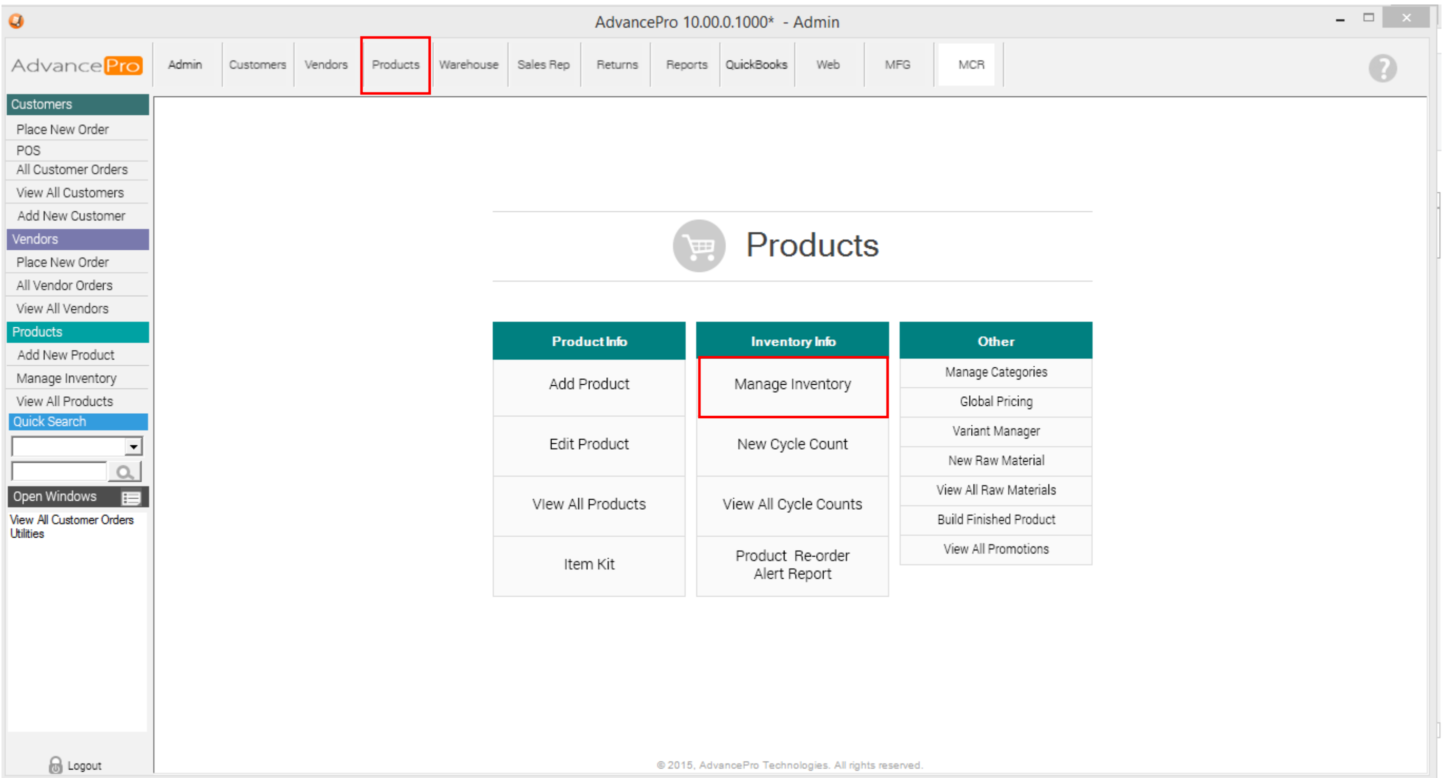
Inventory Control Guide

Managing Inventory

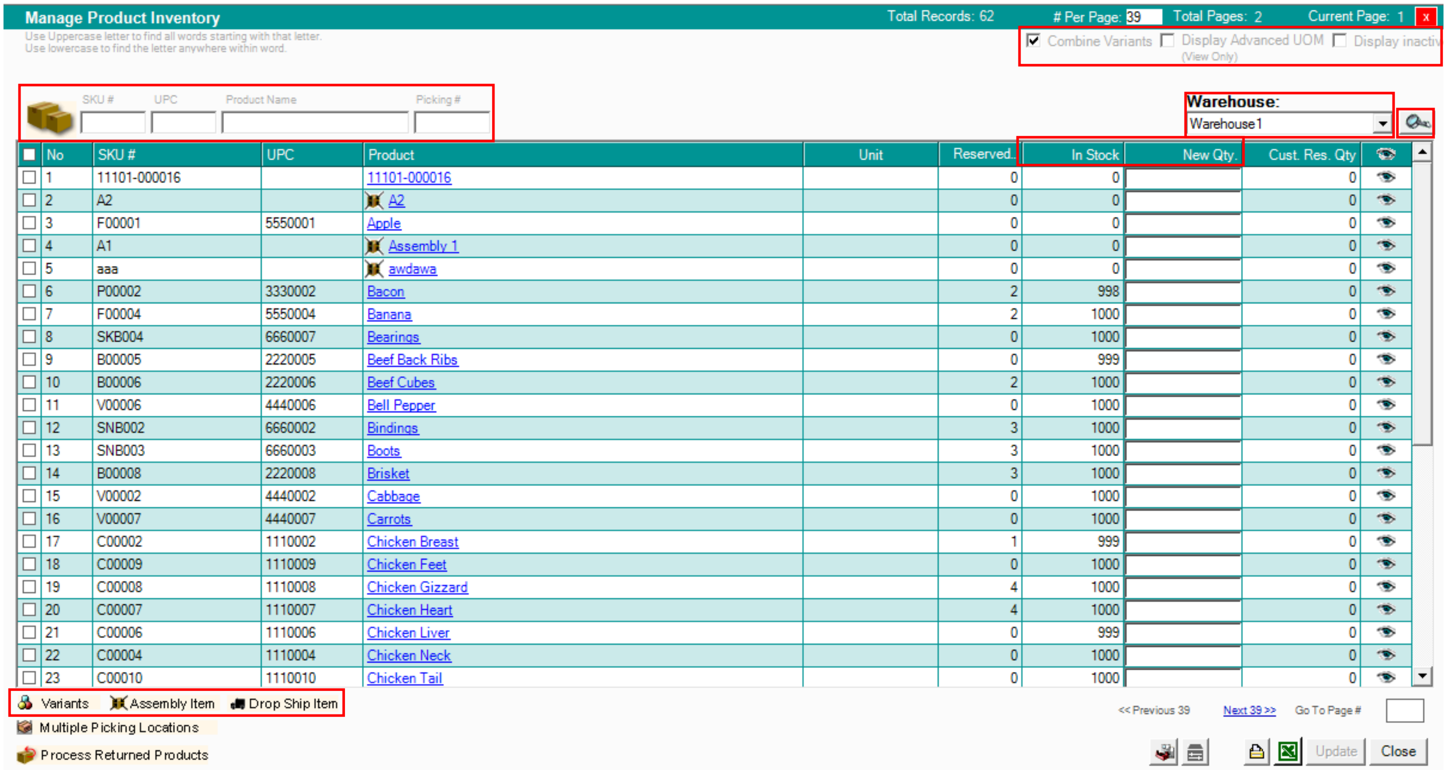
AdvancePro is designed to provide you with total control and visibility into your inventory. In this guide, you will learn how to review inventory, perform inventory adjustments and how to transfer inventory between locations.

