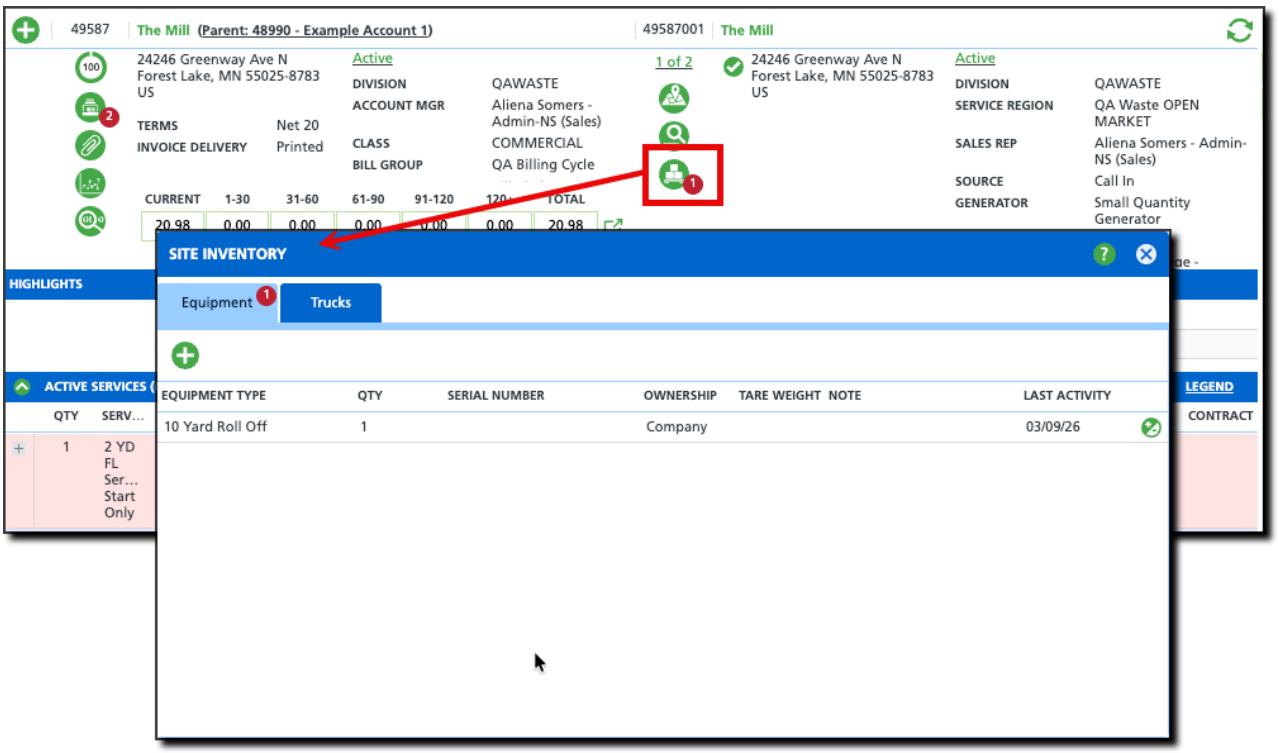
Site Inventory (Equipment)

Last Modified on 08/26/2026 6:56 am PDT

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.

