

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 for site ID 44705001. The site is active and located at 1234 S Houston Ave, Humble, TX 77338-4818, with contact number +1 555-555-6036. The site is managed by Rob Tellerson, with a PO number of 998689 and source 'Call In'. The 'SITE INVENTORY' window is open, showing a list of equipment items:

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

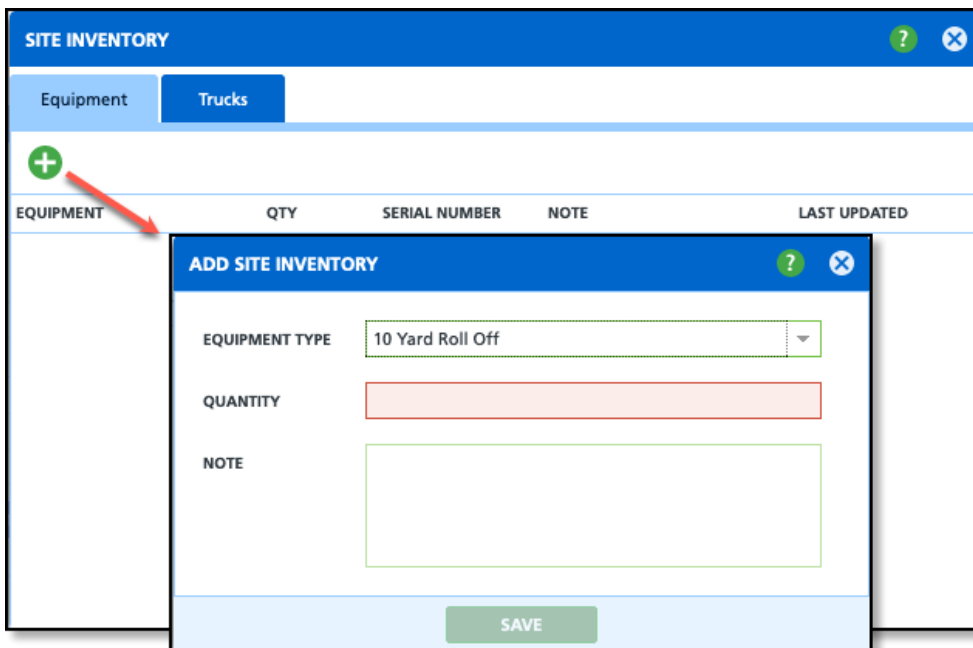
Permissions

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

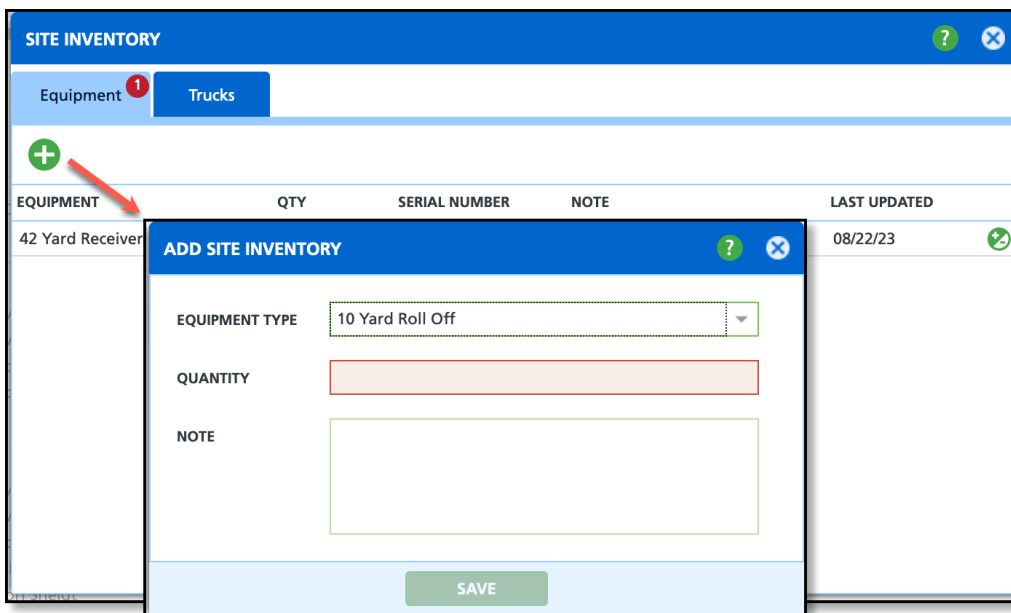
Permission ID	Permission Name
221	View Site Inventory
222	Adjust Site Inventory

