

Site Inventory (Equipment)

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Pathway: Account (Customer Service Screen) > Display Inventory > Equipment (tab)

Site Inventory keeps track of the equipment and trucks used at a site. Users can use this feature to document equipment additions, removals, and transfers to other sites or a storage yard. For more comprehensive equipment tracking and management, the [Inventory Management](#) tool in the Operations module is available.

The screenshot displays the 'Example Site' interface. At the top, it shows the site ID '44705001' and the name 'Example Site'. Below this, there are two columns of information. The left column contains site details: '1 of 1' (with a refresh icon), 'name 2', '1234 S Houston Ave', 'addr 2', 'Humble, TX 77338-4818', and '+1 555-555-6036'. The right column contains site metadata: 'Active', 'DIVISION DAYTON', 'SERVICE REGION DAYTON OPEN MARKET', 'SALES REP Rob Tellerson', 'PO NUMBER 998689', and 'SOURCE Call In'. A red box highlights a site icon with a '7' notification badge. A modal window titled 'SITE INVENTORY' is open, showing tabs for 'Equipment' (6 items) and 'Trucks' (1 item). The 'Equipment' tab is active, displaying a table with the following data:

EQUIPMENT	QTY	SERIAL NUMBER	NOTE	LAST UPDATED	
40 Yard Roll Off	1			08/08/23	
42 Yard Receiver (Ser)	1	1234567	RD 2 - from yard to site	08/22/23	
10 Yard FL (Ser)	1	222	added serial	08/22/23	
10 Yard Roll Off	2		added non serial	08/22/23	
10 Yard FL (Ser)	1		no serial	08/22/23	

Below the table, a calendar view shows dates from 'Aug 2' to 'Aug 5'.

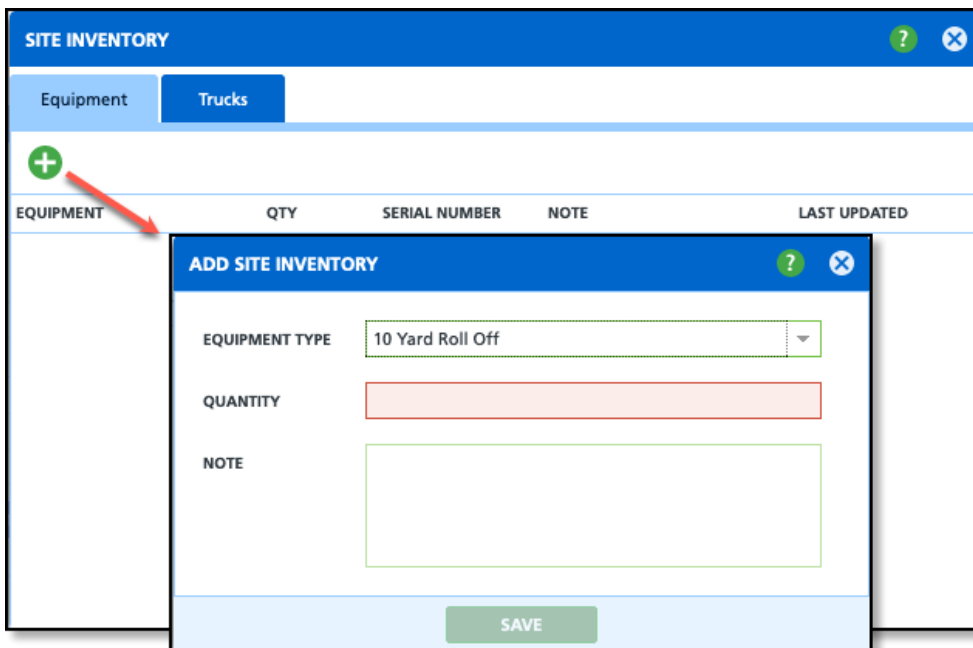
Permissions

The following permissions are required to view and use the Site Inventory feature:

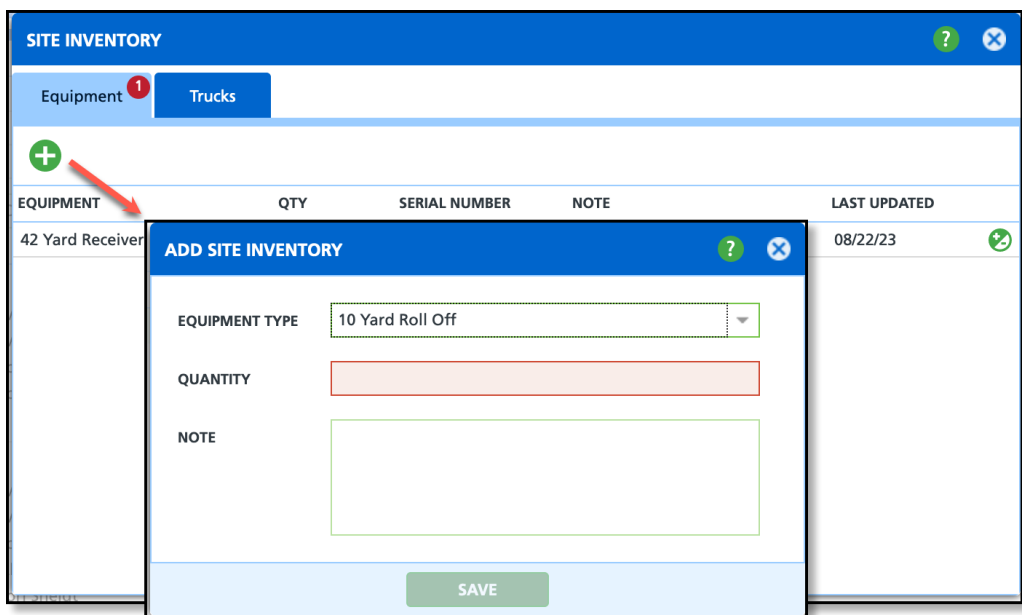
Permission ID	Permission Name
221	View Site Inventory
222	Adjust Site Inventory