Reviewing Product Inventory

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

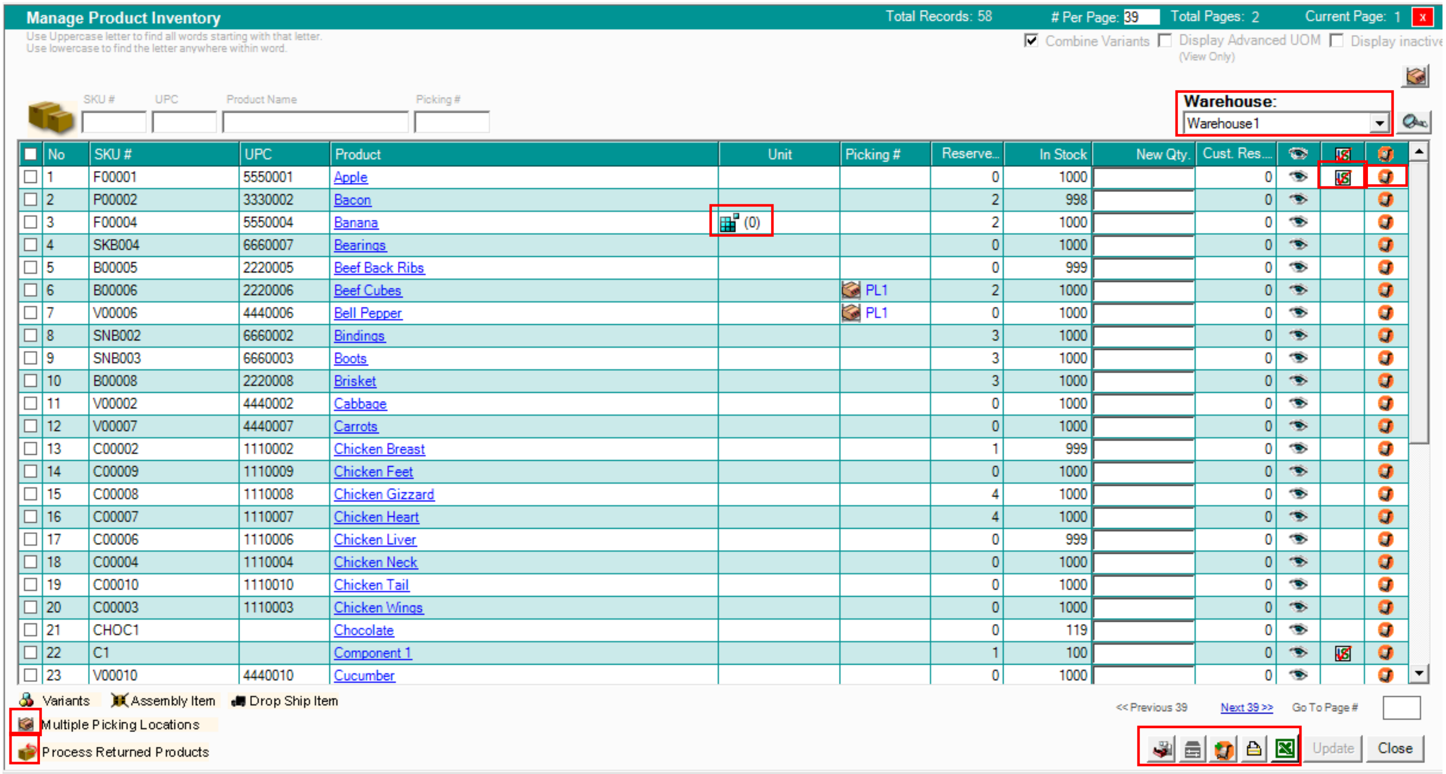


2. The “Manage Product Inventory” screen will open, showing combined inventory across all warehouses.



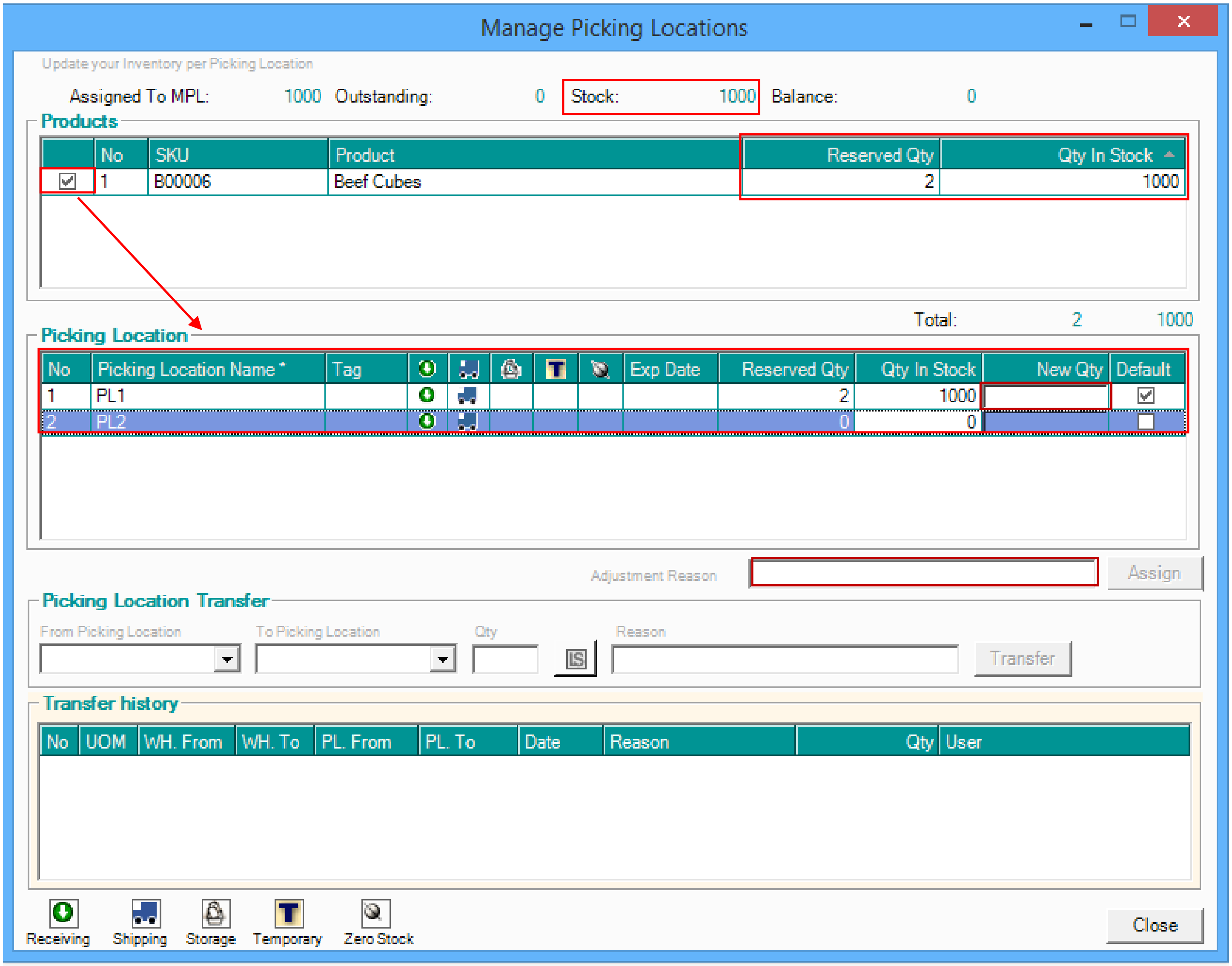
1) While in this screen, you can:
    i. Subset your list by clicking on “Variants”, “Assembly Item” and “Drop Ship Item” at the bottom left of the screen.
    ii. Use the search fields at the top of the screen to find a specific product or products.
    iii. Use the checkboxes at the top right of the 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.

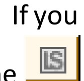
3. In order to enable further inventory management functionality within a specific warehouse, you must select the warehouse in which you want to manage inventory.

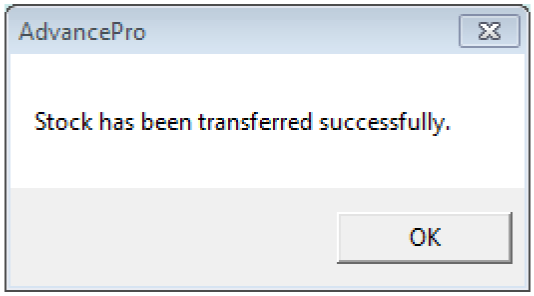


1) Transfer inventory from one warehouse to another by clicking the icon
2) Transfer inventory from one picking location to another by clicking the icon in the "Picking #" column
3) Re-allocate product quantities between units of measure by clicking the advanced units of measure icon ( ).
4) View serial 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 ( ).

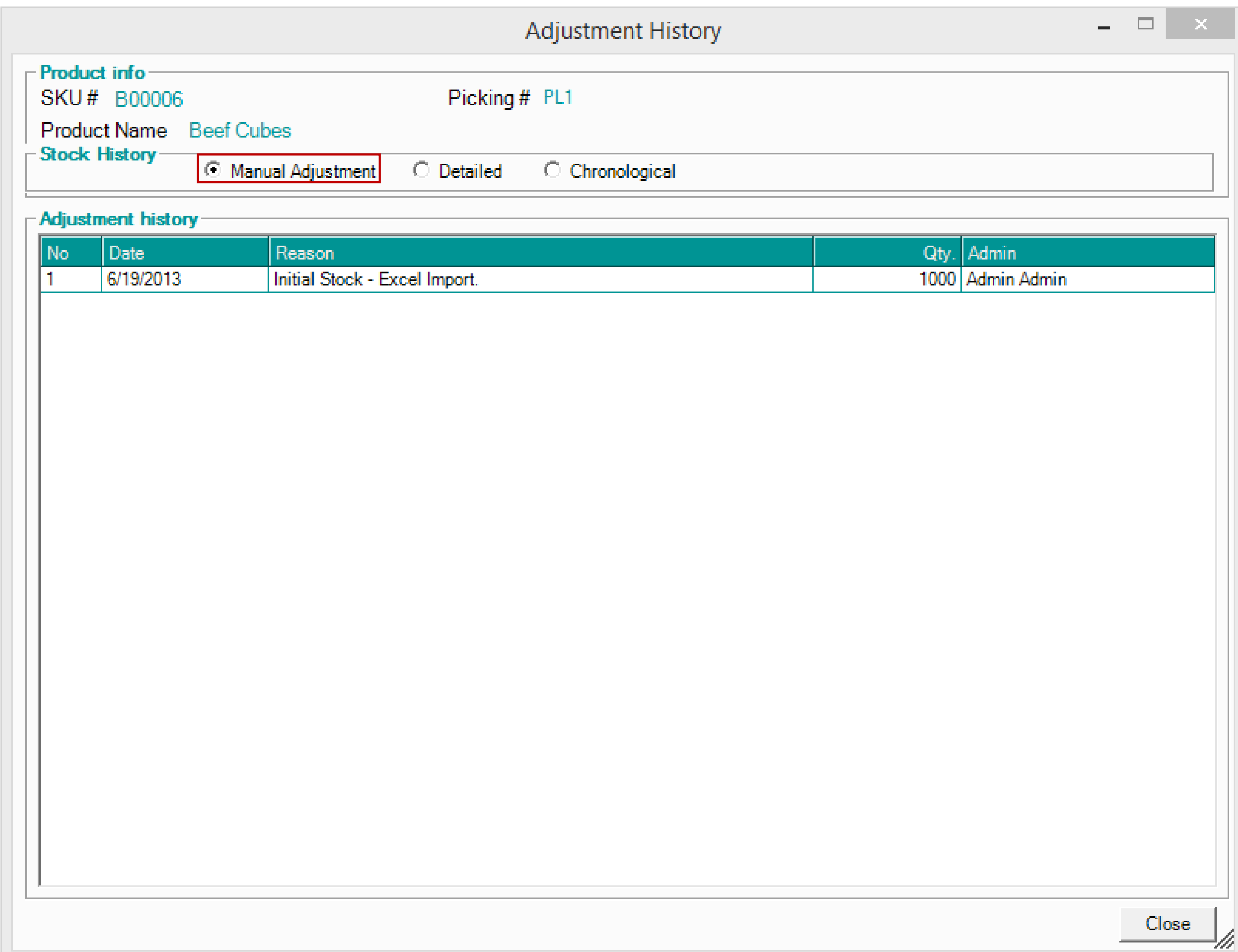
4. You can review product quantities in a specific picking location, as described above, by clicking on the icon in the "Picking #" column. This will bring up the following window:



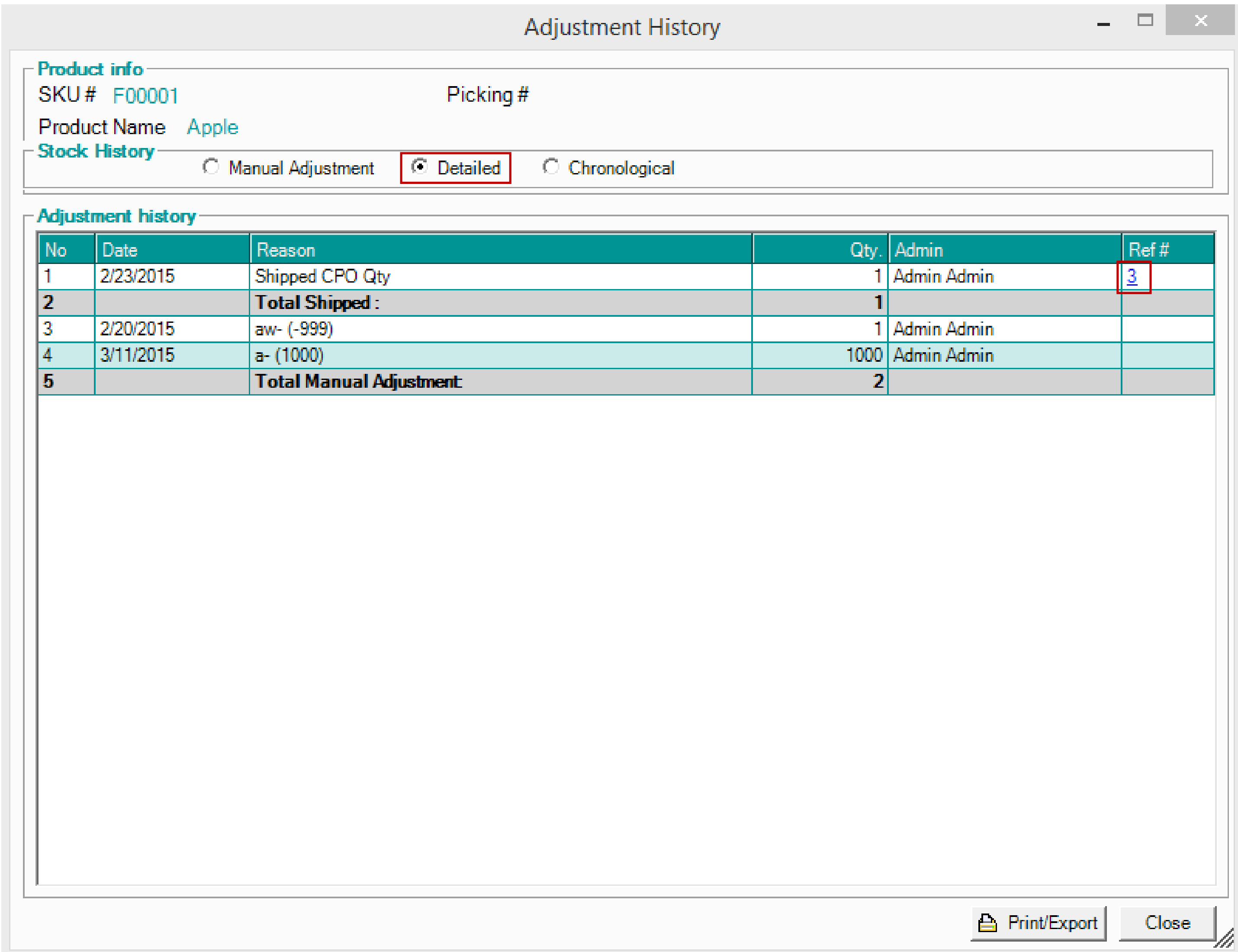
1) If the product has advanced units of measure, select the unit in the Products portion of the form to view the breakdown of that unit by location.
2) An inventory adjustment can then be performed on each picking location by entering a quantity in the ``New Qty`` field and typing in an ``Adjustment 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:



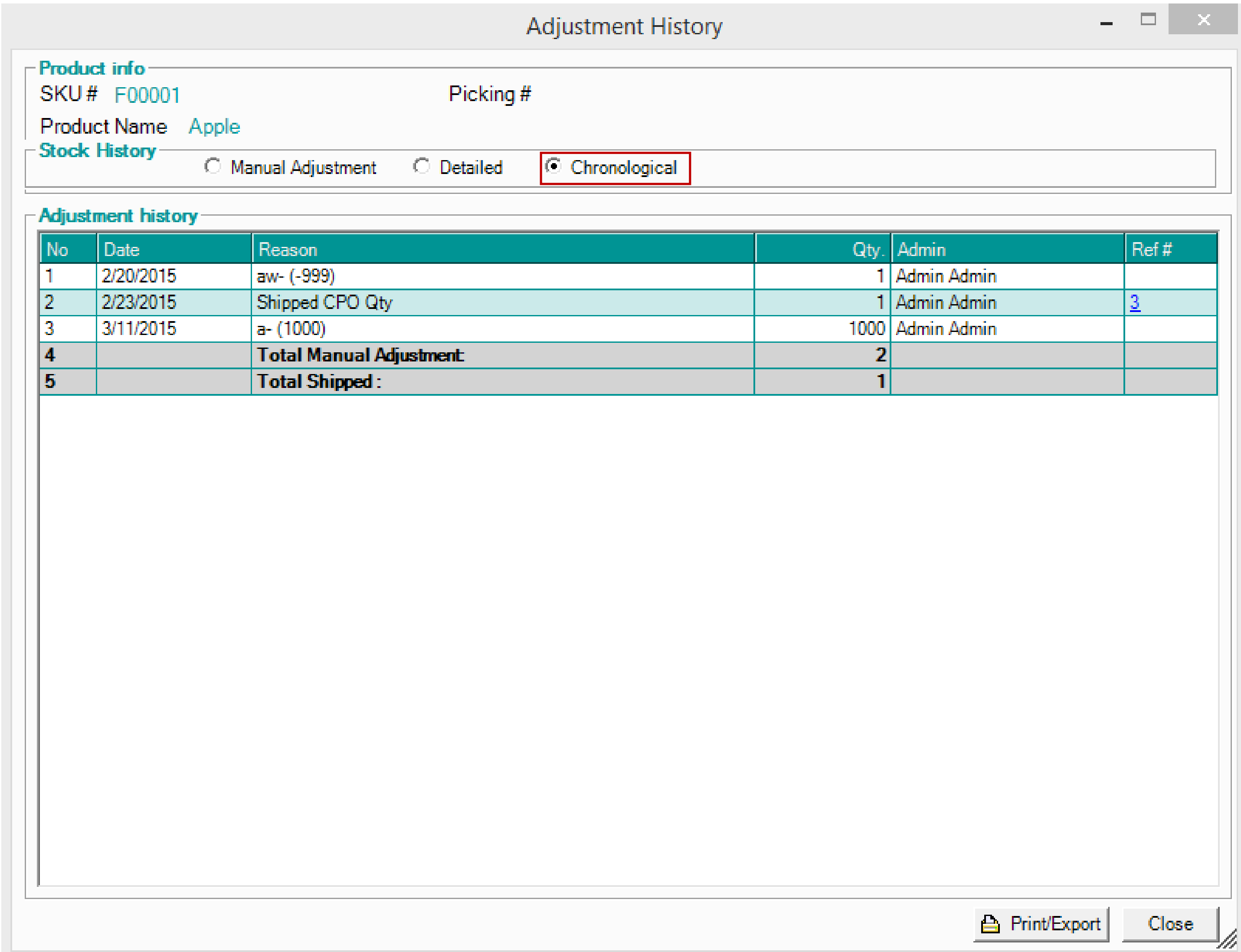
5. You can view inventory history on a selected product by following these steps:
    1) Follow steps 1) – 3) as described above
    2) View a product's inventory history by clicking the "eye" ( ) icon. This brings up the "Adjustment History" screen
    3) The first screen you will see is the "Manual 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



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.



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



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