



Inventory Best Practices

Everyday processes to keep your inventory accurate.

Matt Stevens

Keeping Things Accurate



Material Handling

- Inbound Material
 - Preparing Ahead
 - Suppliers
 - Installation Crew
- Outbound Material
 - Preparing Ahead
 - Timely Delivery

Keeping things clean

- Cycle Counting
 - Small Bites
 - Regular Schedule
- Organizing
 - Look for old material
 - Move bin locations in system

Inbound

- PAWPO – Plan Ahead W/PO
 - Use ETA date to Plan Space Needs
 - Look For Hot List
- Isolate Inbound Material
 - Eliminate missed items
 - Enter product data before receiving
 - Everything gets labeled
 - Print Labels in Batches
 - Use Printable Stock
 - Pre-Receive (when possible)
 - Returns come here too

Outbound

- Creating functional staging tickets
 - Use box or piece qty
 - Make WO for material deliveries
 - Can schedule these too
 - Create Pick Tickets at WO.
- Staging Area
 - Use WO # For Staged Material
 - Staged Pallet Count
 - Label Pallets
 - Have a place for small things
 - Audit against WO install date

PAWPO

Maintaining ETA dates is super important if you want to plan ahead

Look at ordered items for ETA Range to figure how many spots you need.

Generic spot estimation. Broadloom 200sy/spot, Ceramic Tile 500sf/spot, LVT around 1200sf/spot.

PO Search

- Ordered Status
 - Can add Partially Arrived
- Expected Date Range
- Can Add Material Types
- Look for just tomorrow's expected date for hot items

Find Purchase Order

Enter PO Information

Sidemark	Sales Person	PO#	Job #	Contract #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor	Reference #	Order Date	Order By Date	Expected Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	5/20/2021...5/27/2
Store # / Name	Status	Ship Date	Ship To	Ship Via
<input type="text"/>	Ordered	<input type="text"/>	<input type="text"/>	<input type="text"/>
Entry Person	Ordered By	R of L #	Project #	Information
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter Product Information

Type	Product ID	Product Description
Carpet	<input type="text"/>	<input type="text"/>

Ship To Address

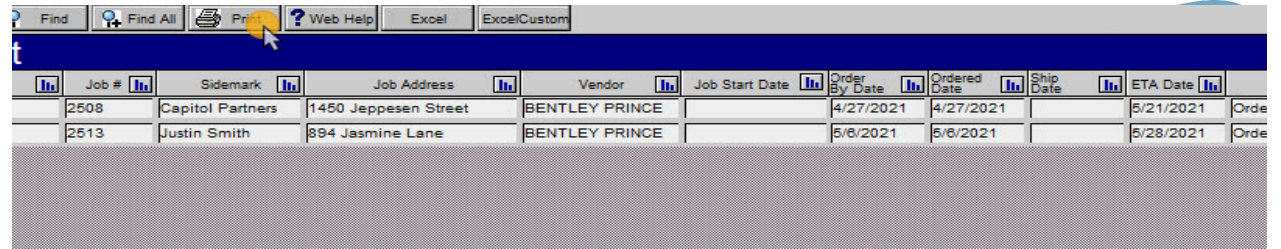
Address / Lot / Suite	Job Start Date
<input type="text"/>	<input type="text"/>
City	State Zip
<input type="text"/>	<input type="text"/>

