Part 3.0: Inventory Functions – Inventory

Calem Enterprise Training

Summer 2024

Austin, Texas

CONFIDENTIAL

What are the goals - Inventory

CalemEAM

Goals
I know how to setup inventory
I know how to create global items
I know how to create site inventory
I know how to receive parts to storerooms
I know how to checkout parts from storerooms
I know how to move parts in storerooms
I know how to count items in storerooms
I know how to populate inventory module via excel files

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Inventory Module

Inventory and Warehouse

Requisition and Purchase Order

Doc, Project, Integration, etc.

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Product Overview – Functions

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Product – Inventory

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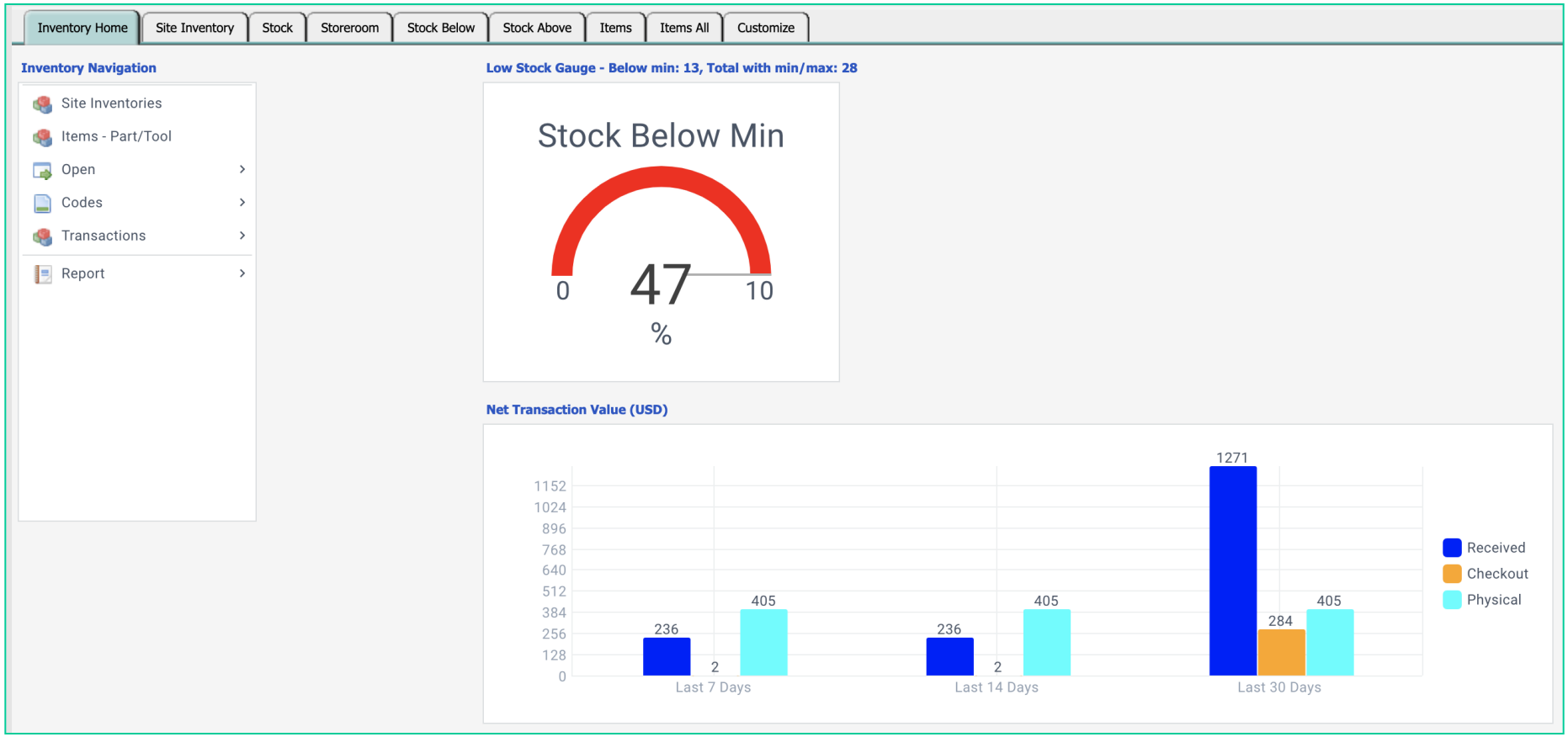
- Track spares stock and usage.
- Optimize spares through Min/Max
- Use barcode for efficiency



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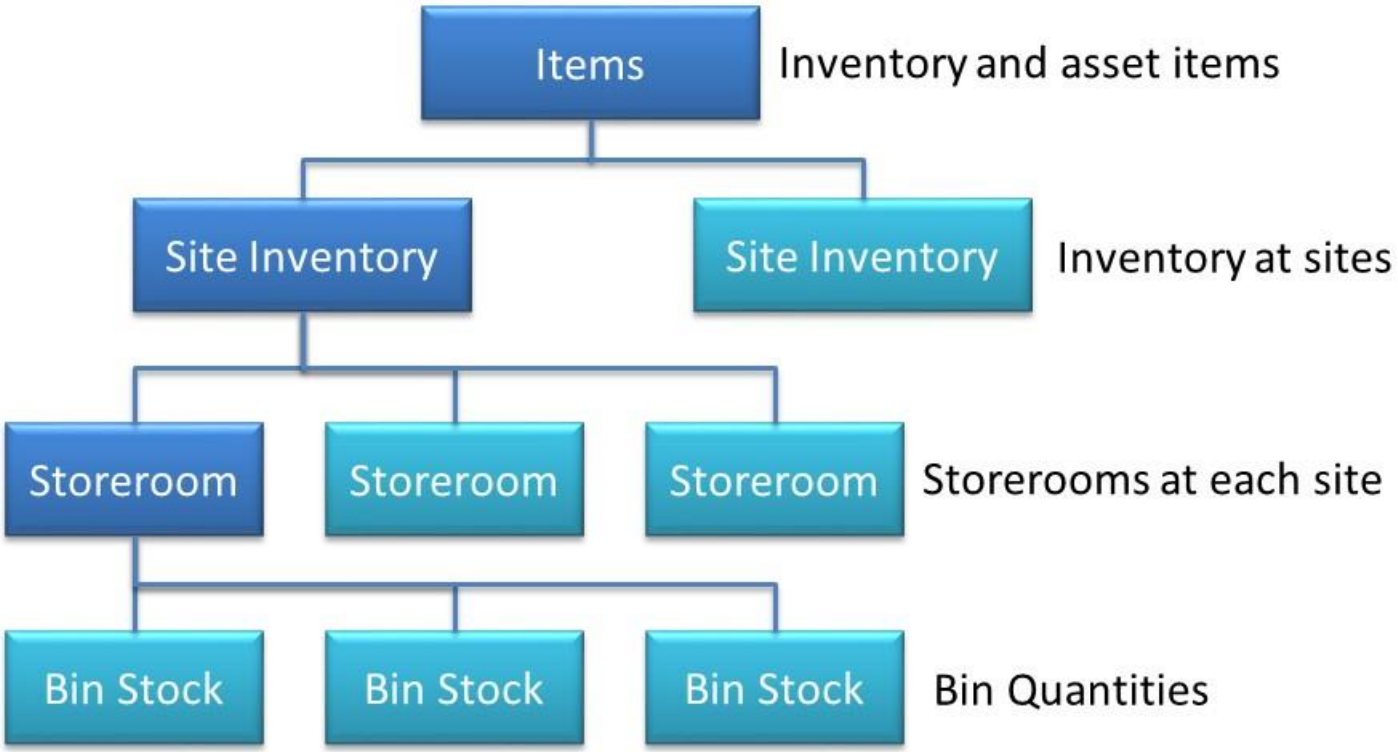
Inventory Module - Item

- Global item list for part and service
- An item may be an asset item



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Inventory Module – Item Creation

