



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 | 11 | |
| 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. | | | |

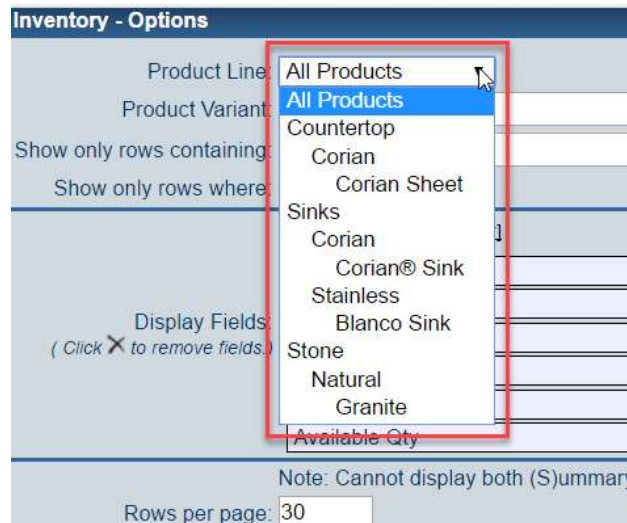
| Job Detail - Mike Jones | | | | | | | |
|--|----------|--------------|------------|-----------|-------------|--|--|
| Job Info: Edit Job Info... Move to Account... | | | | | | | |
| Job Name: Mike Jones | | | | | | | |
| Account: Lowe's #520 | | | | | | | |
| Creation Date: 6/8/2006 | | | | | | | |
| 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 | Tuji | 50 Sq. ft. Granite Absolute Black 2CM @ A1234 = 50 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 |

Key Terms

- Product Line
- Product Family
- Product Hierarchy



Edit Purchase Products

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

Product: All Products
Display Inactive: Yes

| Product Family ↑ | Product Line | Product | Unit | Attribute | |
|------------------|--------------|--------------|---------|---------------------------|-------------------|
| | | | | 1 | 2 |
| Countertop | Corian | Corian Sheet | Each | Corian® Sheet Color (119) | Corian Thickness |
| Sinks | Corian | Corian® Sink | Each | Corian® Sink (24) | Corian® Sink (10) |
| Sinks | Stainless | Blanco Sink | Each | Blanco Sink (23) | |
| Stone | Natural | Granite | Sq. ft. | Granite Color (29) | |

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)

Inventory

| Options... | Views ▼ | Save View... | New Threshold... |
|---|----------------|--------------|------------------|
| Product: Stone >> Natural >> Granite | | | |
| Unit of Measure: Sq. ft. | | | |
| First Prev Page 1 of 3 Next Last (Rows 1 to 100 of 277) | | | |
| Product Variant ↑ | Serial Number | Bat | |
| Granite Absolute Black 2CM | (Unserialized) | | |
| Granite Absolute Black 2CM | 15321 | | |
| Granite Absolute Black 2CM | 15325 | 123 | |
| Granite Absolute Black 2CM | 15326 | 123 | |
| Granite Absolute Black 2CM | 15327 | 123 | |
| Granite Absolute Black 2CM | 15380 | | |
| Granite Absolute Black 2CM | 15381 | | |
| Granite Absolute Black 2CM | 15382 | | |

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 |
| | | | | | | ◀ SN A1234 = 50 Sq. ft. |

Key Terms

- Location
- Supplier
- Cost List

Inventory Settings

| |
|-----------------------------|
| Inventory Locations |
| Label Printable Forms |
| Serial Number Custom Fields |

| 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 |

(Rows 1 to 10 of 10)

Suppliers

| 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) | | | | | # of Product Variants | Taxable | Inventory | Serial Numbers | Print Labels | Supplier - Cost List |
| | | | | 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 | 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  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: <u>Yes</u> | | | | | | | | | | | | |
| Product Family ↑ | Product Line | Product | Unit | Attributes (# of values) | | | | | # of Product Variants | Taxable | Inventory | Serial Numbers |
| | | | | 1 | 2 | 3 | 4 | 5 | | | | |
| Countertop | Corian | <u>Corian Sheet</u> | Each | <u>Corian® Sheet Color (119)</u> | <u>Corian Thickness (2)</u> | <u>Corian Sheet Dimensions (4)</u> | | | 952 | Yes | Yes | Yes |
| Sinks | Corian | <u>Corian® Sink</u> | Each | <u>Corian® Sink (24)</u> | <u>Corian® Sink Color (10)</u> | | | | 240 | Yes | Yes | No |
| Sinks | Stainless | <u>Blanco Sink</u> | Each | <u>Blanco Sink (23)</u> | | | | | 23 | Yes | Yes | No |
| Stone | Natural | <u>Granite</u> | Sq. ft. | <u>Granite Color (29)</u> | | | | | 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) | | |
| | | | | 1 | 2 | 3 |
| Countertop | Corian | Corian Sheet | Each | Corian® Sheet Color (119) | Corian Thickness (2) | Corian Sheet Dim (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) | | |

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 |

| Serial Numbers |
|----------------|
| Yes |
| No |
| No |
| Yes |

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

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”



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?

Using JobTracker Inventory Edition

- Inventory Views can be either Summary or Detail

Inventory

| Product Variant | Unit | On Hand Qty | On Order Qty | Available Qty |
|----------------------------|---------|-------------|--------------|---------------|
| Granite Absolute Black 2CM | Sq. ft. | 63.9255 | 1803.75 | 1767.4255 |
| Granite Absolute Black 3CM | Sq. ft. | 435.069 | | 435.069 |
| Granite Baltic Brown 2CM | Sq. ft. | 385.069 | | 385.069 |
| Granite Baltic Brown 3CM | Sq. ft. | 418.0552 | | 418.0552 |
| Granite Blue Baracuda 2CM | Sq. ft. | 554.7425 | | 554.7425 |
| Granite Blue Baracuda 3CM | Sq. ft. | 435.069 | | 435.069 |

Summary: One row per Product Variant

Inventory - Options

Product Line: Granite

Product Variant: Select... [Clear]

Show only rows containing: On Hand Select... [Clear]

Show only rows where: Add Filter...

Select Fields... [Clear]

| | |
|-------------------|---|
| Product Variant | X |
| (D) Serial Number | X |
| (D) Batch Number | X |
| (D) Measurement | X |
| On Hand Qty | X |
| (D) PO Number | X |
| (D) Location | X |
| (D) Account - Job | X |
| (D) s Remnant | X |

Display Fields: (Click X to remove fields)

Note: Cannot display both (S)ummary and (D)etail columns in the same view.

Rows per page: 100

OK Cancel

Inventory

| Product Variant | Serial Number ↓ | Batch Number | Measurement | PO Number |
|--------------------------|-----------------|--------------|-------------|-----------|
| Granite Desert Dream 3CM | 15423 | S2345 | 120" x 60" | 50 0016 |
| Granite Desert Dream 3CM | 15422 | S2345 | 120" x 60" | 50 0016 |
| Granite Desert Dream 3CM | 15421 | S2345 | 120" x 60" | 50 0016 |
| Granite Desert Dream 3CM | 15420 | S2345 | 120" x 60" | 50 0016 |
| Granite Desert Dream 3CM | 15419 | S2345 | 120" x 60" | 50 0016 |
| Granite Desert Dream 3CM | 15418 | S2345 | 120" x 60" | 25 0016 |

Detail: One row per Serial Number

Making an Inventory View

Inventory - Options [X]

Product Line: Granite ▼

Product Variant: Select... [Clear]

Show only rows containing: On Hand Select... [Clear]

Show only rows where: Add Filter...

Select Fields... [Clear]

| | |
|-------------------|---|
| Product Variant | X |
| (D) Serial Number | X |
| (D) Batch Number | X |
| (D) Measurement | X |
| On Hand Qty | X |
| (D) PO Number | X |
| (D) Location | X |
| (D) Account - Job | X |
| (D) s Remnant | X |

Display Fields:
(Click X to remove fields.)

Note: Cannot display both (S)ummary and (D)etail columns in the same view.

