

Inventory Tracking

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Overview

When you want to make sure your trucks all have at least 100 widgets, serviceminder can help with Inventory Tracking. serviceminder does *not* provide detailed inventory tracking (as with your accounting system - FIFO, LIFO.) The point of serviceminder's Inventory functionality is to allow an organization to set "on hand" and "reorder time" quantities for parts, and track the those quantities at a warehouse and/or vehicle level.

Video Tutorial

Watch [this video](#) for a walk through of inventory management.

Settings and Navigation

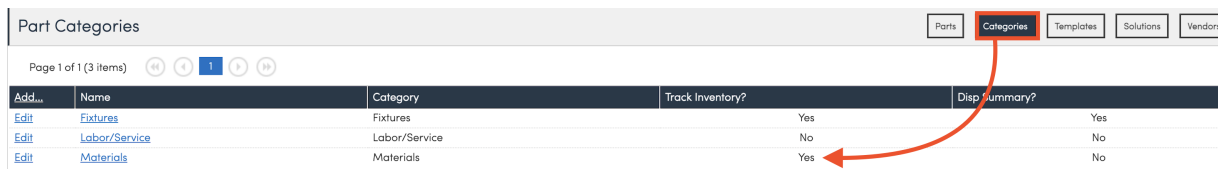
Start in **Control Panel > General** to enable Inventory Tracking in your organization. Here, you can choose to track inventory at the Warehouse or Service Agent (or truck) level.

Inventory Tracking

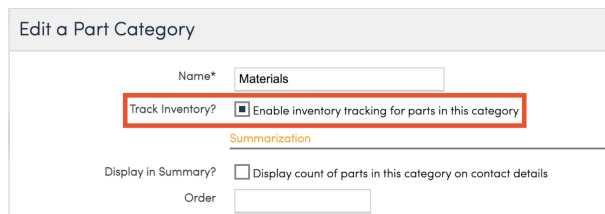
- Warehouse Inventory Tracking Enable tracking inventory at the warehouse level
- Service Agent Inventory Tracking Enable tracking inventory per service agent

Parts

Next, navigate to **Control Panel > Parts/Add-Ons**. If you have not already created the Parts you want to track, this is where you will do so. You will enable inventory tracking with **Part Categories**, so click over to that tab to create or edit a category.



Part Categories				
Page 1 of 1 (3 items)				
Add...	Name	Category	Track Inventory?	Display Summary?
Edit	Fixtures	Fixtures	Yes	Yes
Edit	Labor/Service	Labor/Service	No	No
Edit	Materials	Materials	Yes	No



Edit a Part Category

Name*

Track Inventory? Enable inventory tracking for parts in this category

Summarization

Display in Summary? Display count of parts in this category on contact details

Order

Then, you can edit your parts and assign them to a category which has Inventory Tracking enabled.

Edit an Existing Part or Add-On

Name*

Active

Description*

Color

Category --Select one--
 Fixtures
 Labor/Service
 Materials

Self Service

Internal

Taxable

On the "inventory" part/parts, the user also has the option to enter inventory information. Vendor information may be added to help with streamlined reordering. Quantity on Hand, Reorder Point, and Target Quantity are also available settings. See the Reorder Point Notifications section(below) for more information about notifications when quantity on hand reaches that level.

Vendor

Vendor Part No

Quantity on Hand

Reorder Point

Get notified when quantity on hand falls below this quantity

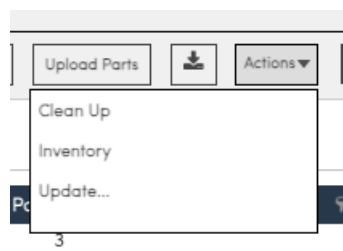
Target Quantity

The target quantity on hand for this item

To be tracked, these parts must be line items on appointments or invoices. These may be "no charge" items, but they must be included to be "consumed."

Bulk-Adjusting Quantities


When on the parts page, you can click the **Actions** button then choose **Inventory**.



That will take you to the Adjust Quantities page, which looks the same whether you're using per-Service Agent tracking or tracking at the organization/warehouse level.

There are arrows (min/max) for all of your Part Categories. Click on any category dropdown then enter in the quantity on hand in the left input and/or the quantity you want to change by in the right hand input for each part. Click Save to update.

