JobTracker Inventory Edition

Business Goals

Why track inventory?

3 problems that JobTracker Inventory Edition helps you solve

Technical Objectives

Basic setup and usage

Key terms

What makes a good Purchase Product

Navigating existing inventory

Ordering new material

Consuming inventory

Making remnants

Manual reconciliation

Customization example: Consignment

Common pitfalls and how to resolve them

Limitations and workarounds

What's Next?

Follow-up will
likely be required!

Why track inventory?

- Make sure customers get the slabs they want, the slabs they choose
- Make sure you have enough core materials for ongoing jobs
- Make sure you don't accidentally assign slabs to multiple jobs
- Make sure slabs don't "walk away"
- Make sure you get what you pay for
- Help understand which products/colors are selling well
- Extract value from remnants
- ?

JT IE helps you solve 3 problems

- Create purchase orders and receive material into the system
- Track which slabs go with which jobs
- Add leftover pieces back into the system as remnants

People processes still matter most: "This is how we do it"

JT IE doesn't solve every problem

- ***SLABS, sinks***, *glue kits*, brackets, blades, maintenance, …
- Doesn't replace your accounting system
  - Have I paid my vendors?
- "Visual" inventory

JT IE kinda sorta helps …

- How much is my inventory worth?
- Consignment

JT IE + 3rd Party Tools

- Tools from Data Bridge, Fabricator's Choice, and others let you scan barcodes
  - Label Printable Forms can include barcodes … but JobTracker has no way to read them
  - Replaces manual reconciliation, but it's not magic … it still requires work!
- Integrate with SlabSmith
- Custom Solutions

Key Terms

- Product
- Attribute
- Product Variant

Edit Purchase Products

| Products: | Options... | New Product... | Edit Costs |

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)				
				1	2	3	4	5
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)		
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)			
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)				
Stone	Natural	Granite	Sq. ft.	Granite Color (29)				

Inventory

| Options... | Views ▼ | Save View... | New Threshold... |

Product: All Products

Product Variant	Unit	On Hand Qty	On Order
Granite Absolute Black 2CM	Sq. ft.	113.9255	1
Granite Absolute Black 3CM	Sq. ft.		
Granite Baltic Brown 2CM	Sq. ft.		
Granite Baltic Brown 3CM	Sq. ft.		
Granite Blue Baracuda 2CM	Sq. ft.		
Granite Blue Baracuda 3CM	Sq. ft.		

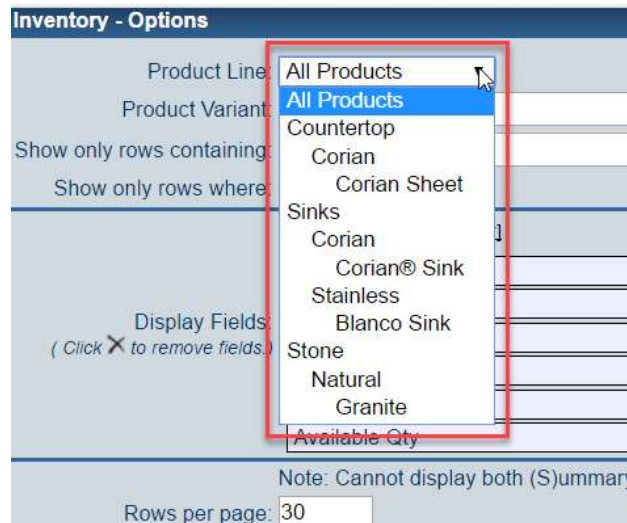**Edit List of Values - Granite Color**

| New "Granite Color" Value... | New Parent Field... | Del |

Name: Granite Color

Granite Color ↑	Description	Status
Absolute Black 2CM		Active
Absolute Black 3CM		Active
Baltic Brown 2CM		Active
Baltic Brown 3CM		Active
Blue Baracuda 2CM		Active
Blue Baracuda 3CM		Active
Costa Smerelda Rose 2CM		Active
Desert Dream 2CM		Active

Job Detail - Mike Jones

| Job Info: | Edit Job Info... | Move to Account... |

Job Name: Mike Jones
Account: Lowe's #620
Creation Date: 6/8/2006
Salesperson: Rob
Job Number:
Invoice Number:
Notes:

| Job Address: | Create Job Address... |

(Same as account address.)

| Job Activities: | New Job Activity... | New Job Phase... |

Activity	Status	Start Date ↑	Sched Time	Duration	Assigned To	Material
Template	Complete	1/30/2017	12:00pm	2.5 hours	Norm	
Fabrication	Complete	1/31/2017	1:00pm	4.5 hours	Tuli	50 Sq. ft Granite Absolute Black 2CM A1234 = 50 Sq. ft.

Key Terms

- Product Line
- Product Family
- Product Hierarchy

This stuff is just for *organizing* your products – don't worry about it too much!

(Focus on your Products instead)

Key Terms

- Serial Number
- Serialized / (Unserialized)

Key Terms

- Location
- Supplier
- Cost List

Inventory Settings

Inventory Locations	Inventory Locations:	New Inventory Location...

Name ↑	Status
Rack A	Active
Rack B	Active
Rack C	Active
Rack D	Active
Rack E	Active
Rack F	Active
Rack H	Active
Rack I	Active
Rack J	Active
Rack K	Active

Label Printable Forms

Serial Number Custom Fields

(Rows 1 to 10 of 10)

Suppliers

Options...	Views ▾	Save View...	New Supplier...

Supplier Name ↑	Tax Rate %	Number of PO's	Notes	Status
ABC Granite	7	17		Active
Fake Supplier				Inactive
Quartz & More	7			Active
Sillco			Makers of Slate Sills	Active
Sinks 'R' Us	8			Active
Solid Surface Supplier	8			Active

(Rows 1 to 6 of 6)

Edit Purchase Products

Products:	Options...	New Product...	Edit Costs

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values) 1	2	3	4	5	# of Product Variants	Taxable	Inventory	Serial Numbers	Print Labels	Supplier - Cost List
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes	Yes	Solid Surface Supplier - Standard
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No	No	Sinks 'R' Us - Standard Solid Surface Supplier - Standard Solid Surface Supplier - Other Costs
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No	No	(None)
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes	Yes	ABC Granite - Standard

Setting up Purchase Products

- Purchase Products are very flexible
  - Product Family and Product Line are *easy to change*
  - Products (specifically, which Attributes they have) are *hard to change*
- You might need to make new Products and mark your old ones inactive (with help from us)
- Clean up

A "Good" Purchase Product

- Has a name that "reads" well on a PO or Job (so typically singular)

Edit Purchase Products

Products: [Options...] [New Product...] [Edit Costs]

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

Activity	Status	Start Date ↑	Sched Time	Duration	Assigned To	Material
Template	Complete	1/30/2017	12:00pm	2.5 hours	Norm	
Fabrication	Complete	1/31/2017	1:00pm	4.5 hours	Tuli	50 Sq. ft. Granite Absolute Black 2CM SN A1234 = 50 Sq. ft.

A "Good" Purchase Product

• Has fewer than 1,000 Product Variants

Edit Purchase Products

Products: Options... | New Product... | Edit Costs

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

A "Good" Purchase Product

- Every Product Variant exists in real life

Edit Purchase Products

Products: [Options...] [New Product...] [Edit Costs]

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

A "Good" Purchase Product

- When in doubt – use fewer attributes

Edit Purchase Products

Products:	Options...	New Product...	Edit Costs						

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)				Serial Numbers
				1	2	3		
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dim (4)		Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)			No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)			23 Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)			29 Yes	Yes	Yes

Edit List of Values - Granite Color

New "Granite Color" Value...	New Parent Field...	Del

Name: Granite Color

Granite Color ↑	Description	Status
Absolute Black 2CM		Active
Absolute Black 3CM		Active
Baltic Brown 2CM		Active
Baltic Brown 3CM		Active
Blue Baracuda 2CM		Active
Blue Baracuda 3CM		Active
Costa Smerelda Rose 2CM		Active
Desert Dream 2CM		Active

A "Good" Purchase Product

- Doesn't share Attributes with any other Purchase Product

Edit Purchase Products

Products: [Options...] [New Product...] [Edit Costs]

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

A "Good" Purchase Product

- Is probably serialized

Edit Purchase Products

Products: [Options...] [New Product...] [Edit Costs]

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

A "Good" Purchase Product

- Makes good remnants (if applicable)

Edit Purchase Products

Products: [Options...] [New Product...] [Edit Costs]

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
				1	2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

Square Feet vs Each

- Use Sq. Ft. for anything that could reasonably have a remnant
- Use Each for sinks

Edit Purchase Products

Products: Options... | New Product... | Edit Costs

Product: All Products
Display Inactive: Yes

Product Family ↑	Product Line	Product	Unit	Attributes (# of values)					# of Product Variants	Taxable	Inventory	Serial Numbers
					2	3	4	5				
Countertop	Corian	Corian Sheet	Each	Corian® Sheet Color (119)	Corian Thickness (2)	Corian Sheet Dimensions (4)			952	Yes	Yes	Yes
Sinks	Corian	Corian® Sink	Each	Corian® Sink (24)	Corian® Sink Color (10)				240	Yes	Yes	No
Sinks	Stainless	Blanco Sink	Each	Blanco Sink (23)					23	Yes	Yes	No
Stone	Natural	Granite	Sq. ft.	Granite Color (29)					29	Yes	Yes	Yes

