

Inventory Overview

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Inventory Overview

Inventory Dashboard overview

The Inventory Dashboard is the inventory hub for reviewing stock signals and opening an

operational destination, which is the page where you handle the signal. Use it when you need

to move from an inventory signal to replenishment, receipts, backorders, purchasing, or an

operations exception. A perspective is a dashboard view for a particular operational question.

The dashboard offers four perspectives: **Warehouse manager**, **Buyer / planner**, **Ops director**, and **CFO / finance**.

The classic **Inventory Overview** page is a separate operation-type page. It is not the dashboard described here.

If you need to...	Go to
Find stock alerts, open operations, and current inventory measures	Understand the perspectives and lists
Open the inventory hub	Open the Inventory Dashboard
Move from a signal to replenishment, receipts, backorders, purchasing, or an exception	Choose an operational destination
Work with transfers or returns	Inventory transfers and returns
Configure replenishment and warehouse operations	Warehouses and replenishment
Maintain products, packages, or delivery data	Products, packages, and delivery
Review inventory reports	Inventory reporting
Resolve an unavailable perspective or empty list	Handle unavailable perspectives and data-dependent lists

Before choosing a destination, review [Before you start](#).

Before you start

Prerequisites

- You have access to the Inventory menu.
- Your account has at least one dashboard perspective available. The available perspectives determine which view you can select.
- You have the inventory signal or operational issue you want to review in front of you.

The dashboard is read-only for metrics and uses navigation controls to open operational destinations. It has no data-entry fields, required markers, or field-level validation.

When you are ready, [open the Inventory Dashboard](#).

Open the Inventory Dashboard

Use this procedure to start from the Inventory menu. The menu contains a separate **Inventory Overview** entry and an **Inventory Dashboard** entry; select the dashboard entry for the hub described on this page.

Steps

1. Open the Inventory menu.
2. Choose the destination that matches your need.

If you need to...	Select
Review stock signals and continue to an operational destination	Inventory Dashboard
Open the classic operation-type cards	Inventory Overview

3. Check that the selected page opens.

Result: The Inventory Dashboard opens with the perspectives and operational destinations available to your account.

Understand the perspectives and lists

Choose the perspective that matches the decision you need to make.

Perspective	Use it to review
Warehouse manager	Stock alerts, open operations, stock value, activity, and items below minimum
Buyer / planner	Stockout risk, days of cover, purchase orders, reorder work, and vendor performance
Ops director	Throughput, delivery timing, work in progress, and exceptions
CFO / finance	Cash held in inventory, ageing, cost of goods shipped, and warehouse valuation

While the dashboard is loading, it displays `...`. When no perspective is available, it displays `No inventory views are enabled for your role. Contact an administrator.`

When more than one perspective is available, the perspective list and chevron are available.

The warehouse-manager perspective can include stock alerts, a forecast, items below minimum,

inventory value, live activity, and open operations. The buyer/planner perspective can include

a reorder queue, vendor performance, and open purchase-order timing. The operations-director

perspective can include throughput, work in progress, and live exception triage. The finance

perspective can include inventory ageing, cost of goods shipped, warehouse valuation, and

capital tied up in stock.

When no matching data is available, the dashboard can display these messages:

Area	Message
Low-stock list	<code>No items below the minimum.</code>
Activity or chart	<code>No recent activity.</code>
Vendor performance	<code>No vendor activity in the last 90 days.</code>
Purchase-order timing	<code>No open purchase orders.</code>
Work in progress	<code>No work in progress.</code>

Area	Message
Exception triage	No open exceptions.
Capital tied up	No aged stock – all inventory is fresh.

The dashboard contains no grid. Work from the headings and readouts visible in the selected perspective.

Use [Choose an operational destination](#) when you have identified the signal you need to handle.

Choose an operational destination

Use the dashboard when you need to review a signal and then continue in the destination that handles it. The available links depend on the perspective and the data shown in its lists.

Steps

1. Open the perspective switcher.
2. Select one of the available perspectives: **Warehouse manager**, **Buyer / planner**, **Ops director**, or **CFO / finance**.
3. Choose the destination that matches the signal or list you are reviewing.

If you need to...	Select	You arrive at
Review replenishment work	Review → or Auto-PO all N →	Replenishment
Move to the buyer/planner view from a stock alert	Reorder →	Buyer/planner perspective
Review receipts awaiting validation	Review → in the open-operations area	Receipts awaiting validation
Review backorders	Resolve →	Backorders
Create a transfer	New transfer	A new stock transfer form
Create a purchase order	Draft PO	A new purchase-order form
Open an operations exception	Open →	The selected exception

4. If a list shows **+ N more below minimum**, select it to expand the list.
5. If the expanded list shows **Show less**, select it to collapse the list.

Result: The selected operational destination opens, or the selected perspective and list

remain visible for the next decision. If the available perspective or list differs from what you expect, continue with [Handle unavailable perspectives and data-dependent lists](#).

Handle unavailable perspectives and data-dependent lists

Use this procedure when the dashboard shows fewer perspectives or list items than you expect.

Steps

1. Open the perspective switcher.
2. Check which perspective names are available.
3. Choose the response that matches what you see.

If you see...	Do this
No inventory views are enabled for your role. Contact an administrator.	Contact an administrator.
No items below the minimum.	Continue with another dashboard area.
No recent activity.	Continue with another dashboard area.
No vendor activity in the last 90 days.	Continue with another dashboard area.
No open purchase orders.	Continue with another dashboard area.
No work in progress.	Continue with another dashboard area.
No open exceptions.	Continue with another dashboard area.
No aged stock – all inventory is fresh.	Continue with another dashboard area.
This view is under construction – coming in the next phase.	Choose another available perspective.

4. If an anomaly, low-stock, or reorder list shows more items than its initial display, select
+ N more below minimum.
5. Select **Show less** when you want to return to the shorter list.

Result: You have either selected an available perspective, identified the empty dashboard area, or expanded the list that contains more items. If the dashboard still does not open, continue with [When the dashboard does not open](#).

When the dashboard does not open

The screen may open somewhere other than the dashboard. Use the following table to identify what happened and what to do next.

What you see	What it means	What to do
A different screen opens instead of the dashboard	A different inventory screen opened	Return to the Inventory menu and select Inventory Dashboard
The Inventory menu does not open	You cannot choose the dashboard entry	Retry the Inventory menu, then select Inventory Dashboard
The dashboard controls do not appear after you choose Inventory Dashboard	The dashboard did not open	Stop there and do not treat the other screen as the Inventory Dashboard
No perspective is available	Your account has no dashboard perspective to select	Contact an administrator

The dashboard view remains unavailable when the Inventory menu cannot be opened or another screen appears.

What to do next

After you choose a destination, continue on the page that owns that operational work:

- Use [Inventory transfers and returns](#) for transfers and returns.

- Use [Warehouses and replenishment](#) for replenishment and warehouse operations.
- Use [Products, packages, and delivery](#) for product, package, and delivery data.
- Use [Inventory reporting](#) for inventory reports.