Adding and Adjusting Inventory

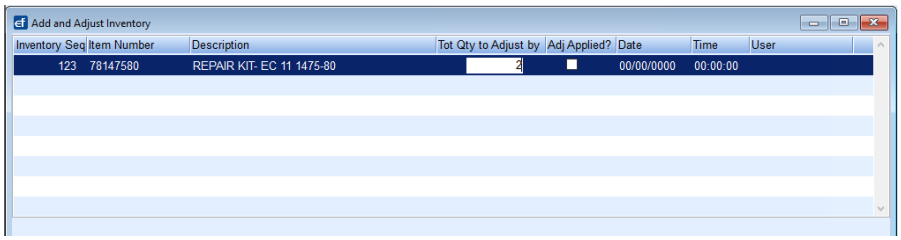
Last Modified on 01/19/2026 5:26 pm EST

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.

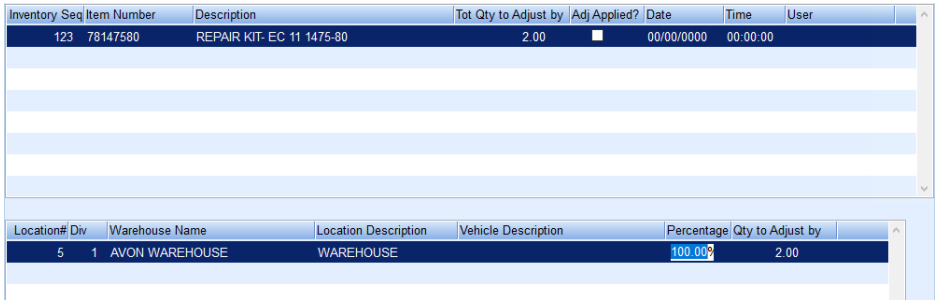
Inventory Distribution

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.

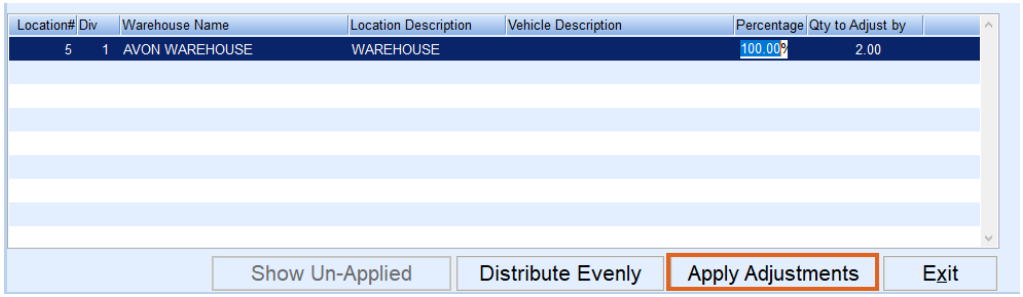


4. Enter the *Tot Qty to Adjust by*.
5. Press **F5** to select the first receiving storage location.

   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**.



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.

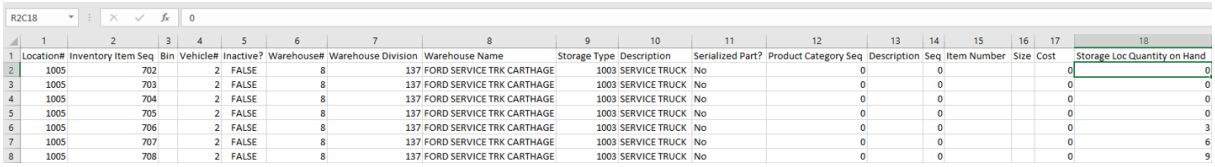
Inventory Quantity Adjustments

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
1	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
2	1005	702		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	0
3	1005	703		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	0
4	1005	704		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	0
5	1005	705		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	0
6	1005	706		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	3
7	1005	707		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	6
8	1005	708		2	FALSE	8	137	FORD SERVICE TRK CARTHAGE	1003	SERVICE TRUCK	No	0		0			0	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.