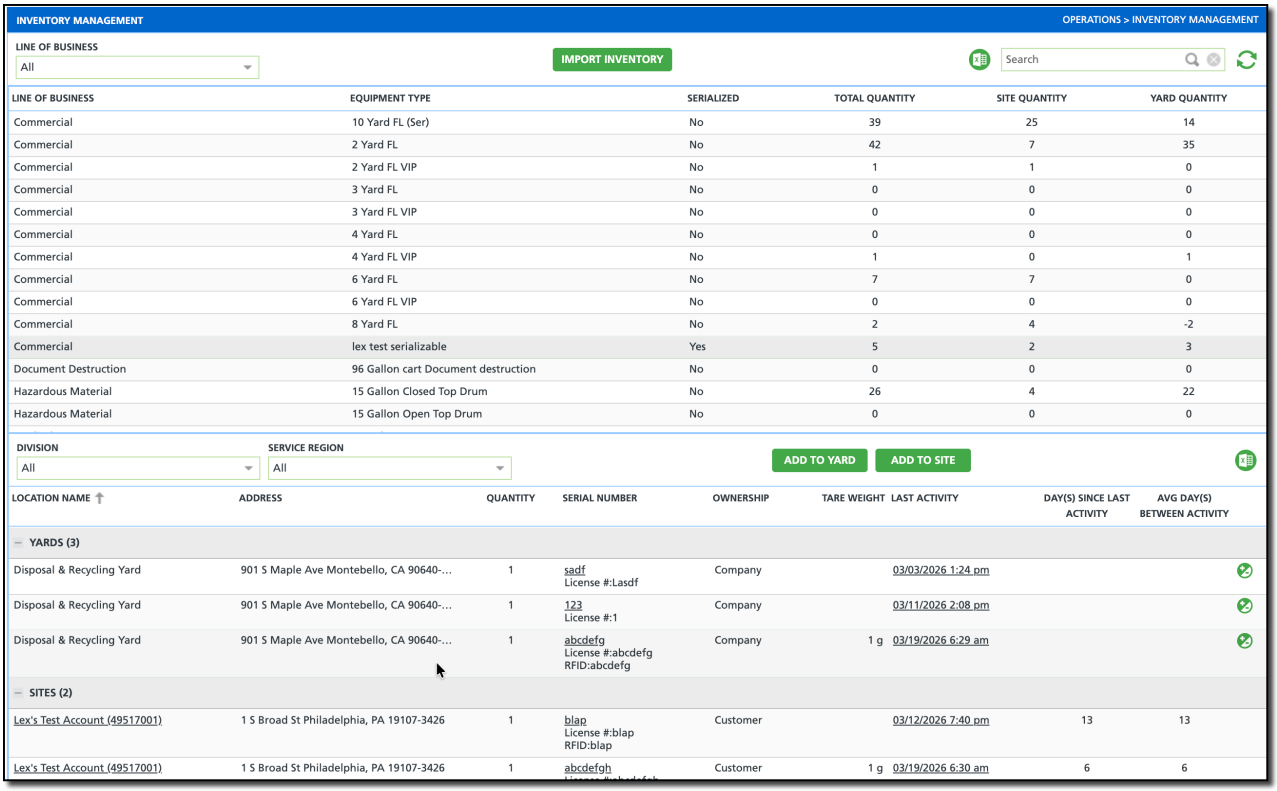
Inventory Management

Last Modified on 09/10/2026 11:22 am PDT

Pathway: *Operations > Inventory Management*

The *Inventory Management* screen effectively tracks and manages equipment inventory at yards and sites. This screen functions through two grids: an upper grid and a lower grid. The upper grid presents each equipment type categorized by the line of business. Upon selecting an equipment type, the lower grid opens to facilitate the addition, review, and adjustment of the equipment's quantity.



Expand All Sections | Collapse All Sections

Helpful Tip: To search all text using **CTRL**-F, you must first click on the Expand All Sections button.

