

# Inventory Management

Last Modified on 03/22/2024 9:37 am EDT

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.

INVENTORY MANAGEMENT		OPERATIONS > INVENTORY MANAGEMENT			
LINE OF BUSINESS		IMPORT INVENTORY		Search	
All					
LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Commercial	10 Yard FL (Ser)	Yes	33	20	13
Commercial	2 Yard FL	No	40	6	34
Commercial	2 Yard FL VIP	No	0	0	0
Commercial	3 Yard FL	No	0	0	0
Commercial	3 Yard FL VIP	No	0	0	0
Commercial	4 Yard FL	No	0	0	0
Commercial	4 Yard FL VIP	No	0	0	0
Commercial	6 Yard FL	No	0	0	0
Commercial	6 Yard FL VIP	No	0	0	0
Commercial	8 Yard FL	No	0	0	0
Document Destruction	96 Gallon cart Document destruction	No	0	0	0
Hazardous Material	15 Gallon Closed Top Drum	No	0	0	0
Hazardous Material	15 Gallon Open Top Drum	No	0	0	0
Medical Waste	18 Gal Box	No	0	0	0
Medical Waste	18 Gal Sharp	No	0	0	0
Medical Waste	200 Gal Cart	No	0	0	0
Medical Waste	2 Quart Sharps	No	0	0	0
Medical Waste	30 Gal Box	No	0	0	0
Medical Waste	43 Gal Reusable	No	0	0	0
Residential	18 Gallon Recycle	No	0	0	0
Residential	2 Yard RL	No	0	0	0
Residential	3 Yard RL	No	0	0	0

DIVISION	SERVICE REGION	ADD TO YARD	ADD TO SITE
All	All		

LOCATION NAME	ADDRESS	QUANTITY	LAST ACTIVITY	DAY(S) SINCE LAST ACTIVITY	AVG DAY(S) BETWEEN ACTIVITY

## Permissions

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

Permission ID	Permission Name
449	Inventory Management

## Field Descriptions

Upper Grid	
Line of Business	Displays 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	Displays the name of the equipment inventory is tracked for.
Serialized	Displays "Yes" if in <i>Setup &gt; Services &gt; Equipment Type</i> 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	

<b>Division</b>	Filters the screen to only display inventory of the selected division.
<b>Service Region</b>	Filters the screen to only display inventory of the selected service region.
<b>Fields</b>	
<b>Location Name</b>	Displays the name of the yard or site inventory is located at.
<b>Address</b>	The address of the yard or site location.
<b>Quantity</b>	Displays the total count of equipment added to the the yard or a site.
<b>Serial Number</b>	Displays the serial number for the equipment if the equipment is serialized. This column does not display if equipment is not serialized.
<b>Last Activity</b>	Displays a timestamp hyperlink of the date and time equipment was last moved or adjusted. Select the link to open and review the activity history.
<b>Day(s) Since Last Activity</b>	Displays the tracked number of days since there has been any movement or adjustments to equipment at the yard or the site.
<b>AVG Day(s) Between Activity</b>	Displays the system averaged days between movement or adjustments to equipment at the yard or the site.
<b>+ / - Icon</b>	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.

The screenshot displays the 'INVENTORY MANAGEMENT' interface. At the top, there's a header with 'OPERATIONS > INVENTORY MANAGEMENT'. Below the header, a dropdown menu shows 'LINE OF BUSINESS' set to 'Roll Off'. A green 'IMPORT INVENTORY' button is visible. A search bar with a magnifying glass icon and a refresh icon is on the right. The main area contains a table with columns: 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'SERIALIZED', 'TOTAL QUANTITY', 'SITE QUANTITY', and 'YARD QUANTITY'. The table lists several 'Roll Off' entries with different equipment types like '10 Yard Roll Off', '15 Yard Roll Off', and '20 Yard Roll Off'. A modal window titled 'ADD YARD INVENTORY' is overlaid on the table. It has a blue header with a question mark and a close button. The modal contains a dropdown for 'EQUIPMENT TYPE', a dropdown for 'YARD', and a text input field for 'NOTE'. A green 'SAVE' button is at the bottom. A red arrow points from the 'ADD TO YARD' button at the bottom of the main interface to the modal window. At the bottom of the interface, there are dropdowns for 'DIVISION' and 'SERVICE REGION', both set to 'All'. There are also 'ADD TO YARD' and 'ADD TO SITE' buttons, and a refresh icon.

