

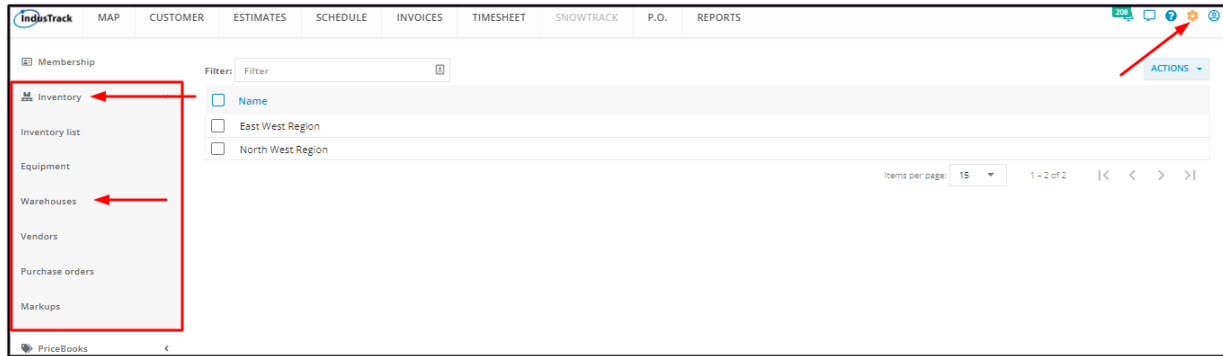
Warehouses

Assign inventory from the main storage facility into warehouses for ease of moving and invoicing these from job to job. IndusTrack provides 2 options for your warehouses – the physical structure and your vehicles.

Physical structures refer to offices or satellite warehouses that have fixed locations. Assign and manage inventory straight from these warehouses instead of your main storage facility.

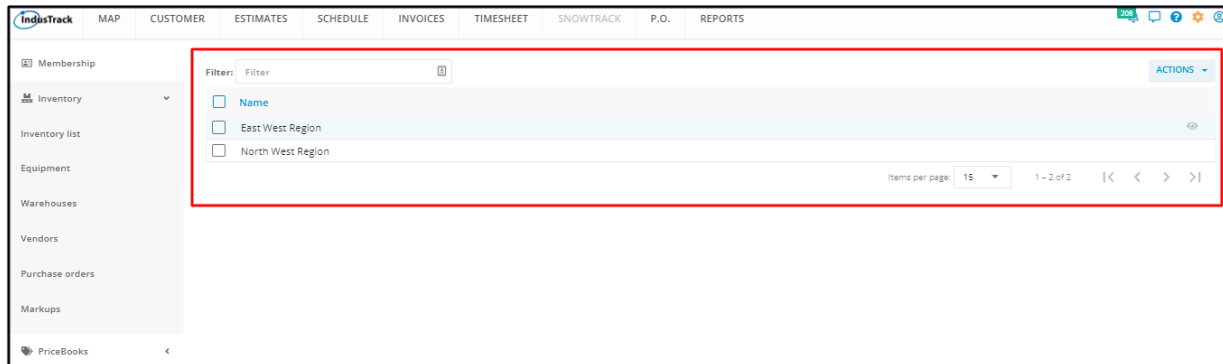
You can also assign and manage inventory straight from your vehicles. These vehicles with inventory are the other **Warehouse** option in IndusTrack. Turn vehicles into warehouses for ease of maintaining and using supplies during the performance of services at the job site when needed.

To set up your warehouses go to **Settings > Inventory > Warehouses**.



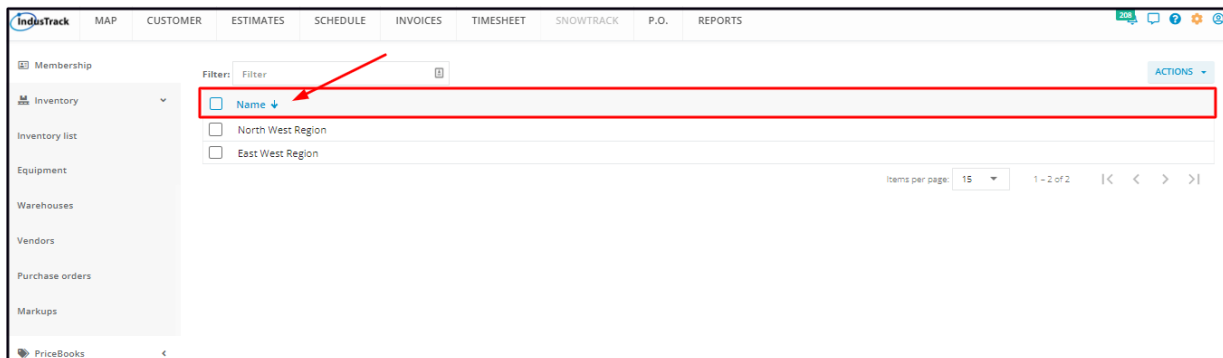
Warehouses List

The Warehouses page defaults to the **Warehouses List** presented in table format.



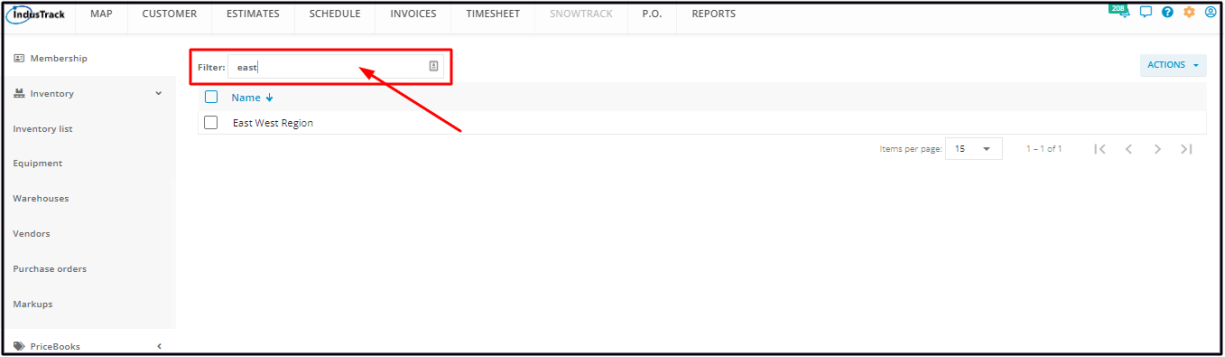
Sort the Warehouses list

Click on the column header to **sort** the warehouse names alphabetically.



