### Part 3.0: Inventory Setup Calem Enterprise Training

Austin, Texas

**Spring**, **2017** 



Inventory module is part of the material management including Inventory, Requisition and Purchase Orders.

Inventory is used in other modules including Work Order, Asset, PM and Projects.

Inventory and Warehouse Requisition and Purchase Order Doc, Project, Integration, etc.

#### Product Overview – Inventory Module



## **Inventory Setup**



### Manufacturers & Vendors

- Define vendors and manufacturers to be referenced in inventory.
- Menu path: Organization module | Open | Vendor list or Manufacturer list
- Create vendors and manufacturers manually; OR
- Import vendors and manufacturers from Calem excel templates.

|               |            | Welcome, Calem  | Welcome, Calem Eam. Wed, 4/19/17 17:12 Central |   |            |            |       |       |       |     | Calem Enterprise 10m |   |  |  |
|---------------|------------|-----------------|--|---|------------|------------|-------|-------|-------|-----|----------------------|---|--|--|
| Calein        |            | Organization    | 👬 EAM Company                                  | 🔓 EAM Company 🕞 Open 🔻 🧟 ACL Profiles 👻 |            |            |       |       |       | s 🔻 | 📃 Report             | • |  |  |
| 🚖 Favorite    |            |                 |  | <u>ii</u>                               | Custome    | r list     |       |       |       |     |                      |   |  |  |
| 🖄 Dashboard   |            |                 |  |   | Vendor li  | st         |       |       |       |     |                      |   |  |  |
| 📥 Admin       | Main       | Site Employee   | Job Role O                                     | <u>li</u>                               | Manufact   | turer list | Doc ) | Custo | omize |     |                      |   |  |  |
| 📊 Analysis    | EAM Compar | ıy (1 of 1)     |  | -                                       | Site Skill |            |       |       |       |     |                      |   |  |  |
| 🚊 Asset       |            | 🗙 📑 Cust        | omize  |   | User Skill | I          |       |       |       |     |                      |   |  |  |
| 📎 Barcode     | Componiu   |                 |  |   | Site Disal | llowed     |       |       |       |     |                      |   |  |  |
| 🧊 Change Mgmt | Company:   | CalemEAM Inc. s | i<br>  |   |            |            |       |       |       |     |                      |   |  |  |
| Contract      | Alias:     |                 |  |   |            |            |       |       |       |     |                      |   |  |  |

#### Item and Site Inventory

- Designed for Single-Site and Multiple-Sites
- Items are global for all sites
- Inventory and stocks are managed at sites



### Items & References

- Define global items and their references (manufacturer numbers)
- Menu path: Inventory module | Items
- Create items for all your inventory parts and tools
- Create item references including manufacturer numbers, old numbers, and vendor numbers, etc.
  - Manufacturer numbers allow you or your vendors to source your items extensively.
  - See screenshot in next slide for an example.
- You can import items and references from Calem excel templates.

#### Items & References

• Your item number (05-01-0023) and manufacturer number (3359246).

| Ma      | ain            | Site Inventory | PM Plan  | Part        | Unit Docun   | ient Lo   | t Equiv | alent  | Customize |               |           |  |
|---------|----------------|----------------|----------|-------------|--------------|-----------|---------|--------|-----------|---------------|-----------|--|
| Item    | em (98 of 281) |                |          |             |              |           |         |        |           |               |           |  |
| -22     | î ↓            | 📚 🗙            | 🔯 Custor | nize        |              |           |         |        |           |               |           |  |
| Item    | #: 😐           | 05-01-0023     |          |             | 1            | lote:     |         |        |           |               |           |  |
| Categ   | jory:          | Part           |          |             | I            | tem type: |         |        |           |               |           |  |
| Site    | Invent         | ory (0)        |          |             |              |           |         |        |           |               |           |  |
| $\odot$ | 0              | 📚 🛛 🔯 Cu       | stomize  |             |              |           |         |        |           |               |           |  |
|         | Item           |                | 5        | lite        | Flag         | Qty in    | stock   | Item t | уре       | Note          |           |  |
|         |                |                |          |             |              |           |         |        |           | No results fo | bund.     |  |
| Refe    | rence          | (1)            |          |             |              |           |         |        |           |               |           |  |
| ٢       | 0              | 🛓 🔯 Custon     | nize     |             |              |           |         |        |           |               |           |  |
|         | Part #         |                | R        | eference    | Partner site | Pa        | Irtner  |        | Note      |               | Item note |  |
|         | 335924         | 6              | Ma       | inufacturer | Acme-Corp    | Ac        | me-Corp |        | Acme Corp |               |           |  |

#### **Storerooms & Locators**

- Storerooms and locators are required when setting up site inventory.
- Menu path: Inventory module | Open | Store list
- Create storerooms for each site. If there is a single site in your Calem, just create storerooms.
- Locators are codes of aisle, shelf and bin where items are stored in a storeroom.
- You can import stores and locators via Calem excel templates.

| CalemEAM      |           | Welcome, Ca | Welcome, Calem Eam. Wed, 4/19/17 17:33 Central |                 |               |           |                |                 | Calem Ent  | erpris        | se 10m    |       |            |       |            |             |
|---------------|-----------|-------------|--|-----------------|---------------|-----------|----------------|-----------------|------------|---------------|-----------|-------|------------|-------|------------|-------------|
|               |           | Inventory   | 🥞 S  | ite Inventories | 🥞 Items       |           | Open 🔻         | Cod             | es 🔻       | 4 Transaction | is 🔻      | 📃 Rep | ort 🔻      |       |            |             |
| 🚖 Favorite    |           |             |  |                 |               |           | ۹              | Store list      | t          | EAM           | Company 💿 | -     | Data Uploa | d o ) | 🥞 Site Inv | ventories 💿 |
| 🖄 Dashboard   | Dashboard |             |  |                 |               | ۹         | Serial numbers |                 |            |               |           |       |            |       |            |             |
| 🛃 Admin       |           |             |  | 0               | Site Inventor | ies (56)  | ٩              | Item References |            |               |           |       |            |       |            |             |
| 🚹 Analysis    | 0 (       |             | 💲 Set price                                    | è 🗙             | ୍ତ୍ତ 🔍        | 🔍 Hide In | ۹              | Item Un         | its        | e 📝           | Customize |       |            |       |            |             |
| 🚊 Asset       |           | #           | Item   |                 | Note          |           | ۹              | Item ser        | ialization |               | Site      |       | Status     | Flag  | Qty in     | Unit        |
| 📎 Barcode     |           | π           | Item   |                 | Note          |           |                |                 |            |               |           |       | Julius     | Tidg  | stock      |             |
| 凌 Change Mgmt |           | 7           | 01-01-0016                                     |                 |               | f         | iber r         | ing 130 x       | 275 W 17   | 04            | TX_MyS    | Site  | Active     |       |            |             |

### Site Inventory & Stocks

- Site inventory includes quantities, min/max, and prices.
- Menu path: Inventory module | Site Inventories
- Create site inventory manually for sites; OR
- Import site inventory via Calem excel templates.
- Populate inventory stocks via physical count manually; OR
- Populate inventory stocks via Calem physical count transaction excel templates.

| CalemEAM      |   | Welcome, Cale   | m Eam. Wed, 4/19/: | Calem Enterprise 10m |        |  |     |                    |                    |      |       |      |
|---------------|---|---|--------------------|----------------------|--------|--|-----|--------------------|--------------------|------|-------|------|
| Calein        | LAM   | Inventory 🥞 Site Inventories 🥞 Items 🗔 Open 👻 📄 Codes 👻 🥞 |                    |                      |        |  | ٩   | 🖣 Transactions 🔻 📘 |                    | Repo | ort 🔻 |      |
| 🚖 Favorite    |   |   |                    |                      |        |  |     | ***                | Checkout           |      |       |      |
| 🖄 Dashboard   |   |   | -93                | Receive              |        |  |     |                    |                    |      |       |      |
| 📣 Admin       |   | Site Inventories (56)                                     |                    |                      |        |  |     |                    |                    |      |       |      |
| 📊 Analysis    | 💿 🥥 💲 Set price 🚘 🗷 🔍 🔍 🔍 Hide Inactive 🔍 Show Inactive 📝 |   |                    |                      |        |  |     | -                  | 👸 Receive Asset    |      |       |      |
| 🚊 Asset       | #   | Item  | Note               | Descri               | otion  |  |     | -                  | Adjust Receiving   |      | s     | Flag |
| 📎 Barcode     |   |   |                    |                      |        |  |     | -                  | Move               |      |       |      |
| 🏹 Change Mgmt |   | 01-01-0001  |                    | bearing              | bush   |  |     | 163                | Poturn             |      |       |      |
| Contract      | 2   | <u>01-01-0001A</u>  |                    | bearing              | bush   |  |     | 710                | Return             |      | •     |      |
|               | 3 <u>01-01-0001A</u> bearing bush                         |   |                    |                      |        |  | -22 | Physical Count     |                    |      |       |      |
|               | 4   | 01-01-0005  |                    | counte               | weight |  |     | 2                  | Import Physical Co | unt  | •     |      |
|               | 5   | 01-01-0010 My Site note bevel gear                        |                    |                      |        |  | ŝ   | Import unit price  |                    |      |       |      |
| maintegration |   |   | ,                  |                      |        |  |     |                    |                    |      |       |      |

### **Vendor Prices**

- Vendor Prices are defined at Purchase Module
- Menu path: Purchase module | Open | Site vendor list
- Create vendors for sites.
- Then, create prices for items supplied by the vendor. See screenshots in next slides.
- You can import site vendor list via Calem excel templates
- You can import vendor prices via Calem excel templates.

| CalemFAM          |       | Welcome, Cale | em Eam. Wed, 4/ | 19/17 17:53 |                | Calem Enterprise 10m |           |          |            |                |  |
|-------------------|-------|---------------|-----------------|-------------|----------------|----------------------|-----------|----------|------------|----------------|--|
| Calein            | LAM   | Purchase      | 💲 My POs 🔻      | 💲 All POs   | s 💲 PO Lines O | pen 🗔                | Open 🔻    | 📑 R      | eport 🔻    |                |  |
| 🚖 Favorite        |       |               |                 |             |                | \$                   | PO Appro  | ovals    |            |                |  |
| 🖄 Dashboard       |       |               |                 |             |                | - \$                 | PO Lines  |          |            |                |  |
| 📥 Admin           |       | G             | My POs (        | 16)         |                | \$                   | Site vend | lor list |            |                |  |
| 📊 Analysis        | 0 😄 📚 | 🗶 🔔 🔎         | 自 Customize     | Q, Q,       | 🔯 Customize    | <b>E</b> \$          | Tax code  |          |            |                |  |
| 🚊 Asset 📎 Barcode | - #   | PO            | Status          | Received    | Buyer          | \$                   | PO Emai   | ls       | or site    | Vendor note    |  |
| 🏹 Change Mgmt     | 1     | PO-000001     | Completed       | Exceeded    | Calem Eam      | 12                   | 2/9/09    | Office   | Max.Austin | OfficeMax Aust |  |

#### **Vendor Prices**

- Leave "Site" field alone to assign a vendor to all sites.
- Add Items supplied by vendors with prices.

| <u>Site vendor list List</u> > Site vendor Create          |                 |  |  |  |  |  |  |  |  |  |  |
|--|-----------------|--|--|--|--|--|--|--|--|--|--|
| Site vendor  |                 |  |  |  |  |  |  |  |  |  |  |
| 🔚 Save 🕱 Cano  | zel 😺 Customize |  |  |  |  |  |  |  |  |  |  |
| Ithe field value for the lookup is not valid.: Vendor site |                 |  |  |  |  |  |  |  |  |  |  |
|  |                 |  |  |  |  |  |  |  |  |  |  |
| Vendor site: 💿 🖉   |                 |  |  |  |  |  |  |  |  |  |  |
| Vendor site: 🧕 🖉<br>Site:                                  |                 |  |  |  |  |  |  |  |  |  |  |
| Vendor site: • 4<br>Site:<br>Is primary:                   |                 |  |  |  |  |  |  |  |  |  |  |
| Vendor site: • • • • • • • • • • • • • • • • • • •         |                 |  |  |  |  |  |  |  |  |  |  |

| Site vendor (3 of 12)    |                                 |               |              |              |              |      |      |  |  |  |  |  |
|--------------------------|---------------------------------|---------------|--------------|--------------|--------------|------|------|--|--|--|--|--|
| 😺 î 🌡                    | 🔯 👔 👃 🗷 🔯 Customize             |               |              |              |              |      |      |  |  |  |  |  |
| Vendor site: • Acme-Corp |                                 |               | Vendor:      | Acme-Corp    |              |      |      |  |  |  |  |  |
| Site:                    |                                 |               | Is primary:  |              |              |      |      |  |  |  |  |  |
| Tax code:                |                                 |               | Disabled?:   |              |              |      |      |  |  |  |  |  |
| Note:                    | Acme Corp                       |               |              |              |              |      |      |  |  |  |  |  |
| Last modified:           | Wed, 4/19/17 07:                | 59 Central    | Modified by: | Calem Eam    | Calem Eam    |      |      |  |  |  |  |  |
| Time created:            | Wed, 4/19/17 07:                | 59 Central    | Created by:  | Calem Eam    | <u>1 Eam</u> |      |      |  |  |  |  |  |
|                          | 0                               | /endor (0)    |              |              |              |      |      |  |  |  |  |  |
| 0 🛛 📚 🍕                  | 💿 🥥 🎼 🖓 Price Log 🛛 🔯 Customize |               |              |              |              |      |      |  |  |  |  |  |
| Item                     |                                 | Vender part # | Is primary   | Unit price ( | USD)         | Unit | Note |  |  |  |  |  |
|                          |                                 |               |              |              |              |      |      |  |  |  |  |  |

### Vendor Prices

• Vendor prices are also accessible from site inventory screen

| Main         | Store inventory                | Reserved Tra       | Insaction Docu | ument   | Customize |                     |        |     |  |  |  |
|--------------|--------------------------------|--------------------|----------------|---------|-----------|---------------------|--------|-----|--|--|--|
| Site Inver   | itory (1 of 56)                |                    |                |         |           |                     |        |     |  |  |  |
| 🤯 1          | 👃 💲 Set price 🛐                | 🛓 🔣 🔯 Cust         | comize 📴 Mor   | e 🕶     |           |                     |        |     |  |  |  |
| Item: 🧿      | tem: • <u>01-01-0001</u> Note: |                    |                |         |           |                     |        |     |  |  |  |
| Site: 💿      | ite:  MySite Category: Part    |                    |                |         |           |                     |        |     |  |  |  |
| Reserved     | l (2)                          |                    |                |         |           |                     |        |     |  |  |  |
| ي 🛃 📚        | Customize                      |                    |                |         |           |                     |        |     |  |  |  |
| Wo #         |                                | Qty                | Unit           | Site    |           |                     |        |     |  |  |  |
| <u>81570</u> |                                | 1                  |                | MySite  | •         |                     |        |     |  |  |  |
|              |                                | 1                  |                | MySite  | ;         |                     |        |     |  |  |  |
|              |                                |                    |                |         |           |                     |        |     |  |  |  |
|              |                                |                    |                |         |           |                     |        |     |  |  |  |
|              |                                |                    |                |         |           |                     |        |     |  |  |  |
|              |                                |                    |                |         |           |                     |        |     |  |  |  |
|              |                                |                    |                |         |           |                     |        |     |  |  |  |
| Vendor (     | 1)                             |                    |                |         |           |                     |        |     |  |  |  |
| 0 0          | 📚 🥞 Price Log 🛛                | 📝 Customize        |                |         |           |                     |        |     |  |  |  |
|              | dor                            | Unit price<br>USD) | Unit Is        | primary | Disabled? | Lead time<br>(days) | e Note |     |  |  |  |
| 🗹 Acme       | e-Corp                         | 120.00             | Box 🗸          |         |           |                     | Acme C | orp |  |  |  |

#### Inventory Module – Data Upload

- Use Excel Templates to initialize your inventory module
- Calem Excel Templates in Training Site
- See training video of <u>inventory module</u> at YouTube.



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