Field Descriptions

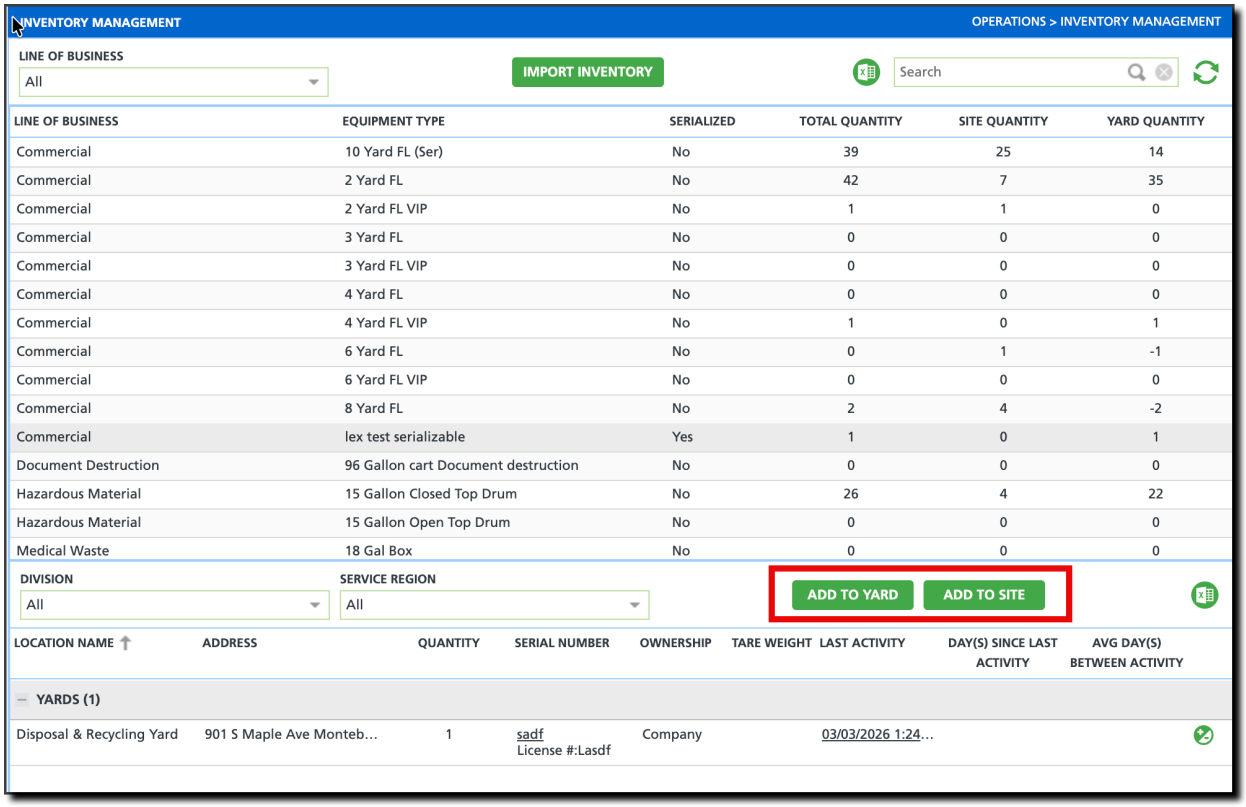
Upper Grid	
Filter Options	
Line of Business	Filters the equipment type list to only display the ones associated with the selected line of business.
Fields	
Line of Business	The line of business the equipment belongs to. Use the Line of Business drop down to filter the screen to a specific line of business.

Equipment Type	The name of the equipment inventory is tracked for.
Serialized	Displays "Yes" if in *Setup > Services > Equipment Type* the equipment type is marked "Yes" for the 'Is Serialized' field. Serialized equipment requires the entry of a serial number when equipment is added to a site or yard.
Total Quantity	The combined amount of Site Quantity and Yard Quantity.
Site Quantity	The total amount of the specific equipment type currently sitting at a site.
Yard Quantity	The total amount of a specific equipment type currently sitting at a yard.
Lower Grid	
Filter Options	
Division	Filters the screen to only display inventory of the selected division.
Service Region	Filters the screen to only display inventory of the selected service region.
Fields	
Location Name	The name of the yard or site inventory is located at.
Address	The address of the yard or site location.
Quantity	The total count of equipment added to the the yard or a site.
Serial Number	The serial number for the equipment if the equipment is serialized. This column does not display if equipment is not serialized. If a license plate is recorded, it will display below the serial number.
Ownership	Displays 'Company' if ownership was not specifically identified, otherwise the value entered as Ownership from the equipment is displayed.
Tare Weight	The tare weight if this was entered for the equipment.
Last Activity	A timestamp hyperlink of the date and time equipment was last moved or adjusted. Select the link to open and review the activity history.
Day(s) Since Last Activity	The tracked number of days since there has been any movement or adjustments to equipment at the yard or the site.
AVG Day(s) Between Activity	The system averaged days between movement or adjustments to equipment at the yard or the site.
+ / - Icon	Option to increase or decrease the equipment quantity at a site or a yard. This is visible in both the Inventory Management screen as well as in Site Inventory (Equipment tab).

Add Inventory

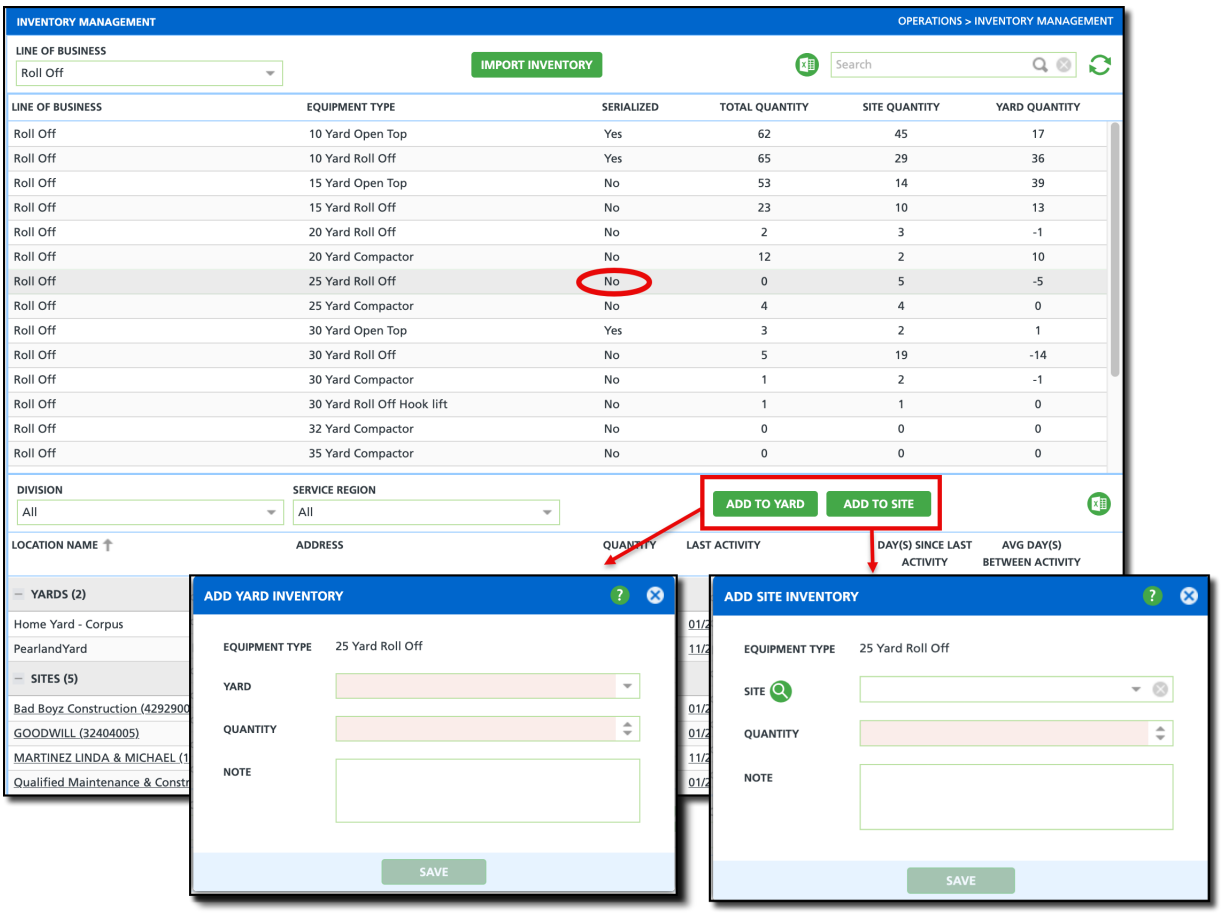
Inventory Management classifies equipment tracking into two categories: serialized and non-serialized. Equipment becomes serialized when the "Is Serialized" field is enabled under *Setup > Services > Equipment Type*. Serialized equipment requires the input of a serial number whereas non-serialized equipment uses a Quantity field.

Serialized and non-serialized inventory can be added to a Yard or to a Site.



Add: Non-Serialized Inventory

If an equipment type is not serialized, the option to add serial numbers is not available when adding inventory to a site or yard and is replaced with a 'Quantity' field.



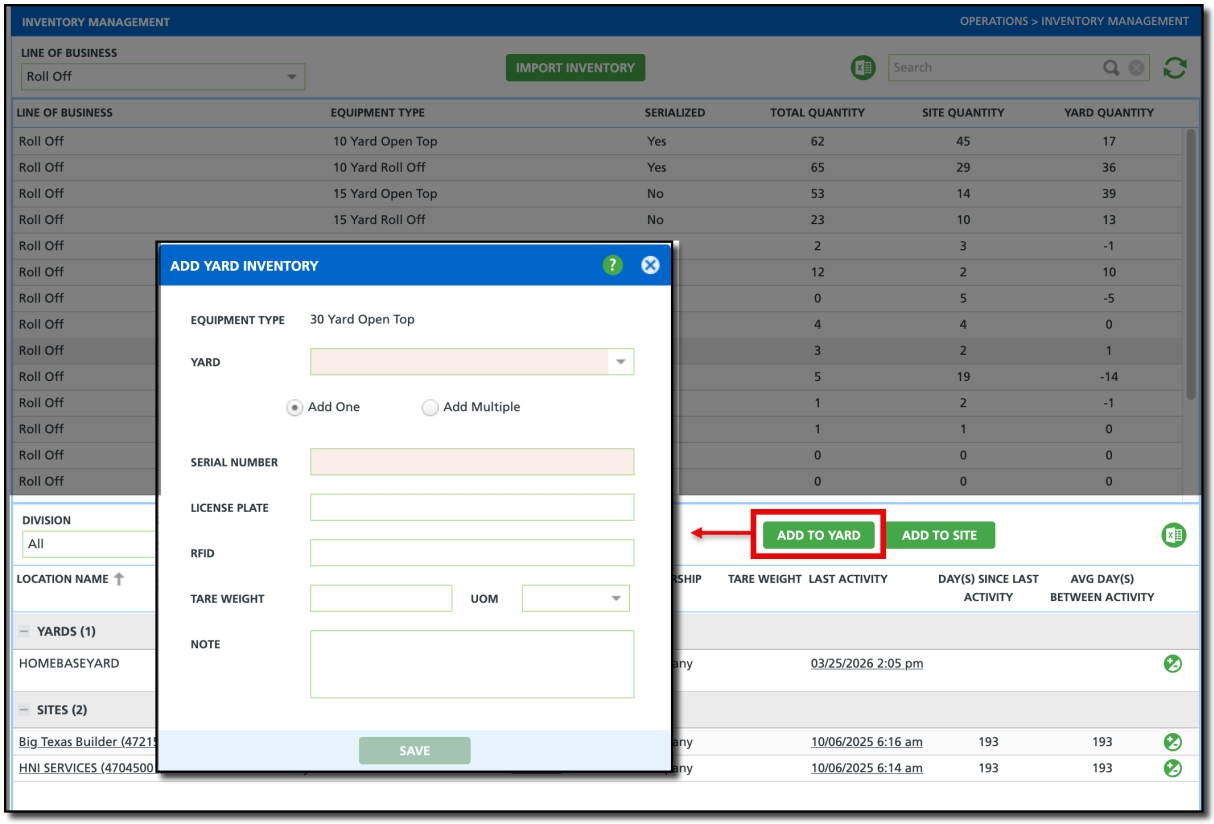
1. Click on the **Equipment Type** from the upper grid you would like to add inventory to.
2. Select **"Add to Yard"** or **"Add to Site"** to create an inventory record.
3. Select where the equipment will be added:
    - If **Add Yard Inventory**, select the Yard the inventory will be added to.
    - If **Add Site Inventory**, search for the site by selecting the site search icon.
4. Enter the quantity of the equipment being added.
5. Optional - Add an internal note regarding the equipment or inventory.
6. Click **Save** when finished.

Add: Serialized Inventory

If an equipment type is serialized, the Serial Number field is required when inventory is added. If more than one serial number exists, separate each serial number with a space, comma, semi-colon, or as a new line. Upon save, a confirmation window displays with a serial number count confirming each will be added as a unique inventory record count. Serialized equipment can be added to a Yard or to a Site.

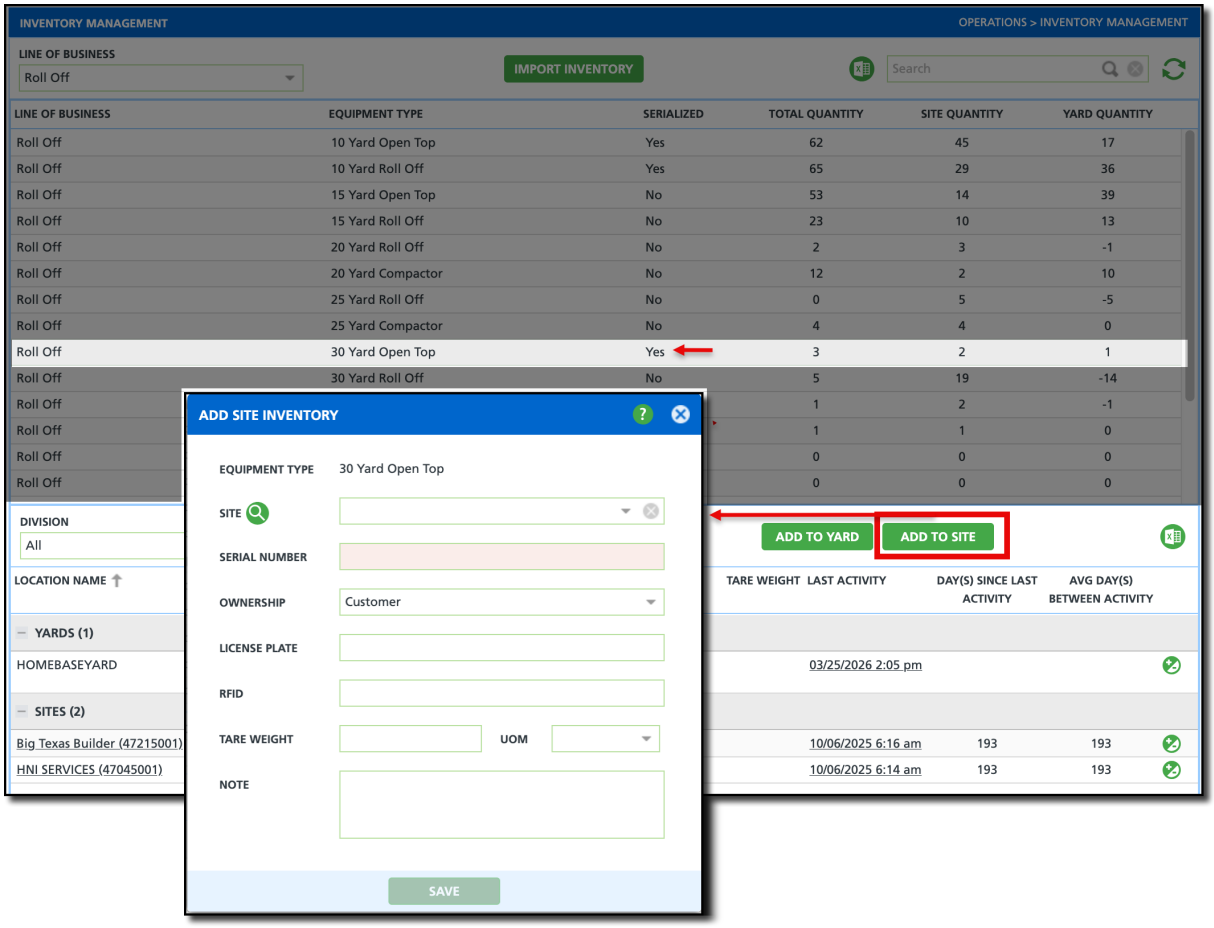
> Equipment is considered serialized if in *Setup > Services > Equipment Type*, the "Is Serialized" field for the specific equipment type is set to "Yes."

Add Serialized Inventory To Yard



1. Click on the **Equipment Type** from the upper grid you would like to add inventory to.
2. Click on **"Add to Yard"** to add inventory to either a Yard or a Site. This will create a new inventory record.
3. Select the Yard the inventory will be added to using the drop down list.
4. Click **"Add Multiple"** to add multiple serialized equipment records. The option of only being allowed to add one ,**"Add One",** is selected by default**.**
5. Enter the **serial number** for every piece of equipment being added. For "**Add Multiple"**, enter multiple serial numbers separated by a comma, semi-colon, space or new line. Each serial number entered creates a unique inventory record.
6. For the "**Add One**" option, optional fields are displayed and can be set, if applicable.
    a. License Plate - Enter a license plate for the equipment being added.
    b. Tare - Enter Tare weight and UOM for the weight of the equipment being added.
7. Optional: Add any Notes regarding the equipment or inventory.
8. Click **Save** when finished.

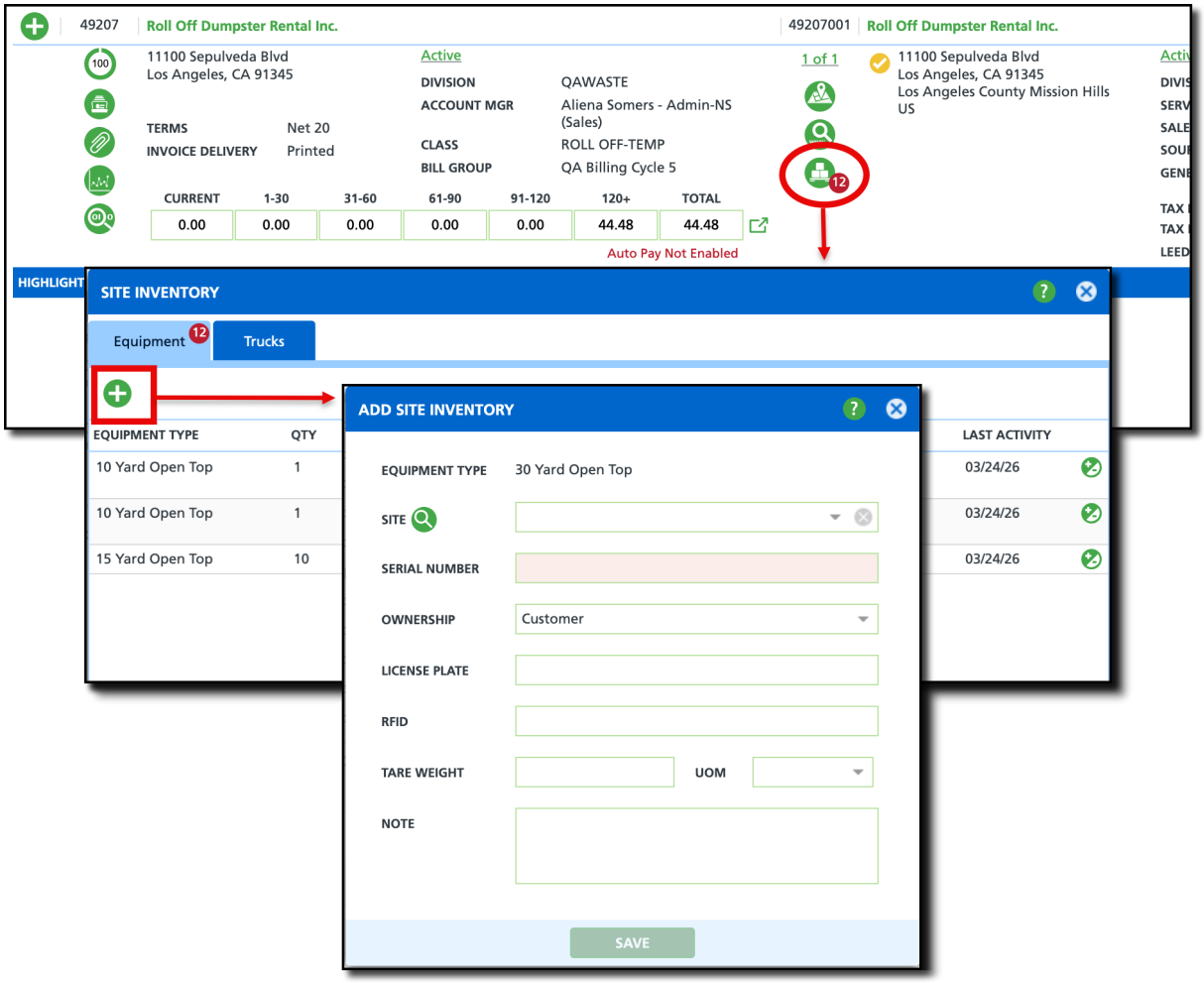
Add Serialized Inventory To Site



1. Click on the **Equipment Type** from the upper grid you would like to add inventory to.
2. Click **"Add to Site"** to add inventory to a Site. This will create a new inventory record.
3. Search for the site where the inventory is being added by selecting the site search icon.
4. Enter the **serial number** for the equipment being added. Each serial number entered creates a unique inventory record.
5. Optional: Enter a license plate for the equipment.
6. Optional: Enter an RFID for the equipment.
7. Optional: Enter Tare weight and UOM for the weight of the equipment.
8. Optional: Add any notes regarding the equipment or inventory.
9. Click **Save** when finished.

Add: Inventory at the Site Level