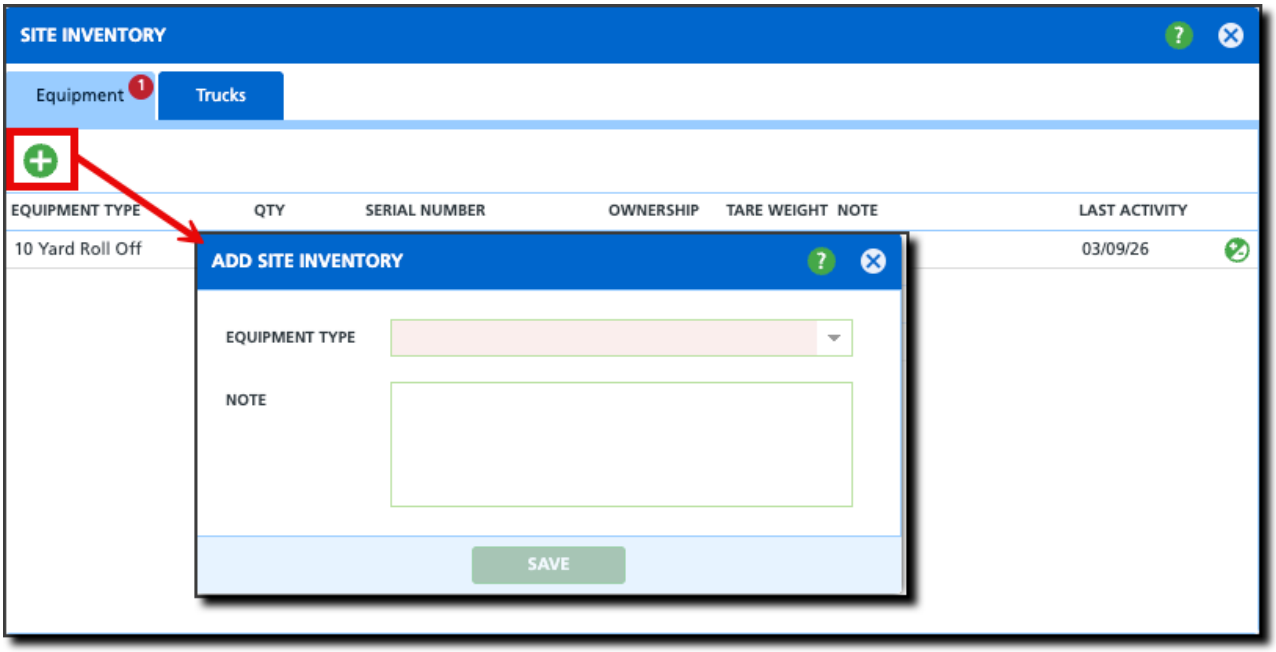


Expand All Sections | Collapse All Sections

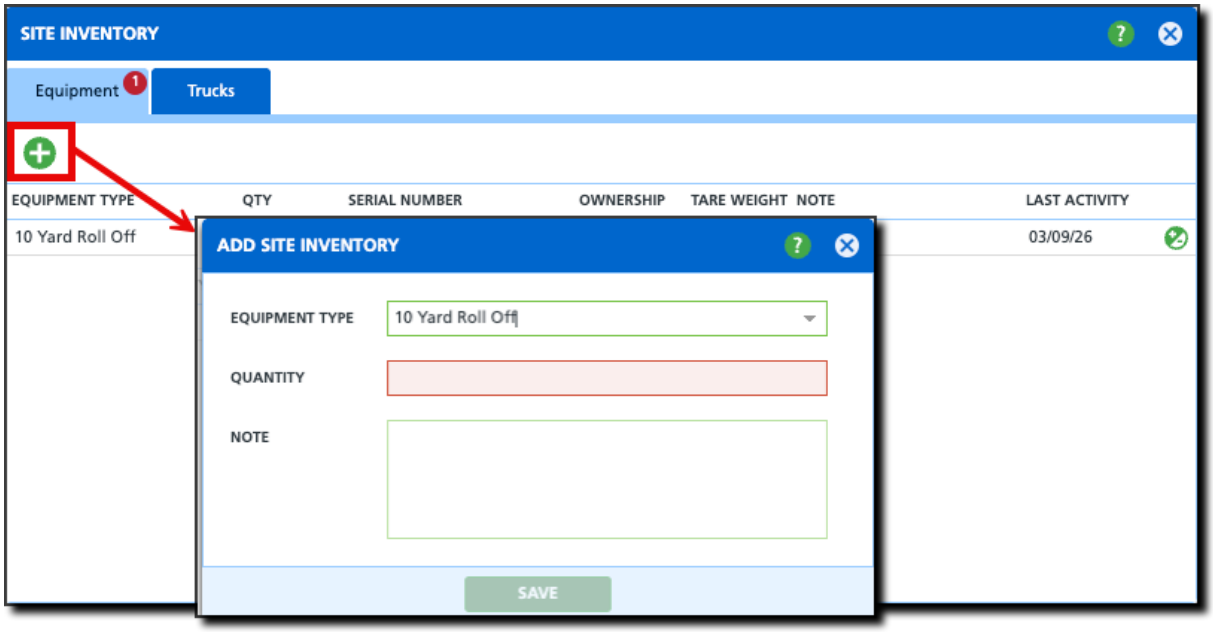
Helpful Tip >> To search for text using **CTRL-F**, you must first click on the **Expand All Sections** button.