Rows per page: 100

OK Cancel

Product Variants and Serial Numbers are almost always “clickable”

Product: All Products

| Product Variant | Unit | On Hand Qty | On Order Qty | Allocated Qty |
|---------------------------------|---------|-------------|--------------|---------------|
| Granite Absolute Black 2CM | Sq. ft. | 63.9255 | 1803.75 | 10 |
| Granite Absolute Black 3CM | Sq. ft. | 125.060 | | |
| Granite Baltic Brown 2CM | Sq. ft. | | | |
| Granite Baltic Brown 3CM | Sq. ft. | | | |
| Granite Blue Baracoda 2CM | Sq. ft. | | | |
| Granite Blue Baracoda 3CM | Sq. ft. | | | |
| Granite Costa Smerelda Rose 2CM | Sq. ft. | 143.8125 | | |

- View Current Inventory
- View Inventory Transactions for 'Granite Absolute Black 3CM'
- New Inventory Threshold...

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

| Serial Number ↑ | Status | Measurement | Batch Number |
|-----------------|---------|-------------|--------------|
| 15198 | On Hand | 55" x 110" | D1234 |
| 15198 | | 0" | D1234 |
| 15200 | | 0" | D1234 |
| 15200 | | 0" | D1234 |
| 15200 | | 0" | D1234 |

- Edit Serial Number '15198'...
- View Serial Number Detail
- Print Label...

50 Sq. ft. Granite Baltic Brown 2CM

SN 15109 = 50 Sq. ft.

| Material | Notes |
|-------------------------------------|-------|
| 50 Sq. ft. Granite Baltic Brown 2CM | |
| SN 15109 = 50 Sq. ft. | |

- Edit 'Granite Baltic Brown 2CM'...
- Add Material...
- View Current Inventory
- View Inventory Transactions
- Delete

| Material | Notes |
|-------------------------------------|-------|
| 50 Sq. ft. Granite Baltic Brown 2CM | |
| SN 15109 = 50 Sq. ft. | |

- Edit Allocation for '15109'...
- View Serial Number Detail
- Print Label...
- Create Remnant...
- Delete
- View Serial Number Change Log

Jobs are linked, too

Inventory Detail

| New Serial Number... | | | | | | | | | | | |
|--|---------|-------------|--------------|-------------|----------|-------------|----------------------------|---------|----------|-----------|-----------|
| Product Variant: <u>Granite Baltic Brown 2CM</u> | | | | | | | | | | | |
| 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 |

View Job 'Park Job'

Duplicate...

New ▶

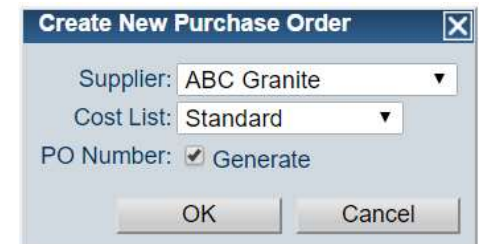
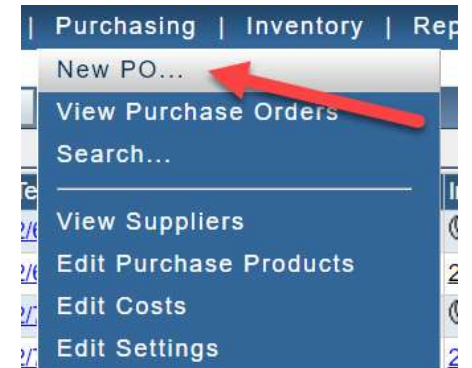
Forms ▶

View Change Log

(Rows 1 to 12 of 12)

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

Purchase Order Detail - 001640

Edit PO Info... Printable View...

PO Number: 001640
Supplier: ABC Granite
Cost List: Standard
Status: Not Ordered
Order Date: 2/3/2017
Expected Delivery Date:
Tax Rate: 7%
Notes:


PO Lines: Add ▾ Get Current Unit Cost

No Purchase Order Receipts

Related Jobs: Add Related Jobs...

Files: Attach File...

No Data Available



Create New Purchase Order Line

Product: Granite Stone - Natural (Sq. ft.)

OK Cancel

Create New Purchase Order Line

Product: Granite
Stone - Natural (Sq. ft.)

