

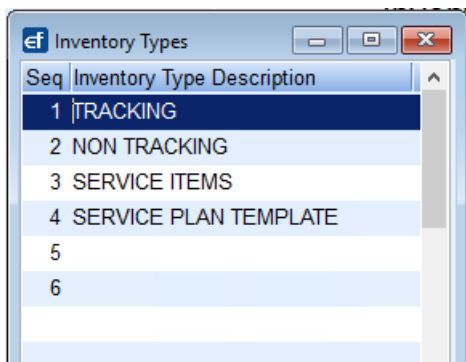
EnergyService Inventory

Last Modified on 01/20/2026 2:56 pm EST

The Inventory module is where all items that are used to provide service to customers are entered and adjustments are made.

Inventory Types

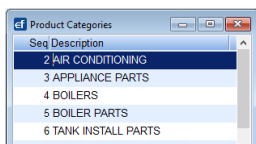
These are the types of inventory items that will be tracked in EnergyService such as Tracked Inventory, Non-Tracked inventory, etc.



1. From the EnergyService menu, select **Inventory**.
2. Choose **Inventory Types**.
3. Press **Ctrl+C** to create.
4. *Seq* will automatically be assigned once the Inventory Type is saved.
5. Enter the *Inventory Type Description* and press the **Down Arrow** or **F4** to enter another line item.
6. Press **Ctrl+Q** to save.

Product Categories

Product Categories are used to group specific items.



1. Select **Product Categories**.
2. Press **Ctrl+C** to create.
3. *Seq* will automatically be assigned once the category is saved.
4. Enter the *Product Category Description* and press the **Down Arrow** or **F4** to enter another line item.
5. Press **Ctrl+Q** to save.

Inventory Items

All inventory items used in Service are entered and tracked in this module. Markup pricing, Sales pricing, vendors, Locations, etc. are updated in this file as well.

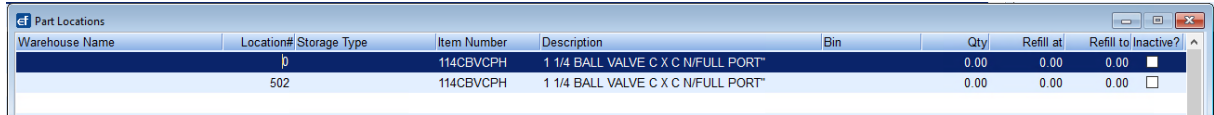
The screenshot shows the 'Inventory Items' window with a table of items and a form below it.

Type	Product Categ	Description	Item Number	Description	Qty on Order	Qty on Hand	Cost	Inactive?
6	TANK INSTALL PARTS	114CBVCPH	1 1/4 BALL VALVE C X C N/FULL PORT"	0.00	10.00	15.86	<input checked="" type="checkbox"/>	
1	6 TANK INSTALL PARTS	114CFADCPH	1 1/4 C X 1 1/4" FE IPS ADAPTER"	0.00	20.00	4.34	<input type="checkbox"/>	
1	6 TANK INSTALL PARTS	114C112MIP	1 1/4 C X 1 1/2" M IPS ADAPTER"	0.00	20.00	12.07	<input type="checkbox"/>	
1	6 TANK INSTALL PARTS	114BLKCAP	1 1/4 CAP BLK 150#"	0.00	15.00	1.43	<input type="checkbox"/>	
1	6 TANK INSTALL PARTS	114CCPLGCPH	1 1/4 COUPLING C X C"	0.00	15.00	2.59	<input type="checkbox"/>	
1	6 TANK INSTALL PARTS	114BR90	1 1/4 ELBOW 90 BRASS"	0.00	15.00	4.75	<input type="checkbox"/>	
6	6 TANK INSTALL PARTS	114BLKST90	1 1/4 STREET 90 ELBOW BLK 150#	0.00	10.00	2.69	<input type="checkbox"/>	
2	6 TANK INSTALL PARTS	00-5407	1000 GAL SKID TANK SINGLE WALL 7GA	0.00	5.00	2705.40	<input type="checkbox"/>	
2	6 TANK INSTALL PARTS	00-5406	1000 GAL SKID TANK SINGLE WALL 10GA	0.00	5.00	1163.97	<input type="checkbox"/>	
5	6 TANK INSTALL PARTS	1143434CTCDS	11/4 C 3/4" C X 3/4" C TEE"	1.00	20.00	6.25	<input type="checkbox"/>	
6	6 TANK INSTALL PARTS	114BLK45	11/4 45 ELBOW BLK 150#"	0.00	200.00	2.98	<input type="checkbox"/>	
5	6 TANK INSTALL PARTS	1143434CTJES	11/4 C X 3/4 C X 3/4" C TEE"	0.00	6.00	12.75	<input type="checkbox"/>	
5	6 TANK INSTALL PARTS	1143434CTCPH	11/4 C X 3/4" C X 3/4" C TEE	0.00	40.00	7.86	<input type="checkbox"/>	
6	6 TANK INSTALL PARTS	114BLACOUPL	11/4 COUPLING BLK:	1.00	10.00	3.00	<input type="checkbox"/>	

Below the table, the 'Type Description' is set to 'TRACKING'. The 'Serialized?' checkbox is unchecked. The 'Size' is set to 'EACH'. The 'Markup' fields are set to 100.0000%, 75.0000%, and 50.0000% respectively. The 'Sales Price' fields are calculated as 31.72, 27.76, and 23.79. The 'Department Code' is set to 999, 'PROPANE PARTS'. The 'Vendor' fields are set to 2, 'FAIRBANK EQUIPMENT CO', and the 'Vendor Part#' is set to 114CBVCPH. There are buttons for 'Show Locations', 'Group Items', 'Transfer History', and 'Exit'.

1. From the *Inventory* menu, select **Inventory Items**.
2. Press **Ctrl+C** to create.
3. Enter the *Type* of inventory being entered.
4. In *Product Categ*, press **F5** and select the proper category.
5. Enter the *Item Number* assigned to the product.
6. Enter the *Description* of the product.
7. *Qty on Order* and *Qty on Hand* will be uploaded the first time after initial inventory has been taken. See [here](#) for more information.
8. Enter the *Cost* of the product prior to markup.
9. The *Type Description* will automatically display the description selected from Step 3.
10. Select the *Serialized?* box to indicate this product has a serial number.
11. Press **F5** to select the *Size*.
12. Markup Pricing is used to indicate the price markup of the product based off of the *Cost* entered in Step 8.
This item is then tied to the *Price Zone* in the customer's *Service Location* file to determine pricing at the time of a Proposal quote or invoicing. Enter the *Markup 1* percentage.
13. *Sales Price 1* is the extension of the *Cost* plus the *Markup 1* percentage and is automatically populated.
14. Enter the *Markup 2* percentage. *Sales Price 2* will automatically calculate.
15. Enter the *Markup 3* percentage. *Sales Price 3* will automatically calculate.
16. Press **F5** in the *Department Code* field and select the department the product will be tied to in Energy Force.
This item will appear on the *Sales Journal* and *Customer History* screen.
17. Press **F5** in the *Vendor 1* field and select the vendor from which the product was purchased.

18. Enter the *Vendor Part#*.
19. Repeat Steps 17 and 18 for Vendor 2 and 3 if applicable.
20. Select **Show Locations**. Enter the Warehouse with the inventory item. More than one location can be listed if the inventory item is present at those facilities.
21. Press **F5** in the *Location#* field and select the Warehouse or Vehicle for the inventory item.

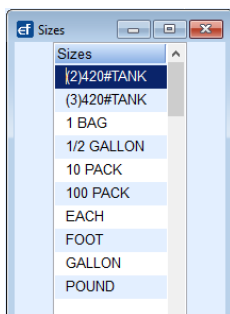


Warehouse Name	Location#	Storage Type	Item Number	Description	Bin	Qty	Refill at	Refill to Inactive?
	b		114CBVCPH	1 1/4 BALL VALVE C X C N/FULL PORT"		0.00	0.00	0.00 <input checked="" type="checkbox"/>
	502		114CBVCPH	1 1/4 BALL VALVE C X C N/FULL PORT"		0.00	0.00	0.00 <input type="checkbox"/>

22. If tracking parts by a specific Bin, enter the *Bin* name or number.
23. Enter the *Qty* and press **Tab**. If setting up inventory for the first time to import from spreadsheet, this will update using the utility.
24. Enter the *Refill at* amount. This represents when more items should be purchased.
25. Enter the *Refill to* amount. This represents the number of items that should be ordered.
26. Press the **Down Arrow** or **F4** to insert a new line to add more Locations. Otherwise, select **Exit**.
27. The item will automatically save. Press **Ctrl+C** to create a new item.

Sizes

This Maintenance Table is used to track the size of items used in EnergyService such as quarts, gallons, each, etc.



1. From the EnergyService *Inventory* menu, select **Sized**.
2. Press **Ctrl+C** to create.
3. *Seq* will automatically be assigned once the Size has been saved.
4. Enter the *Unit Size Description*.
5. Press the **Down Arrow** or **F4** to enter another line item.
6. Press **Ctrl+Q** to save.