Can add Partially Arrived with Xtra Find with same Expected Date and Type

Cancel Xtra Find Find

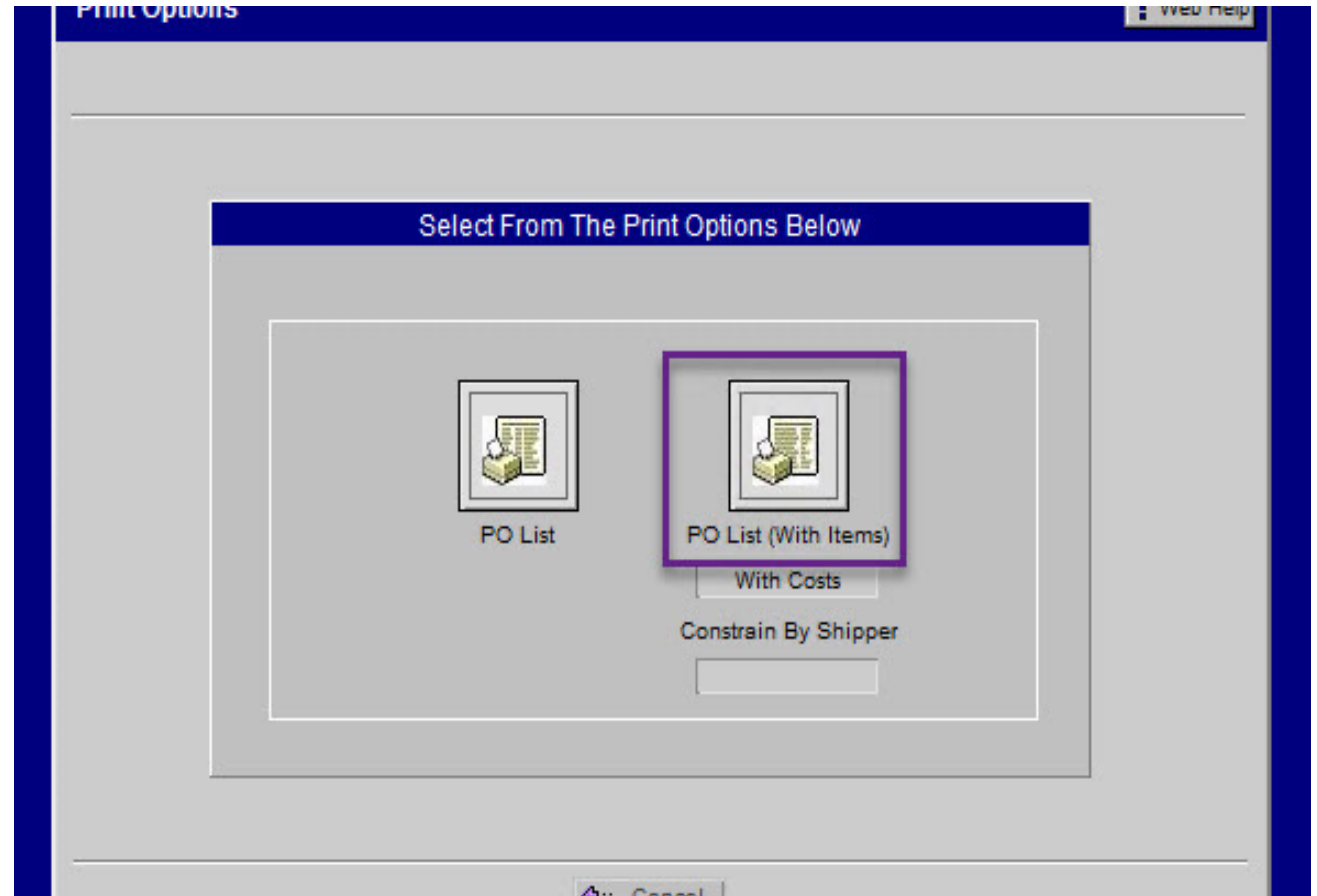
List View Print

- Select Print from list view
- Print PO List (With Items)
- With costs does not matter



The screenshot shows a software toolbar with buttons for 'Find', 'Find All', 'Print', 'Web Help', 'Excel', and 'ExcelCustom'. The 'Print' button is highlighted with a mouse cursor. Below the toolbar is a table with columns for Job #, Sidemark, Job Address, Vendor, Job Start Date, Order By Date, Ordered Date, Ship Date, ETA Date, and Order.