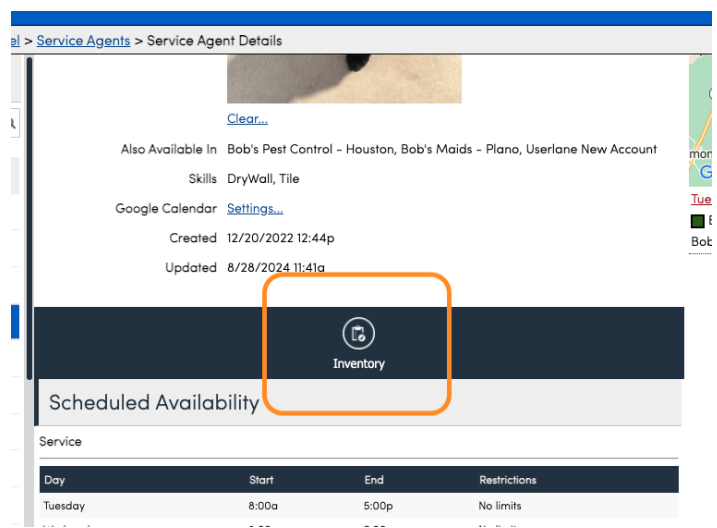
Adjust Total Quantities						
Adjust the total quantities by updating the quantity in the left column or putting in a quantity adjustment (+ or -) in the right column. Hit Save when you're done.						
Part	Description	Vendor	Vendor Part	Target	Reorder Point	On Hand
> Other						

 On the Mobile App, Service Agents can access the Adjust Counts Function from the Contact details page. From an appointment, tap on the Contact name, then hit the Action menu and select Adjust Part Counts.

Service Agent Inventory

If your organization wants to track inventory based on the Service Agent (whether that's a person or a vehicle), the process is similar. If you've enabled "Enable Tracking Inventory per Service Agent," then the inventory grid will appear on the service agent's page.

Click on the Agent's name (not User name) and you'll see Inventory just above their schedule:



Click on the "Inventory" icon to reach the Adjust Quantities Grid:

Adjust Inventory for Karen Agent									
Part	Description	Target	On Hand	Difference	Adjust Qty	From/To	Warehouse	Value	
▼ Fixtures (1)									\$90.00
BB3	well light	<input type="text"/>	<input type="text"/>		<input type="text"/>	←		148	
BB7	path light	<input type="text"/>	<input type="text"/>		<input type="text"/>	←		8	
Cabinet Handles	4" Brushed Stainless	<input type="text"/>	<input type="text"/>		<input type="text"/>	←		573	
Cabinet Hinges	Hidden, soft-close	<input type="text"/>	<input type="text"/>		<input type="text"/>	←		26	
GG Filters	Filter	<input type="text" value="10"/>	<input type="text" value="6"/>	4	<input type="text"/>	←		297	
Part Assembly Test	This is a part assembly for summarizing	<input type="text"/>	<input type="text"/>		<input type="text"/>	←			
Treadmill Test	Customer owned machine	<input type="text"/>	<input type="text"/>		<input type="text"/>	←			
TW-8-2	8' x 2' wall section	<input type="text"/>	<input type="text"/>		<input type="text"/>	←		23	
▶ Transformers									\$0.00
▶ Other									\$0.00

Here, a user can manually adjust quantities for that agent/vehicle. Any set target quantities will be displayed as well. The drop down at the top right is how one may quickly "move" inventory quantities from the warehouse or another agent to the Agent in question.

Reorder Point Notifications.

When a service agent finishes an appointment and an invoice is generated, any parts on that invoice will be checked for inventory tracking. If they have a reorder point set, then the quantity specified on the invoice will be decremented from either the service agent's quantity or the organization's quantity. If the new quantity is below the part's reorder point, an email notification will launch (see notification settings.)

That's all there is to it! Keep in mind that this functionality is basic.... helping you track quantities for things that you want to ensure you keep a certain quantity on hand. We don't track *when* they are consumed, so we don't provide any reporting that shows how many of a particular item were on hand at any point in the past. We track the current quantity.

Inventory Reporting

There are two reports related to Inventory:

- Part Usage
- Service Agent Inventory

If you are tracking at the warehouse level, the Service Agent Inventory is fairly irrelevant. The Part Usage report can be filtered by part, service or service agent. This report allows for more flexibility.

Part Usage							
Part	Part	Description	Qty Used	Lines	Unit Cost	Extended Cost	Revenue
None							
	Bear Trap	For larger lupins in the field.	2	2	\$0.00	\$0.00	\$0.00
	Garlic Appetizer	For vampires	2	2	\$0.00	\$0.00	\$100.00
	Honeybadger Trap	for honeybadgers only - not monster or ghost approved	7	7	\$0.00	\$0.00	\$595.00
	Sheet with two holes in it	required for sleuthing	14	14	\$0.00	\$0.00	\$318.75
						\$0.00	\$1,013.75
Totals						\$0.00	\$1,013.75

Troubleshooting

I don't see any quantities in inventory.

The owner will need to add "On Hand" quantities to all of the parts they want to track. So they need a beginning number for the system to go off of. They can also add this part-by-part, but it is easier to use this grid to do many parts at once.