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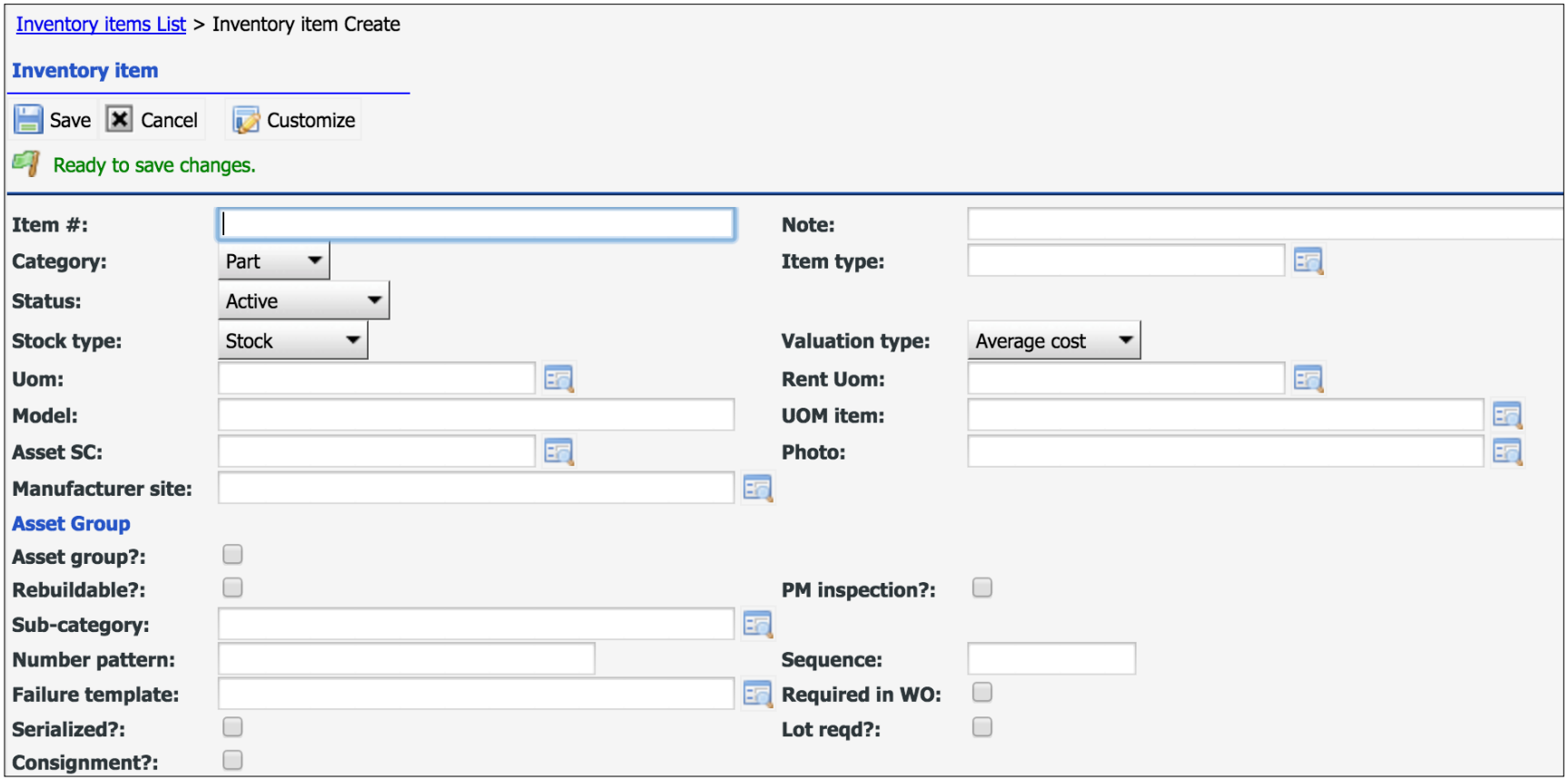
- "Item #" – auto-generated if left blank
- Set Note and Description (to share with Site Item)
- Set Category, UOM, Model, Manufacturer



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Item Form – Site Inventory

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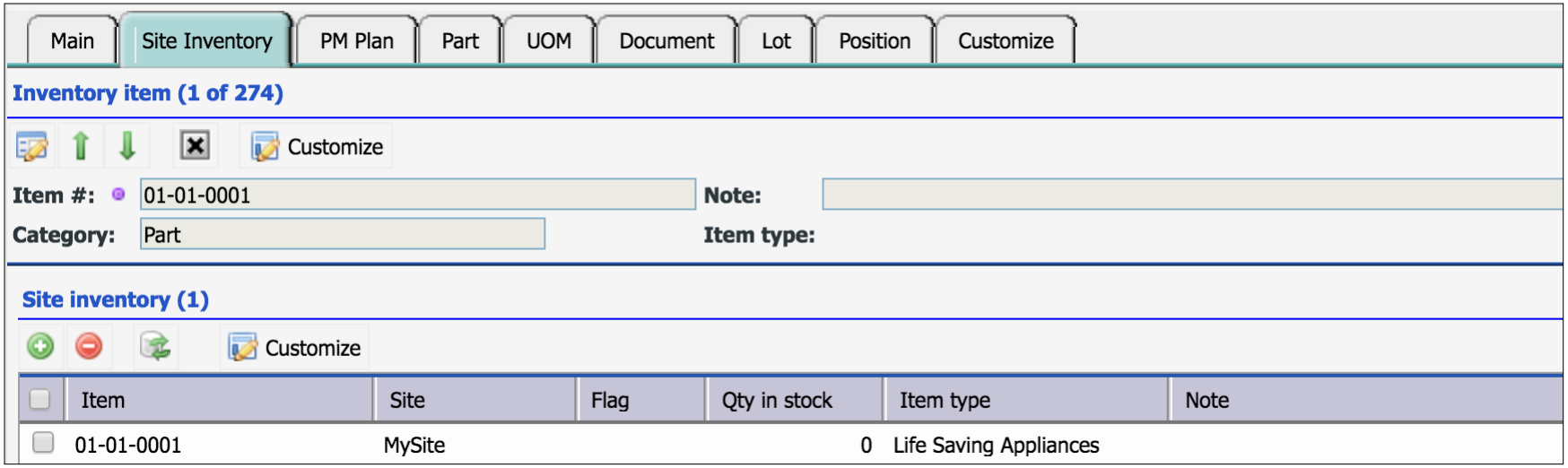
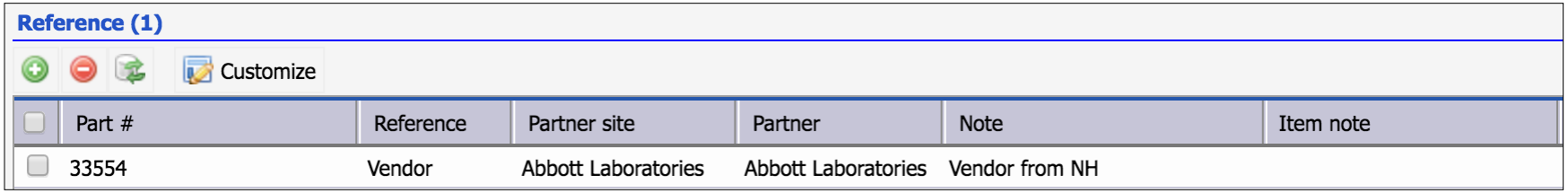
- Site Inventory: Item used in sites
- Item Reference: part numbers by vendor/manufacturer





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Item Form – Part

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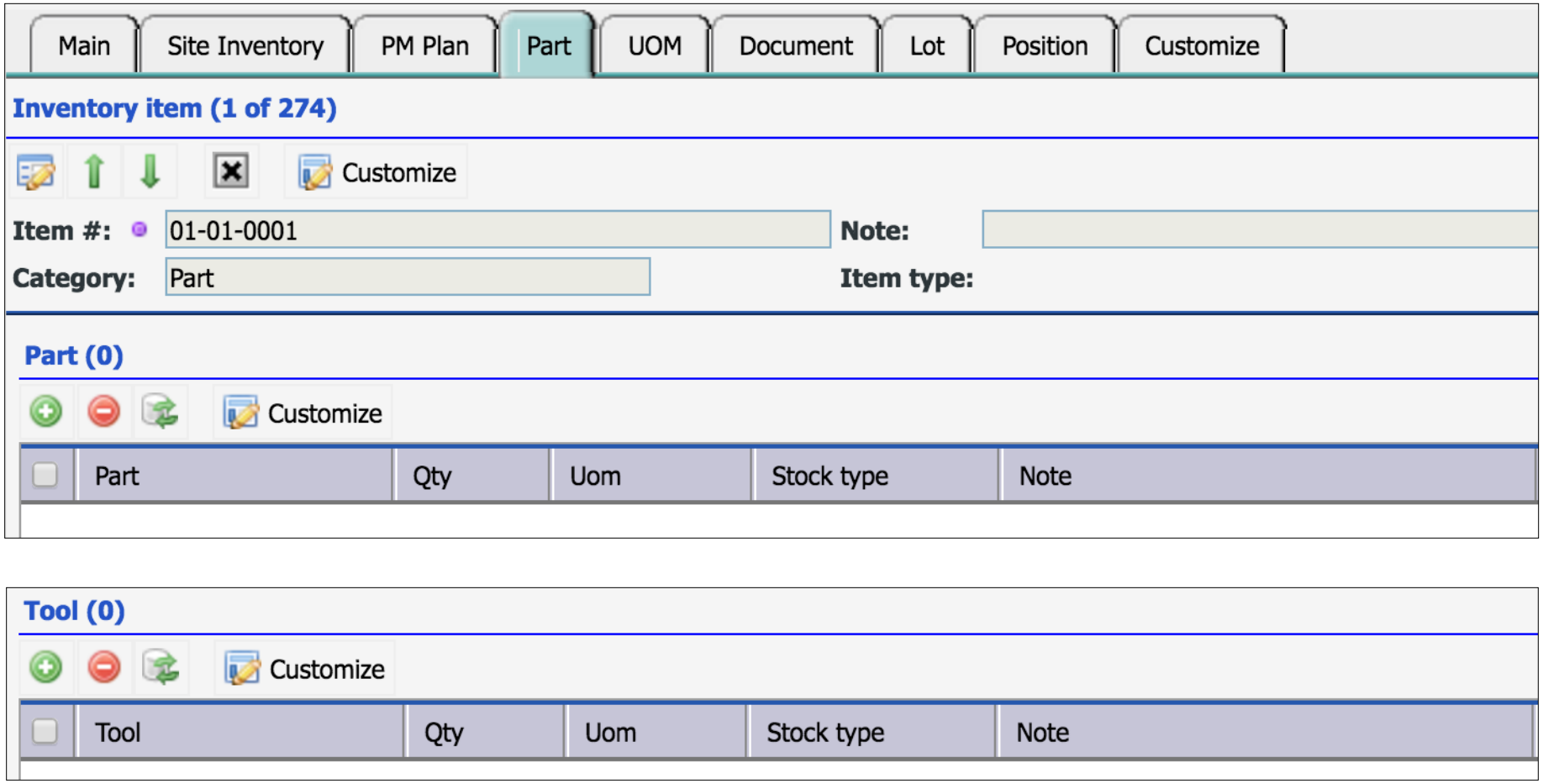
- Spare Parts for the Item
- Tools for the item



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Item Form – Doc & Attachment

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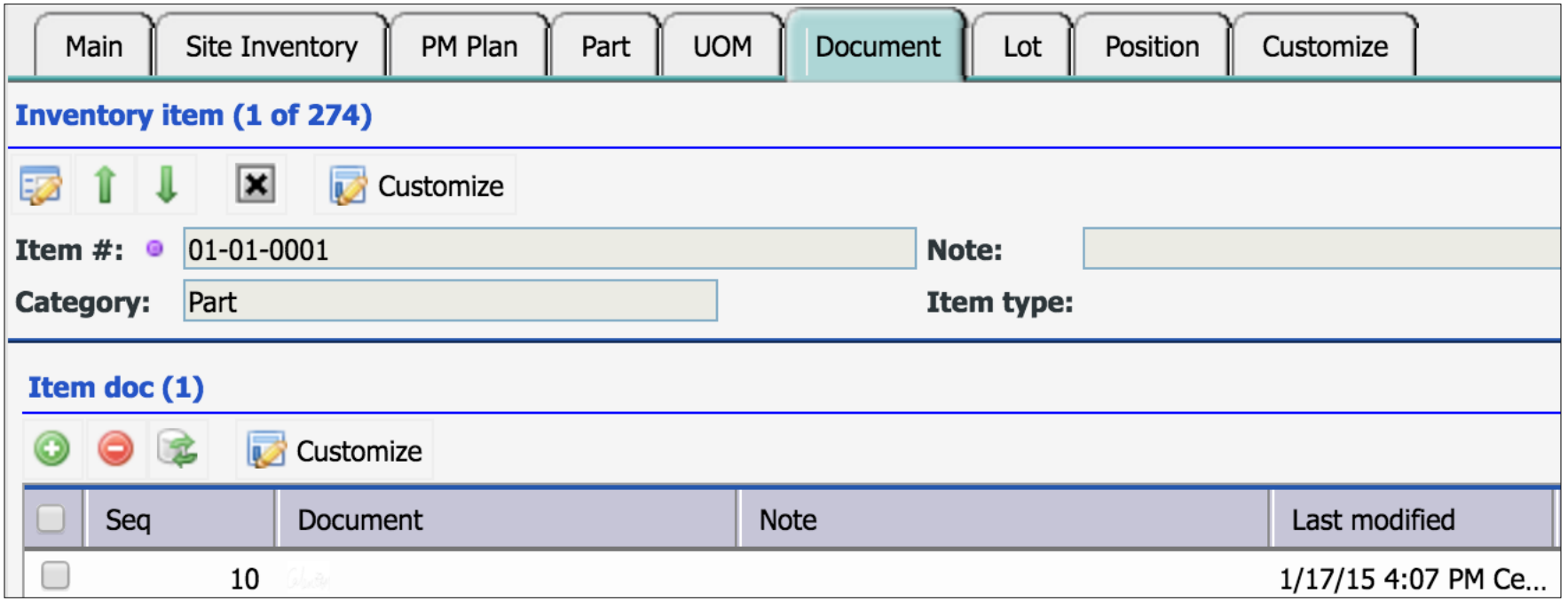

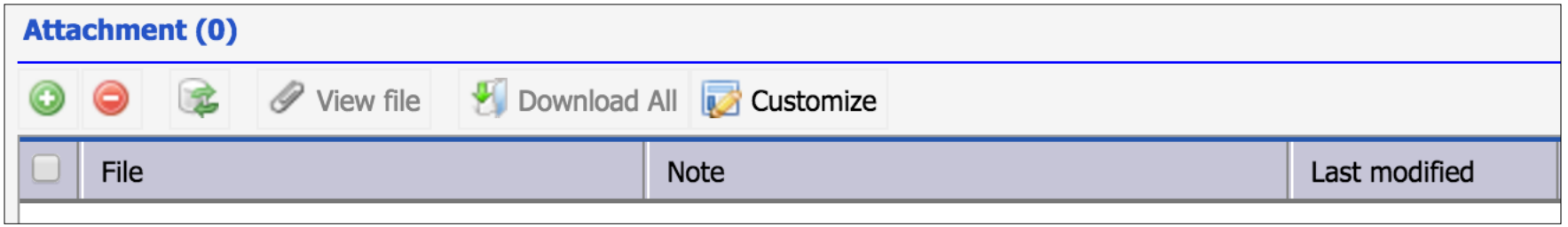

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Item Form – Lot

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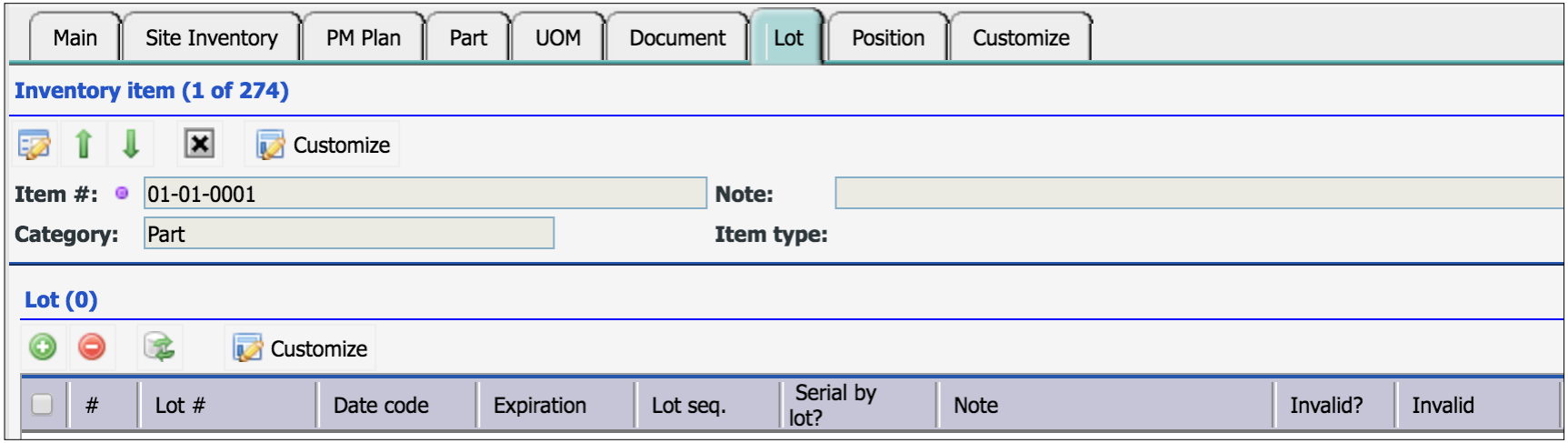
- Use Lot to manage time-sensitive items
- Items become invalid for checkout if lot expired



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Item Form – UOM by Item (Optional)

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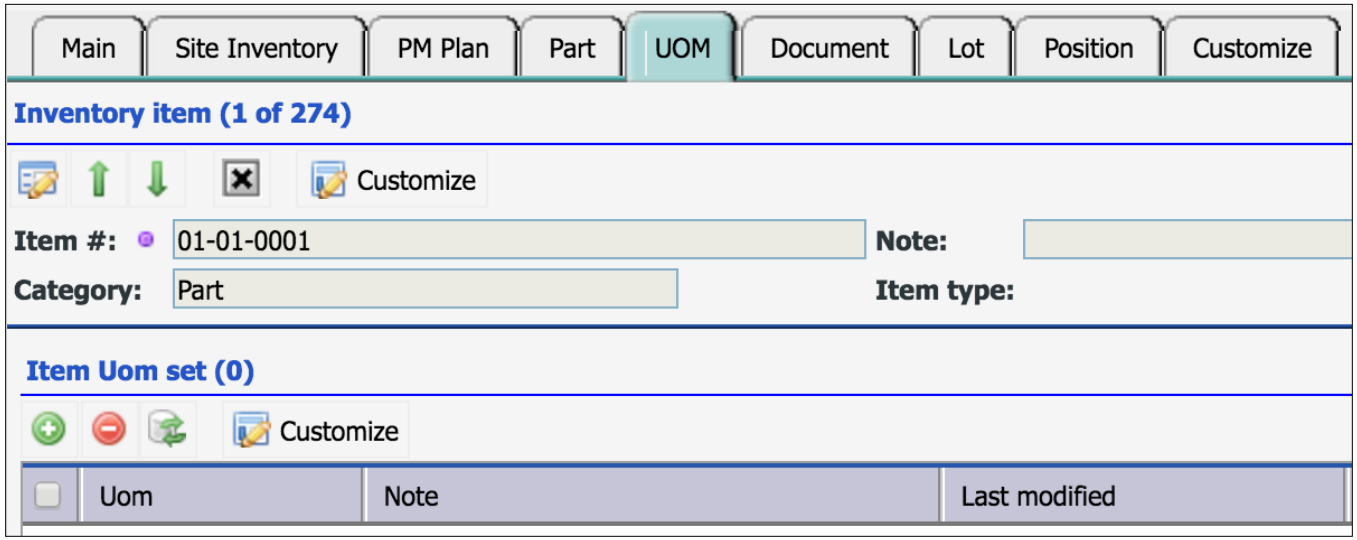
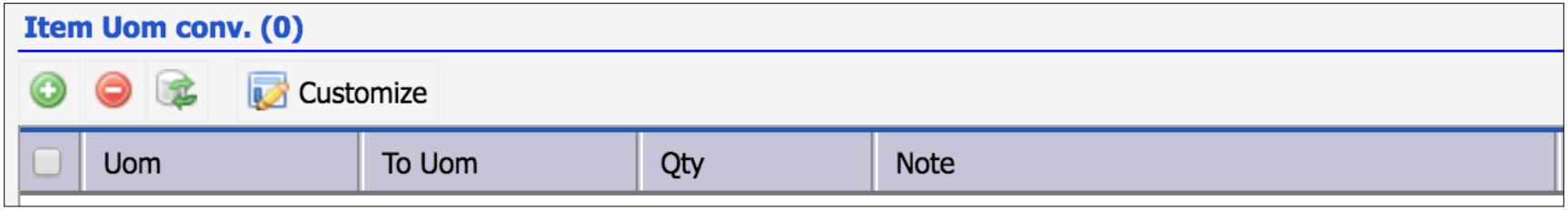
- Item specific Units
- Item specific conversion (1 box = 10 each)





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Site Inventory

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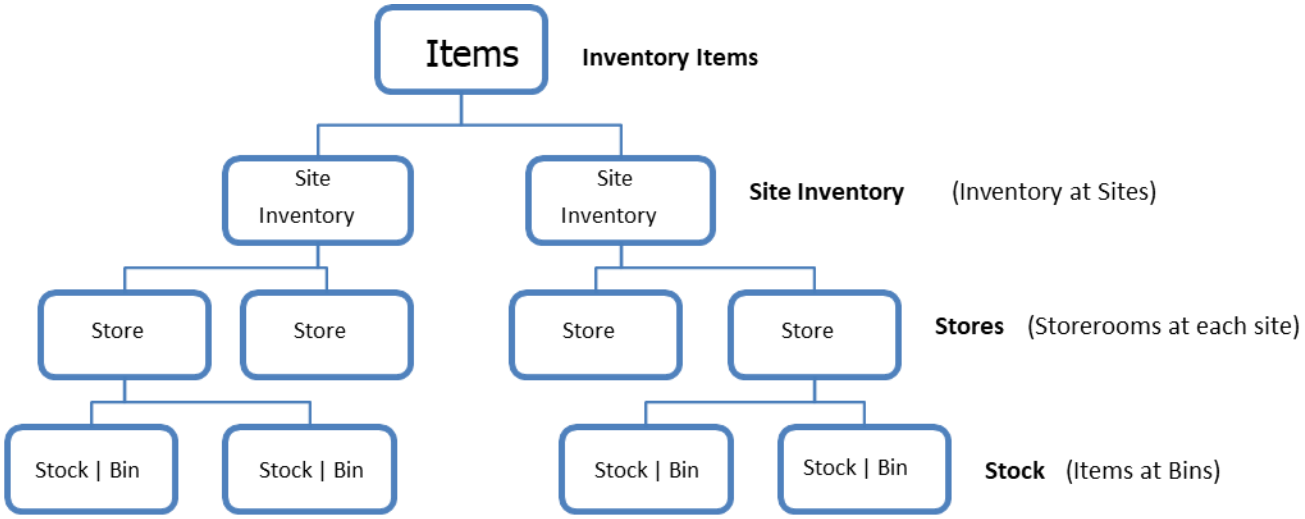
- Storerooms for Site
- Bin in Stores
- Item stocked in Sites
- Customer Inventory
- Project Inventory



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Site Inventory - Creation

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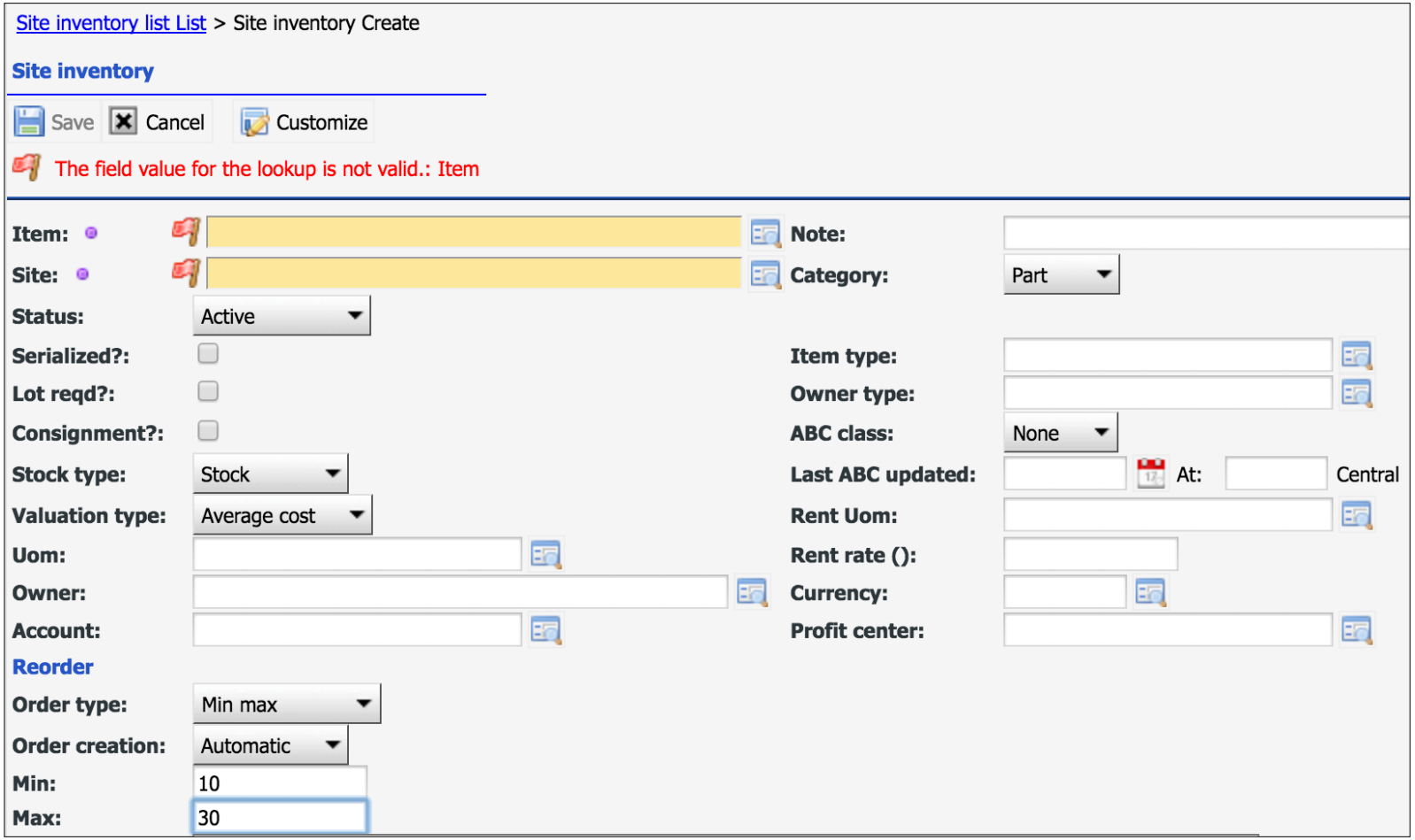
- Set Item, Site (Note & Description to copy from Item if not set)
- Set Reorder to Min/Max; Order creation to Automatic for auto-Requisition



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Site Inventory – Storerooms and Bins