Job #	Sidemark	Job Address	Vendor	Job Start Date	Order By Date	Ordered Date	Ship Date	ETA Date	Order
2508	Capitol Partners	1450 Jeppesen Street	BENTLEY PRINCE		4/27/2021	4/27/2021		5/21/2021	Orde
2513	Justin Smith	894 Jasmine Lane	BENTLEY PRINCE		5/6/2021	5/6/2021		5/28/2021	Orde



PO List

- Ordered Status
 - Can add Partially Arrived
- Expected Date Range
- Can Add Material Types
- Look for just tomorrow's expected date for hot items

One Point Floors

949-297-3760 Phone 949-297-3761 Fax

Purchase Orders

Vendor	PO #	Sidemark	Order Date	Reference #	B of L #	Sales Person	
BENTLEY PRINCE STREET -800-423-4709 Ext Acct # 137							
4620-2508	Capitol Partners	4/27/2021	34567	Bonni			
Type	Prod ID	Quantity	Order Size	Item Size	Item Cost	Frt. Cost	Summary
Carpet	2590	800 SY	or 12'6" x 576'0" LnFt		\$12.00	\$0.65	\$10,120.00
	BENTLEY	Description: Kings Road 8kr420630r Color / Item: 880320 Ecru					5/21/2021
4625-2513	Justin Smith	5/6/2021	BPS87654	Matt			
Type	Prod ID	Quantity	Order Size	Item Size	Item Cost	Frt. Cost	Summary
Carpet	2794	258 SY	or 12'6" x 185'9" LnFt		\$11.00	\$0.48	\$2,961.84
	Bentley	Description: Kings Road 8kr420000t Color / Item: 880362 Chili Pepper					5/28/2021

At 200sy/spot this would be 5 or 6 Spots



More accurate receiving



Everything gets labeled



Can be a place for warehouse workstation



Job returns start here as well



Save time by batch receiving and label printing

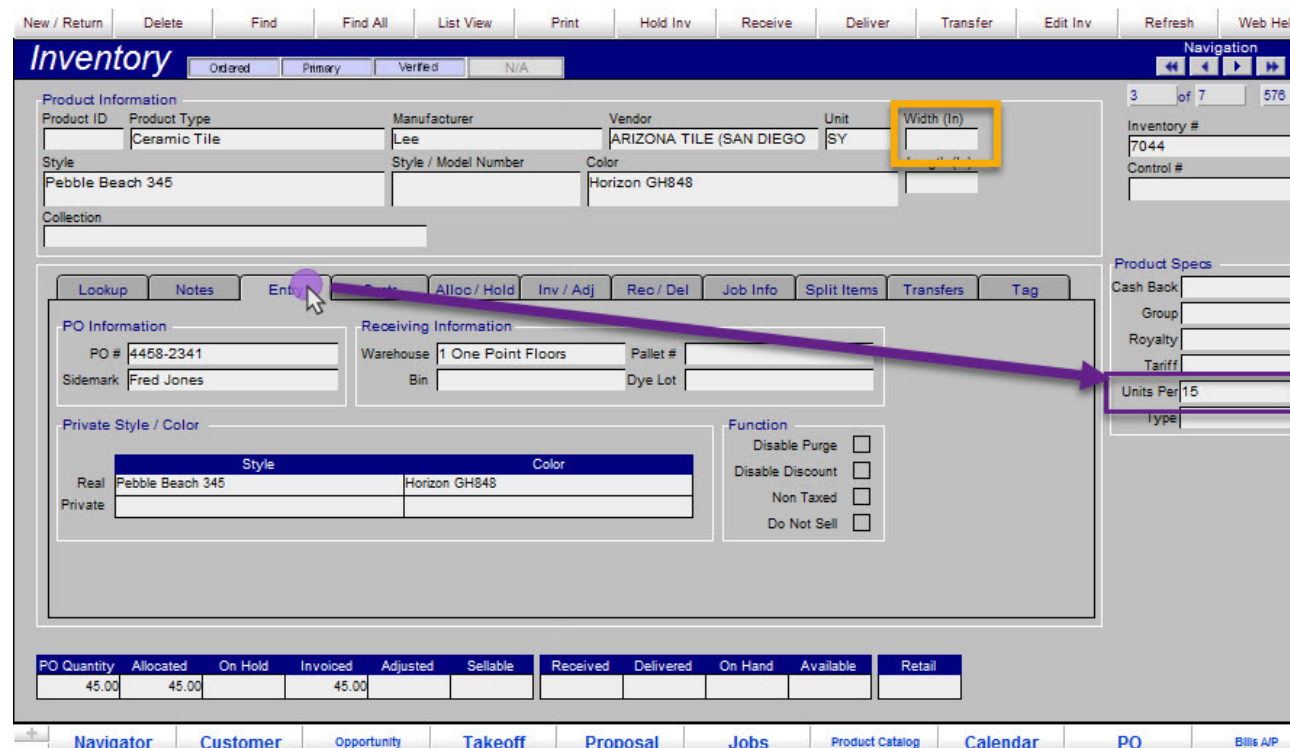


Easy auditing of on time receiving

Benefits of using a receiving hold area to isolate inbound material

Adding Box Qty

- On Entry Tab Enter Units Per
- Now even without Product ID# can use the box qty for pick ticket amounts
- Would also want to enter roll width if broadloom goods



The screenshot shows the 'Inventory' software interface. At the top, there is a navigation bar with buttons: New / Return, Delete, Find, Find All, List View, Print, Hold Inv, Receive, Deliver, Transfer, Edit Inv, Refresh, and Web Help. Below this is a sub-header for 'Inventory' with tabs: Ordered, Primary, Verified, and N/A. A 'Navigation' bar on the right shows '3 of 7' and '578'.

The main form is divided into several sections:

- Product Information:** Includes fields for Product ID, Product Type (Ceramic Tile), Manufacturer (Lee), Vendor (ARIZONA TILE (SAN DIEGO)), Unit (SY), and Width (In). The 'Width (In)' field is highlighted with a yellow box.
- Style / Model Number:** Includes fields for Style (Pebble Beach 345), Style / Model Number, and Color (Horizon GH848).
- Collection:** A text field for the collection name.
- PO Information:** Includes fields for PO # (4458-2341) and Sidemark (Fred Jones).
- Receiving Information:** Includes fields for Warehouse (1 One Point Floors), Pallet #, Bin, and Dye Lot.
- Private Style / Color:** A table with columns for Style and Color, showing 'Pebble Beach 345' and 'Horizon GH848'.
- Function:** A group of checkboxes: Disable Purge, Disable Discount, Non Taxed, and Do Not Sell.
- Product Specs:** Includes fields for Cash Back, Group, Royalty, Tariff, and Units Per (15). The 'Units Per' field is highlighted with a purple box.

