

ActionFlow Inventory Life Cycle



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Topics Covered

Inventory Status Life Cycle

Job Status

Inventory PO History

Illogical Actions History

Used vs Installed

WIP vs Finished Goods

Inventory Reports

Inventory Purchase Order

Purchase Order is:

- created
- ordered (using Inventory PO Action)
- received (using Inventory PO Action)
- partial received (using Inventory PO Action)

Inventory PO Actions move both the Inventory PO and the Inventory Item to its next status (partial inventory receive is the exception)

Inventory Item is:

- added (status is created)
- PO is ordered (status changes to ordered)
- PO is received (status changes to available)
- PO is partially received (status is manually set by user)

Inventory Items initially deem their status from the Inventory PO, up to the point of “Available”.

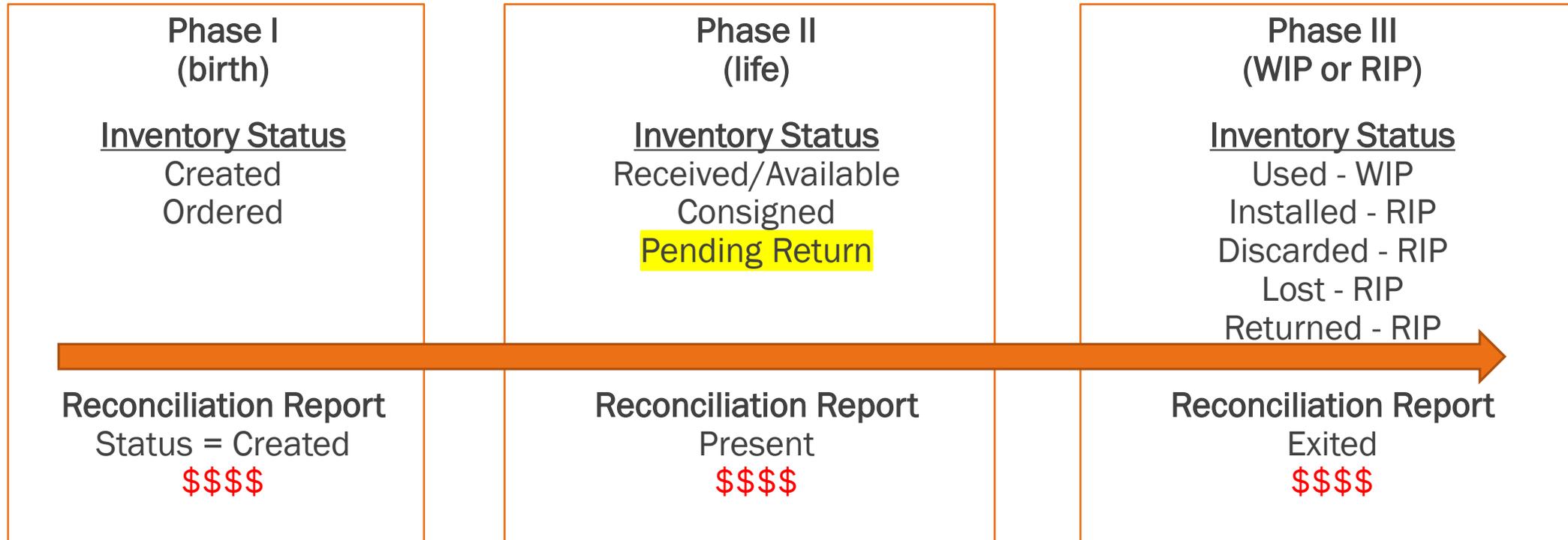
Subsequent statuses are determined by Clicking USED within the Fabrication Tab and then ultimately by a Target* Date being completed. This sets the inventory Item status to INSTALLED.

Target Date = Install, Pickup, Delivery etc.

Inventory Status vs Inventory SnapShot TimeStamps

Inventory Status is updated each day to ensure that the system has a daily “timestamp” (record/picture) defining the status of each Inventory Item for that day (both Serialized and Non-Serialized Inventory)
This facilitates rapid data retrieval for reporting purpose for any given date or date range based upon the status “at that time” in history

Inventory Life Cycle/Reconcile \$\$



How Job Target Date Impacts Inventory

Once the inventory has been Tagged to a Job the user is required to interact with the Job/Area via the Fabrication Tab

- 1) Slab – user clicks the USED button when the Slab has been consumed. The system will prompt the user whether a Remnant(s) will be created from the Slab. This defines the Slab Inventory as “Work in Progress” when the First Fabrication Action is Completed
- 2) Serialized Sink or any other Serialized Non Slab Inventory Item – user clicks USED button. This defines the inventory item as “Work in Progress” along with the Slab

Once the Job/Area Status is updated to Installed (by one of the Target Dates – Install, Job Pickup, Job Delivery etc.) the system will automatically change the Inventory Status from “Used” to “Installed” (RIP).

Issues that Cause MisInformation

- Not Using Inventory PO Actions – this breaks any automation of the inventory SKU LifeCycle
- Managing Inventory Item Actions “manually” – this breaks the natural LifeCycle of the Inventory Item and renders the status and financial reports inaccurate
- Adding an Inventory Item to a Job/Area after the job status = Installed – this will result in the inventory item never receiving its final status of “installed”
- Changing the Status of an Inventory Item from Phase III to Phase II (see section on how to do this properly)
- Manually setting an inventory item that is not tagged to a job to a status = Used

Inventory Checks & Balances

Here is a good procedure to validate your inventory status:

- Grid View – Inventory Item
- Status = Used
- Review the Qty and determine if this is reasonable....remember it gets set to a status of USED typically by your CAD/ENG department and then changes automatically to INSTALLED with an Action defines the job as installed
- Find all Inventory that has a status of USED but is NOT TAGGED to a Job
 - If you find any, that would be a good place to start to find out why the inventory is not associated to a Job
 - Many times, it is because inventory is released from the AREA but the Status is never updated back to Available...this can be done either in Grid View or Inventory PO
- Find all Inventory that that has a Status of USED and the USED DATE is in the rearview mirror
 - Filter on the Used Date (example all of 2022)....you are probably safe to set the status manually by hand to Installed – this will update the Item Date Exited
 - These were probably inventory items that we added after the job status = Installed
 - Repeat the same for 2023 etc

Inventory Checks & Balances

- Primary reasons why USED inventory will never = status of Installed
 - Job Status is not set to Installed
 - Inventory is released from a Job but never manually updated back to status = available
 - Not using the Scan Sessions correctly to reconcile your inventory scans
- How to Prevent
 - Take the time to clean up your current inventory status
 - Check daily to monitor Inventory status = USED
 - Look to see if there a pattern as to why the list of USED Inventory Increases
 - Talk to your personnel to determine why the status is not managed correctly
 - Each inventory scan session needs to be reconciled

Inventory Illogical Action Dialog

- Whilst manually changing the inventory status you may see an Inventory Illogical dialog box
- This is designed to tell you that you have the inventory status sequence in the wrong order
- Remember the status has to move from Birth >> Life >> RIP
 - If any of these status's are in the incorrect sequence (based upon date) this dialog box will pop up
 - Take a moment and read it and you will find that some update the status of the inventory item out of sequence
 - Rarely is this a system problem as both the Job Process and Inventory Item Process knows how to manage the statuses in the correct order.

Warning: The history of Actions for this item is not logical. The Actions highlighted in pink below do not make sense related to the rest of the Actions. If you click the 'Yes' button below, the highlighted Actions below will be voided to fix the Action history.

	Action	Decision	Comment	Completed	Status	LastEditBy	LastEditDate
>	SetStatus	Available		Thu 7/6/23 12:55 A	Available		7/6/2023 0:55:3
	SetStatus	Available	Remnant created from Item #21981	Thu 7/6/23 12:55 A	Available		7/6/2023 0:55:3
	SetStatus	Installed		Fri 7/7/23 9:43 A	Installed		7/7/2023 9:43:2
	Mobile Update	na	Moved to 'REM-08A' via Mobile App	Wed 7/12/23 8:34 A	Available		7/12/2023 8:34:
	Tagged	na	Job #6372, Area #4740	Thu 8/3/23 9:45 A			8/3/2023 9:43:3
	SetStatus	Used		Fri 8/4/23 11:42 A	Used		8/4/2023 11:42:
	SetStatus	Installed		Tue 4/30/24 2:36 P	Installed		MasterRoderick

These are the action that is to be "VOID" as it is illogical to go from Installed > Available > Used and back to Installed

Yes. Void the Actions highlighted in pink above.

No. Do not void the Actions highlighted in pink above.

Inventory PO Historic Info

The Inventory PO is an invaluable area to understand the History of any serialized Inventory

- Inventory PO
- In the Inventory Items section enter a Serial number
- Highlight that Serial Number
- Open Details Section
- Click on History checkbox (ignore dialog box)
- You will see the History about this Serial Number

Order: #32

Order Search...

INVENTORY PO VIEW

INVENTORY ITEM VIEW

Vendor: Cambria

20341-01	Cambria 3cm	Brookvale High Gloss - 3cm	\$0.00	1.0000	\$0.00	Installed	32	Cambria	2024-04-30	132.0000	38.4000	REM-08B	35.2000	FG0000061	FG0000061
> 20342	Cambria 3cm	Brookvale High Gloss - 3cm	\$18.50	1.0000	\$1,191.00	Installed	32	Cambria	2024-04-30	132.0000	65.5000	Quartz Racks	60.0400	FG0000265	FG0000265
Count: 54			\$33,348.00												

#20342

Inventory Search...

Enter Serial Number Here 20342

The system will find the PO where this Serial number exists

Serial Number History

Basic Info

Status: Installed Process: *

Type: Contact Information

Persons

Assigned Roles

Details

Actions

History

Void

View Voided

Action	Decision	Comment	Start	Urgnt	Completed	User	Status	Hrs	Sub	Link	LastEditBy	LastEditDate	Chk	Intgr	\$	Decimal	Text
Done	SetStatus	Ordered			Wed 12-7-22 10:53 A		Ordered					2022-12-07 10:53:21 AM	:	:	:	:	
Done	SetStatus	Available			Wed 12-7-22 10:53 A		Available					2022-12-07 10:53:59 AM	:	:	:	:	
Done	Tagged	na	Job #6441, Area #4915		Wed 6-21-23 3:53 P							2023-06-21 3:53:17 PM	:				
Done	SetStatus	Used			Thu 6-22-23 11:34 P		Used					2023-06-22 11:34:43 PM	:	:	:	:	From HandleEvent in ParentViewMc
Done	SetStatus	Installed			Tue 4-30-24 2:15 P	MasterRoderick	Installed				MasterRoderick	2024-04-30 2:15:22 PM	:	:	:	:	

Inventory Reports

There are a number of inventory reports that rely on the Inventory Status/Dates to be correct

- GridView (status & date)
- Inventory Snapshot (status & date)
- Inventory Waste (status & date)
- Inventory Financial Summary (exited date)
- Inventory COGS by SKU Class (exited date)

PS – inventory status does not impact data that may be Sync'd to QB unless the inventory was not tagged to the AREA at the time of Invoice

Note: if you have Fixed the Used status and changed to Install status then the Exited Date will be the date when this was fixed

Questions

Open Mike Time.....

If you have any further questions please direct them to your AF Account Representative