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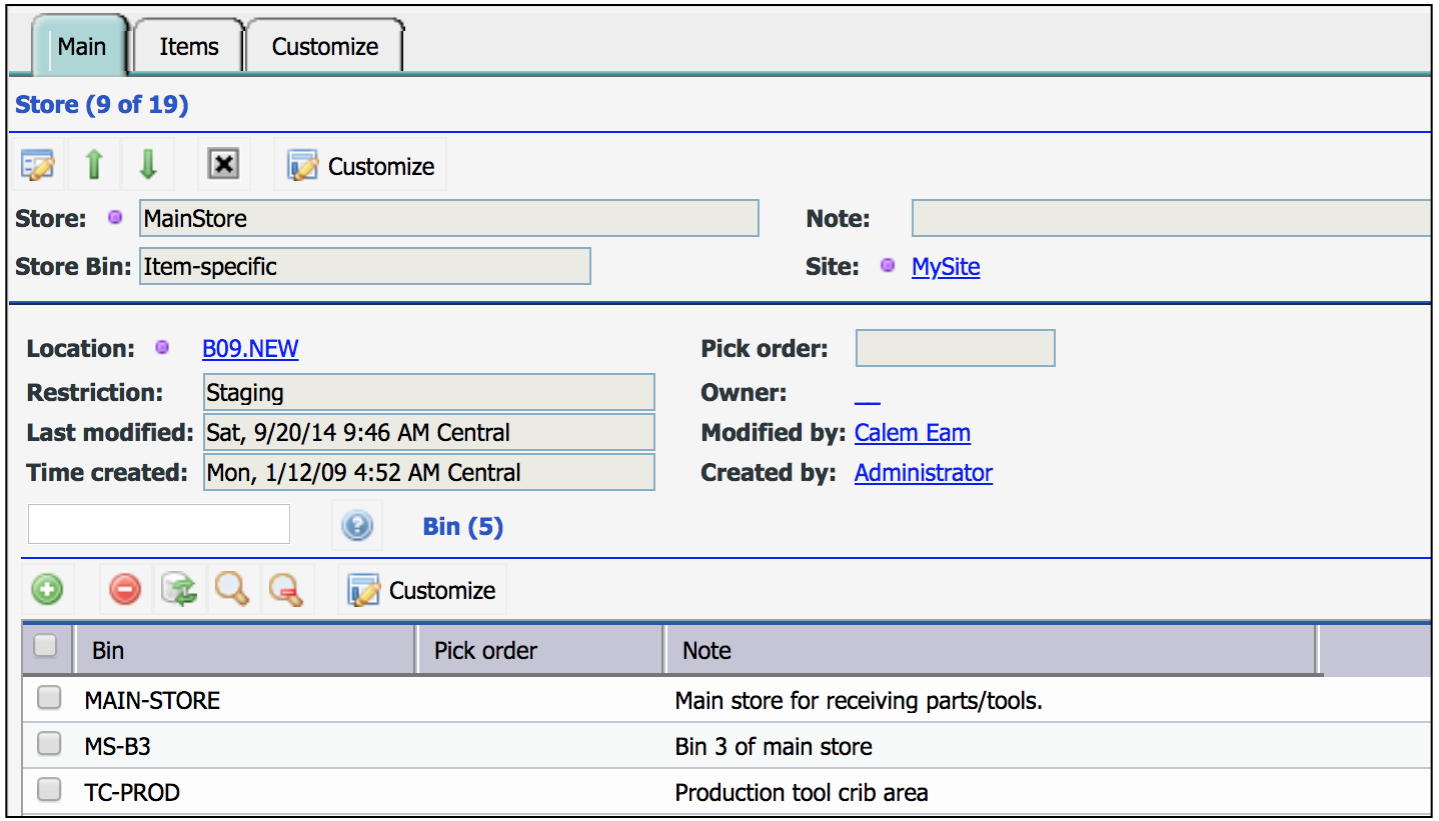
- Set up storerooms
- Set up bins in a storeroom



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Site Inventory – Store Inventory

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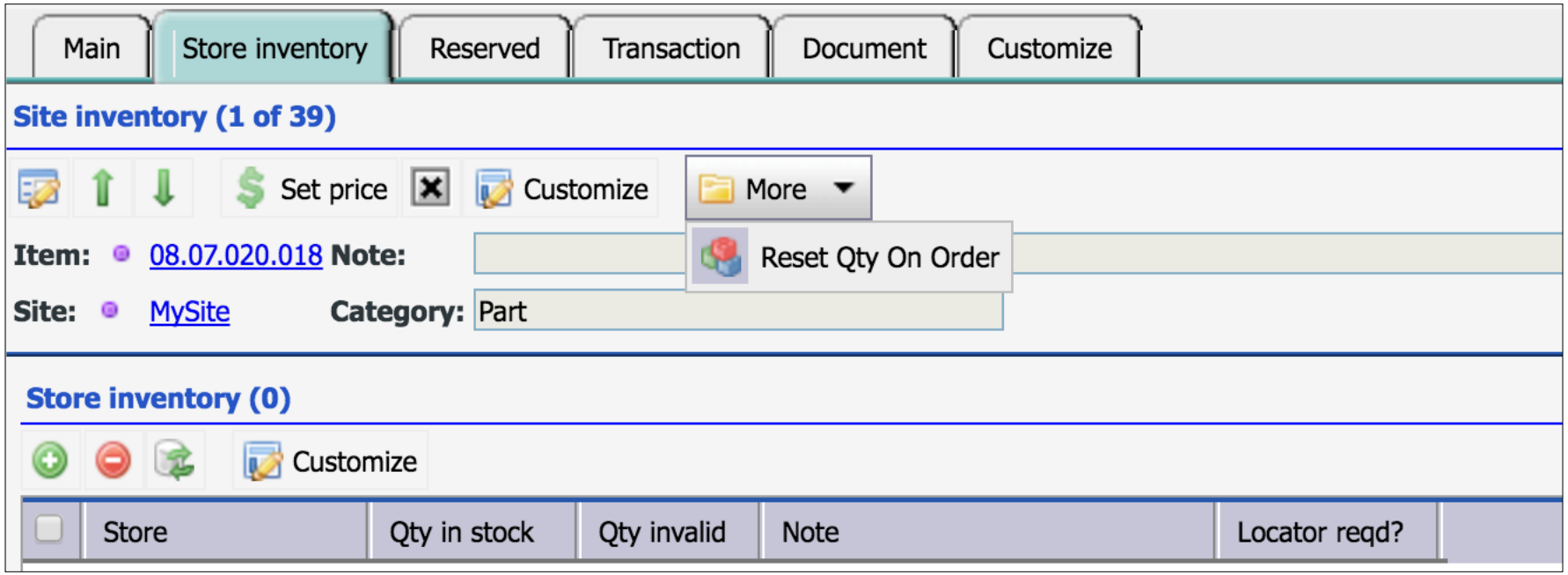
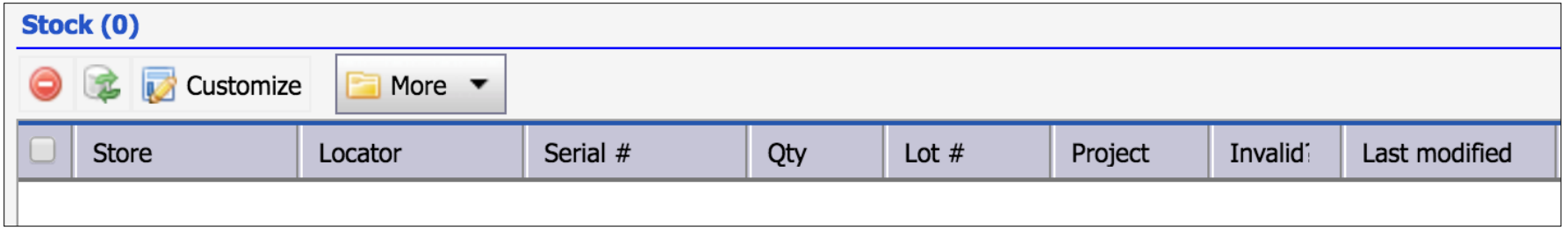
- Qty in Stores
- Qty in Bins (or Locators)





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Site Inventory – Vendor and Prices

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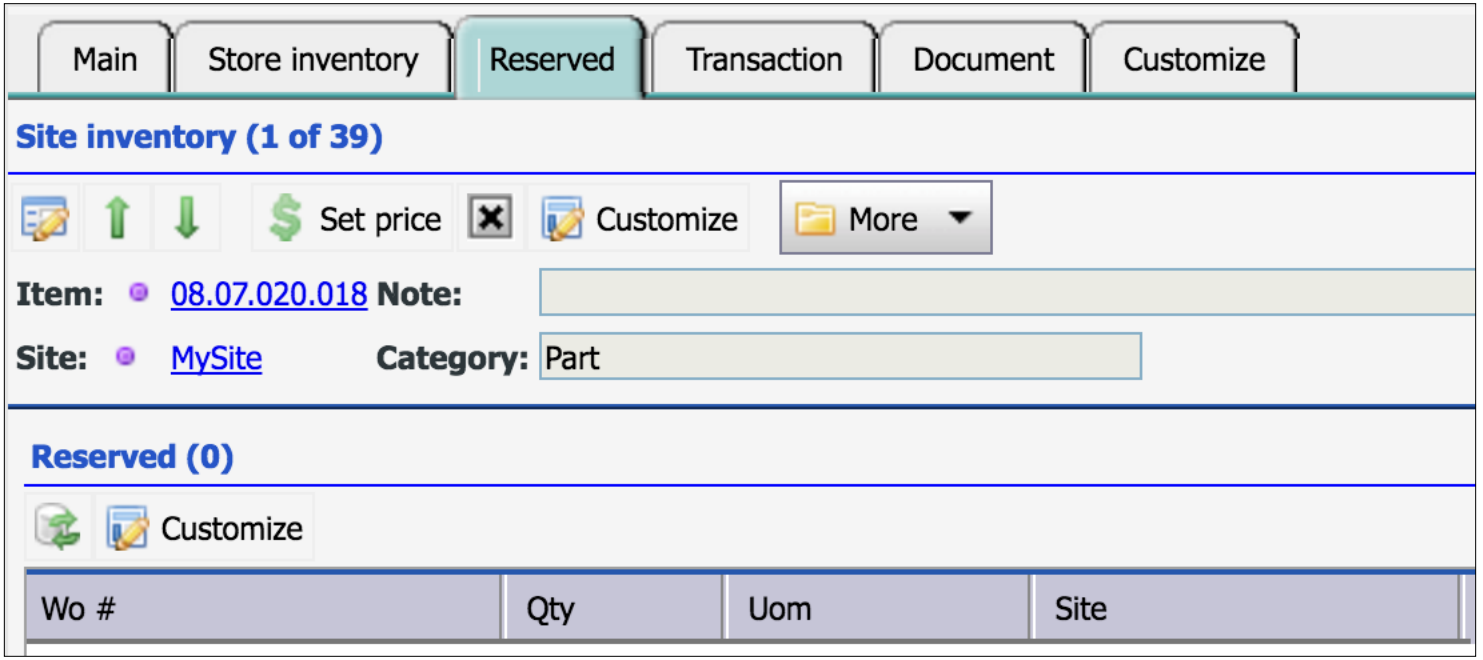
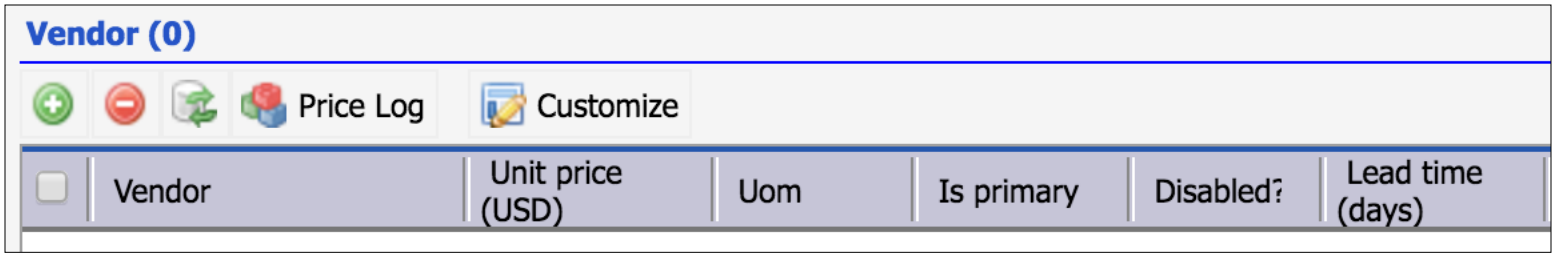
- Vendors, Unit and Prices





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Site Inventory – Transaction

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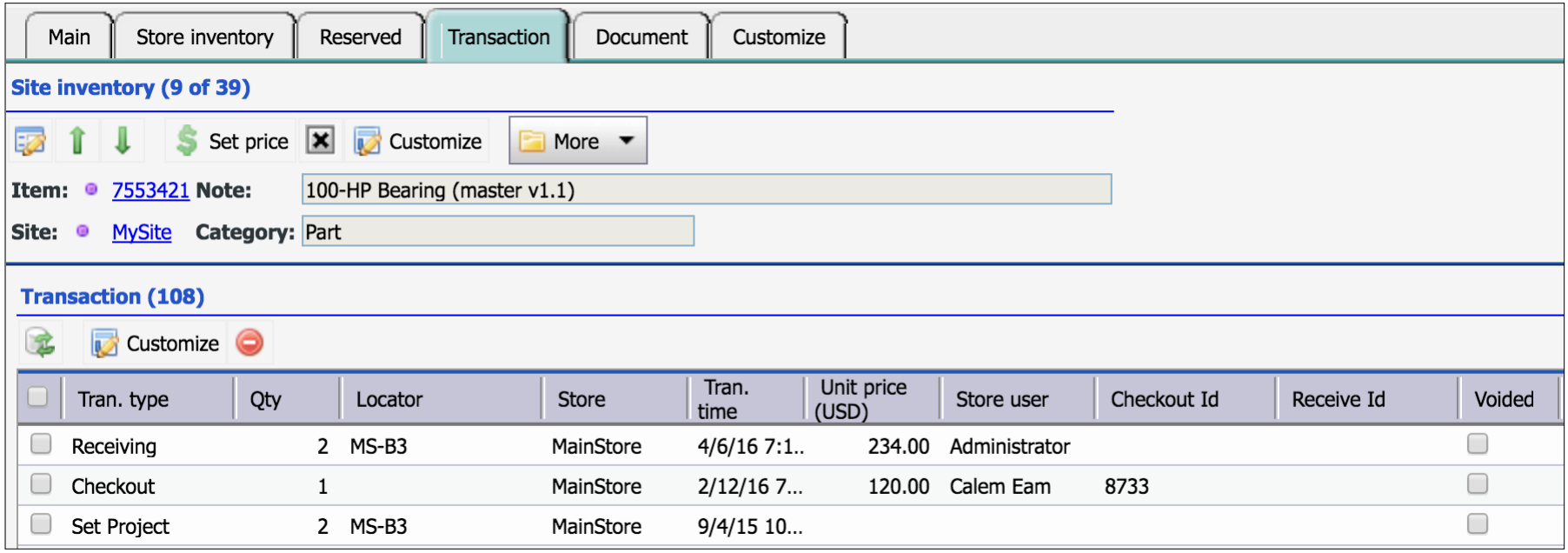
- Transaction History



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Site Inventory – Transaction Menu

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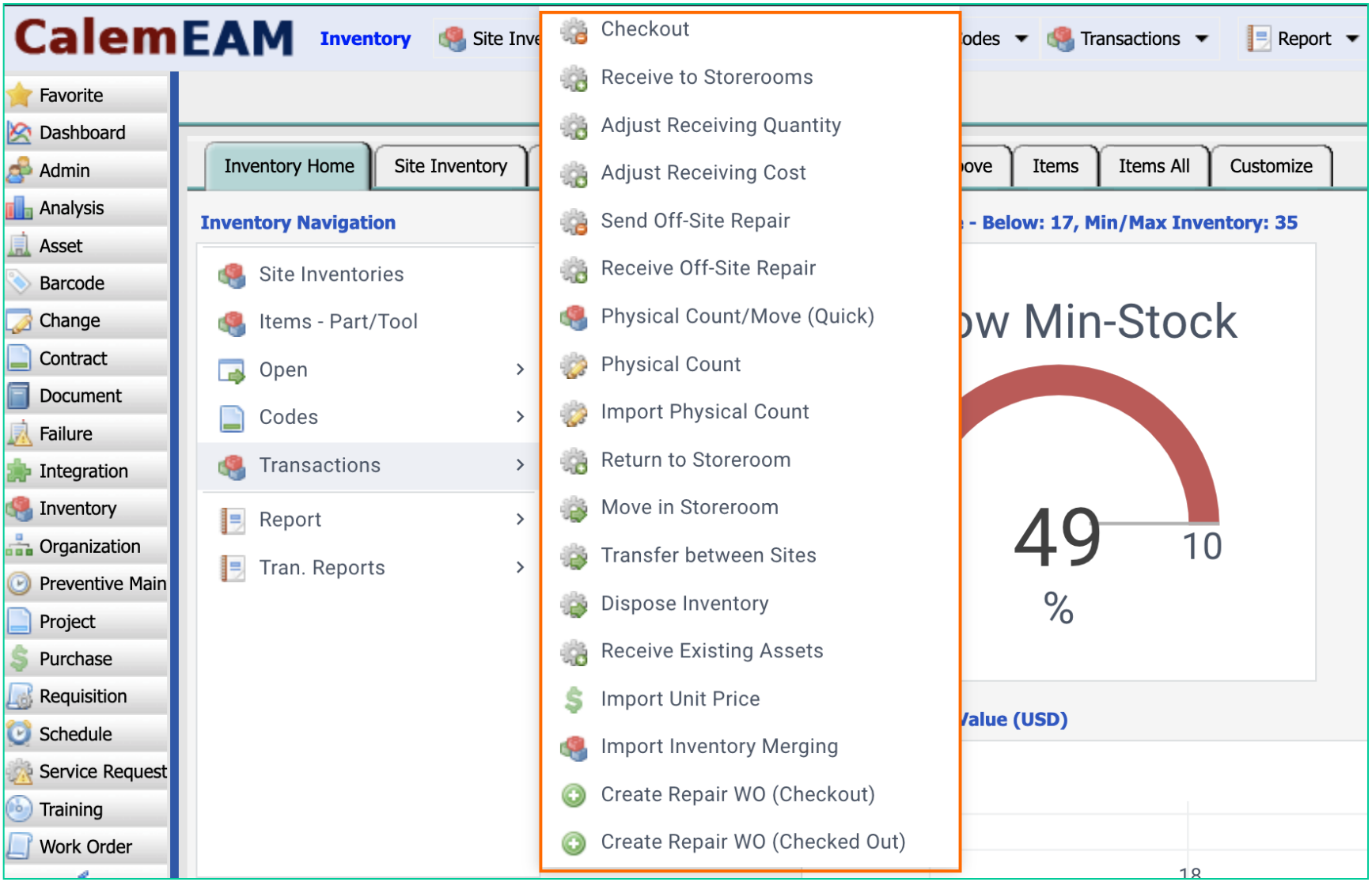

Site Inventory – Receive

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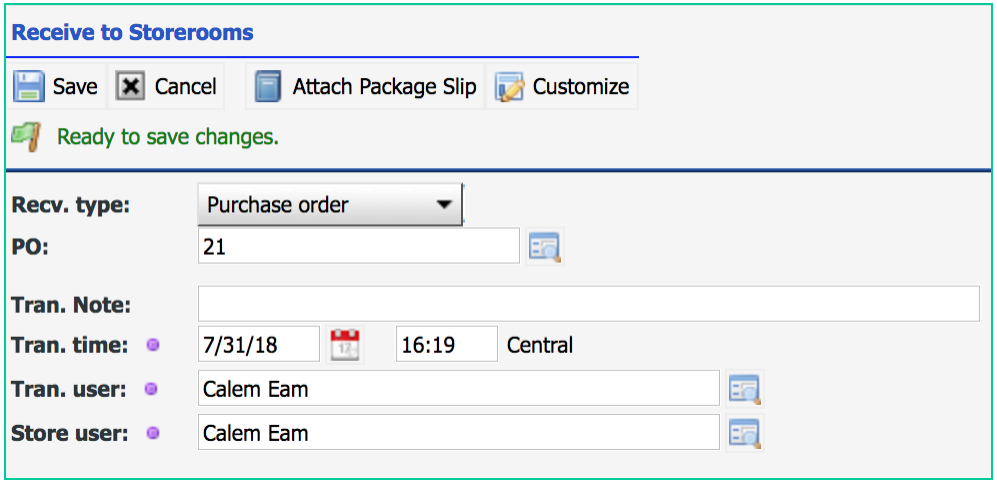
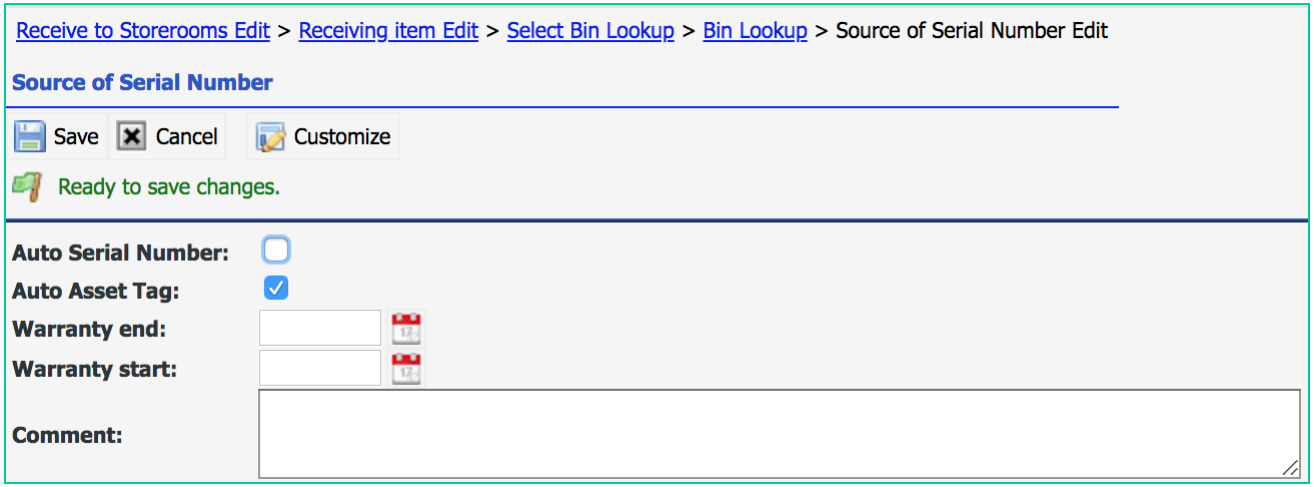
- Receive Non-Assets and Asset Items



- Asset Items require serial numbers and asset tags



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Site Inventory – Adjust Cost by Invoice

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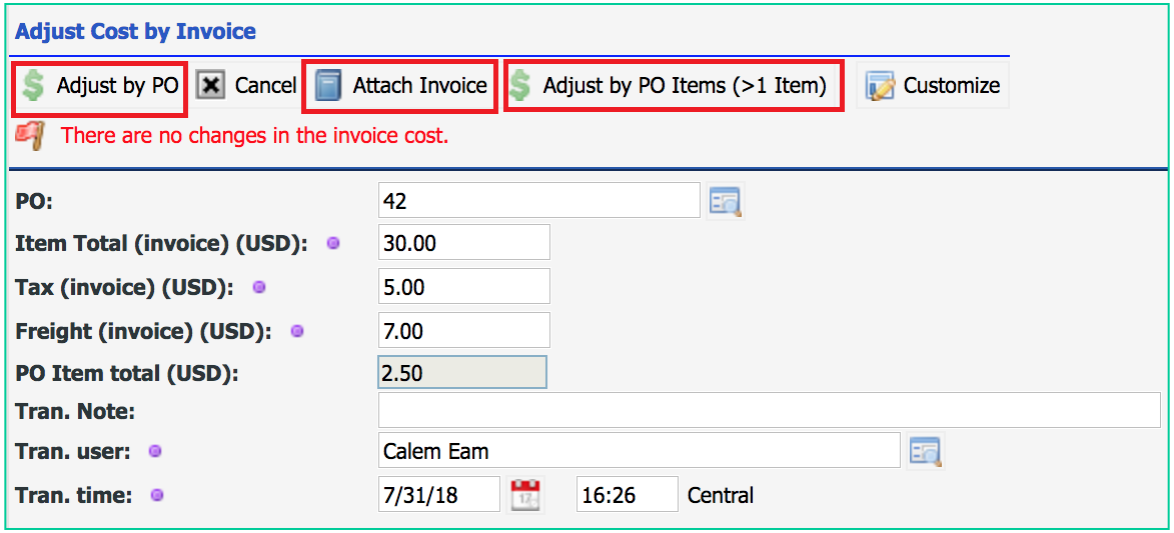
- Adjust PO cost by invoice item total, tax and freight
- Attach invoice and package slips
- For POs with multiple PO lines, each PO line has to be adjusted manually



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Site Inventory – Adjust Qty Received

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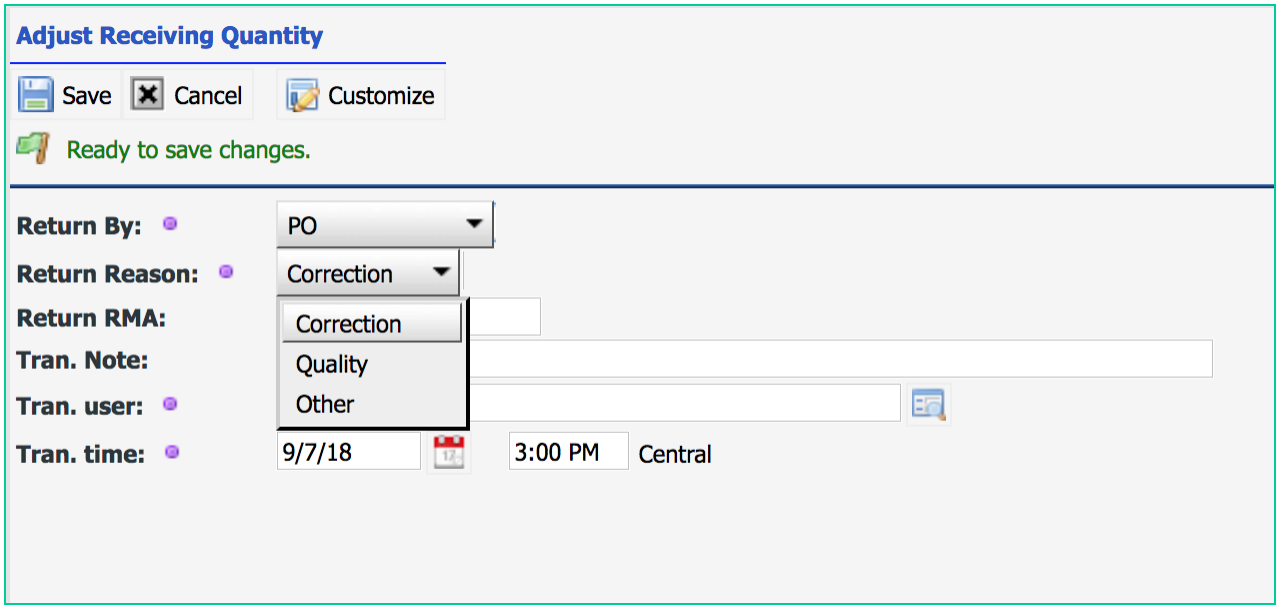
- Adjust Qty received



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Site Inventory – Checkout

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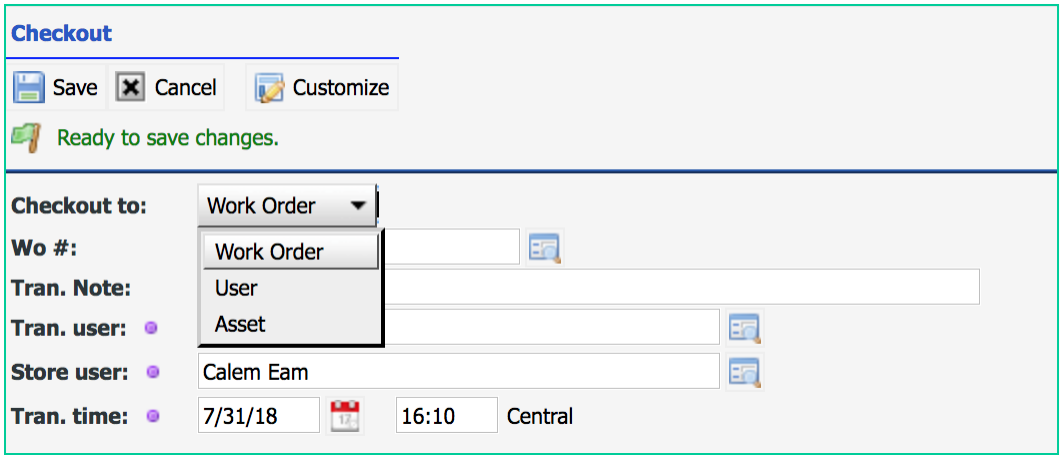
- Issue Parts to Work Order, User, or Asset



