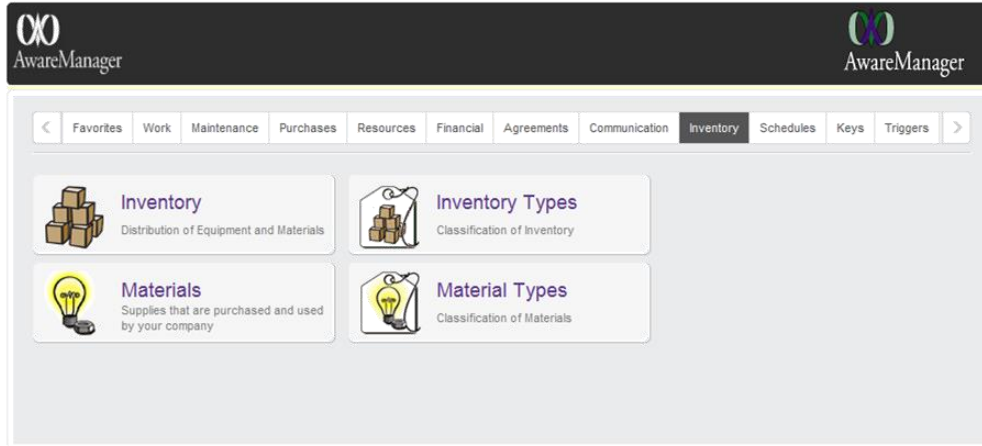


The Inventory module tracks the distribution of Equipment and Materials for your organization, including the location, quantity, and information on reordering. The Create Inventory Operation uses the Work and Purchase records you've already entered to update your Inventory.



### Create Inventory from 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.

The screenshot shows the 'Purchase List' window in the software. The window title is 'Purchase List'. It features a toolbar with various icons for navigation and actions. Below the toolbar is a table with the following data:

| Request Number | Purchase Status | Purchase Type | Vendor    | Date Entered       | Description                 |
|----------------|-----------------|---------------|-----------|--------------------|-----------------------------|
| 10-0001        | APPROVED        | MMB WING LITE | ABC       | September 9, 2010  |                             |
| 10-0002        | APPROVED        | GOODS-BLDG    | ELECTRICS | September 23, 2010 | Electrical supplies         |
| 10-0003        | APPROVED        | GOODS-BLDG    | ABC       | September 23, 2010 |                             |
| 10-0004        | APPROVED        | GOODS-BLDG    | ATV       | September 23, 2010 | Electrical supplies         |
| 10-0005        | APPROVED        | GOODS-BLDG    | ELECTRICS | September 24, 2010 | electric supplies           |
| 10-0006        | APPROVED        | GOODS-TEN     | ATV       | September 24, 2010 | electrical supplies         |
| 10-0007        | RECEIVED        | GOODS-TEN     | ELECTRICS | September 24, 2010 |                             |
| 10-0008        | APPROVED        | GOODS-TEN     | ATV       | September 24, 2010 |                             |
| 10-0009        | APPROVED        | ELECT-INSTALL | ELEC.DCM  | March 7, 2011      | Install new Air Dryer in M  |
| 11-0001        | APPROVED        | MMB WING LITE | BATTERY   | October 27, 2011   | Replacement batteries       |
| 11-0002        | APPROVED        | GOODS-BLDG    | ATV       | January 31, 2012   |                             |
| 11-0003        | PARTIAL         | MMB WING LITE |           | March 18, 2014     |                             |
| 11-0004        | APPROVED        | BUILDING      | ABC       | June 24, 2014      | Compact Flourescent 75 Watt |

At the bottom of the window, it says 'Visible: 13 Hidden: 0 Selected: 1 Available: 13' and 'Refreshed At: 12:07:38'. A context menu is open over the table, showing the following options:

- Create Work Record
- Create Inventory**
- Update Work Materials
- Generate Letters
- Generate Email
- Approve Purchases
- Purchase Materials Report
- Purchase Vs Work Report
- Partial Receipt Report
- Print Single Records

1. 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.

| Material           | Description                 | Quantity | Measure | Unit Cost | Extension | Account |
|--------------------|-----------------------------|----------|---------|-----------|-----------|---------|
| COMPACT FLR 75WATT | Compact Flourescent 75 Watt | 150.000  | ea      | 1.1800    | \$177.00  | 255500  |
|                    |                             | 0.000    |         | 0.0000    | \$0.00    |         |

**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 Flourescent 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 |

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.