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.

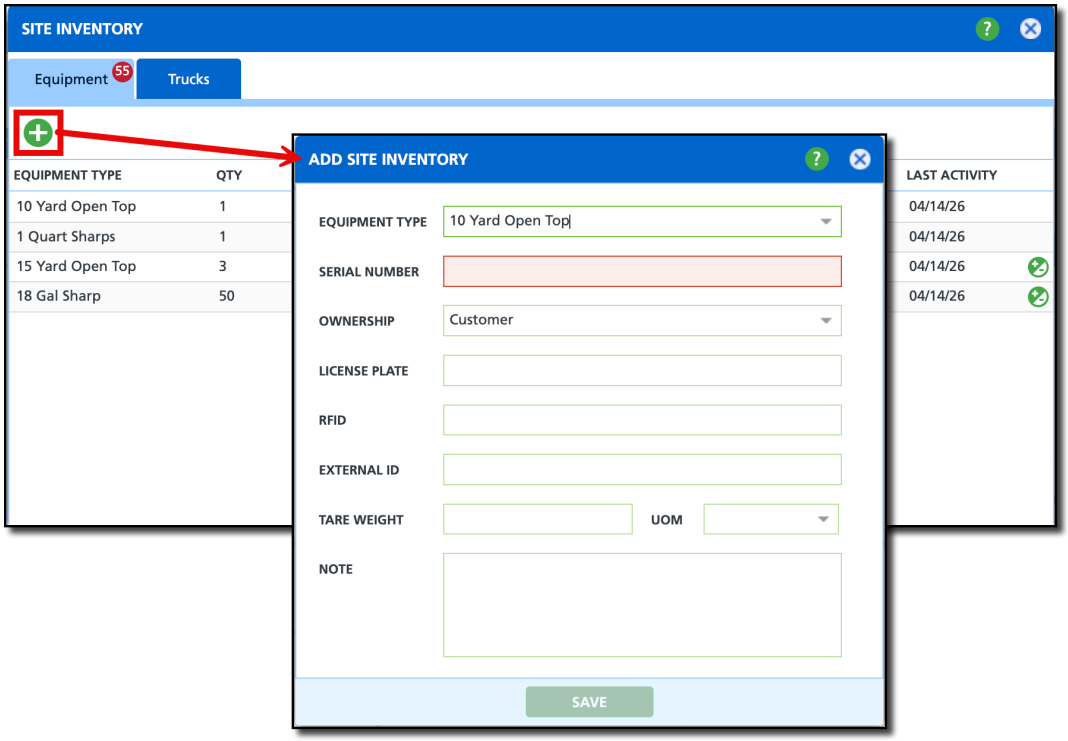


Add Non-Serialized Inventory



1. Select the green "+" icon to open the **Add Site Inventory** popup.
2. Choose a non-serialized **Equipment Type** from the dropdown.
3. Enter the total **Quantity** of the equipment.
4. Add an internal **Note** that will display with the equipment in the inventory tools (optional).
5. Click **Save** when finished.