Granite Color: Absolute Black 3CM

Quantity: 7

Measurement: 120" x 60"

OK Cancel

Purchase Order Detail - 001640

Edit PO Info... Receive PO... Printable View...

PO Number: 001640
Supplier: ABC Granite
Cost List: Standard
Status: Ordered
Order Date: 2/3/2017
Expected Delivery Date:
Tax Rate: 7%
Notes:

PO Lines: Add ▾ Get Current Unit Cost Assign Serial Numbers... Print Labels...

| Ordered Qty | Description ↑ | Total Units | Unit Cost | Total | Taxable | Line Status | Received Qty | Delivery Date |
|-------------|---------------------------------------|-------------|-----------|--------|---------|-------------|--------------|---------------|
| 7 | 120" x 60" Granite Absolute Black 3CM | 350 Sq. ft. | \$0.00 | \$0.00 | Yes | Ordered | 0 | |

Tax: \$0.00
Total: \$0.00

PO Receipts:
No Purchase Order Receipts

Related Jobs: Add Related Jobs...

Files: Attach File...

No Data Available

Receiving a PO

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

Purchase Order Detail - 001640

Edit PO Info... Receive PO... Printable View...

PO Number: 001640
Supplier: [ABC Granite](#)
Cost List: [Standard](#)
Status: [Ordered](#)
Order Date: 2/3/2017
Expected Delivery Date:
Tax Rate: 7%
Notes:

PO Lines: Add ▾

| Ordered Qty | Description |
|-------------|-------------|
| 7 | 120" |

Tax: \$0.00
Total: \$0.00

PO Receipts:
No Purchase Order Receipts

Related Jobs: Add Related Jobs...

Receive Purchase Order

PO Number: 001640
Receipt Date: 2/3/2017

| Received Qty | Description | Serial Number | Batch Number | Location | |
|--------------|--|---------------|--------------|----------|------------------|
| 7 | of 7 120" × 60" Granite Absolute Black 3CM | (Generate) | A1234 | Rack A ▾ | Add Measurements |

OK Cancel

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)

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

| Activity | Status | Start Date ↑ | Sched T |
|-------------|----------|--------------|---------|
| Template | Complete | 1/27/2017 | 8:00am |
| Fabrication | Complete | 1/31/2017 | 1:30pm |

Install
Invoice

Forms:

Room
Delete

Room
View Change Log

Context menu for Fabrication:

- Edit Fabrication...
- Change Status to
- Add Material to Fabrication...
- Create Duplicate Fabrication Activity...
- Printable View...

Add Material To Job Activity

Product: Granite


Stone - Natural (Sq. ft.)

Granite Color: Absolute Black 3CM

Click Add Serial Numbers... to add specific items.
Use Unassigned Quantity to add material without choosing serial numbers.

Serial Numbers:

Unassigned Quantity: Sq. ft.



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 |
| | | | | | |  15203 = 50 Sq. ft. |

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

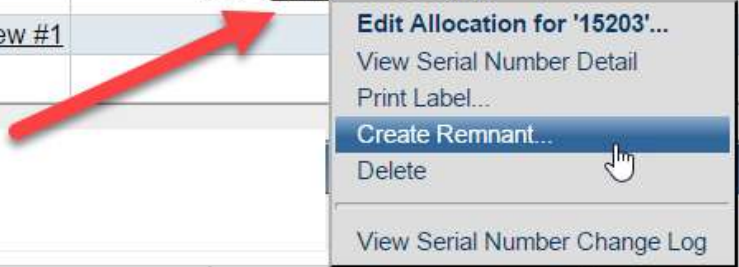
Inventory Transactions

| Date | Transaction | Reference | Serial Number | Bin 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

| Job Activities: New Job Activity... New Job Phase... | | | | | | | |
|--|------------------|---------------------------|------------|----------|---------------------------------|--|-------------------|
| Activity | Status | Start Date ↑ | Sched Time | Duration | Assigned To | Material | Notes |
| Template | Complete | 1/27/2017 | 8:00am | 2 hours | | | waiting for quote |
| Fabrication | Complete | 1/31/2017 | 1:30pm | 2 hours | Ben | 50 Sq. ft. Granite Absolute Black 3CM ⏪ SN 15203 = 50 Sq. ft. | |
| Install | Complete | 2/2/2017 | 7:35am | 1 minute | Install Crew #1 | | |
| Invoice | Auto-Schedule ☀️ | 2/3/2017 | 8:00am | 1 hour | | | |



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

| Inventory Settings | | | | | |
|------------------------------------|--|------------|----------------|-------------|--------|
| Inventory Locations | Serial Number Custom Fields: New Serial Number Custom Field... | | | | |
| Label Printable Forms | Name | Sequence ↑ | Data Type | Description | Status |
| Serial Number Custom Fields | Consignment | 1 | List of values | | Active |

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

Inventory

Options... Views Save View... New Threshold...

Product: All Products
 Show only rows containing: On Hand
 Filters: Serial Number Location is Rack A

| Serial Number ↑ | Measurement | Product Variant | Account - Job | On Hand Qty | Location |
|-----------------|-------------------|-----------------------------|---------------|-------------|----------|
| 15104 | 55" x 110" | Granite Baltic Brown 2CM | | 42.0138 | Rack A |
| 15105 | 55" x 110" | Granite Baltic Brown 2CM | | 42.0138 | Rack A |
| 15106 | 55" x 110" | Granite Baltic Brown 2CM | | 42.0138 | Rack A |
| 15107 | 55" x 110" | Granite Baltic Brown 2CM | | 42.0138 | Rack A |
| 15108 | 55" x 110" | Granite Baltic Brown 2CM | | 42.0138 | Rack A |
| 15111 | 60" x 120" | Granite Baltic Brown 2CM | | 50 | Rack A |
| 15112 | 60" x 120" | Granite Baltic Brown 2CM | | 50 | Rack A |
| 15113 | 60" x 120" | Granite Baltic Brown 2CM | | 50 | Rack A |
| 15226 | 55" x 110" | Granite Blue Baracuda 3CM | | 42.0138 | Rack A |
| 15227 | 55" x 110" | Granite Blue Baracuda 3CM | | 42.0138 | Rack A |
| 15228 | 55" x 110" | Granite Blue Baracuda 3CM | | 42.0138 | Rack A |
| 15229 | 55" x 110" | Granite Blue Baracuda 3CM | | 42.0138 | Rack A |
| 15230 | 55" x 110" | Granite Blue Baracuda 3CM | | 42.0138 | Rack A |
| 15231 | 60" x 120" | Granite Blue Baracuda 3CM | | 50 | Rack A |
| 15233 | 60" x 120" | Granite Blue Baracuda 3CM | | 50 | Rack A |
| 15234 | 60" x 120" | Granite Blue Baracuda 3CM | | 50 | Rack A |
| 15235 | 60" x 120" | Granite Blue Baracuda 3CM | | 50 | Rack A |
| 15236 | 30" x 120" | Granite Blue Baracuda 3CM | | 25 | Rack A |
| 15299 | 120" x 30" | Granite Moon Rock 3CM | | 25 | Rack A |
| 15325 | 60.25" x 120.837" | Granite Absolute Black 2CM | | 50.5585 | Rack A |
| 15326 | 60.25" x 120.837" | Granite Absolute Black 2CM | | 50.5585 | Rack A |
| 15327 | 60.25" x 120.837" | Granite Absolute Black 2CM | | 50.5585 | Rack A |
| 15334 | 55" x 112" | Granite Verde Butterfly 3CM | | 42.7777 | Rack A |
| 15335 | 55" x 112" | Granite Verde Butterfly 3CM | | 42.7777 | Rack A |
| 15336 | 55" x 112" | Granite Verde Butterfly 3CM | | 42.7777 | Rack A |
| 15337 | 55" x 112" | Granite Verde Butterfly 3CM | | 42.7777 | Rack A |
| 15338 | 55" x 112" | Granite Verde Butterfly 3CM | | 42.7777 | Rack A |
| 15339 | 60" x 120" | Granite Verde Butterfly 3CM | | 50 | Rack A |
| 15340 | 60" x 120" | Granite Verde Butterfly 3CM | | 50 | Rack A |
| 15340-R | 30" x 120" | Granite Verde Butterfly 3CM | | 25 | Rack A |
| 15341 | 60" x 120" | Granite Verde Butterfly 3CM | | 50 | Rack A |
| 15342 | 60" x 120" | Granite Verde Butterfly 3CM | | 50 | Rack A |
| 15343 | 60" x 120" | Granite Verde Butterfly 3CM | | 50 | Rack A |

(Rows 1 to 33 of 33)

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

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?

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

Instead, Edit Serial Numbers

- Edit the Allocation
- Edit Serial Numbers
- Uncheck unneeded slabs

150 Sq. ft. Granite Absolute Black 3CM

SN 15205 = 50 Sq. ft.
 SN 15206 = 50 Sq. ft.
 SN 15207 = 50 Sq. ft.

Edit Job Activity Material

Product Variant: Granite Absolute Black 3CM

Edit Serial Numbers...

| Serial Number | Allocated | Available |
|---------------|------------|------------|
| 15205 | 50 Sq. ft. | 50 Sq. ft. |
| 15206 | 50 Sq. ft. | 50 Sq. ft. |
| 15207 | 50 Sq. ft. | 50 Sq. ft. |

quantity: 0 Sq. ft. [Clear](#)

quantity: 150 Sq. ft.

Select Serial Numbers

Product Variant: Granite Absolute Black 3CM

2 item(s) selected (100 Sq. ft.) [Show Selected](#)

Filters:

Minimum Quantity: Sq. ft.

Minimum Measurements: " x "

| <input type="checkbox"/> | Serial Number | Allocated | Available | Allocated to other activities | Status | Measurement | Batch Number | Description | Location | Unit Cost | Remnant | Consignment |
|-------------------------------------|---------------|---|-----------------|-------------------------------|---------|-------------|--------------|-------------|----------|-----------|---------|-------------|
| <input type="checkbox"/> | 15198 | | 42.0138 Sq. ft. | | On Hand | 55" x 110" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input type="checkbox"/> | 15199 | | 42.0138 Sq. ft. | | On Hand | 55" x 110" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input type="checkbox"/> | 15200 | | 42.0138 Sq. ft. | | On Hand | 55" x 110" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input type="checkbox"/> | 15201 | | 42.0138 Sq. ft. | | On Hand | 55" x 110" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input type="checkbox"/> | 15202 | | 42.0138 Sq. ft. | | On Hand | 55" x 110" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input checked="" type="checkbox"/> | 15205 | <input type="text" value="50"/> Sq. ft. | 50 Sq. ft. | | On Hand | 60" x 120" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input checked="" type="checkbox"/> | 15206 | <input type="text" value="50"/> Sq. ft. | 50 Sq. ft. | | On Hand | 60" x 120" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input checked="" type="checkbox"/> | 15207 | | 50 Sq. ft. | | On Hand | 60" x 120" | D1234 | 1601 | Rack C | \$13.00 | No | |
| <input type="checkbox"/> | 15208 | | 25 Sq. ft. | | On Hand | 120" x 30" | D1234 | | Rack C | \$13.00 | Yes | |

(Rows 1 to 9 of 9)

(Unserialized) with negative Available

Inventory Detail

| New Serial Number... | | | | | | | | | | | |
|--|---------|-------------|--------------|-------------|----------|-------------|-------------------------------------|---------|----------|-----------|-----------|
| Product Variant: <u>Granite Absolute Black 3CM</u> | | | | | | | | | | | |
| 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 |
| <u>15198</u> | On Hand | 55" x 110" | D1234 | 1601 | Rack C | | | 42.0138 | | | 42.0138 |
| <u>15199</u> | On Hand | 55" x 110" | D1234 | 1601 | Rack C | | | 42.0138 | | | 42.0138 |
| <u>15200</u> | On Hand | 55" x 110" | D1234 | 1601 | Rack C | | | 42.0138 | | | 42.0138 |
| <u>15201</u> | On Hand | 55" x 110" | D1234 | 1601 | Rack C | | | 42.0138 | | | 42.0138 |
| <u>15202</u> | On Hand | 55" x 110" | D1234 | 1601 | Rack C | | | 42.0138 | | | 42.0138 |
| <u>15205</u> | On Hand | 60" x 120" | D1234 | 1601 | Rack C | | <u>Zander Contracting - Bob Lee</u> | 50 | | 50 | |
| <u>15206</u> | On Hand | 60" x 120" | D1234 | 1601 | Rack C | | <u>Zander Contracting - Bob Lee</u> | 50 | | 50 | |
| <u>15207</u> | On Hand | 60" x 120" | D1234 | 1601 | Rack C | | | 50 | | | 50 |
| <u>15208</u> | On Hand | 120" x 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 Transactions

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

Product Variant: Granite Absolute Black 3CM
Beginning: 2/3/2017
Unit of Measure: Sq. ft.

| Date | Transaction | Reference | Serial Number | Batch Number | Received | On Order | Consumed |
|----------|-------------------|-----------|---------------|--------------|----------|----------|----------|
| 2/3/2017 | Beginning Balance | | | | | | |
| 2/6/2017 | Job (Estimate) | Bob Lee | | | | | |
| 2/6/2017 | Job (Estimate) | Bob Lee | 15206 | D1234 | | | |
| 2/6/2017 | Job (Estimate) | Bob Lee | 15205 | D1234 | | | |

Material

Notes

150 Sq. ft. Granite Absolute Black 3
(Unserialized) = 50 Sq. ft.
SN 15205 = 50 Sq. ft.
SN 15206 = 50 Sq. ft.

Edit Job Activity Material

Product Variant: Granite Absolute Black 3CM

Edit Serial Numbers...

| Serial Number | Allocated | Available |
|---------------|------------|------------|
| 15205 | 50 Sq. ft. | 50 Sq. ft. |
| 15206 | 50 Sq. ft. | 50 Sq. ft. |

Unassigned Quantity: 50 Sq. ft. **Clear** Assign Serial Numbers...

Total Quantity: 150 Sq. ft.

OK Cancel

Inventory Reports

Inventory Reporting: What's Selling?

Report

Options... Reports Save Report... New Report...

Year: 2017
Filters: Activity Status is Complete

| Allocated Product Variant ↑ | Unit | Total Allocated Product Quantity by Activity Date |
|-----------------------------|---------|---|
| Granite Absolute Black 2CM | Sq. ft. | 200.25 |
| Granite Absolute Black 3CM | Sq. ft. | 50.0 |
| Granite Baltic Brown 2CM | Sq. ft. | 100.0 |
| Granite Blue Baracuda 2CM | Sq. ft. | 84.0276 |
| Granite Costa 3CM | Sq. ft. | 75.0 |
| Granite Volga Blue 3CM | Sq. ft. | |

(Rows 1 to 6 of 6)

Edit Measure

Subject Area:

- Quote
- Job
- Job Activity
- Purchase Order
- Job Form

Measure: Total Allocated Product Quantity ▾
by Time Field: Activity Date ▾

OK Cancel

Report - Options

Time Selection: Year ▾
Reporting Date: 2/15/2017

Measure: Total Allocated Product Quantity by Activity Date

Display Fields:

| | |
|---------------------------|----------------------------------|
| Allocated Product Variant | <input type="button" value="X"/> |
| Unit | <input type="button" value="X"/> |

Filters:
Activity Status is Complete

Display Type: Table ▾
Rows per page: 30

OK Cancel

Inventory Reporting: What are we ordering?

Report

| Product ↑ | Total PO Line Pre-tax Amount by PO Order Date |
|-----------|---|
| Granite | \$11,616.89 |

Edit Measure


Subject Area:

- Quote
- Job
- Job Activity
- Purchase Order
- Job Form

Measure: Total PO Line Pre-tax Amount

by Time Field: PO Order Date

OK Cancel



Report - Options

Time Selection: Year

Reporting Date: 2/15/2017

Measure: Total PO Line Pre-tax Amount by PO Order Date

Display Fields: Product

Filters: Add Filter...

Display Type: Table

Rows per page: 30

OK Cancel

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