When adding equipment inventory to a site, you have two choices: you can either utilize the Inventory Management tool, or directly add it to the site through the Site Inventory screen. Once the inventory is added to a site, the tally for the particular equipment type will be automatically updated on the Inventory Management screen.



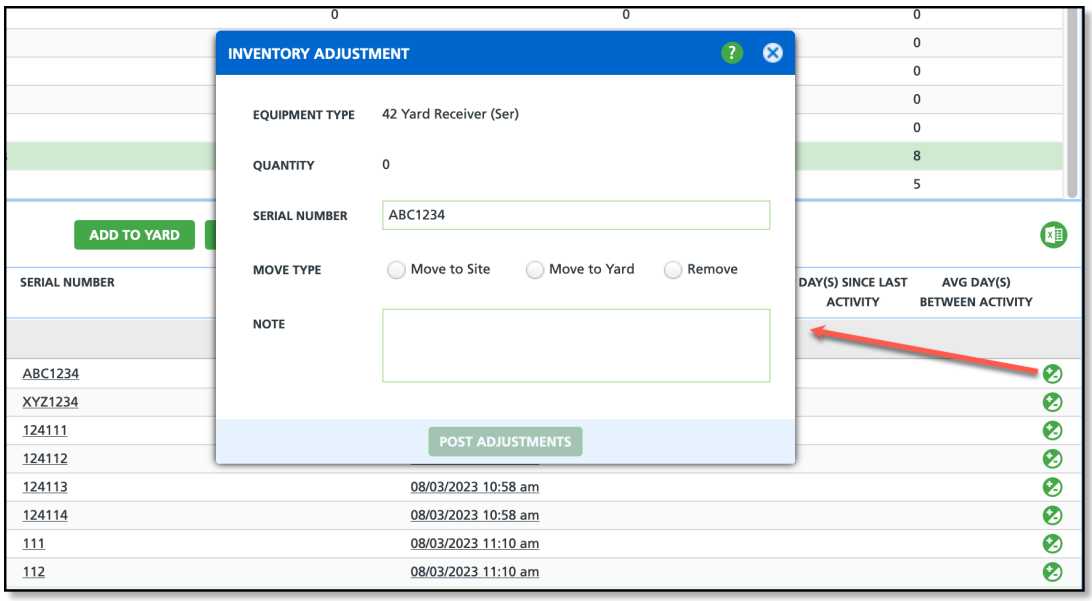
Add Equipment:

1. Search and open the site.
2. Select the **Display Inventory** icon in the Site section of the Customer Service screen. This will open the Site Inventory popup.
3. Select the **Equipment** tab.
4. Click on the **green "+"** icon to display the 'Add Site Inventory' popup.
5. Select the **Equipment Type** from the drop down.
6. If the equipment is non-serialized:
    a. Enter a **Quantity**. The Quantity field only displays for equipment types that are not serialized.
7. If the equipment type is serialized,
    - enter the serial number(s) in the **Serial Number** field. For multiple serial numbers separate with a comma, semi-colon, space or new line.
    - Select Ownership of equipment from the drop down field. Default is set at "Customer".
    - Optional: Enter a License plate number for the equipment being added.
    - Optional: Enter the RFID for the equipment being added.
8. Optional: Enter a notes that will display with the equipment.
9. Click **Save** when finished.

Related Article: Site Inventory

Move Inventory

The option to move site inventory is available for serialized equipment.



Move to Site

1. Select the "**+/-**" icon of a serialized equipment type.
2. Select the **"Move to Site"** radio button and the Site search field will display.
3. Enter the site number in the search field, or select the green search icon to open a search window.
4. Optional: add an internal **Note** that will display with the equipment in the inventory tools.
5. Select **"Post Adjustments"** when finished.

Move to Yard

1. Select the "**+/-**" icon of a serialized equipment type.
2. Select the **"Move to Yard"** radio button and the Yard drop down will display.
3. Select the **Yard** the inventory is being moved to.
4. Optional: add an internal **Note** that will display with the equipment in the inventory tools.
5. Select **"Post Adjustments"** when finished

Remove

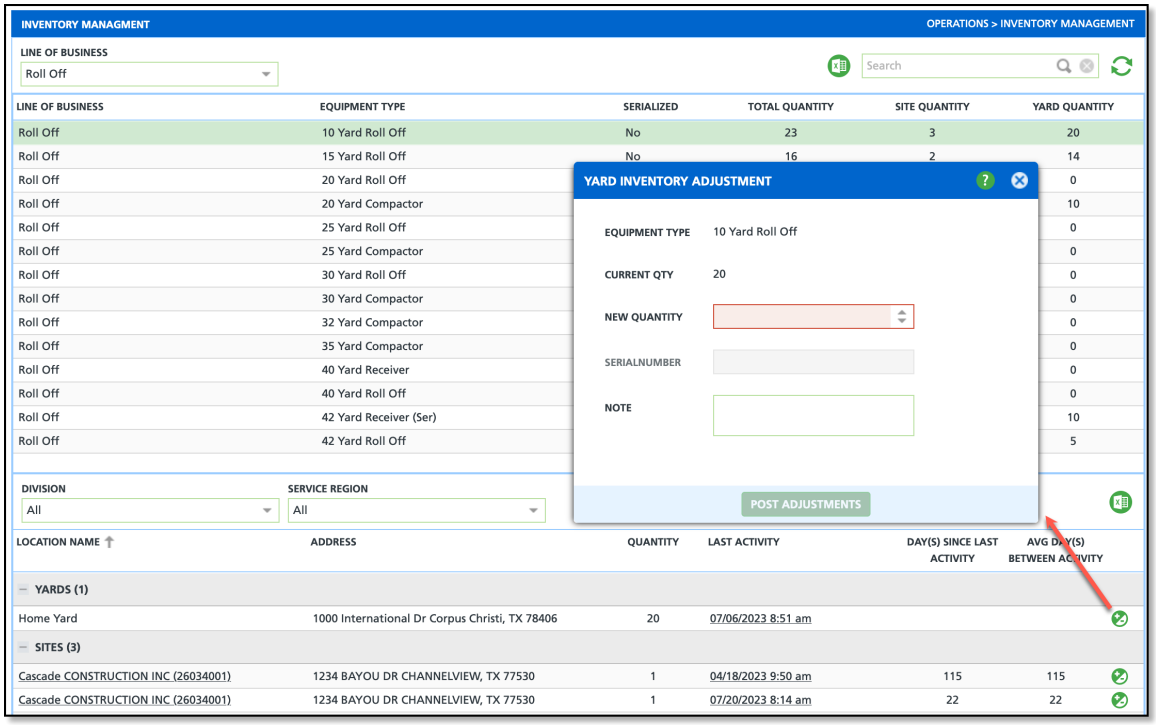
√ *Removing serialized equipment from a site or yard only removes the record from the location you're working with, it does not delete the record from the system.*

1. Select the "**+/-**" icon of a serialized equipment type.
2. Select the "**Remove**" radio button.
3. Optional: add an internal **Note** that will display with the equipment in the inventory tools.
4. Select **"Post Adjustments"** when finished.

Audit and Adjust Inventory Counts

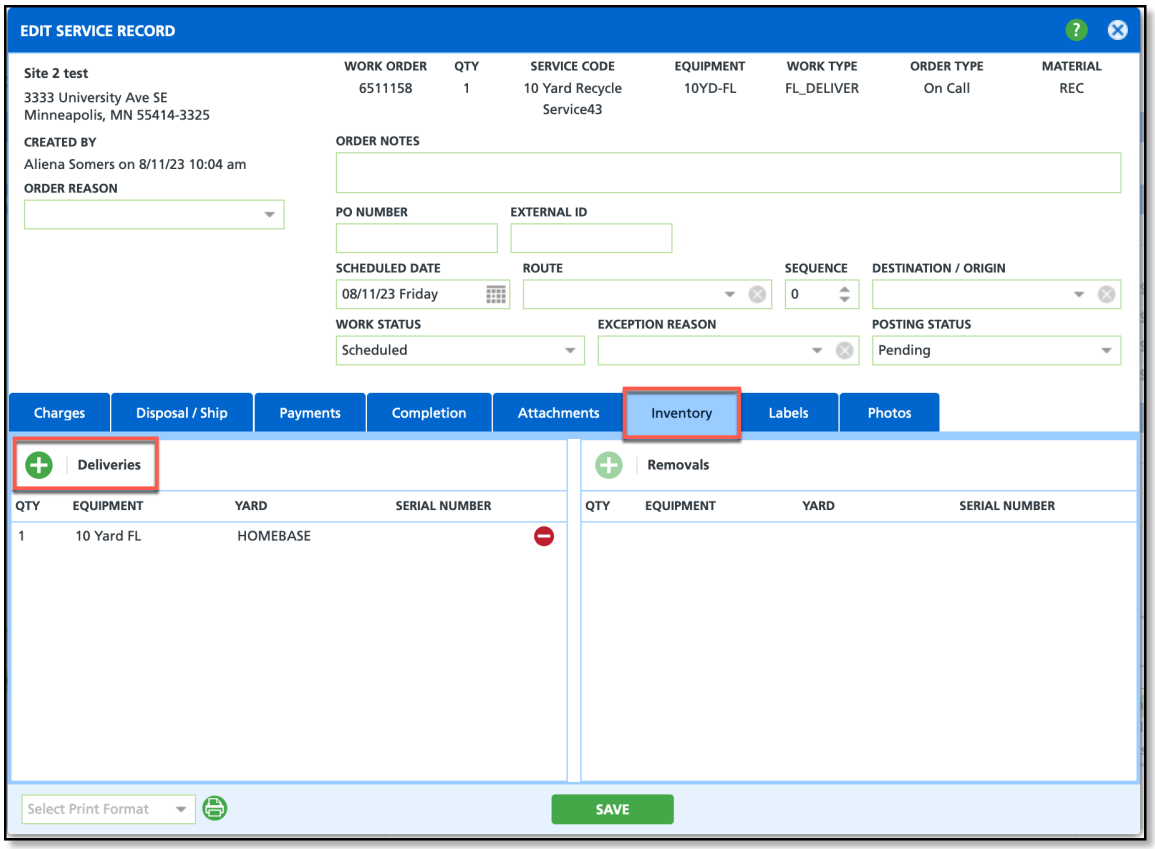
Adjustments to the equipment quantity display in the lower grid of the Inventory Management screen. To adjust the inventory amount at a site or a yard, select the specific equipment type from the upper grid and its inventory record will display in the lower grid.

Consider auditing and adjusting inventory counts for both the site and the yard when equipment is moved without a work order.



Add Inventory to a Work Order

When equipment is delivered to a site, the inventory tracking process involves updating the equipment's movement through the Inventory tab within the Service Record. When equipment is added, and a yard identified, it will be reflected in Site and Yard counts in Inventory Management for the equipment type.



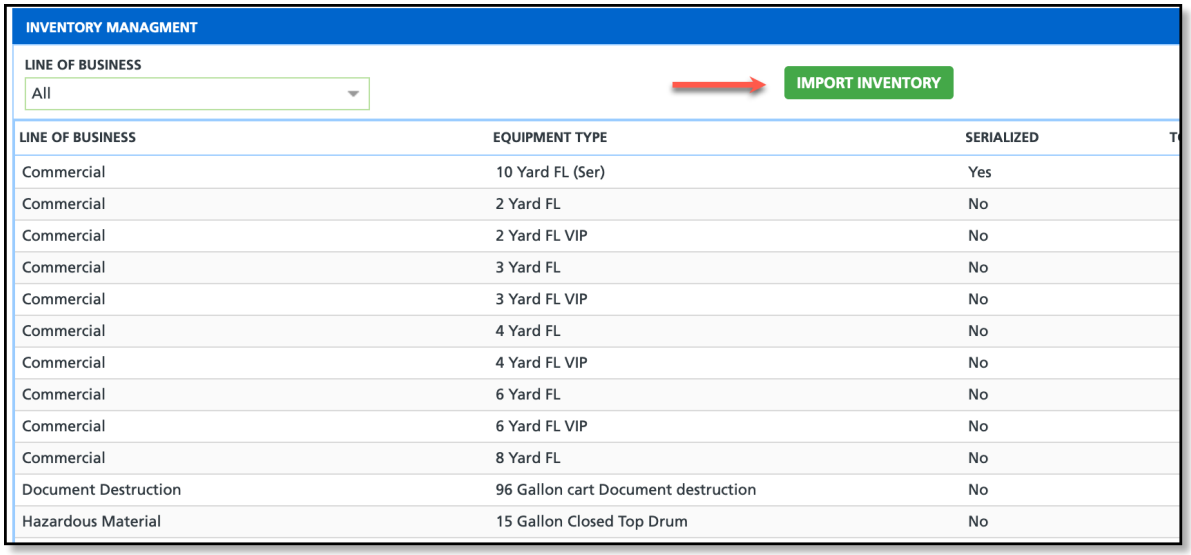
Add Inventory

1. Open the work order.
2. Select the **Inventory tab.**
3. Select the **green "+"** icon from the **Deliveries** section.
4. Enter the **quantity.**
5. Click within the **Yard** column and select the yard the equipment is being taken from.
6. Enter a **serial number** if the equipment is serialized.
7. Select **Save** when finished.

Import Inventory

The Import Inventory tool is used to mass import equipment inventory from an external CSV file into Navusoft. Review the Import Inventory article linked above for more information including file requirements.

Related Article: Import Inventory



LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED
Commercial	10 Yard FL (Ser)	Yes
Commercial	2 Yard FL	No
Commercial	2 Yard FL VIP	No
Commercial	3 Yard FL	No
Commercial	3 Yard FL VIP	No
Commercial	4 Yard FL	No
Commercial	4 Yard FL VIP	No
Commercial	6 Yard FL	No
Commercial	6 Yard FL VIP	No
Commercial	8 Yard FL	No
Document Destruction	96 Gallon cart Document destruction	No
Hazardous Material	15 Gallon Closed Top Drum	No

Permissions

The Inventory Management screen requires the following permission from the Operations module:

Permission ID	Permission Name
449	Inventory Management

Related Articles

Import Inventory
Site Inventory (Equipment)
Site Inventory (Trucks)
Database Query - Inventory Management Entity