

# Inventory Management

Last Modified on 04/17/2026 12:08 pm 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.

INVENTORY MANAGEMENT						OPERATIONS > INVENTORY MANAGEMENT	
LINE OF BUSINESS All		IMPORT INVENTORY		Search			
LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY		
Commercial	10 Yard FL (Ser)	No	39	25	14		
Commercial	2 Yard FL	No	42	7	35		
Commercial	2 Yard FL VIP	No	1	1	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	1	0	1		
Commercial	6 Yard FL	No	7	7	0		
Commercial	6 Yard FL VIP	No	0	0	0		
Commercial	8 Yard FL	No	2	4	-2		
Commercial	lex test serializable	Yes	5	2	3		
Document Destruction	96 Gallon cart Document destruction	No	0	0	0		
Hazardous Material	15 Gallon Closed Top Drum	No	26	4	22		
Hazardous Material	15 Gallon Open Top Drum	No	0	0	0		

DIVISION All		SERVICE REGION All		ADD TO YARD		ADD TO SITE		
LOCATION NAME ↑	ADDRESS	QUANTITY	SERIAL NUMBER	OWNERSHIP	TARE WEIGHT	LAST ACTIVITY	DAY(S) SINCE LAST ACTIVITY	AVG DAY(S) BETWEEN ACTIVITY
= YARDS (3)								
Disposal & Recycling Yard	901 S Maple Ave Montebello, CA 90640-...	1	sadf License #:Lasdf	Company		03/03/2026 1:24 pm		
Disposal & Recycling Yard	901 S Maple Ave Montebello, CA 90640-...	1	123 License #:1	Company		03/11/2026 2:08 pm		
Disposal & Recycling Yard	901 S Maple Ave Montebello, CA 90640-...	1	abcdefg License #:abcdefg RFID:abcdefg	Company	1 g	03/19/2026 6:29 am		
= SITES (2)								
Lex's Test Account (49517001)	1 S Broad St Philadelphia, PA 19107-3426	1	blap License #:blap RFID:blap	Customer		03/12/2026 7:40 pm	13	13
Lex's Test Account (49517001)	1 S Broad St Philadelphia, PA 19107-3426	1	abcdefgh License #:abcdefgh RFID:abcdefgh	Customer	1 g	03/19/2026 6:30 am	6	6

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	

<b>Line of Business</b>	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.
<b>Equipment Type</b>	The name of the equipment inventory is tracked for.
<b>Serialized</b>	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.
<b>Total Quantity</b>	The combined amount of Site Quantity and Yard Quantity.
<b>Site Quantity</b>	The total amount of the specific equipment type currently sitting at a site.
<b>Yard Quantity</b>	The total amount of a specific equipment type currently sitting at a yard.
<b>Lower Grid</b>	
<b>Filter Options</b>	
<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>	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>	The total count of equipment added to the the yard or a site.
<b>Serial Number</b>	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.
<b>Ownership</b>	Displays 'Company' if ownership was not specifically identified, otherwise the value entered as Ownership from the equipment is displayed.
<b>Tare Weight</b>	The tare weight if this was entered for the equipment.
<b>Last Activity</b>	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>	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>	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.

The screenshot shows the 'INVENTORY MANAGEMENT' interface. At the top, there's a navigation bar with 'OPERATIONS > INVENTORY MANAGEMENT'. Below it, a 'LINE OF BUSINESS' dropdown is set to 'All', and an 'IMPORT INVENTORY' button is visible. A search bar and a refresh icon are also present. The main part of the screen is a table with the following columns: LINE OF BUSINESS, EQUIPMENT TYPE, SERIALIZED, TOTAL QUANTITY, SITE QUANTITY, and YARD QUANTITY. The table lists various equipment types such as '10 Yard FL (Ser)', '2 Yard FL', '3 Yard FL VIP', etc. Below the table, there are 'DIVISION' and 'SERVICE REGION' dropdowns, both set to 'All'. Two buttons, 'ADD TO YARD' and 'ADD TO SITE', are highlighted with a red box. At the bottom, there's a table with columns: LOCATION NAME, ADDRESS, QUANTITY, SERIAL NUMBER, OWNERSHIP, TARE WEIGHT, LAST ACTIVITY, DAY(S) SINCE LAST ACTIVITY, and AVG DAY(S) BETWEEN ACTIVITY. A single entry is shown for 'Disposal & Recycling Yard' with a quantity of 1 and a last activity date of '03/03/2026 1:24...'. A '+ / -' icon is visible at the end of this row.

## 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 displays the 'INVENTORY MANAGEMENT' interface. At the top, there is a search bar and an 'IMPORT INVENTORY' button. Below this is a table with columns: LINE OF BUSINESS, EQUIPMENT TYPE, SERIALIZED, TOTAL QUANTITY, SITE QUANTITY, and YARD QUANTITY. The 'SERIALIZED' column for the '25 Yard Roll Off' row is circled in red. Below the table are dropdown menus for 'DIVISION' and 'SERVICE REGION', and two buttons: 'ADD TO YARD' and 'ADD TO SITE'. Two modal windows are overlaid: 'ADD YARD INVENTORY' and 'ADD SITE INVENTORY'. Both modals have fields for 'EQUIPMENT TYPE', 'YARD' (or 'SITE'), 'QUANTITY', and 'NOTE', with a 'SAVE' button at the bottom.

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Roll Off	10 Yard Open Top	Yes	62	45	17
Roll Off	10 Yard Roll Off	Yes	65	29	36
Roll Off	15 Yard Open Top	No	53	14	39
Roll Off	15 Yard Roll Off	No	23	10	13
Roll Off	20 Yard Roll Off	No	2	3	-1
Roll Off	20 Yard Compactor	No	12	2	10
Roll Off	25 Yard Roll Off	No	0	5	-5
Roll Off	25 Yard Compactor	No	4	4	0
Roll Off	30 Yard Open Top	Yes	3	2	1
Roll Off	30 Yard Roll Off	No	5	19	-14
Roll Off	30 Yard Compactor	No	1	2	-1
Roll Off	30 Yard Roll Off Hook lift	No	1	1	0
Roll Off	32 Yard Compactor	No	0	0	0
Roll Off	35 Yard Compactor	No	0	0	0

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

The screenshot displays the 'INVENTORY MANAGEMENT' interface. At the top, there's a header with 'OPERATIONS > INVENTORY MANAGEMENT'. Below that, a search bar and an 'IMPORT INVENTORY' button are visible. The main area contains a table with columns: LINE OF BUSINESS, EQUIPMENT TYPE, SERIALIZED, TOTAL QUANTITY, SITE QUANTITY, and YARD QUANTITY. A modal window titled 'ADD YARD INVENTORY' is overlaid on the table. This modal has a blue header with a question mark and a close button. It contains several input fields: 'EQUIPMENT TYPE' (set to '30 Yard Open Top'), 'YARD' (a dropdown menu), 'SERIAL NUMBER' (a text input), 'LICENSE PLATE' (a text input), 'RFID' (a text input), 'TARE WEIGHT' (a text input) and 'UOM' (a dropdown), and 'NOTE' (a large text area). There are two radio buttons: 'Add One' (selected) and 'Add Multiple'. At the bottom of the modal is a 'SAVE' button. Below the modal, there are two buttons: 'ADD TO YARD' and 'ADD TO SITE'. A red box highlights the 'ADD TO YARD' button, and a red arrow points to it from the left. Below these buttons is another table with columns: SHIP, TARE WEIGHT, LAST ACTIVITY, DAY(S) SINCE LAST ACTIVITY, and AVG DAY(S) BETWEEN ACTIVITY. The bottom table shows several rows of data with dates and times.

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

INVENTORY MANAGEMENT OPERATIONS > INVENTORY MANAGEMENT

LINE OF BUSINESS Roll Off IMPORT INVENTORY Search

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Roll Off	10 Yard Open Top	Yes	62	45	17
Roll Off	10 Yard Roll Off	Yes	65	29	36
Roll Off	15 Yard Open Top	No	53	14	39
Roll Off	15 Yard Roll Off	No	23	10	13
Roll Off	20 Yard Roll Off	No	2	3	-1
Roll Off	20 Yard Compactor	No	12	2	10
Roll Off	25 Yard Roll Off	No	0	5	-5
Roll Off	25 Yard Compactor	No	4	4	0
Roll Off	30 Yard Open Top	Yes	3	2	1
Roll Off	30 Yard Roll Off	No	5	19	-14
Roll Off			1	2	-1
Roll Off			1	1	0
Roll Off			0	0	0
Roll Off			0	0	0

**ADD SITE INVENTORY**

EQUIPMENT TYPE 30 Yard Open Top

SITE

SERIAL NUMBER

OWNERSHIP Customer

LICENSE PLATE

RFID

TARE WEIGHT  UOM

NOTE

SAVE

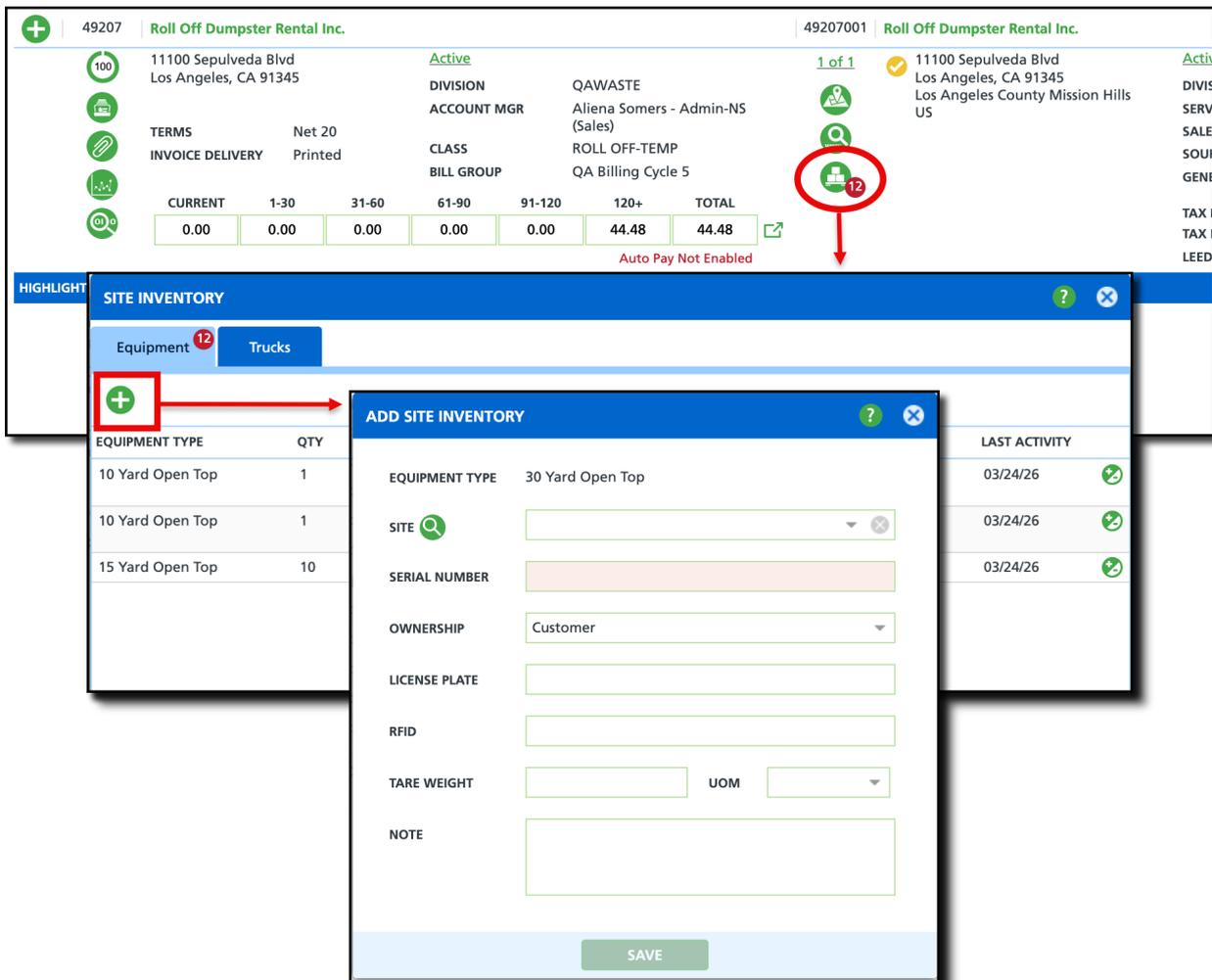
TARE WEIGHT	LAST ACTIVITY	DAY(S) SINCE LAST ACTIVITY	AVG DAY(S) BETWEEN ACTIVITY
	03/25/2026 2:05 pm		
	10/06/2025 6:16 am	193	193
	10/06/2025 6:14 am	193	193