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Site Inventory – Physical Counting

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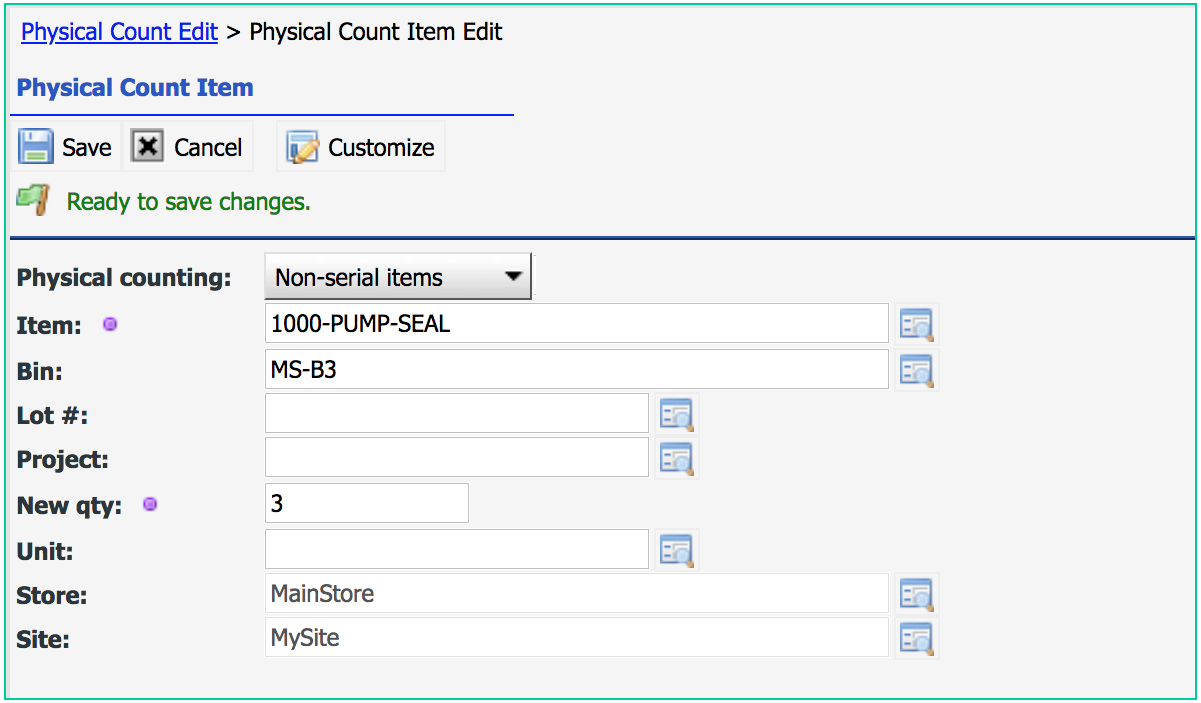
- Set physical count of bin stock periodically



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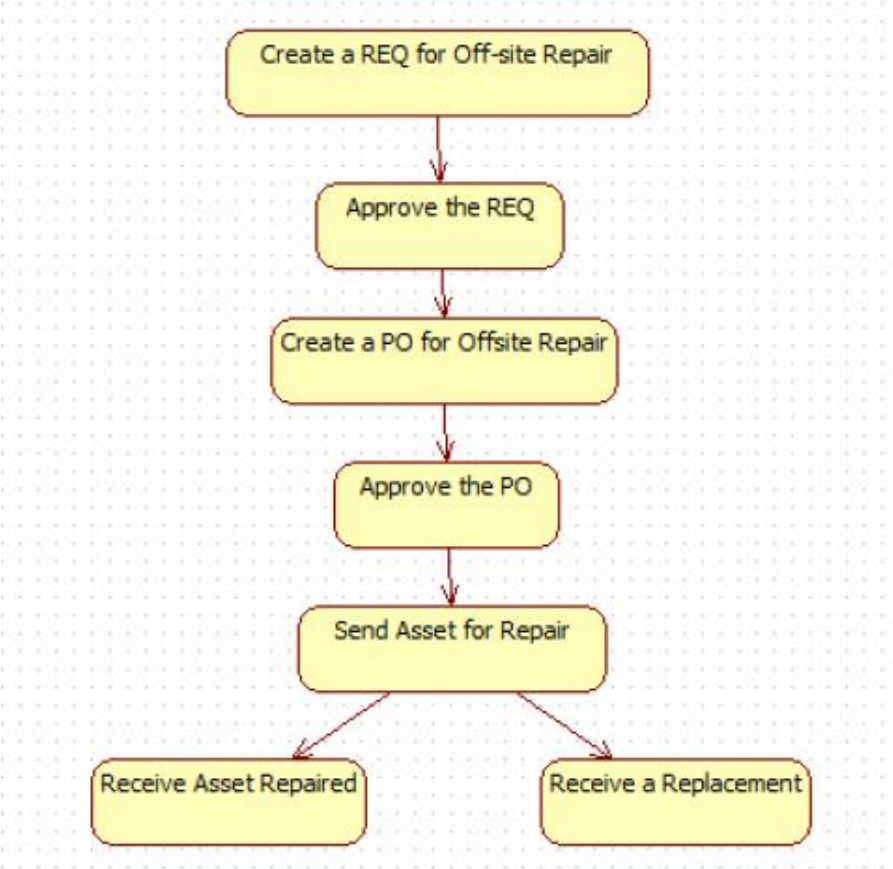
Site Inventory – Off-Site Repair

- See the blog: http://www.calemeam.com/calemcustomers-2/asset-off-site-repair-and-tracking



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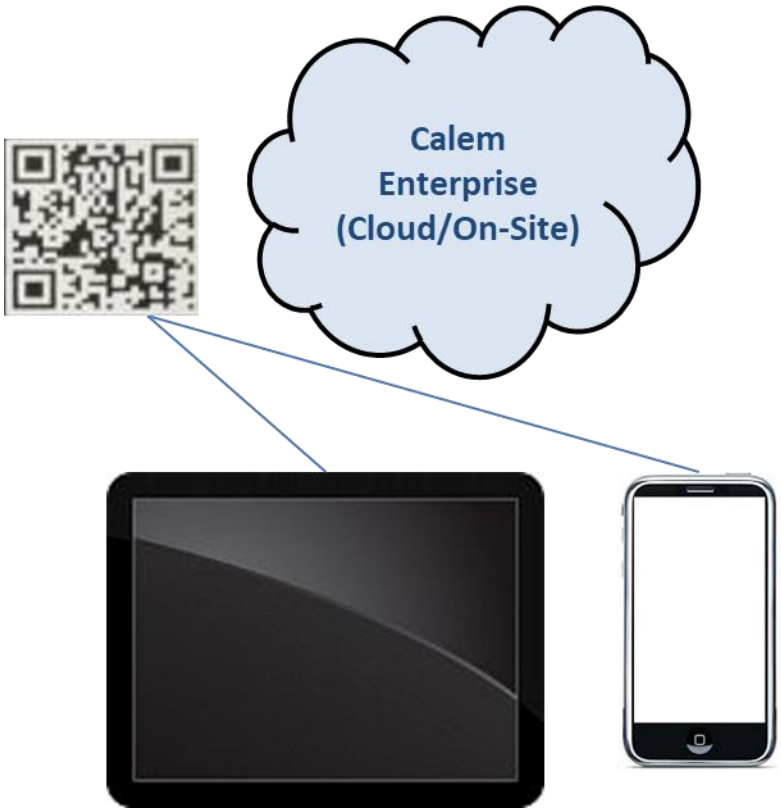
Barcode – Calem Mobile

- Use Calem Mobile for barcoding
- iOS and Android phones/tablets



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Barcode – Printers & Scanners

Optional Equipment:

- Barcode Printer for Q-R Code
  - E.g. Honeywell PC43T
- Barcode Scanners USB
  - E.g. Honeywell Xenon 1900 for 1D and 2D
- Barcode Computers
  - E.g. Honeywell CT-50 Barcode Computer with Android

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Barcode Transactions

Physical Count

- Use a barcode device to walk aisles/shelves to count stock quantity.

Checkout

- Option 1: Use a barcode device to walk aisles/shelves to check out items.
- Option 2: Use barcode scanner connected to a PC as a Checkout Station

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Inventory Module – Reports

- Stock Level
- Vendor Price
- Transaction

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Inventory Module – Data Upload

- Inventory Setup Flow:
- http://www.calemeam.com/calemcustomers-2/data-setup-part-1-inventory-setup

- Use Excel Templates to initialize your inventory module
- http://www.calemeam.com/calemcustomers-2/upload-1-inventory-setup-by-data-upload

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Inventory Module – Hands-On Lab

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Hands-On

- Set up an Item with Reference Numbers
- Set up a Site Inventory Item
    - Set up Min/Max and Reordering to be automatic
- Perform Inventory Transactions
    - Receive
    - Checkout
    - Adjust quantity received
    - Adjust PO cost by invoice
    - Physical Count
    - Move items
- Run an inventory transaction report for a period of time
- Barcode checkout
- Barcode Physical Count

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Next Module – REQ & PO

Inventory and Warehouse

Requisition and Purchase Order

Doc, Project, Integration, etc.

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Barcode – Touch PC and Scanner

Use Touch PC and Barcode Scanner as a Checkout Station in a Storeroom

Windows 10 Touch PC

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