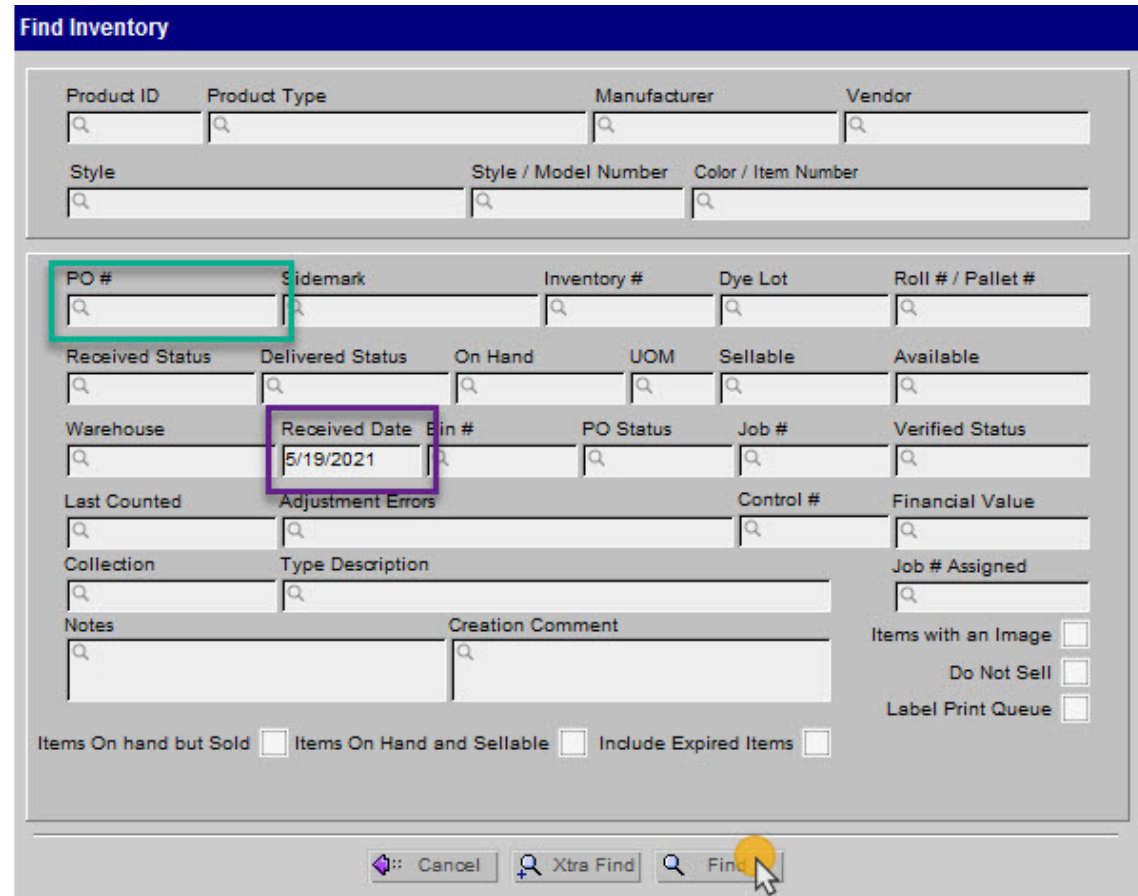
A purple arrow points from the 'Entry' tab to the 'Units Per' field. Another purple arrow points from the 'Width (In)' field to the 'Units Per' field.

At the bottom, there is a table with columns: PO Quantity, Allocated, On Hold, Invoiced, Adjusted, Sellable, Received, Delivered, On Hand, Available, and Retail. The 'PO Quantity' and 'Invoiced' columns show the value 45.00.

The bottom navigation bar includes buttons: Navigator, Customer, Opportunity, Takeoff, Proposal, Jobs, Product Catalog, Calendar, PO, and Bills A/P.

Batch Printing

- Find by Received Date
- Could combine with PO# if already printed once that day



The image shows a 'Find Inventory' form with various search criteria. A green box highlights the 'PO #' field, and a purple box highlights the 'Received Date' field, which contains the value '5/19/2021'. The form includes fields for Product ID, Product Type, Manufacturer, Vendor, Style, Style / Model Number, Color / Item Number, Sidemark, Inventory #, Dye Lot, Roll # / Pallet #, Received Status, Delivered Status, On Hand, UOM, Sellable, Available, Warehouse, Bin #, PO Status, Job #, Verified Status, Last Counted, Adjustment Errors, Control #, Financial Value, Collection, Type Description, Job # Assigned, Notes, and Creation Comment. There are also checkboxes for 'Items On hand but Sold', 'Items On Hand and Sellable', 'Include Expired Items', 'Items with an Image', 'Do Not Sell', and 'Label Print Queue'. The bottom of the form has buttons for 'Cancel', 'Xtra Find', and 'Find', with a mouse cursor clicking on the 'Find' button.

Product ID	Product Type	Manufacturer	Vendor
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Style	Style / Model Number	Color / Item Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

PO #	Sidemark	Inventory #	Dye Lot	Roll # / Pallet #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Received Status	Delivered Status	On Hand	UOM	Sellable	Available
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Warehouse	Received Date	Bin #	PO Status	Job #	Verified Status
<input type="text"/>	5/19/2021	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Last Counted	Adjustment Errors	Control #	Financial Value
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Collection	Type Description	Job # Assigned
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes	Creation Comment
<input type="text"/>	<input type="text"/>

Items On hand but Sold ☐ Items On Hand and Sellable ☐ Include Expired Items ☐

Items with an Image ☐
Do Not Sell ☐
Label Print Queue ☐

Cancel Xtra Find Find

Batch Printing

- From found list of records Print and select records being browsed option

Select Print option

➔ Print an **Inventory List** for the found set of items

(The print option below requires information to be entered in the label field below)

➔ Print **Inventory Labels with Bar Code** for the found set of items

➔ Print **Queued Labels with Bar Code**

Label Selection

Eltron 4X6

☒ Navigator
 ☐ Customer
 ☐ Opportunity
 ☐ Takeoff

Print

Print: Records being browsed

Printer

Name: Microsoft Print to PDF

Status: Ready

Type: Microsoft Print To PDF

Where: PORTPROMPT:

Comment:

Properties...

☐ Print to file

Print range

☒ All

☐ Pages from: 1 to: 1

Number pages from: 1

Copies

Number of copies: 1

1 1 2 2 3 3

☐ Collate

Entering Box Quantity to get unit amount on Pick Ticket

Entry	CRM Activities	Upgrades	Bundle	Status	Profits	Chg Orders	Job Mail	Pick Ticket		
Filter Product Type		Filter Procurement		Staging Completed		Filter Warehouse				
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text" value="Unallocated"/>	<input type="button" value="Clear Filtering"/>	
Type	Notes	Allocated Quantity	Already Delivered	Staged Not Delivered	Remaining To Deliver	Quantity To Stage	Date	Expected Date	On Hand In Warehouse	Inv # Control
Food		120 SF	0 SF		120 SF	<input type="text"/>		8/22/2019	0 SF	7043
		3 Case	0 Case	0 Case	3 Case	<input type="text"/>			0 Case	
Notes										
Ceramic Tile		45 SY	0 SY		45 SY	<input type="text"/>		8/22/2019	45 SY	7044
		3 Case	0 Case	0 Case	3 Case	<input type="text"/>			3 Case	
Notes										
Food		45				<input type="text"/>		8/20/2019	0 SF	7045
		1.8				<input type="text"/>			0 Case	
Notes										
Carpet		100			100 SY	<input type="text"/>		4/25/2019	225 SY	8972
		??			??	<input type="text"/>			??	
Notes										

Entering box qty here will not populate unit amount in top field based on Units Per

Entering box qty here will not populate unit amount in top field based on Units Per

- Entering box qty amount from lower cell on pick ticket tab now auto-calculates total unit amount

Entry	CRM Activities	Upgrades	Bundle	Status	Profits	Chg Orders	Job Mail	Pick Ticket		
Filter Product Type		Filter Procurement		Staging Completed		Filter Warehouse				
db		db		db		db		Unallocated		
								Clear Filtering		
Type	Notes	Allocated Quantity	Already Delivered	Staged Not Delivered	Remaining To Deliver	Quantity To Stage	Date	Expected Date	On Hand In Warehouse	Inv Contr
Wood		120 SF	0 SF		120 SF	⇒		8/22/2019	0 SF	7043
		3 Case	0 Case	0 Case	3 Case	🗑			0 Case	
Notes										
Ceramic Tile		45 SY	0 SY		45 SY	⇒	30	5/19/2021	8/22/2019	45 SY
		3 Case	0 Case	0 Case	3 Case	🗑	2			3 Case
Notes										
Wood		45			45 SF	⇒		8/20/2019	0 SF	7045
		1.8			1.8 Case	🗑			0 Case	
Notes										
Carpet		100			100 SY	⇒		4/25/2019	225 SY	8972
		??			??	🗑			??	
Notes										

Totals units is populated her by system.

Totals units is populated here by system.

Entering Staging Location.



- From found list of records Print and select records being browsed option

50 Jeppesen Street

Address 1450 Jeppesen Street

Lot / Suite #

City, State, Zip Connifer

Phone

Itemized Costs Job Mail **Pick Ticket** Old Pick Ticket Forms Directions

Filter Product Type Filter Procurement Staging Completed Filter Warehouse

Type	Notes	Allocated Quantity	Already Delivered	Staged Not Delivered	Remaining To Deliver	Quantity To Stage	Date	Expected Date
Carpet		1800 SqYd	0 SqYd	1800 SqYd	0 SqYd	1800	5/19/2021	5/18/2021
		1296'0"	0'0"	1296'0"	0'0"			
Notes	Staging J - 9 Rolls							
Adhesive		10 Each	0 Each	10 Each	0 Each	10	5/19/2021	5/25/2021
Notes	Staging J - 1 Pallet							

Status Stage Memo Picked Up By Picked By Date Deliver M

Staged Staging J - 9 Rolls 1 pallet 5/24/2021

Each Parabond Parabond 4 Gallon 4099 (60 Yds Per Bucket) 4 Gallon Bucket)

Quantity	Product Description	Color / Item Number Width	PO # / Ref #	Inv # / Control #
10	Parabond Parabond 4 Gallon 4099 (60 Yds Per Bucket)	4 Gallon	4629-2521	7298
			sadf	

Skid / Roll _____ Dye Lot / Reg # _____ Bin _____

Staging J - 1 Pallet

Carpet

SqYd Bentley Kings Road 8kr420630r 880320 Ecru

Quantity	Product Description	Color / Item Number Width	PO # / Ref #	Inv # / Control #
1800	BENTLEY Kings Road 8kr420630r	880320 Ecru	4628-2521	7297
1296'0"		12.5	asdfsdf	

Skid / Roll _____ Dye Lot / Reg # _____ Bin _____

Staging J - 9 Rolls

Signed _____ Date ____/____/____

Keeping Things Clean



Clean up old material

- On hand quantity >0
 - Received more than x amount of time
 - Trash or donate it
 - Move to a specified location for closeout
- Update Bin Locations
 - When moving and/or organizing
 - Location is important

Cycle Count

- Best done every day
 - Part of daily routine
 - Takes short amount of time
- Use a simple breakdown
 - Bin Location
 - Location accuracy as important as count accuracy
 - Do prep steps every day first

Finding Old Inventory

- Find for inventory on hand and available >0
- Also want to add Received Date <year ago

Product ID	Product Type	Manufacturer	Vendor
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Style	Style / Model Number	Color / Item Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

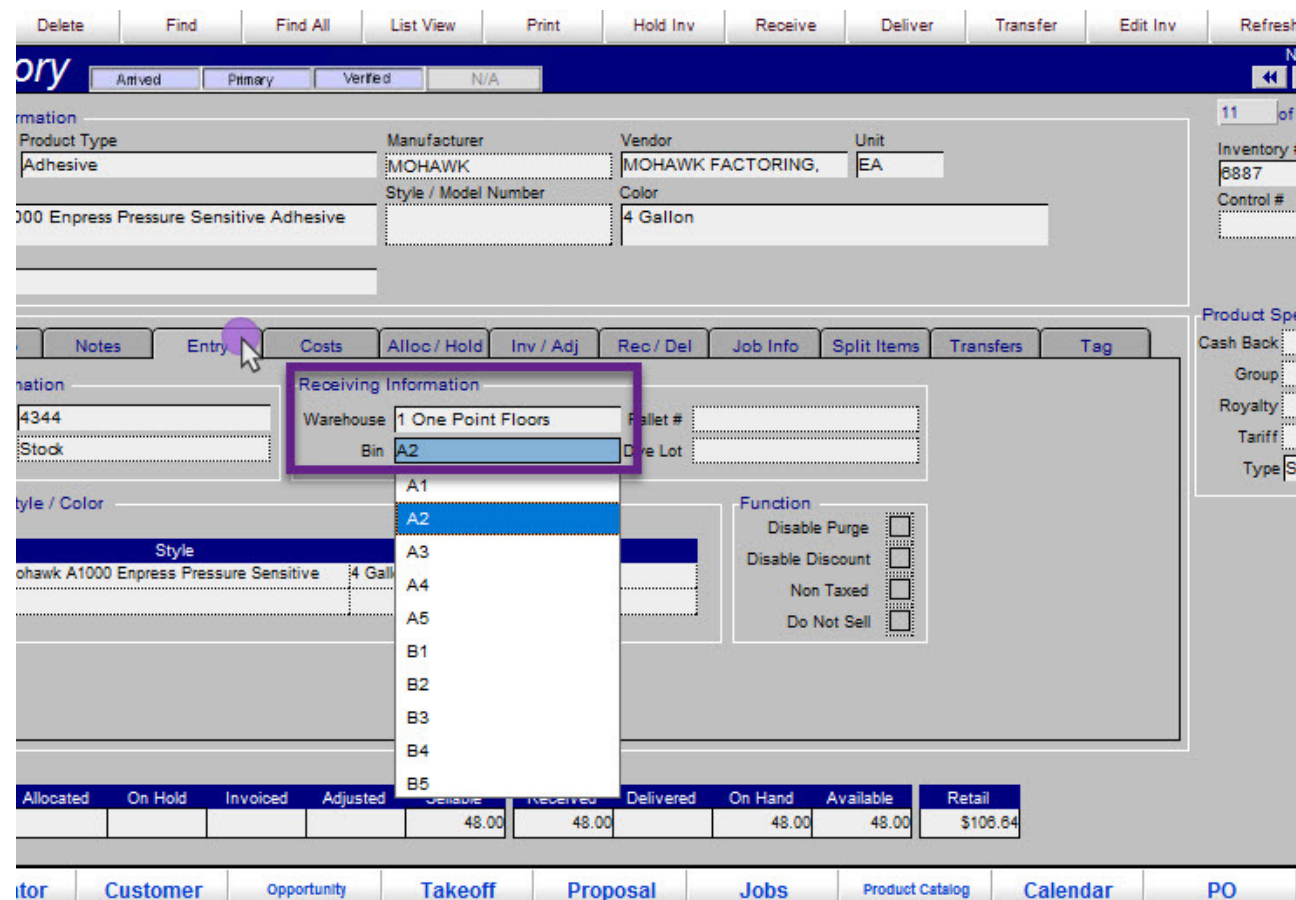
PO #	Sidemark	Inventory #	Dye Lot	Roll # / Pallet #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Received Status	Delivered Status	On Hand	JOM	Sellable
<input type="text"/>	<input type="text"/>	<input type="text" value=">0"/>	<input type="text"/>	<input type="text" value=">0"/>
Warehouse	Received Date	Bin #	PO Status	Job #
<input type="text"/>	<input type="text" value="<5/19/2020"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Counted	Adjustment Errors	Control #	Financial Value	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Collection	Type Description	Job # Assigned		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Notes	Creation Comment			
<input type="text"/>	<input type="text"/>			

☐ Items On hand but Sold
 ☐ Items On Hand and Sellable
 ☐ Include Expired Items

☐ Items with an Image
☐ Do Not Sell
☐ Label Print Queue

Update Bin Locations

- Navigate to Entry tab on inventory record being moved physically
- Update Bin and Warehouse locations if needed.



The screenshot shows a software interface for inventory management. At the top, there are navigation buttons: Delete, Find, Find All, List View, Print, Hold Inv, Receive, Deliver, Transfer, Edit Inv, and Refresh. Below these are tabs for 'Antived', 'Primary', 'Verfed', and 'N/A'. The main area displays product information for 'MOHAWK' adhesive, including 'MOHAWK FACTORING, EA' as the vendor and '4 Gallon' as the unit. A 'Receiving Information' dialog box is open, showing 'Warehouse' as '1 One Point Floors' and 'Bin' as 'A2'. A dropdown menu for the 'Bin' field is visible, listing options from A1 to B5. The 'Function' section includes checkboxes for 'Disable Purge', 'Disable Discount', 'Non Taxed', and 'Do Not Sell'. At the bottom, there is a table with columns for 'Allocated', 'On Hold', 'Invoiced', 'Adjusted', 'Received', 'Delivered', 'On Hand', 'Available', and 'Retail'. The 'Retail' column shows a value of \$108.64.

Allocated	On Hold	Invoiced	Adjusted	Received	Delivered	On Hand	Available	Retail
				48.00	48.00	48.00	48.00	\$108.64