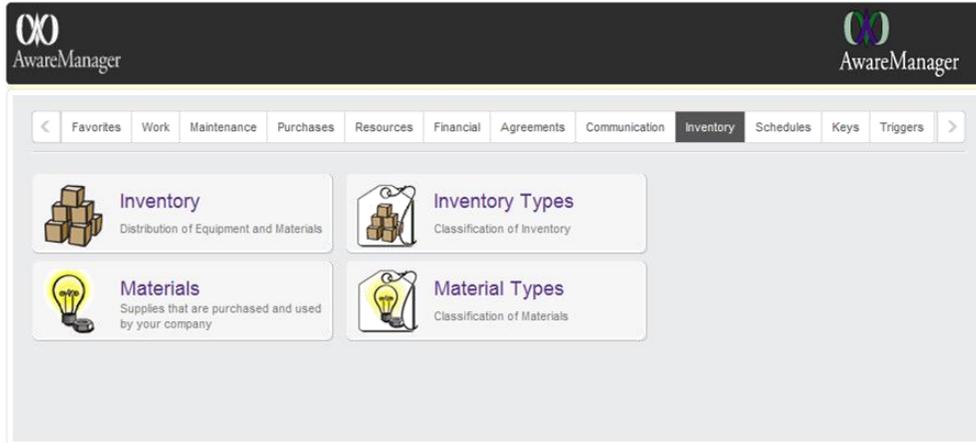
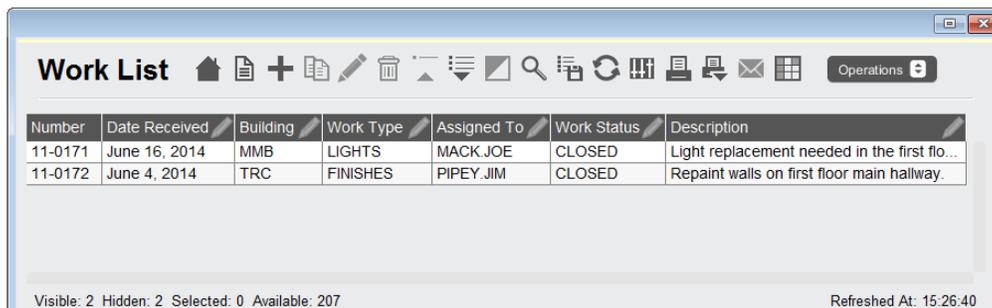


The Inventory module tracks the distribution of Equipment and Materials for your organization, including the location, quantity, and information on reordering. The Create Inventory Operation uses the Work and Purchase records you've already entered to update your Inventory.

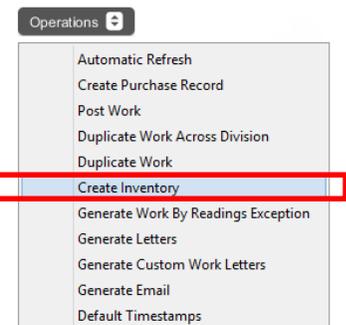
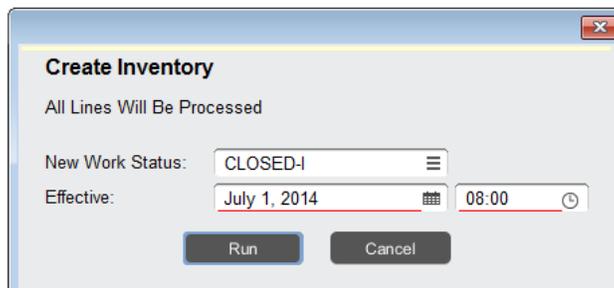


Create Inventory from Work

The Materials tab in a Work record is used to show which and how much of your Materials were used in the course of completing the work. Material records include a field called **Quantity on Hand** that tracks the amount of a given item available on site. Creating Inventory records based on Work will subtract the amount of a Material used from the Quantity on Hand for that item.



1. Use Work Search to pull up the Work records with Material lines that need to be added to Inventory.
2. Go to **Operations** and choose **Create Inventory**.
3. Choose a new Work Status to indicate your Inventory for these work records has been created. Choose an Effective date/time.

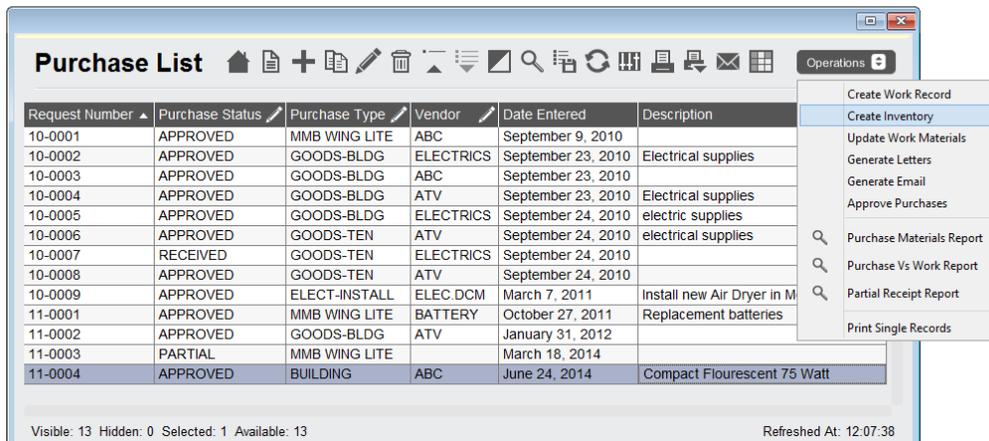


- Click **Run**. You should see a message confirming that the operation has completed successfully.