### 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.

The screenshot shows the 'INVENTORY MANAGEMENT' interface. At the top, there is a 'LINE OF BUSINESS' dropdown menu set to 'Commercial'. Below this is a table with columns for 'LINE OF BUSINESS', 'EQUIPMENT TYPE', and 'SERIALIZED'. The table contains several rows of equipment types, including '10 Yard FL', '2 Yard FL', and '2 Yard FL VIP'. A modal window titled 'ADD YARD INVENTORY' is open in the foreground. This modal has a blue header with a question mark and a close button. It contains the following fields: 'EQUIPMENT TYPE' (set to '2 Yard FL'), 'YARD' (a dropdown menu set to 'Pearland'), 'QUANTITY' (a spinner box set to '2'), and 'NOTE' (a text area). A green 'SAVE' button is located at the bottom of the modal.

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED
Commercial	10 Yard FL	Yes
Commercial	2 Yard FL	No
Commercial	2 Yard FL VIP	No
Commercial		No
Commercial		No
Commercial		No
Commercial		No
Commercial		No
Commercial		No
Commercial		No
Commercial		No
Commercial		No

### Add Inventory:

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.
  - o If "Add to Yard" is selected, select the Yard the inventory will be added to.
  - o If "Add to Site" is selected, search for the site by selecting the site search icon.
3. Enter the quantity of the equipment in the **Quantity** field.
4. Optional - Add any notes regarding the equipment or inventory.
5. 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.



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

The screenshot shows the 'ADD YARD INVENTORY' dialog box. The background table lists equipment types and their status:

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY
Commercial	10 Yard FL	Yes	23
Commercial	2 Yard FL	No	22
Commercial	2 Yard FL VIP		0
Commercial	3 Yard FL		0
Commercial	3 Yard FL VIP		0
Commercial	4 Yard FL		0
Commercial	4 Yard FL VIP		0
Commercial	6 Yard FL		0
Commercial	6 Yard FL VIP		0
Commercial	8 Yard FL		0

The 'ADD YARD INVENTORY' dialog box contains the following fields:

- EQUIPMENT TYPE:** 10 Yard FL
- YARD:** Pearland
- SERIAL NUMBER:** 1233, 2223; 0987, 3983 4676
- NOTE:** (Empty text area)
- SAVE:** (Green button)

### Add Inventory:

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.
  - If "Add to Yard" is selected, select the Yard the inventory will be added to.
  - If "Add to Site" is selected, search for the site by selecting the site search icon.
3. Enter the **serial number** for every piece of equipment. Each serial number entered creates a unique inventory record.
  - For multiple serial numbers separate with a comma, semi-colon, space or new line.
4. Optional - Add any notes regarding the equipment or inventory.
5. Click **Save** when finished.

### Add: Inventory at the Site Level

Related Article Link: [Site Inventory](#)

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.

48954 | Test -Leads Analysis | 48954002 | Site 2 test

100 12341 Aberdeen St NE Blaine, MN 55449-5144

Active

DIVISION CORPUS

ACCOUNT MGR House Account

CLASS ROLL OFF-PERM

BILL GROUP DAY-ROLF BI-WEEKLY

Arrears - Twice a month Billed Thru Date Jul 17, 20

2 of 2 3333 University Ave SE Minneapolis, MN 55414-3325 Hennepin County Prospect Park US

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	25.00	0.00	0.00	0.00	0.00	25.00

**SITE INVENTORY**

Equipment Trucks

+ EQUIPMENT QTY SERIAL NUMBER NOTE LAST UPDATED

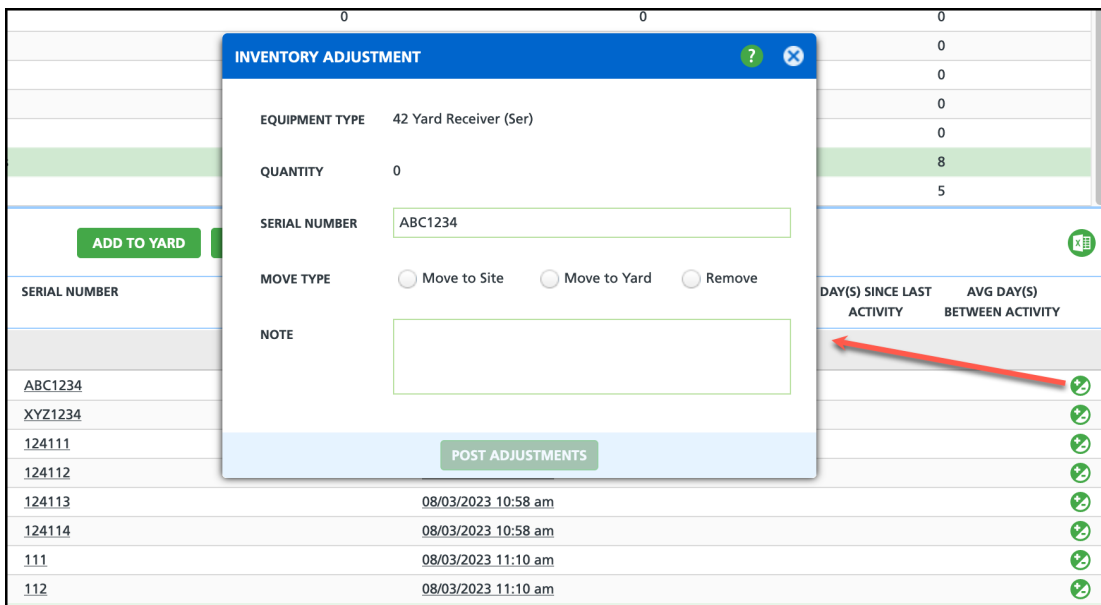
20 Yard Compactor	2			08/09/23
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#### Add Equipment:

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. 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.
  - o For multiple serial numbers separate with a comma, semi-colon, space or new line.
8. Click **Save** when finished.

## 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.



INVENTORY MANAGEMENT OPERATIONS > INVENTORY MANAGEMENT

LINE OF BUSINESS: Roll Off

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Roll Off	10 Yard Roll Off	No	23	3	20
Roll Off	15 Yard Roll Off	No	16	2	14
Roll Off	20 Yard Roll Off				0
Roll Off	20 Yard Compactor				10
Roll Off	25 Yard Roll Off				0
Roll Off	25 Yard Compactor				0
Roll Off	30 Yard Roll Off				0
Roll Off	30 Yard Compactor				0
Roll Off	32 Yard Compactor				0
Roll Off	35 Yard Compactor				0
Roll Off	40 Yard Receiver				0
Roll Off	40 Yard Roll Off				0
Roll Off	42 Yard Receiver (Ser)				10
Roll Off	42 Yard Roll Off				5

DIVISION: All SERVICE REGION: All

LOCATION NAME ↑ ADDRESS QUANTITY LAST ACTIVITY DAY(S) SINCE LAST ACTIVITY AVG DAY(S) BETWEEN ACTIVITY

YARDS (1)

Home Yard	1000 International Dr Corpus Christi, TX 78406	20	07/06/2023 8:51 am		
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SITES (3)

Cascade CONSTRUCTION INC (26034001)	1234 BAYOU DR CHANNELVIEW, TX 77530	1	04/18/2023 9:50 am	115	115
Cascade CONSTRUCTION INC (26034001)	1234 BAYOU DR CHANNELVIEW, TX 77530	1	07/20/2023 8:14 am	22	22

YARD INVENTORY ADJUSTMENT

EQUIPMENT TYPE: 10 Yard Roll Off

CURRENT QTY: 20

NEW QUANTITY:

SERIALNUMBER:

NOTE:

POST ADJUSTMENTS

## 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.

**EDIT SERVICE RECORD** ? X

Site 2 test 3333 University Ave SE Minneapolis, MN 55414-3325	WORK ORDER 6511158	QTY 1	SERVICE CODE 10 Yard Recycle Service43	EQUIPMENT 10YD-FL	WORK TYPE FL_DELIVER	ORDER TYPE On Call	MATERIAL REC
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CREATED BY: Aliena Somers on 8/11/23 10:04 am

ORDER REASON:

ORDER NOTES:

PO NUMBER:  EXTERNAL ID:

SCHEDULED DATE: 08/11/23 Friday  ROUTE:  SEQUENCE: 0  DESTINATION / ORIGIN:

WORK STATUS: Scheduled  EXCEPTION REASON:  POSTING STATUS: Pending

Charges Disposal / Ship Payments Completion Attachments Inventory Labels Photos

+ Deliveries

QTY	EQUIPMENT	YARD	SERIAL NUMBER
1	10 Yard FL	HOMEBASE	-

+ Removals

QTY	EQUIPMENT	YARD	SERIAL NUMBER

Select Print Format 
SAVE

## 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

Related Article: [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.



INVENTORY MANAGMENT

LINE OF BUSINESS

All



IMPORT INVENTORY

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	T
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	