

# Adding and Adjusting Inventory

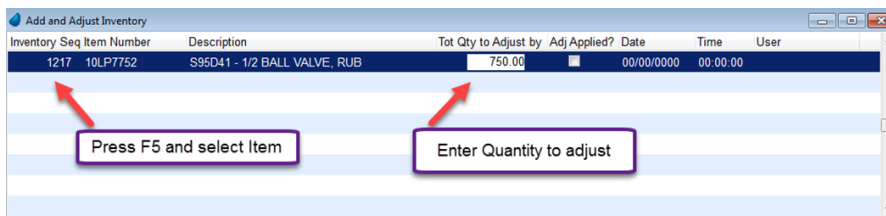
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The Add and Adjust Inventory is designed to distribute Non-Serialized Inventory items to several locations at one time rather than having to perform multiple transfers. An example of this type of transfer would take place after a Purchase Order has been received to a shipping location and needs distributed to multiple warehouse locations.

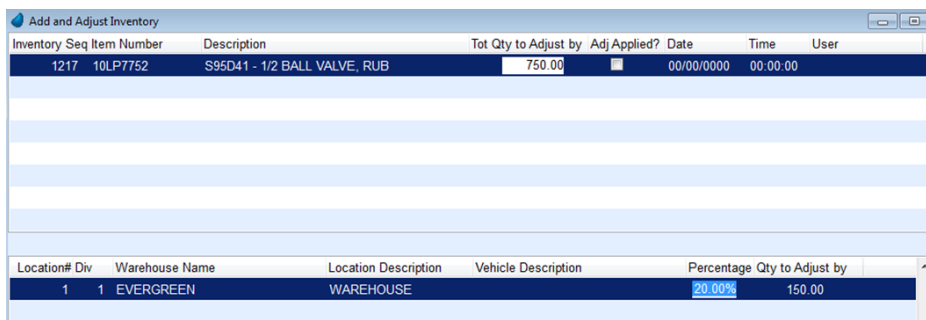
Additionally, if quantity values are incorrect or have somehow gotten out of sync with actual values, adjustments can be made.

## Inventory Distribution

1. From the *EnergyService* menu go to *Inventory / Add & Adjust Inventory*.
2. Press **Ctrl+C** to create an inventory adjustment.
3. Press **F5** in the *Inventory Seq* field and select the inventory item to be distributed.



4. Enter the *Tot Qty to Adjust by*.
5. Press **F5** to select the first receiving storage location.  
**Note:** If the *Qty to Adjust by* is to be distributed to all Storage Locations, select **Distribute Evenly** at the bottom the screen and the system will automatically input all storage locations and the *Qty to Adjust by* will automatically update.
6. Enter the quantity the storage location is to receive. The % field will automatically update.



7. To add additional receiving locations, press the **Down Arrow** to add a new line and press **F5** in the *Location* field. Repeat until all locations are present.
8. Once the *Qty to Adjust by* is equal to the *Tot Qty to Adjust by*, select **Apply Adjustments**.

Location#	Div	Warehouse Name	Location Description	Vehicle Description	Percentage	Qty to Adjust by
1	1	EVERGREEN	WAREHOUSE		20.00%	150.00
2	2	BREWTON	WAREHOUSE		20.00%	150.00
3	21	BONIFAY	WAREHOUSE		20.00%	150.00
4	3	MONROEVILLE	WAREHOUSE		20.00%	150.00
5	5	THOMASVILLE	WAREHOUSE		20.00%	150.00

9. The system will automatically apply the adjustments and remove the entry from the screen.

**Note:** Inventory Distributions do not record to the inventory transfer audit tables.

10. Navigate to the *Warehouse Locations* menu and verify the items updated properly.

## Inventory Quantity Adjustments

EnergyService offers the ability to electronically update inventory quantities by using the *Inventory Utility* menu.

Within this menu, the current inventory can be exported to an Excel spreadsheet. This spreadsheet can be updated with the current inventory numbers and then reimported into Energy Force.

### Export Inventory

1. From the EnergyService Main Menu, go to *Supervisor / Utility*.
2. Select **Export Inventory**.
3. Enter the warehouse Divisions numbers to export.
4. Select to export *All, Serialized, or Non-Serialized* and choose **Process**.
5. The system will export an inventory file to the \\servername\CTLS93\DD85\CSV folder. The file will also open automatically in Excel.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Location#	Inventory Item Seq	Bin	Vehicle#	Inactive?	Warehouse#	Warehouse Division	Warehouse Name	Storage Type	Description	Serialized Part?	Product Category Seq	Description Seq	Item Number	Size	Cost	Storage Loc	Quantity on Hand
1005	702		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							0
1005	703		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							0
1005	704		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							0
1005	705		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							0
1005	706		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							3
1005	707		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							6
1005	708		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No							9

6. Within this spreadsheet, update *Storage Loc Quantity on Hand* (Column 18) with the most up-to-date quantity on hand.
7. Once completed, go to *File / Save As* and rename it *InvenImport.CSV*.

### Import Inventory Quantities

Once the items listed within the inventory spreadsheet are updated and copied back into the CSV folder, use the *Import Inventory Quantities* utility.

Select **Import Inventory Quantities**. The program will automatically import the spreadsheet back into the system and will advise of the number of records updated.