Purchase Products Health Check

- Do you have "good" Products for your needs?
  - Are you tracking only products worth tracking?
  - Do your product variants read well?
  - Do you have too many attributes? Overly shared attributes?
- Do you have lots of inactive products? Consider moving them to "z – Inactive"

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Key terms
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Customization example: Consignment
Common pitfalls and how to resolve them
Limitations and workarounds
What's Next?

Using JobTracker Inventory Edition

- Inventory Views can be either Summary or Detail

Making an Inventory View

Product Variants and Serial Numbers are almost always "clickable"

Jobs are linked, too

Inventory Detail

New Serial Number...

Product Variant: Granite Baltic Brown 2CM
Unit of Measure: Sq. ft.

Serial Number ↑	Status	Measurement	Batch Number	Description	Location	Consignment	Account - Job	On Hand	On Order	Allocated	Available
(Unserialized)								-50			-50
15104	On Hand	55" × 110"	A234	1577	Rack A			42.0138			42.0138
15105	On Hand	55" × 110"	A234	1577	Rack A			42.0138			42.0138
15106	On Hand	55" × 110"	A234	1577	Rack A			42.0138			42.0138
15107	On Hand	55" × 110"	A234	1577	Rack A			42.0138			42.0138
15108	On Hand	55" × 110"	A234	1577	Rack A			42.0138			42.0138
15109	On Hand	60" × 120"	A234	1577	Rack A		Home Depot #150 - Park Job	50		50	
15111	On Hand	60" × 120"	A234	1577	Rack A						50
15112	On Hand	60" × 120"	A234	1577	Rack A						50
15113	On Hand	60" × 120"	A234	1577	Rack A						50
15114	On Hand	30" × 120"	A234		Rack B						25
15345	On Hand	60" × 120"		1619							50

(Rows 1 to 12 of 12)

View Job 'Park Job'
Duplicate...
New ▸
Forms ▸
View Change Log

Adding New Inventory

Click on Purchasing > New PO
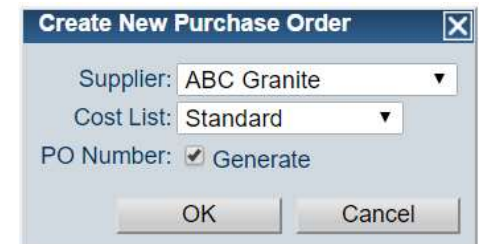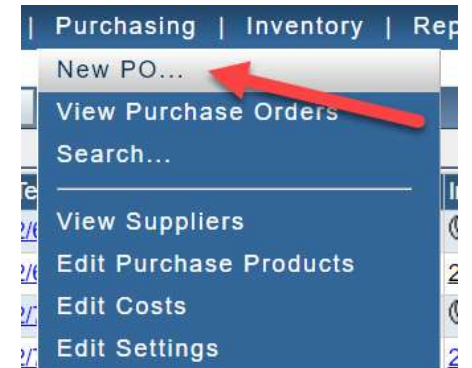
Purchasing Stock Inventory

- Click Add > Product
- You can only add Products from the Cost List on the PO

Receiving a PO

- Click Receive PO when your slabs arrive
- Confirm the size(s) as your receive them

Adding Inventory to Jobs

- Material is added on an individual activity
  - Tip: use the same activity every time
- Find the right Product Variant and then Add Serial Numbers
  - (Can't start from the serial number and add to job)

Consuming Inventory

- Completing the activity "removes it from Inventory"

Fabrication	Complete	1/31/2017	1:30pm	2 hours	Ben	50 Sq. ft. Granite Absolute Black 3CM SN 15203 = 50 Sq. ft.

- You can still find it if you View Inventory Transactions for the Product Variant

Inventory Transactions

Options...	New Unserialized Adjustment...	New Serial Number...

Product Variant: Granite Absolute Black 3CM
Beginning: 1/3/2017
Unit of Measure: Sq. ft.
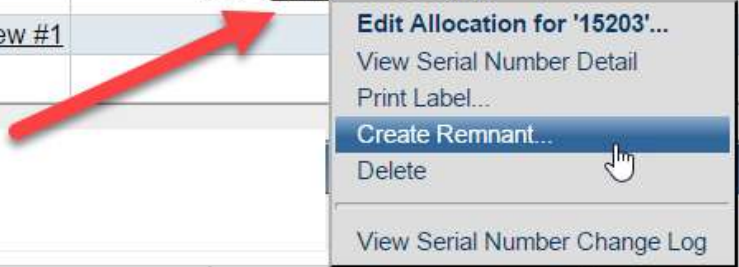
Date	Transaction	Reference	Serial Number	Batch Number	Received	On Order	Consumed	Allocated	Adjustment	On-Hand Balance
1/3/2017	Beginning Balance									435.069
2/13/2017	Job (Complete)	Sal Maglie	15203	D1234			50			385.069
2/17/2017	Job (Estimate)	Bob Lee	15207	D1234				50		335.069
2/17/2017	Job (Estimate)	Bob Lee	15206	D1234				50		285.069
2/17/2017	Job (Estimate)	Bob Lee	15205	D1234				50		235.069

Making Remnants

- Click on the Serial Number from the Job to create a remnant

Exercise

- Create and receive a PO with a few slabs
- Create a test job and add a couple of slabs to it
- Complete the activity to consume the slabs and notice the results when you View Current Inventory
- Create a remnant from the job and notice the results in View Current Inventory. Click on Serial Number Details for the remnant and its parent until you find the PO where it originally came from
- Delete everything you just created!
  - Start with the Job, then the Remnant, then the Serial Numbers (PO Receipts), then the PO Lines, then the PO.

Consignment

- Serial Number Custom Field
- Job Activity (or checklist item) to pay consignment vendor

Tough Questions

- How do you know if you've made a mistake with your record keeping?
- How do you know if slabs are being stolen?

Reconciliation

- At some regular interval (daily, weekly, monthly, …), you must compare what's in the system to what you have in real life

- You can do that manually by checking off slabs on a printout

Barcoding and reconciliation

- JobTracker let's you print barcodes, but it doesn't have any built-in way to read them
- 3rd party tools can add this – the reconciliation process is quite similar, just sped up by the reader

Break?

JobTracker Inventory Edition

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Technical Objectives		Customization example: Consignment
Basic setup and usage		Common pitfalls and how to resolve them
Key terms		Limitations and workarounds
What makes a good Purchase Product		What's Next?
Navigating existing inventory		
Ordering new material		
Consuming inventory		
Making remnants		
Manual reconciliation		

Scenario: Special Ordering for a Job

- Can do exactly like stock if you prefer
- Particularly useful if you want to print job name on label
- (demo)

Common Pitfalls

#1 Mistake: Not Completing Activities

- If you don't complete activities, your inventory won't be consumed!
- It will slowly (or quickly) get wronger and wronger

Removing a slab without adjusting allocation

Instead, Edit Serial Numbers

- Edit the Allocation

- Edit Serial Numbers

- Uncheck unneeded slabs

(Unserialized) with negative Available

Inventory Detail

New Serial Number...

Product Variant: Granite Absolute Black 3CM
Unit of Measure: Sq. ft.

Serial Number ↑	Status	Measurement	Batch Number	Description	Location	Consignment	Account - Job	On Hand	On Order	Allocated	Available
(Unserialized)										50	-50
15198	On Hand	55" × 110"	D1234	1601	Rack C			42.0138			42.0138
15199	On Hand	55" × 110"	D1234	1601	Rack C			42.0138			42.0138
15200	On Hand	55" × 110"	D1234	1601	Rack C			42.0138			42.0138
15201	On Hand	55" × 110"	D1234	1601	Rack C			42.0138			42.0138
15202	On Hand	55" × 110"	D1234	1601	Rack C			42.0138			42.0138
15205	On Hand	60" × 120"	D1234	1601	Rack C		Zander Contracting - Bob Lee	50		50	
15206	On Hand	60" × 120"	D1234	1601	Rack C		Zander Contracting - Bob Lee	50		50	
15207	On Hand	60" × 120"	D1234	1601	Rack C			50			50
15208	On Hand	120" × 30"	D1234		Rack C			25			25

(Rows 1 to 10 of 10)

To find, View Inventory Transactions

- **Click Options and set the beginning date back!**
- Find the row missing a value for the serial number
- Click on the job and clear the Unassigned Quantity

Inventory Reports

Inventory Reporting: What's Selling?

Inventory Reporting: What are we ordering?

How much are my slabs worth? How many?

- Use Excel
- (demo)

Inventory

| Options... | Views ▾ | Save View... | New Threshold... |

Product: All Products
Show only rows containing: On Hand

Product Family	Product Line	Product	Product Variant	Serial Number ↓	Batch Number	PO Number	Location	Is Remnant	On Hand Qty	Serialized On Hand Cost
Stone	Natural	Granite	Granite Costa 3CM	15434	A2345		Rack C	Yes	25	$300.00
Stone	Natural	Granite	Granite Costa 3CM	15433	A2345	001641	Rack A	No	50	$600.00
Stone	Natural	Granite	Granite Costa 3CM	15432	A2345	001641	Rack A	No	50	$600.00
Stone	Natural	Granite	Granite Costa 3CM	15431	A2345	001641	Rack A	No	50	$600.00
Stone	Natural	Granite	Granite Costa 3CM	15430	A2345	001641	Rack A	No	50	$600.00
Stone	Natural	Granite	Granite Costa 3CM	15427	A2345	001641	Rack A	No	44.3333	$532.00
Stone	Natural	Granite	Granite Costa 3CM	15426	A2345	001641	Rack A	No	44.3333	$532.00
Stone	Natural	Granite	Granite Costa 3CM	15425	A2345	001641	Rack A	No	44.3333	$532.00
Stone	Natural	Granite	Granite Costa 3CM	15424	A2345	001641	Rack A	No	44.3333	$532.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15423	S2345		Rack E	Yes	25	$312.50
Stone	Natural	Granite	Granite Desert Dream 3CM	15422	S2345	001639	Rack E	No	50	$625.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15421	S2345	001639	Rack E	No	50	$625.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15420	S2345	001639	Rack E	No	50	$625.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15419	S2345	001639	Rack E	No	50	$625.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15418	S2345	001639	Rack E	No	25	$312.50
Stone	Natural	Granite	Granite Desert Dream 3CM	15417	S2345	001639	Rack E	No	50	$625.00
Stone	Natural	Granite	Granite Desert Dream 3CM	15416	S2345	001639	Rack E	No	42.7777	$534.72
Stone	Natural	Granite	Granite Desert Dream 3CM	15415	S2345	001639	Rack E	No	42.7777	$534.72
Stone	Natural	Granite	Granite Desert Dream 3CM	15414	S2345	001639	Rack E	No	42.7777	$534.72
Stone	Natural	Granite	Granite Desert Dream 3CM	15413	S2345	001639	Rack E	No	42.7777	$534.72
Stone	Natural	Granite	Granite Desert Dream 2CM	15412	A2345	001638	Rack C	No	50	$600.00
Stone	Natural	Granite	Granite Desert Dream 2CM	15411	A2345	001638	Rack C	No	50	$600.00
Stone	Natural	Granite	Granite Desert Dream 2CM	15410	A2345	001638	Rack C	No	50	$600.00
Stone	Natural	Granite	Granite Desert Dream 2CM	15409	A2345	001638	Rack C	No	50	$600.00
Stone	Natural	Granite	Granite Desert Dream 2CM	15408	A2345	001638	Rack C	No	50	$600.00
Stone	Natural	Granite	Granite Desert Dream 2CM	15407	A2345	001638	Rack C	No	44.3055	$531.67
Stone	Natural	Granite	Granite Desert Dream 2CM	15406	A2345	001638	Rack C	No	44.3055	$531.67
Stone	Natural	Granite	Granite Desert Dream 2CM	15405	A2345	001638	Rack C	No	44.3055	$531.67
Stone	Natural	Granite	Granite Desert Dream 2CM	15404	A2345	001638	Rack C	No	44.3055	$531.67
Stone	Natural	Granite	Granite Desert Dream 2CM	15403	A2345	001638	Rack C	No	44.3055	$531.67
Stone	Natural	Granite	Granite Green	15402	C987	001637	Rack C	No	50	$0.00
Stone	Natural	Granite	Granite Green	15401	C987	001637	Rack C	No	50	$0.00

Limitations and Workarounds

- No way to look at a serial number and add it to a job (have to find the job and look for the serial number)
- Can add *material* to job view but not *serial numbers* – to see a list of jobs with their serial numbers, create a Calendar Printable Form
- Count slabs? Use Excel
- How much is my inventory worth? Use Excel
- Internal and external color names
- Cost vs Price

What's Next? *Assessment questions*

- Do you have summary and detail Inventory views
  - Do any of your detail views show negative Available balances?
- Are you completing activities?
  - Do you have lots of history that needs to be cleaned up?
- When was the last time you reconciled inventory?
- How many Purchase Products do you have?
  - Are they all worth tracking? Worth tracking in JobTracker?
  - Do any need to be fundamentally changed?
- Would it be easier to zero everything out and start over?

Time slots

- Set up spreadsheet for clean up