Equipment: Add Site Inventory

Site inventory 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.



Add Non-Serialized Inventory



1. Select the **green "+"** icon to open Add Site Inventory.
2. Select the Equipment Type from the drop down field.
3. Enter the total quantity of the equipment.
4. Optional: add an internal Note that will display with the equipment in the inventory tools.
5. Click Save when finished.

Add Serialized Inventory

The screenshot shows the 'SITE INVENTORY' application interface. At the top, there are tabs for 'Equipment' and 'Trucks'. Below the tabs is a table with columns: EQUIPMENT, QTY, SERIAL NUMBER, NOTE, and LAST UPDATED. A green '+' icon is located in the top left corner of the table area, with a red arrow pointing to it. An 'ADD SITE INVENTORY' modal form is open in the foreground. The modal has a blue header with a question mark and a close button. It contains three input fields: 'EQUIPMENT TYPE' (a dropdown menu with '10 Yard FL (Ser)' selected), 'SERIAL NUMBER' (a text input field), and 'NOTE' (a text area). A 'SAVE' button is located at the bottom of the modal. The background table shows one row with the equipment name '42 Yard Receiver' and a 'LAST UPDATED' date of '08/22/23'.

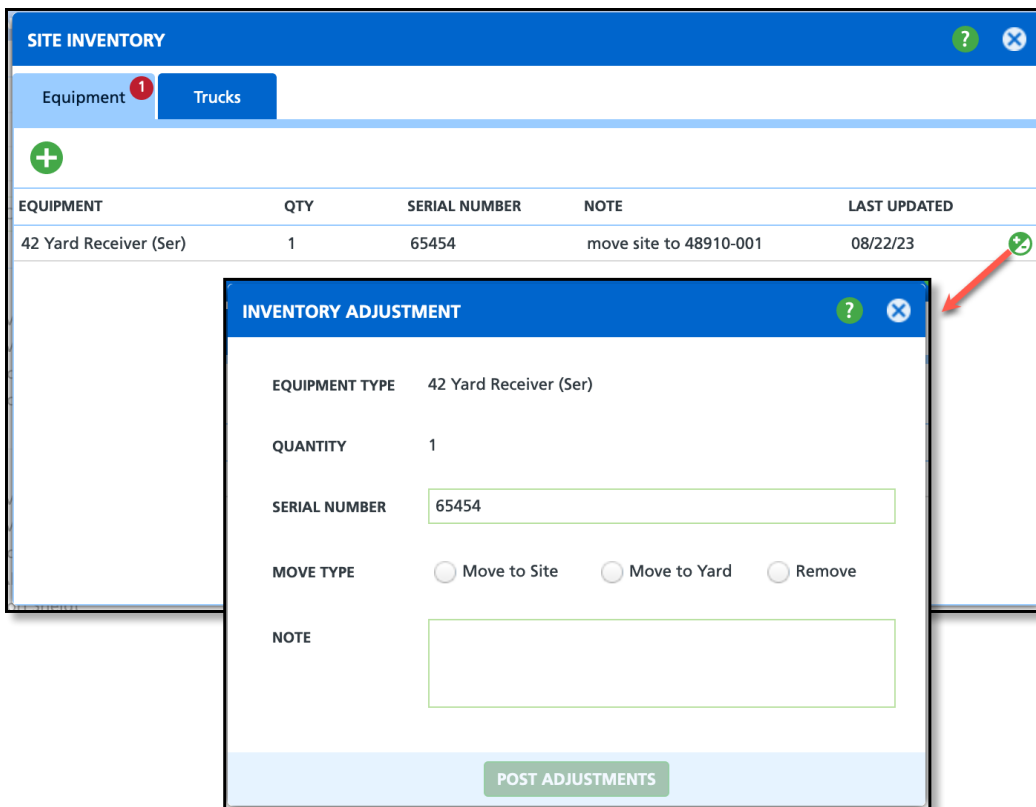


For the addition of multiple serialized equipment pieces, each one must be entered as an individual record.

1. Select the **green "+"** icon to open Add Site Inventory.
2. Select the Equipment Type from the drop down field.
3. Enter the serial number for the equipment.
4. Optional: add an internal Note that will display with the equipment in the inventory tools.
5. Click Save when finished.

Equipment: Move Site Inventory

The option to move site inventory is available for serialized equipment. When equipment is moved site to site, or site to yard, the adjustment is tracked in Inventory Management.



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.

Related Articles:

