Inventory

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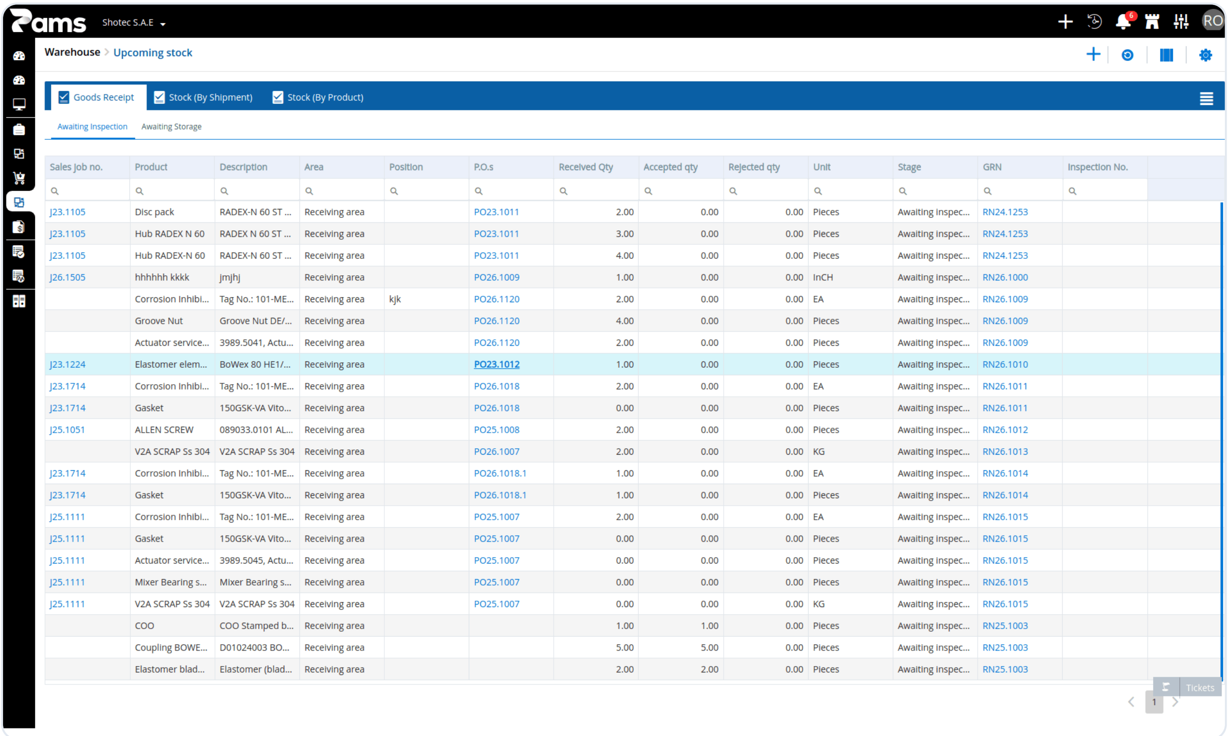
Applications › Inventory



Warehouse — Inventory

Overview

Inventory provides a warehouse-focused view of products and materials associated with sales jobs, including product descriptions, areas, positions, purchase orders, received quantities, and accumulated quantities. Sales representatives, project managers, purchasing officers, warehouse managers, and finance users can use this view to review stock information relevant to a sales job and its procurement activity. Use it when you need to locate a product line, review quantities, or switch between shipment-based and product-based stock views.

Settings

Before working with inventory records, set up a layout that displays the information your role needs.

1. Open **Inventory**, then select **Warehouse** from the available workspace controls.
2. To create a personal or task-specific display, select **Add Layout**.
3. Enter a value in **Layout name** to identify the new layout.
4. Use **Columns Chooser** to select the columns required for your review. For example, you may require sales job number, product description, area, position, purchase order, received quantity, and accumulated quantity.
5. Select **Save** to retain the new layout.

> **Tip:** Use a descriptive layout name, such as “Receiving Review” or “Sales Job Stock,” so that you can quickly select the appropriate column arrangement later.

To change an existing layout, select it, adjust the displayed columns, and choose **Update Current**. To remove an obsolete layout, use **Delete Current** or **Delete**.

> **Warning:** Deleting a layout removes the selected layout definition. Confirm that you no longer need its column arrangement before using a delete action.