ADD TO YARD ADD 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.



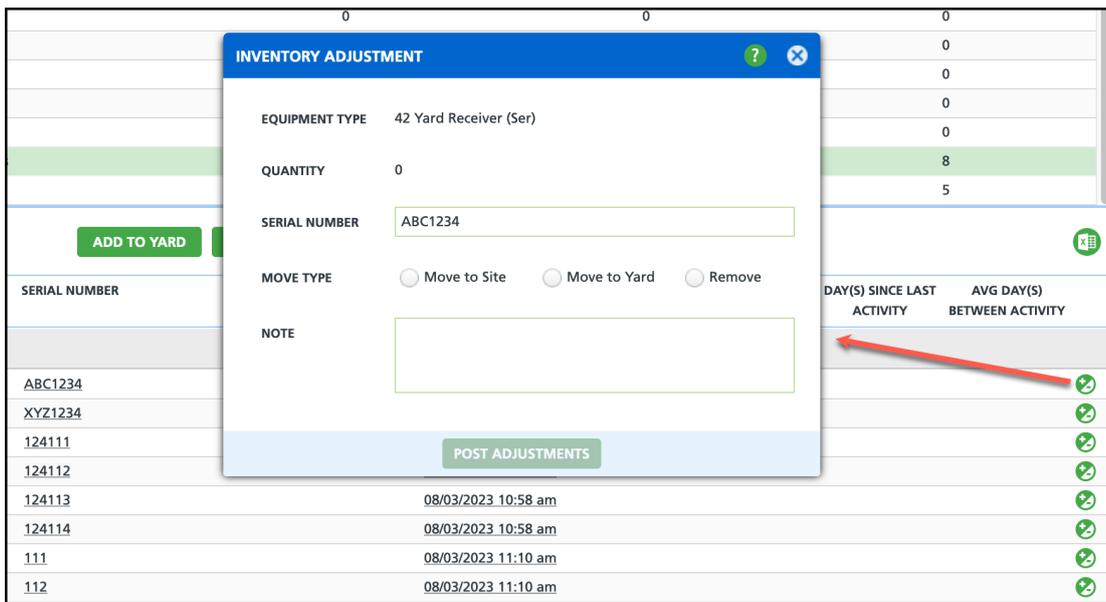
### Add Equipment:

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.

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		SERVICE REGION				
All		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			
- 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																							
Site 2 test	WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL																
3333 University Ave SE Minneapolis, MN 55414-3325	6511158	1	10 Yard Recycle Service43	10YD-FL	FL_DELIVER	On Call	REC																
CREATED BY Aliena Somers on 8/11/23 10:04 am	ORDER NOTES																						
ORDER REASON	<input type="text"/>																						
	PO NUMBER	EXTERNAL ID																					
	<input type="text"/>	<input type="text"/>																					
	SCHEDULED DATE	ROUTE	SEQUENCE	DESTINATION / ORIGIN																			
	08/11/23 Friday	<input type="text"/>	0	<input type="text"/>																			
	WORK STATUS	EXCEPTION REASON		POSTING STATUS																			
	Scheduled	<input type="text"/>		Pending																			
<div style="display: flex; justify-content: space-between;"> <span>Charges</span> <span>Disposal / Ship</span> <span>Payments</span> <span>Completion</span> <span>Attachments</span> <span style="border: 2px solid red; padding: 2px;">Inventory</span> <span>Labels</span> <span>Photos</span> </div>																							
<div style="border: 2px solid red; padding: 2px; display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> Deliveries         </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>QTY</th> <th>EQUIPMENT</th> <th>YARD</th> <th>SERIAL NUMBER</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>10 Yard FL</td> <td>HOMEBASE</td> <td style="text-align: center;">-</td> </tr> </tbody> </table>				QTY	EQUIPMENT	YARD	SERIAL NUMBER	1	10 Yard FL	HOMEBASE	-	<div style="border: 2px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> Removals         </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>QTY</th> <th>EQUIPMENT</th> <th>YARD</th> <th>SERIAL NUMBER</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>				QTY	EQUIPMENT	YARD	SERIAL NUMBER				
QTY	EQUIPMENT	YARD	SERIAL NUMBER																				
1	10 Yard FL	HOMEBASE	-																				
QTY	EQUIPMENT	YARD	SERIAL NUMBER																				
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Select Print Format</span> <span>SAVE</span> </div>																							

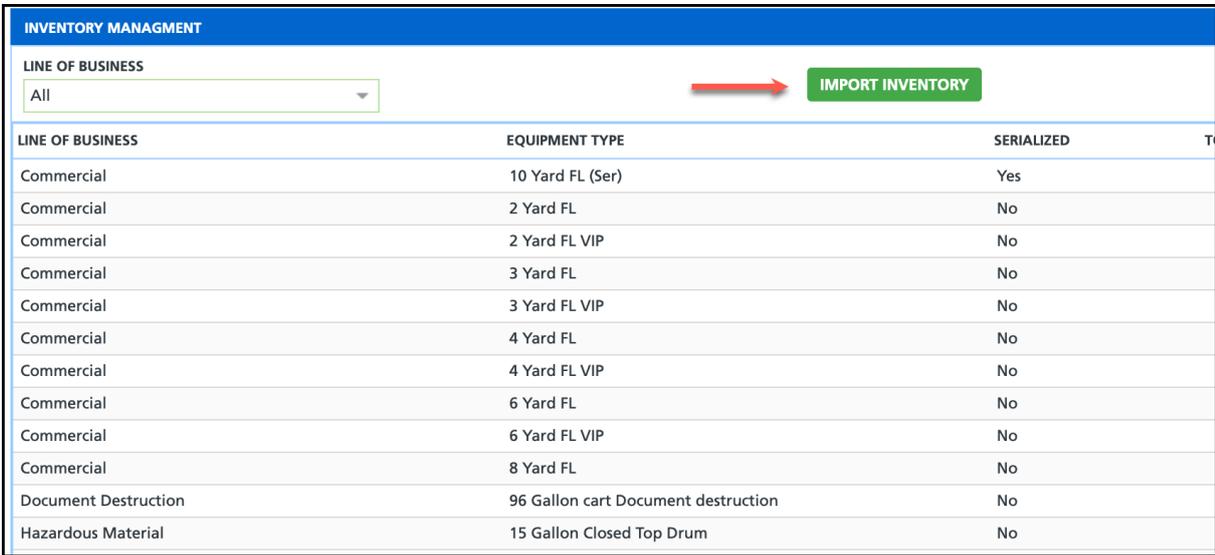
## Add Inventory

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](#)



The screenshot shows the 'INVENTORY MANAGEMENT' interface. At the top, there is a blue header with the text 'INVENTORY MANAGEMENT'. Below the header, there is a dropdown menu for 'LINE OF BUSINESS' with 'All' selected. To the right of the dropdown is a red arrow pointing to a green button labeled 'IMPORT INVENTORY'. Below this is a table with columns: 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'SERIALIZED', and 'T'. The table contains 14 rows of equipment data.

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	

## 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 \(Trucks\)](#)