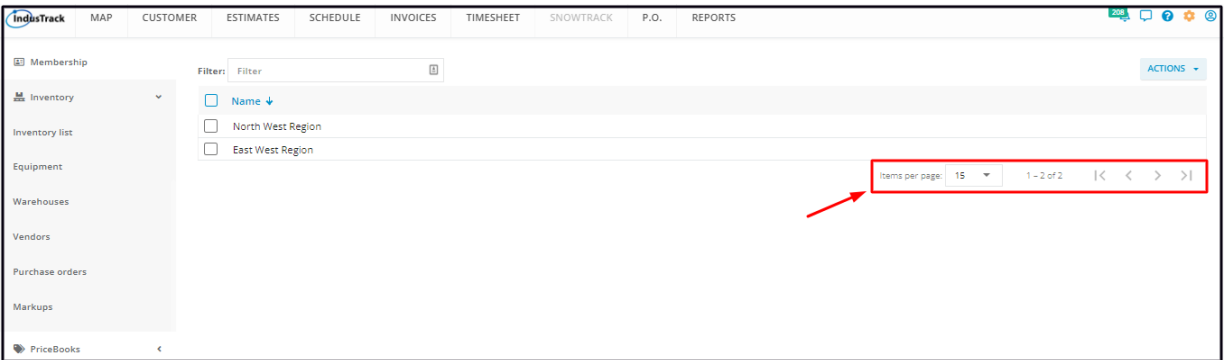
Filter Bar

Key in the information you are looking for on the **Filter bar** and matching information will populate the Warehouses table.



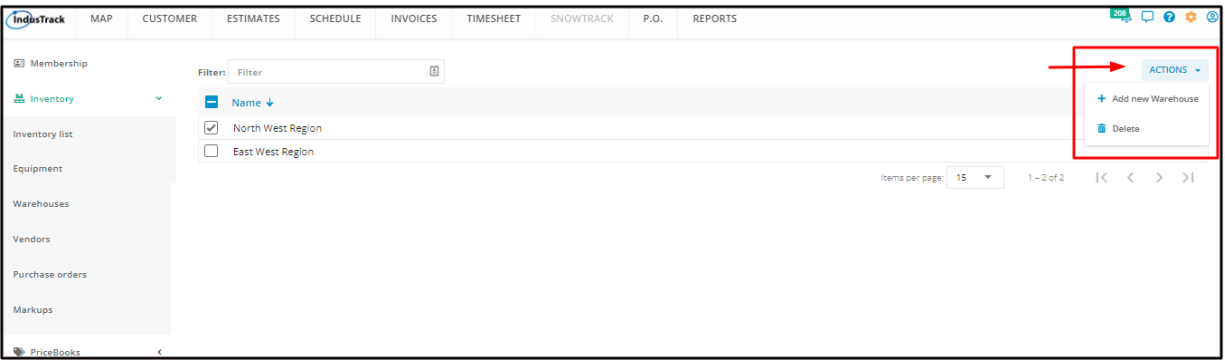
List Per Page

Select the number of warehouses to be displayed per page. Options to choose from are 15, 25, and 50. Use the Previous and Next buttons to move from one page to another (if there is more than one page).



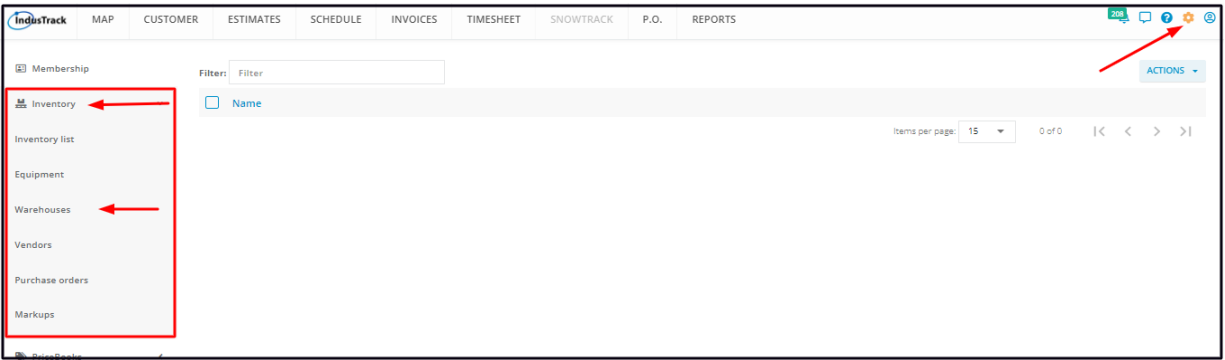
Actions Button

This button is used to create and delete warehouses.



Set Up a New Warehouse

To create and manage warehouses, go to **Settings > Inventory > Warehouses**.



Go to the **Actions** button and select **+ Add new Warehouse**.

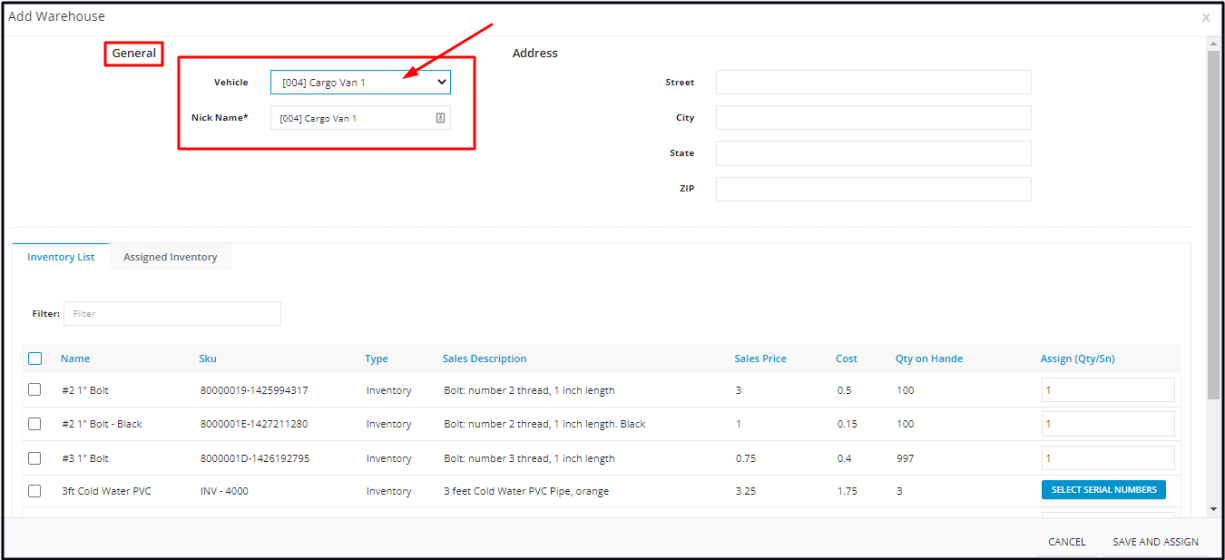


Fill in the item details on the **Add Warehouse window**. Fields with (*) are required.

General Information

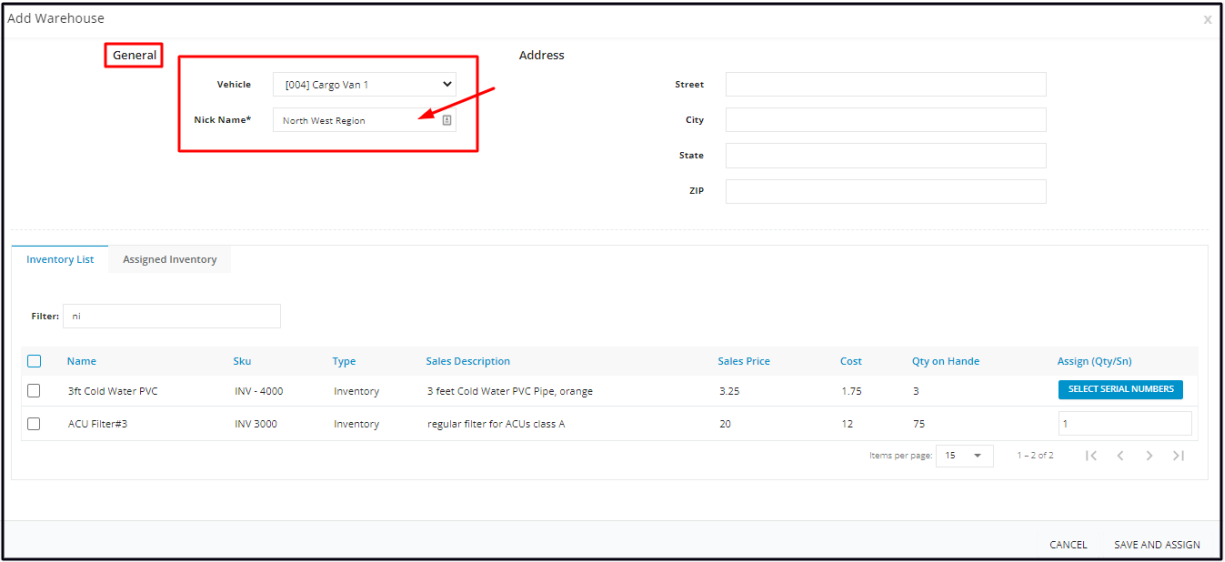
Vehicle

- If the warehouse is a vehicle, select the one to be assigned with inventory from the drop-down list.
- This is not a required field for a fixed Warehouse facility.



Nick Name

- The vehicle's name (if selected) will auto-populate this field. Use this field to give the warehouse a name. This name will be reflected on the Warehouses List.



Add Warehouse

General

Vehicle

Nick Name* Columbia Satellite

Address

Street

City

State

ZIP

Inventory List Assigned Inventory

Filter:

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	Cabinets	26584	Inventory	Cabinets store things, like a bathroom cabinet that holds items like toothbrushes... show all	39	39	156	<input type="text" value="1"/>
<input type="checkbox"/>	Cabinets:Cabinet Pulls	11745236	Inventory	A Cabinet handle is the attached piece of hardware that is used to open and clos... show all	25.99	25.99	422	<input type="text" value="1"/>
<input type="checkbox"/>	Cabinets:Light Pine	1174952	Inventory	Light pine kitchen cabinet wall unit. Cabinet lighting is a discreet form of lig... show all	68.79	68.79	126	<input type="text" value="1"/>
<input type="checkbox"/>	create new item	4747	Inventory				1	<input type="text" value="1"/>

CANCEL SAVE AND ASSIGN

Address

Key in the warehouse's address on the provided fields. Leave these blank if the warehouse is a vehicle.

- Street
- City
- State
- Zip

Add Warehouse

General

Vehicle

Nick Name* Columbia Satellite

Address

Street 49th Avenue

City Columbia Heights

State MN

ZIP 55421

Inventory List Assigned Inventory

Filter:

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	Cabinets	26584	Inventory	Cabinets store things, like a bathroom cabinet that holds items like toothbrushes... show all	39	39	156	<input type="text" value="1"/>
<input type="checkbox"/>	Cabinets:Cabinet Pulls	11745236	Inventory	A Cabinet handle is the attached piece of hardware that is used to open and clos... show all	25.99	25.99	422	<input type="text" value="1"/>
<input type="checkbox"/>	Cabinets:Light Pine	1174952	Inventory	Light pine kitchen cabinet wall unit. Cabinet lighting is a discreet form of lig... show all	68.79	68.79	126	<input type="text" value="1"/>
<input type="checkbox"/>	create new item	4747	Inventory				1	<input type="text" value="1"/>

CANCEL SAVE AND ASSIGN

Inventory List

This tab contains the list of all active inventory items at your main storage facility. From this list, select the items that will be assigned or relocated to the Warehouse.

Add Warehouse

General Vehicle: [004] Cargo Van 1 Nick Name*: North West Region

Address Street, City, State, ZIP

Inventory List Assigned Inventory

Filter: Filter

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	#2 1" Bolt	8000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100	1
<input type="checkbox"/>	#2 1" Bolt - Black	800001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100	1
<input type="checkbox"/>	#3 1" Bolt	800001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997	1
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3	SELECT SERIAL NUMBERS

CANCEL SAVE AND ASSIGN

Click on the column header to **sort the list** according to the preferred field.

Add Warehouse

ZIP

Inventory List Assigned Inventory

Filter: Filter

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	1	SELECT SERIAL NUMBERS
<input type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	23	1
<input type="checkbox"/>	ACU Filter#3	INV 3000	Inventory	regular filter for ACUs class A	20	12	50	1
<input type="checkbox"/>	#2 1" Bolt	8000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100	1
<input type="checkbox"/>	#2 1" Bolt - Black	800001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100	1
<input type="checkbox"/>	Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425	1
<input type="checkbox"/>	#3 1" Bolt	800001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	962	1

Items per page: 15 1-7 of 7

CANCEL [SAVE AND ASSIGN](#)

Use the **Filter** option to narrow down the list or quickly find an item.