Workflow

1. **Open the inventory workspace and choose the review basis.**
   In **Inventory**, open **Warehouse**. Review the available stock perspectives and choose either **Stock (By Shipment)** when you need to review stock by shipment, or **Stock (By Product)** when you need to review stock by product.

   The selected view determines how you review the available stock information. Use the shipment-based view when shipment context is relevant; use the product-based view when you need to locate or compare product lines.

2. **Decide whether to review all visible records or find a specific record.**
   To locate a particular sales job, product, area, position, or purchase order, enter a relevant value in **Search**. Review the resulting rows, which can include sales job number, product description, area, position, purchase order information, received quantity, and accumulated quantity.

If you do not need to restrict the list, leave the search empty and review the visible inventory lines.

3. **Decide whether the current column layout supports the review.**
   If the displayed columns provide the required information, continue reviewing the records. If essential information is not visible, select **Columns Chooser** and adjust the columns in the current layout.

   - Select **Update Current** when the revised columns should replace the current layout.
   - Select **Add Layout** when the revised columns should be saved as a separate layout.
   - Select **Cancel** if you decide not to retain the change.

4. **Decide whether to use a standard or saved layout.**
   Select **Standard Layout** when you need to return to the standard display. Select the layout control, **Layout icon (icn icn-layoout)**, when you need to work with saved layout choices.

   Use a saved layout when the same set of columns is repeatedly needed for a role or activity, such as receiving review or sales-job stock review.

5. **Complete the review by exporting or sharing the visible result.**
   When the current view contains the records and columns required for follow-up, select **Export** to produce an export of the displayed information.

   Use the exported result for review, reconciliation, or communication with the relevant sales job, purchasing, warehouse, or finance stakeholders. If you change the screen arrangement before exporting, ensure that the intended layout and search result are active first.

> **Note:** The available screen controls support reviewing, searching, arranging, and exporting inventory information. No receiving, transfer, reservation, or stock-adjustment action is shown on this screen.

Examples

A warehouse manager needs to review the stock position for sales job `J23.1105` and prepare a product-level list for the project manager.

1. In **Inventory**, open **Warehouse** and select **Stock (By Product)**.

2. In **Search**, enter `J23.1105`. The list is limited to inventory lines associated with that sales job.
3. Review the product lines and confirm that the display includes the information needed for the discussion: product description, area, position, purchase order reference, received quantity, and accumulated quantity.
4. Because the existing display does not show the preferred set of columns, select **Columns Chooser** and select the required columns.
5. Select **Add Layout**, enter `J23.1105 Stock Review` in **Layout name**, and select **Save**.
6. Review the visible product lines, including the disc pack and hub items associated with the sales job, together with their receiving-area and purchase-order information.
7. Select **Export** to create a copy of the filtered, product-based inventory review for the project manager.

The saved layout can be reused for later product-level reviews of the same sales job or for comparable sales-job inventory reviews.

Tips

> **Tip:** Search using the most specific available value, such as a sales job number or product description, to reduce the number of inventory lines you must review.

> **Note:** Use **Stock (By Shipment)** and **Stock (By Product)** deliberately. These controls provide different stock perspectives, so confirm the selected perspective before interpreting quantities.

> **Warning:** Select **Update Current** only when all users of the current layout should see the revised columns. Create a separate layout with **Add Layout** when the arrangement is specific to one task.

Troubleshooting

Symptom	Likely cause	Fix
The required sales job or	The current list is not filtered to the required value, or the	Enter the sales job number, product description, area, position, or purchase order

Symptom	Likely cause	Fix
product is not visible.	selected stock perspective is not appropriate.	value in **Search**. If necessary, switch between **Stock (By Shipment)** and **Stock (By Product)**.
Required information is missing from the list.	The current layout does not include the necessary columns.	Select **Columns Chooser**, add the required columns, then select **Update Current** or save the arrangement with **Add Layout**.
A layout change was not retained.	The layout was changed but not saved or updated.	Select **Update Current** to revise the active layout, or use **Add Layout**, provide a **Layout name**, and select **Save**.
The wrong information was exported.	The search, stock perspective, or layout was not confirmed before export.	Review **Search**, select the intended stock view, verify the visible columns, and then select **Export** again.

Related pages

- Inventory — Overview
- Inventory — Learning Path