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 row is visible with '42 Yard Receiver' in the EQUIPMENT column and '08/22/23' in the LAST UPDATED column. A modal dialog box titled 'ADD SITE INVENTORY' is open in the foreground. It contains a dropdown menu for 'EQUIPMENT TYPE' with '10 Yard FL (Ser)' selected, a text input field for 'SERIAL NUMBER', and a text area for 'NOTE'. A green 'SAVE' button is located at the bottom of the dialog. A red arrow points from a green '+' icon in the table to the dialog box.

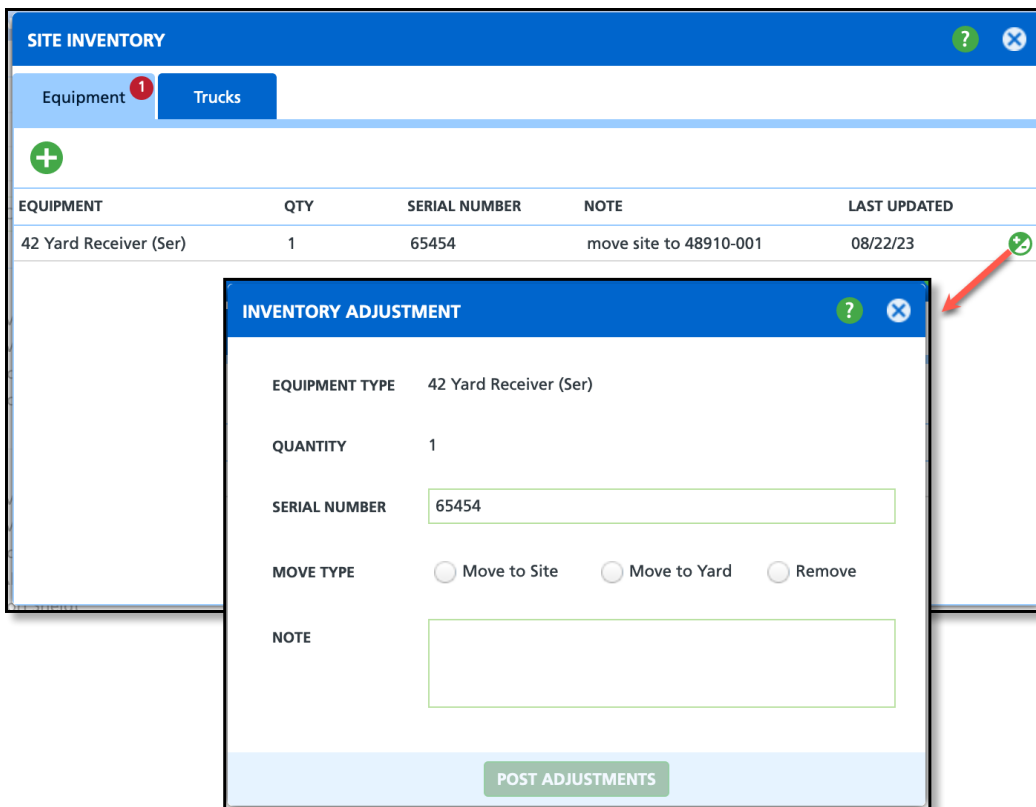


For the addition of multiple serialized equipment pieces, each one must be entered as an individual record.

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:

