

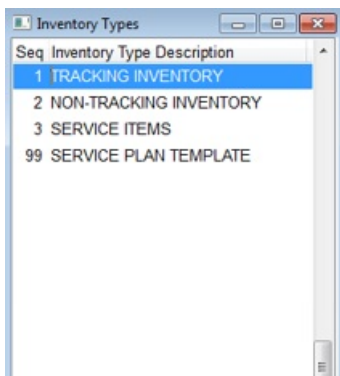
# EnergyService Inventory

Last Modified on 02/19/2024 4:53 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.

Type	Product Categ	Description	Item Number	Description	Qty on Order	Qty on Hand	Cost
1	1,000	AIR CONDITIONING/REFRIGERAT	02435328000	S1 CONDENSER MOTOR 1/8HP	0.00	0.00	106.10
1	1,000	AIR CONDITIONING/REFRIGERAT	hf	COLEMAN CONDENSING UNIT 2.5TON	0.00	0.00	457.20
1	1,000	AIR CONDITIONING/REFRIGERAT	ZR47K3-PFV-9	COPELAND COMPRESSOR R22 SCROLL	0.00	0.00	419.00
1	1,000	AIR CONDITIONING/REFRIGERAT	ZR28K3PFV930	COPELAND COMP. SCROLL 28500BTU	0.00	0.00	277.87
1	1,000	AIR CONDITIONING/REFRIGERAT	YZE03611C	YORK CONDENSER AFF 3T 15S R410	0.00	0.00	2204.40
1	1,000	AIR CONDITIONING/REFRIGERAT	YORFC30B3XN1	YORK COIL FULL FLEX 2.5T 17.5	0.00	0.00	0.00
1	1,000	AIR CONDITIONING/REFRIGERAT	YORCZH03611	YORK CONDENSER AFFINITY 3T 18S	0.00	0.00	2448.60
1	1,000	AIR CONDITIONING/REFRIGERAT	YORCZB04811	YORK CONDENSER AFFINITY 4T 13S	0.00	0.00	1616.50
1	1,000	AIR CONDITIONING/REFRIGERAT	YHJD48S41S4	YORK CONDENSER 4T R410A	0.00	-1.00	1823.70
1	1,000	AIR CONDITIONING/REFRIGERAT	YHJD24S41S4	YORK CONDENSER 2T R410A	0.00	-1.00	1215.70
1	1,000	AIR CONDITIONING/REFRIGERAT	YCJF60S41S1	YORK CONDENSER 5T LX 410	0.00	0.00	1674.60
1	1,000	AIR CONDITIONING/REFRIGERAT	YCJF48S41S1	YORK CONDENSER MICRO 4T 14.5SR	0.00	0.00	1399.00
1	1,000	AIR CONDITIONING/REFRIGERAT	YCJF42S41S1	YORK CONDENSER LX 3.5T R410	0.00	0.00	1237.10
1	1,000	AIR CONDITIONING/REFRIGERAT	YCJF36S41S1	YORK CONDENSER MICRO 3T 14.5SR	0.00	0.00	1226.91
1	1,000	AIR CONDITIONING/REFRIGERAT	YCJF30S41S1	YORK CONDENSER MICROCHL 2.5T	0.00	0.00	947.30

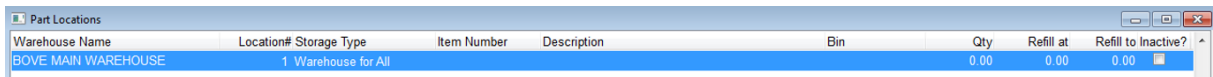
Type Description	TRACKING INVENTORY	
Serialized?	<input type="checkbox"/>	Size
Markup 1	107.3044%	Sales Price 1 219.95
Markup 2	93.7323%	Sales Price 2 205.55
Markup 3	79.0763%	Sales Price 3 190.00
Department Code	1000 AIR CONDITIONING/REFRIGERAT	
Vendor 1	25 F W WEBB	Vendor Part# 02435328000
Vendor 2	0	Vendor Part#
Vendor 3	0	Vendor Part#

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.

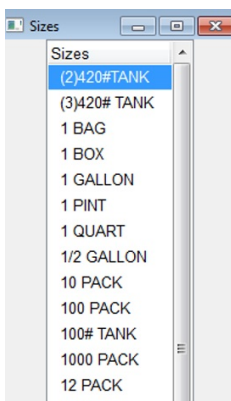


Warehouse Name	Location#	Storage Type	Item Number	Description	Bin	Qty	Refill at	Refill to Inactive?
BOVE MAIN WAREHOUSE	1	Warehouse for All				0.00	0.00	0.00

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.



Sizes
(2)420#TANK
(3)420# TANK
1 BAG
1 BOX
1 GALLON
1 PINT
1 QUART
1/2 GALLON
10 PACK
100 PACK
100# TANK
1000 PACK
12 PACK
.....

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.