Add Serialized Inventory

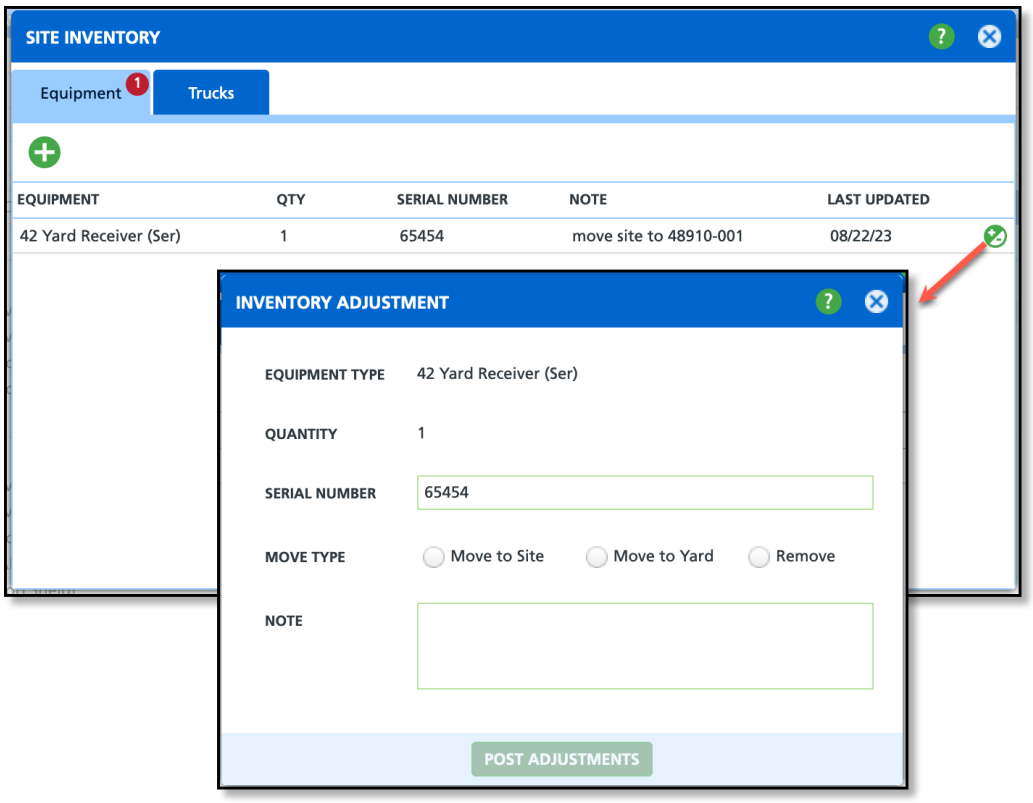


For the addition of multiple serialized equipment pieces, each one must be entered as an individual record.

1. Select the **green "+"** icon to open the *Add Site Inventory* screen.
2. Choose a serialized **Equipment Type** from the dropdown.
3. Enter the **Serial Number** for the equipment.
4. Choose the owner of the equipment from the **Ownership** dropdown. Default is set at "Customer".
5. Add a **License Plate** for the equipment (optional).
6. Enter an **RFID** for the equipment (optional).
7. Enter an **External ID** for the equipment (optional).
8. Enter the **Tare Weight** and **UOM** if available for the equipment (optional).
9. Add an internal **Note** that will display with the equipment in the inventory tools (optional).
10. 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. Click on the green "**+/-**" icon of a serialized equipment type to display the**Inventory Adjustment** popup.
2. Click 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. Add an internal **Note** that will display with the equipment in the inventory tools (optional).
5. Select **"Post Adjustments"** when finished.

Move to Yard

1. Click on the green "**+/-**" icon of a serialized equipment type to display the**Inventory Adjustment** popup.
2. Click the **"Move to Yard"** radio button and the Yard dropdown will display.
3. Choose the **Yard** the inventory is being moved to.
4. Add an internal **Note** that will display with the equipment in the inventory tools (optional).
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. Click on the green "**+/-**" icon of a serialized equipment type to display the**Inventory Adjustment** popup.
2. Click 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.

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

Related Articles:

Inventory Management
Import Inventory
Site Inventory (Trucks)