type="checkbox"/> 1	F00001	5550001	Apple			0	1000		0			
<input type="checkbox"/> 2	P00002	3330002	Bacon			2	998		0			
<input type="checkbox"/> 3	F00004	5550004	Banana	(0)		2	1000		0			
<input type="checkbox"/> 4	SKB004	6660007	Bearings			0	1000		0			
<input type="checkbox"/> 5	B00005	2220005	Beef Back Ribs			0	999		0			
<input type="checkbox"/> 6	B00006	2220006	Beef Cubes		PL1	2	1000		0			
<input type="checkbox"/> 7	V00006	4440006	Bell Pepper		PL1	0	1000		0			
<input type="checkbox"/> 8	SNB002	6660002	Bindings			3	1000		0			
<input type="checkbox"/> 9	SNB003	6660003	Boots			3	1000		0			
<input type="checkbox"/> 10	B00008	2220008	Brisket			3	1000		0			
<input type="checkbox"/> 11	V00002	4440002	Cabbage			0	1000		0			
<input type="checkbox"/> 12	V00007	4440007	Carrots			0	1000		0			
<input type="checkbox"/> 13	C00002	1110002	Chicken Breast			1	999		0			
<input type="checkbox"/> 14	C00009	1110009	Chicken Feet			0	1000		0			
<input type="checkbox"/> 15	C00008	1110008	Chicken Gizzard			4	1000		0			
<input type="checkbox"/> 16	C00007	1110007	Chicken Heart			4	1000		0			
<input type="checkbox"/> 17	C00006	1110006	Chicken Liver			0	999		0			
<input type="checkbox"/> 18	C00004	1110004	Chicken Neck			0	1000		0			
<input type="checkbox"/> 19	C00010	1110010	Chicken Tail			0	1000		0			
<input type="checkbox"/> 20	C00003	1110003	Chicken Wings			0	1000		0			
<input type="checkbox"/> 21	CHOC1		Chocolate			0	119		0			
<input type="checkbox"/> 22	C1		Component 1			1	100		0			
<input type="checkbox"/> 23	V00010	4440010	Cucumber			0	1000		0			

Variants

Assembly Item

Drop Ship Item

Multiple Picking Locations

Process Returned Products













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Go To Page #

Update

Close

- 1) Transfer inventory from one warehouse to another by clicking the  icon
 - 2) Transfer inventory from one picking location to another by clicking the  icon in the “Picking #” column
 - 3) Re-allocate product quantities between units of measure by clicking the advanced units of measure icon ().
 - 4) View serial and lot numbers by clicking the lot and serial number button ().
 - 5) Update inventory quantities manually directly in the “New Qty” column.
 - 6) View a product’s inventory history by clicking the “eye” () icon.
 - 7) Print or export a matrix view for products with 2 sets of variants by clicking the  icon (Order Matrix Module required)
 - 8) Create an EDI export 832 document by clicking the  icon.
 - 9) View a history of all multiple transfers by clicking the  icon.
 - 10) Transfer multiple products between warehouses by clicking the  icon at the bottom of the screen.
 - 11) Transfer multiple products between picking locations by clicking the  icon at the bottom of the screen.
 - 12) Review returned products and indicate whether they should be discarded or sent back to inventory by clicking the return button ().
4. You can review product quantities in a specific picking location, as described above, by clicking on the  icon in the “Picking #” column. This will bring up the following window:

Manage Picking Locations

Update your Inventory per Picking Location

Assigned To MPL: 1000 Outstanding: 0 Stock: 1000 Balance: 0

Products

No	SKU	Product	Reserved Qty	Qty In Stock
<input checked="" type="checkbox"/> 1	B00006	Beef Cubes	2	1000

Picking Location Total: 2 1000

No	Picking Location Name *	Tag	Reserved Qty	Qty In Stock	New Qty	Default
1	PL1		2	1000		<input checked="" type="checkbox"/>
2	PL2		0	0		<input type="checkbox"/>

Picking Location Transfer

Adjustment Reason Assign

From Picking Location ▼ To Picking Location ▼ Qty Reason Transfer

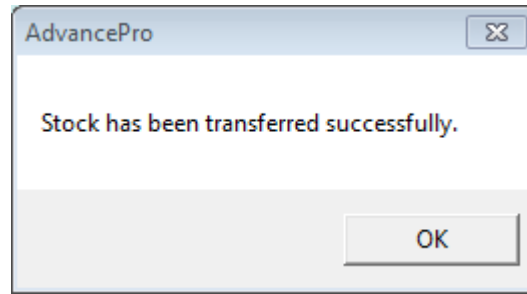
Transfer history

No	UOM	WH. From	WH. To	PL. From	PL. To	Date	Reason	Qty	User
----	-----	----------	--------	----------	--------	------	--------	-----	------

Receiving
 Shipping
 Storage
 Temporary
 Zero Stock

Close

- 1) If the product has advanced units of measure, select the unit in the Products portion of the form to view the breakdown of that unit by location.
- 2) An inventory adjustment can then be performed on each picking location by entering a quantity in the ``New Qty`` field and typing in an ``Adjustment Reason`` explaining why you adjusted the inventory level.
- 3) The total quantity in stock and reserved quantity in each unit of measure are displayed at the top of the screen.
- 4) Inventory can be transferred between picking locations within a single warehouse using the ``Picking Location Transfer`` field. In this field, you select the picking location you are moving inventory from, the location you are moving inventory to, the quantity and the reason for the transfer. If you use lot and serial numbers, you can select which ones to transfer between locations by selecting the button.
- 5) When inventory has been successfully transferred, you will see this screen popup:



5. You can view inventory history on a selected product by following these steps:
 - 1) Follow steps 1) – 3) as described above
 - 2) View a product's inventory history by clicking the "eye" (👁️) icon. This brings up the "Adjustment History" screen
 - 3) The first screen you will see is the "Manual Adjustment" screen. This window lists all the manual adjustment history of the chosen product, along with date of the adjustment, the reason for the adjustment, the new quantity of the product, and the person responsible for performing the adjustment

Adjustment History
- □ ×

Product info
 SKU # B00006 Picking # PL1
 Product Name Beef Cubes

Stock History
☒ Manual Adjustment
 ☐ Detailed
 ☐ Chronological

Adjustment history

No	Date	Reason	Qty.	Admin
1	6/19/2013	Initial Stock - Excel Import.	1000	Admin Admin

Close

- 4) The next screen you can select is “Detailed” stock history. In this screen, you can view a detailed history of the inventory adjustments related to the product sorted by adjustment type. This screen includes both manual adjustment and adjustments that are a result of operations. The columns are the same as the above screen, but there is an additional column here which provides a clickable link to the document where an operational procedure resulted in a change in inventory.

Adjustment History

Product info

SKU # F00001

Product Name Apple

Picking #

Stock History

☐ Manual Adjustment
 ☒ Detailed
 ☐ Chronological

Adjustment history

No	Date	Reason	Qty.	Admin	Ref #
1	2/23/2015	Shipped CPO Qty	1	Admin Admin	3
2		Total Shipped :	1		
3	2/20/2015	aw- (-999)	1	Admin Admin	
4	3/11/2015	a- (1000)	1000	Admin Admin	
5		Total Manual Adjustment	2		

Print/Export

Close

- 5) The “Chronological” stock history is identical to the “Detailed” stock history, but is sorted in order of when the adjustment took place

Adjustment History
- □ ×

Product info
 SKU # F00001 Picking #
 Product Name Apple

Stock History ☐ Manual Adjustment ☐ Detailed ☒ Chronological

Adjustment history

No	Date	Reason	Qty.	Admin	Ref #
1	2/20/2015	aw- (-999)	1	Admin Admin	
2	2/23/2015	Shipped CPO Qty	1	Admin Admin	3
3	3/11/2015	a- (1000)	1000	Admin Admin	
4		Total Manual Adjustment:	2		
5		Total Shipped :	1		

Print/Export Close

For further help, please visit the [AdvancePro Knowledge Base](#).