Add Warehouse

ZIP

Inventory List Assigned Inventory

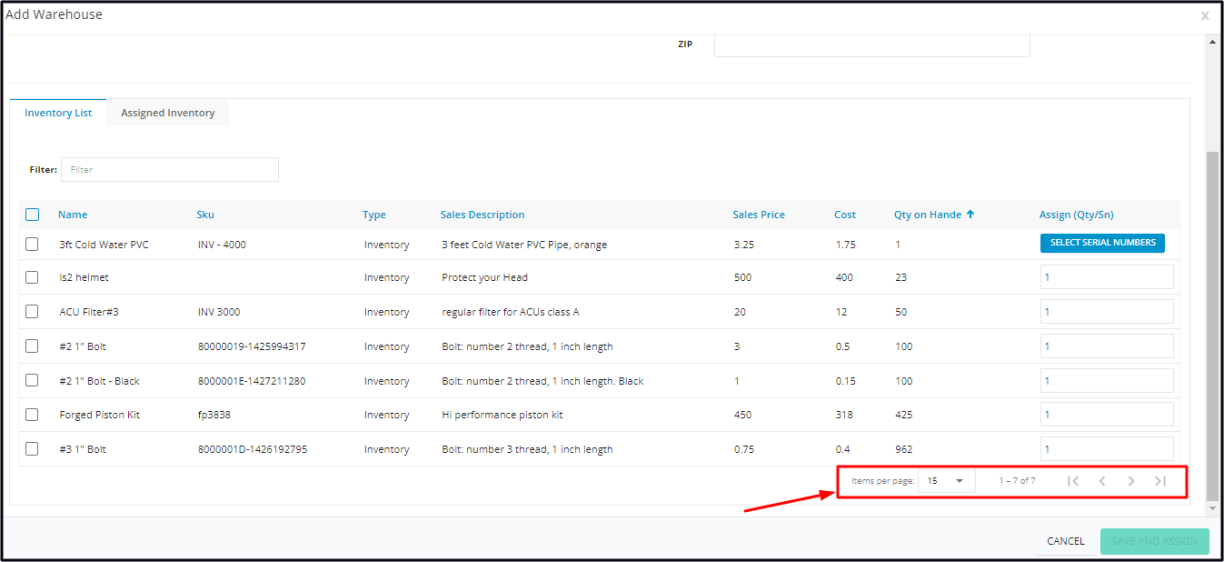
Filter: Filter

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	1	SELECT SERIAL NUMBERS
<input type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	23	1
<input type="checkbox"/>	ACU Filter#3	INV 3000	Inventory	regular filter for ACUs class A	20	12	50	1
<input type="checkbox"/>	#2 1" Bolt	8000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100	1
<input type="checkbox"/>	#2 1" Bolt - Black	800001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100	1
<input type="checkbox"/>	Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425	1
<input type="checkbox"/>	#3 1" Bolt	800001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	962	1

Items per page: 15 1-7 of 7

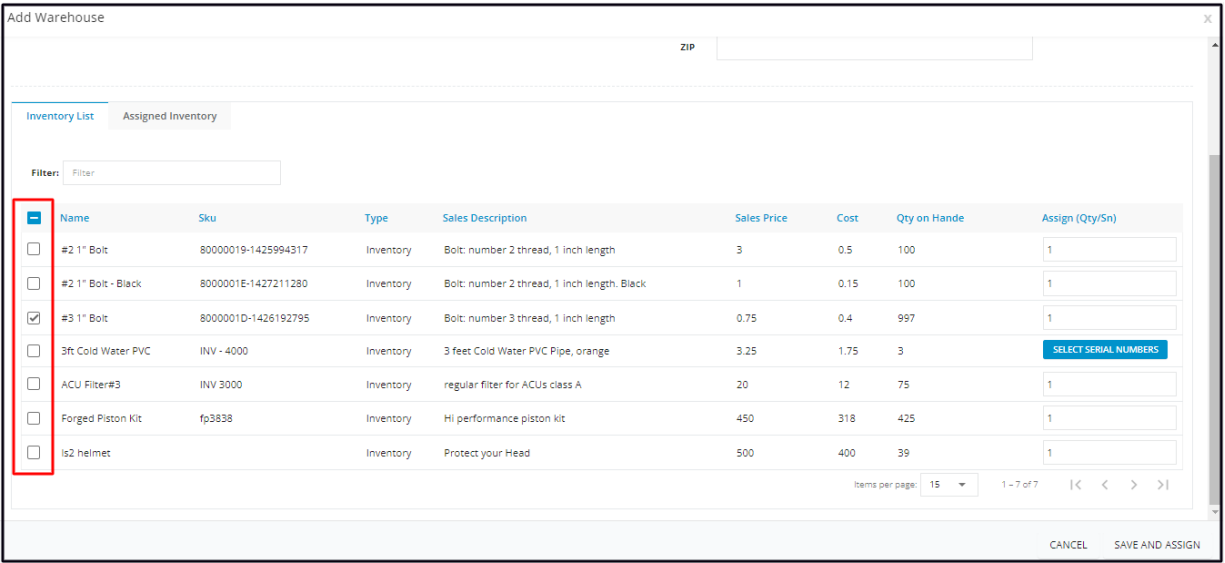
CANCEL [SAVE AND ASSIGN](#)

Select the number of inventory items to be displayed per page. Options to choose from are 15, 25, and 50. Use the Previous and Next buttons to move from one page to another (if there is more than one page).



Assign Inventories

Find the inventory to be assigned to the warehouse. Tick the checkbox to the left of the inventory item.

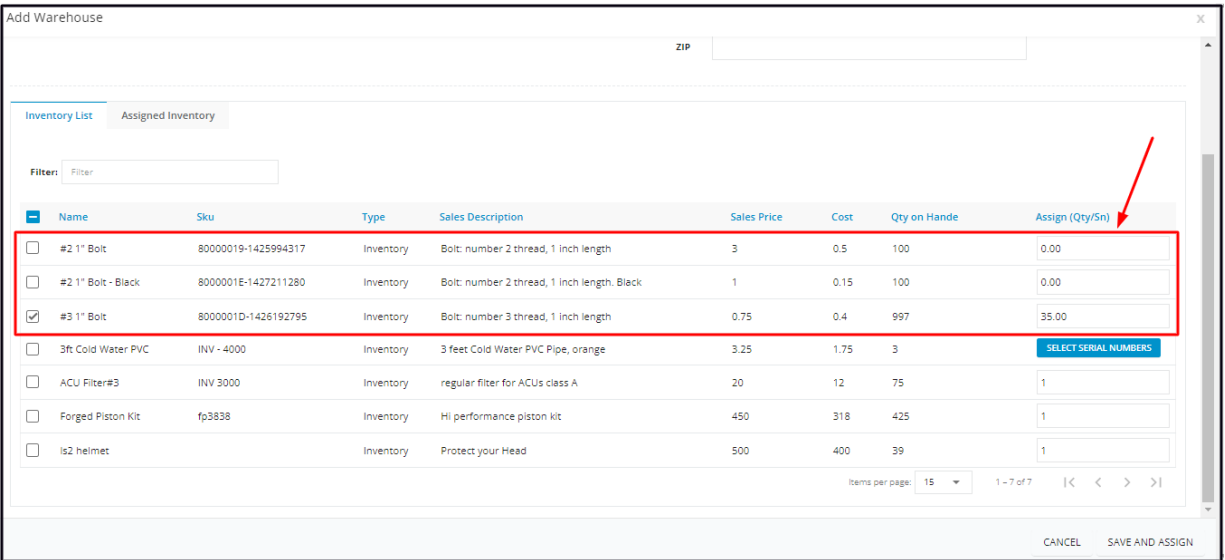


Under the **Assign Qty/SN** column, set the quantity or select the serial number(s) of the item to be assigned.

Only inventory items with quantity on hand can be assigned. The quantity to be assigned must also not be greater than the quantity on hand. If it is, the system will not accept the data.

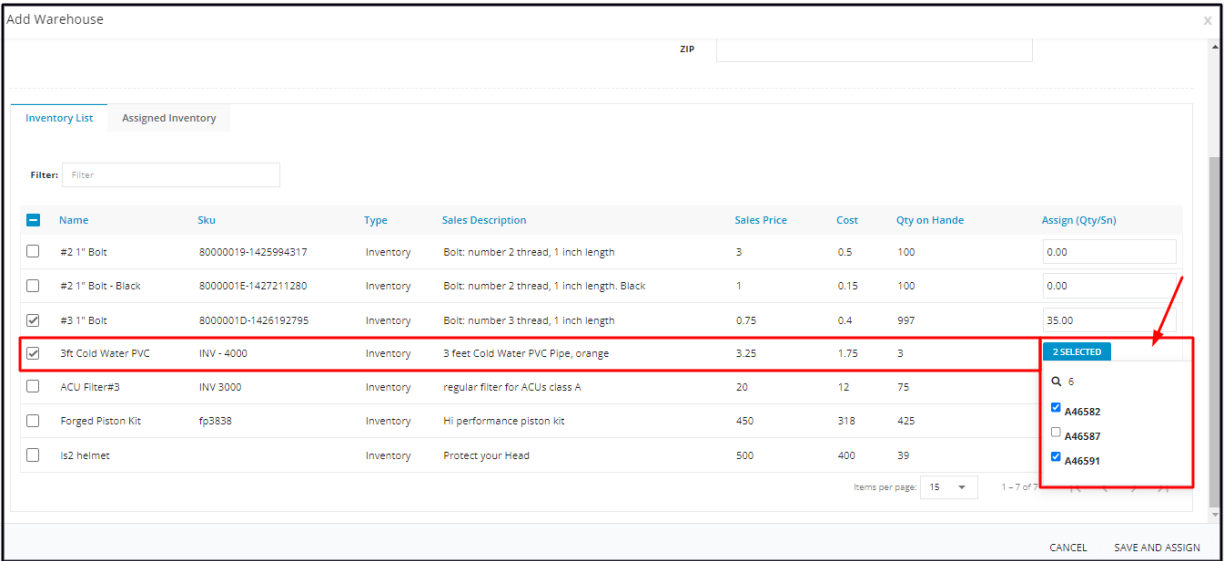
- **Inventory Count**

- Set the quantity to be assigned. The default quantity is one, edit as may be needed.
- If the check box of an item is not ticked, there is no need to update the quantity or set the 1 to 0.



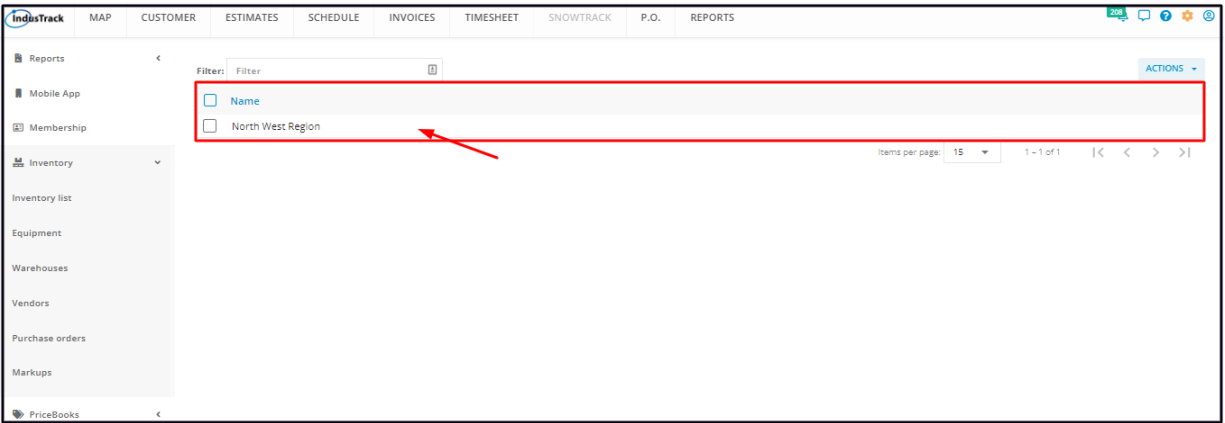
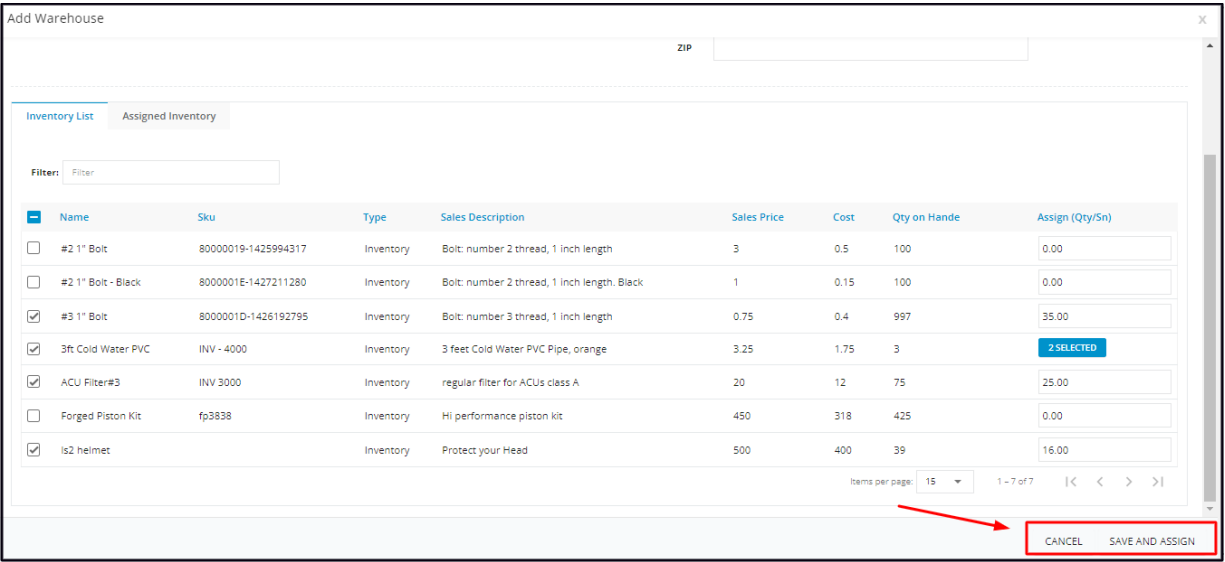
- **Serial Numbers**

- o Click the **Select Serial Numbers** option to bring up the list.
- o Find the serial number(s) to be assigned. Use the Filter option to quickly find a serial number.
- o Tick the checkbox(es) to select.
 - Untick the checkbox to deselect.

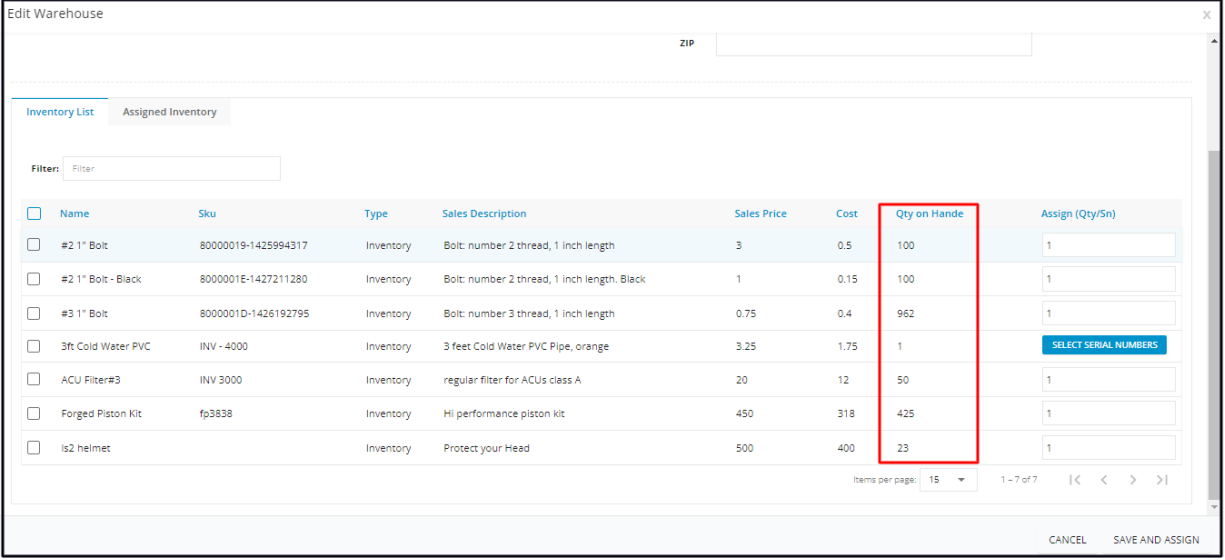


Continue to assign all inventories as applicable.

Once done, **Save and Assign**. The new warehouse will be added to the list.



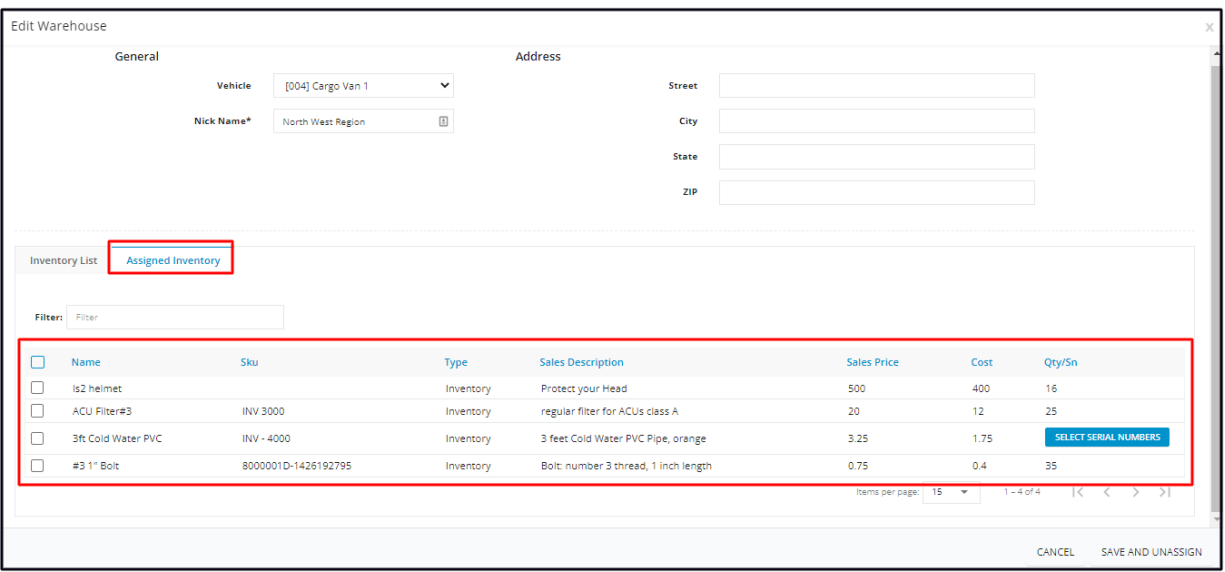
The count of assigned items will be automatically removed from the main storage facility's inventory. The quantity on hand on the Inventory List will be updated. The warehouse is now accountable for the inventory.



Assigned Inventory

This tab will be populated once the new warehouse is saved with assigned inventories. Review the assigned inventory item as needed. To view and update, open the warehouse in edit mode. Go to the **Assigned Inventory** tab and go over the warehouse inventory list that was just created. Edit as may be needed. Once done, save the changes.

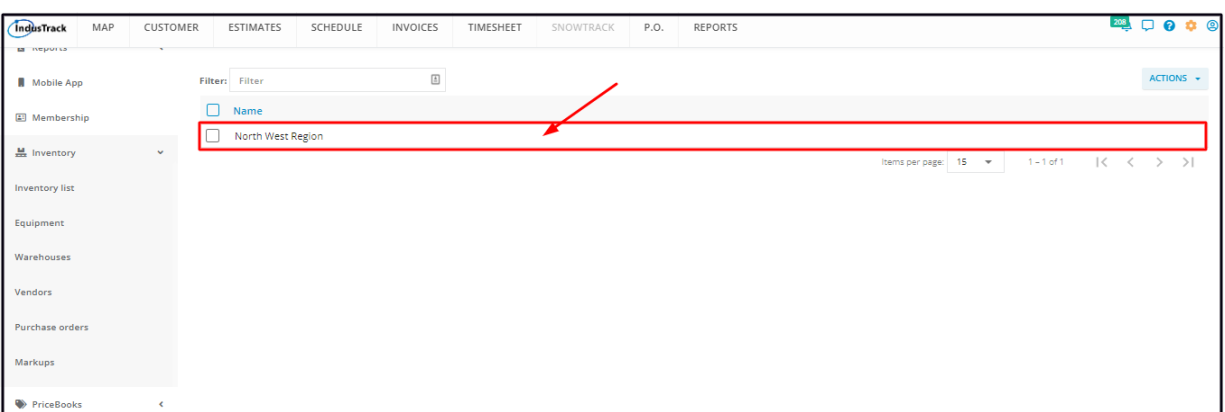
- The Warehouse Assigned Item quantity on hand is automatically updated when an item from the vehicle is used and invoiced.



Update/Edit a Warehouse

Updating of warehouse inventory is limited to Office Users who have editing permissions.

From the Warehouse List, find the one to be updated. Click on the warehouse name to open the profile in edit mode.



Edit the General And Address information as may be needed.

Edit Warehouse

General **Address**

Vehicle: [004] Cargo Van 1
 Nick Name*: North West Region

Street: _____
 City: _____
 State: _____
 ZIP: _____

Inventory List Assigned Inventory

Filter:

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100	<input type="text" value="1"/>
<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100	<input type="text" value="1"/>
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	962	<input type="text" value="1"/>
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	1	<input type="button" value="SELECT SERIAL NUMBERS"/>

CANCEL SAVE AND ASSIGN

Update the warehouse's assigned inventory.
 To **remove** an item from the list, unassign it.

Edit Warehouse

General **Address**

Vehicle: [004] Cargo Van 1
 Nick Name*: North West Region

Street: _____
 City: _____
 State: _____
 ZIP: _____

Inventory List **Assigned Inventory**

Filter:

<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty/Sn
<input checked="" type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	16
<input type="checkbox"/>	ACU Filter#3	INV 3000	Inventory	regular filter for ACUs class A	20	12	25
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	<input type="button" value="SELECT SERIAL NUMBERS"/>
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	35

Items per page: 15 1 - 4 of 4 < > >>

CANCEL **SAVE AND UNASSIGN**

To add another inventory item to the list, go back to the Inventory List tab and assign the item to the warehouse.

Edit Warehouse

General **Address**

Vehicle: [004] Cargo Van 1
 Nick Name*: North West Region

Street: _____
 City: _____
 State: _____
 ZIP: _____

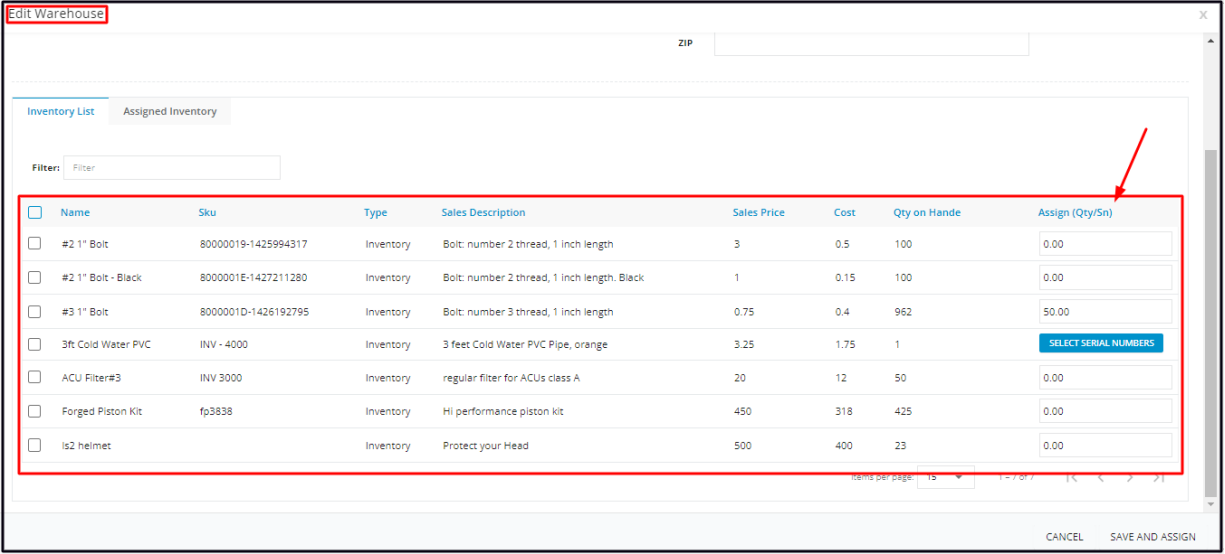
Inventory List Assigned Inventory

Filter:

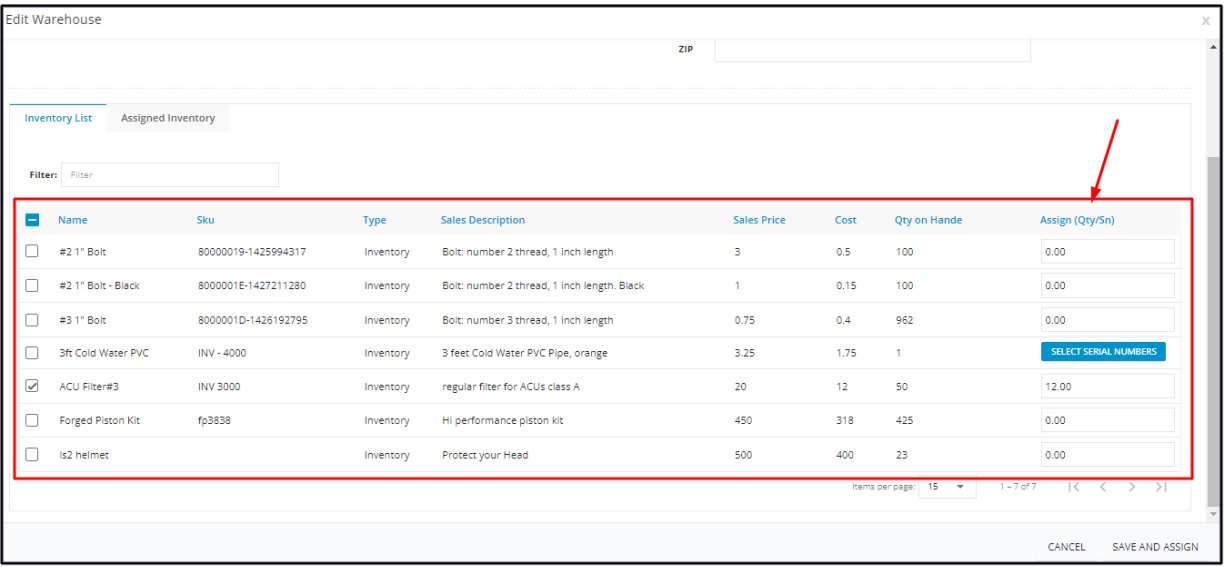
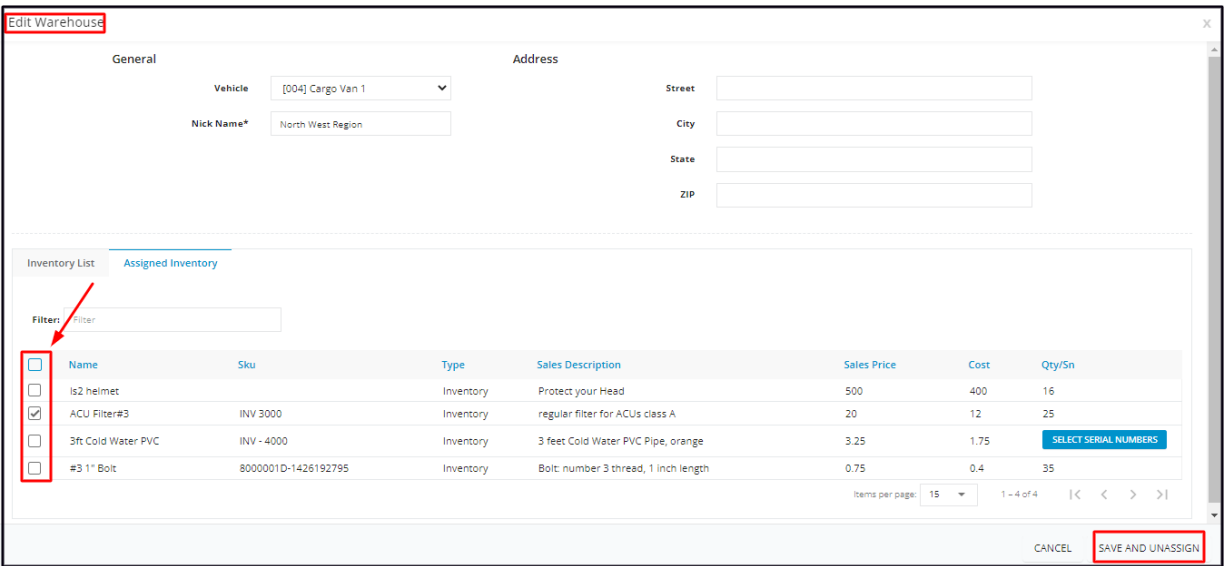
<input type="checkbox"/>	Name	SKU	Type	Sales Description	Sales Price	Cost	Qty on Hand	Assign (Qty/Sn)
<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100	<input type="text" value="1"/>
<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100	<input type="text" value="1"/>
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	962	<input type="text" value="1"/>
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	1	<input type="button" value="SELECT SERIAL NUMBERS"/>

CANCEL SAVE AND ASSIGN

To increase an item's assigned quantity, go back to the Inventory List tab and assign the additional quantity. This will be added to the warehouse's stocks on hand.



To reduce the item's assigned quantity, unassign this and assign the item again with the new quantity.

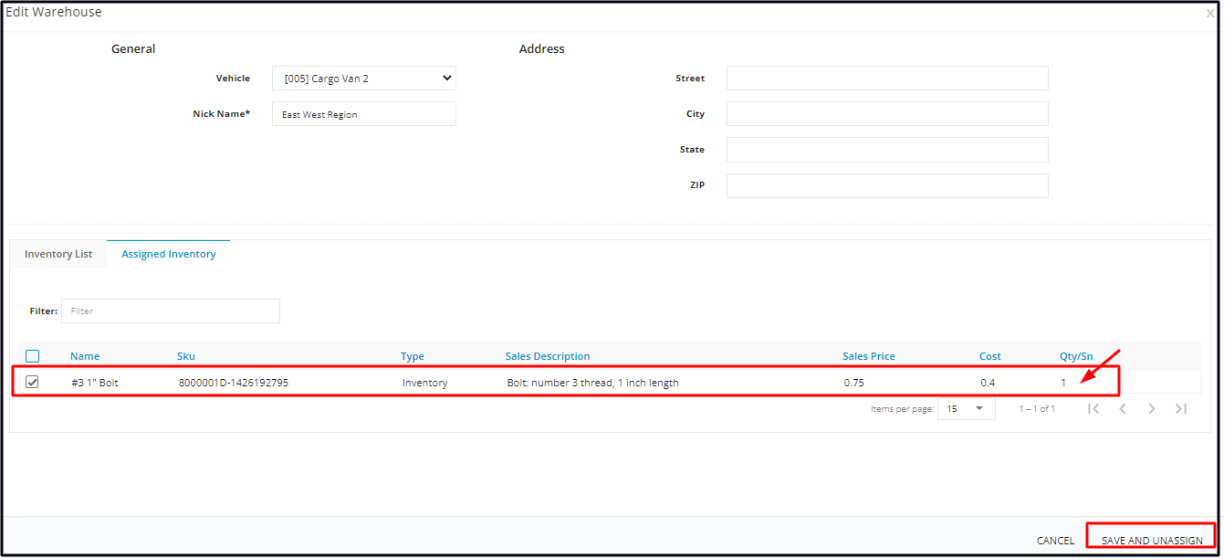


Save the changes.

Delete a Warehouse

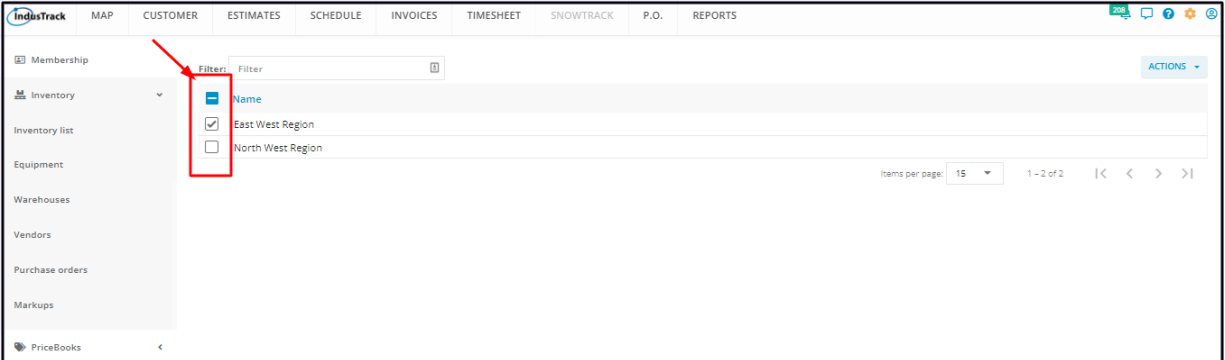
Remove a Warehouse from the list that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting an item may have an effect on other functions, settings or data. This action can not be undone.

Before deleting a warehouse, check if it has **Zero (0) assigned items**. Any existing inventory will be deleted and will be unaccounted for. If there are assigned items to the warehouse, unassign these first before deleting the warehouse.



Find the Warehouse name to be deleted from the list. Tick the checkbox to its left.

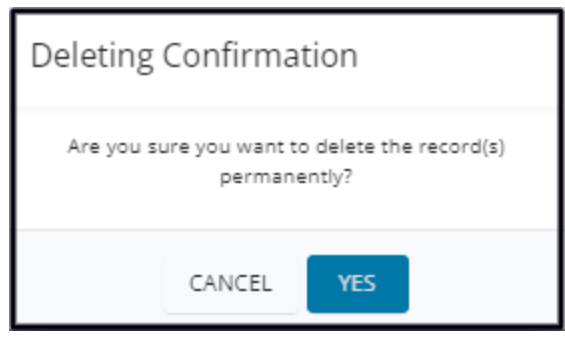
- To delete multiple warehouses from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.



Go to the **Actions** button and select **Delete**.



A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The warehouse will be removed from the list.