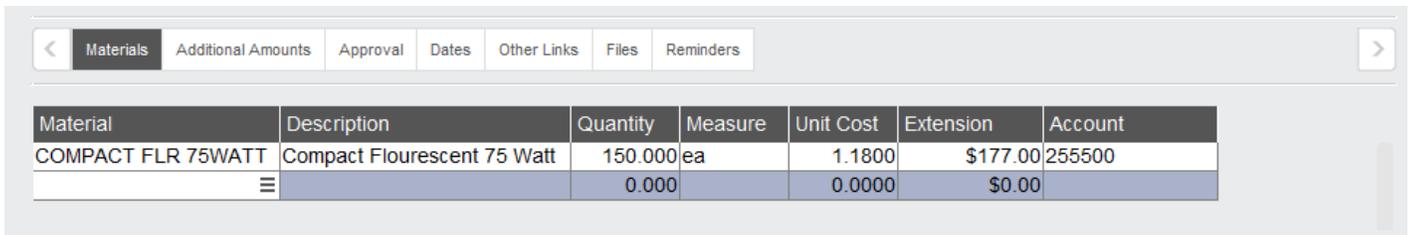
Your records will now appear in the Inventory List.

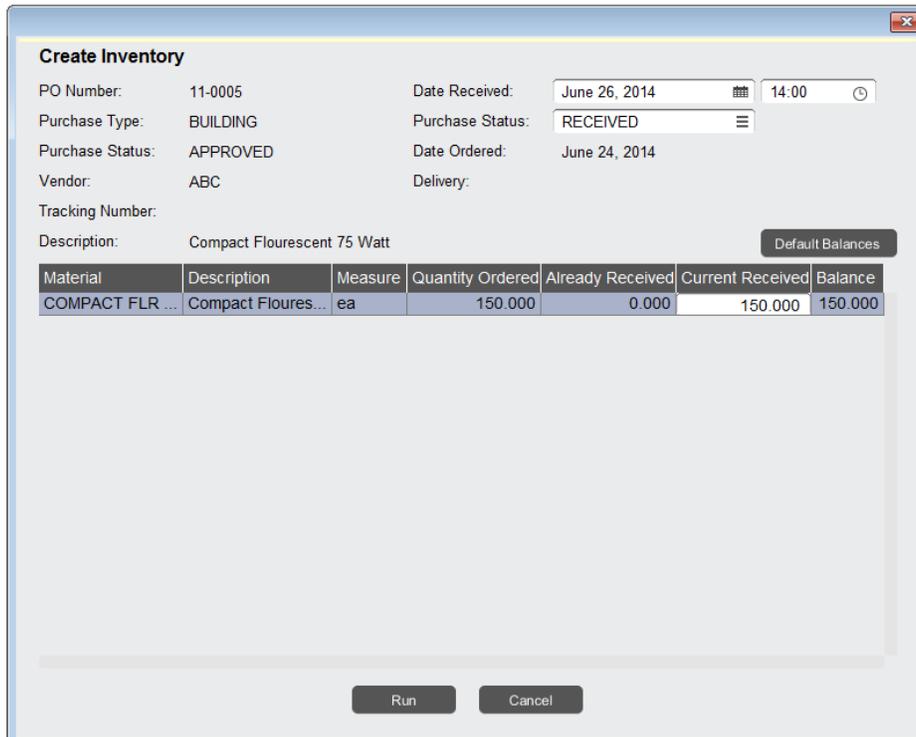
Create Inventory from Purchases

As items are used to complete Work, it is necessary to replace them periodically. In a Material record, the **Reorder Level** tells you at what point more of that item needs to be purchased. The **Reorder Quantity** in a Material record tells you how many of that item you should order each time you replenish the supply. Inventory records should be updated after the purchased items have been received.



- Choose the Purchase record that you want to use to update your Inventory. Make sure all of the correct information is filled in on the Materials tab, including the **Material** record, the **Quantity**, and **Unit Cost**. Save your changes.





Create Inventory

PO Number: 11-0005 Date Received: June 26, 2014 14:00

Purchase Type: BUILDING Purchase Status: RECEIVED

Purchase Status: APPROVED Date Ordered: June 24, 2014

Vendor: ABC Delivery:

Tracking Number:

Description: Compact Fluorescent 75 Watt Default Balances

Material	Description	Measure	Quantity Ordered	Already Received	Current Received	Balance
COMPACT FLR ...	Compact Floures...	ea	150.000	0.000	150.000	150.000

Run Cancel

2. Fill in the **Date** and **Time Received** information, and update the **Purchase Status**. In the Materials detail table at the bottom of the form, be sure to update the “Current Received” column to reflect the number of the total items ordered that have been received. This may be only a partial quantity, or may be the whole amount ordered.
3. Click **Run**. You should see a message confirming that the operation has completed successfully.

Your records will now appear in the Inventory List.