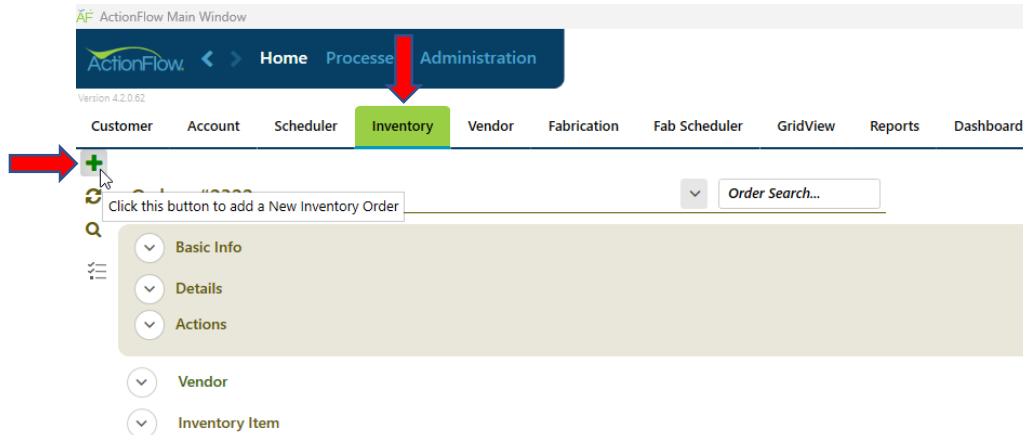


# Inventory Training Guide

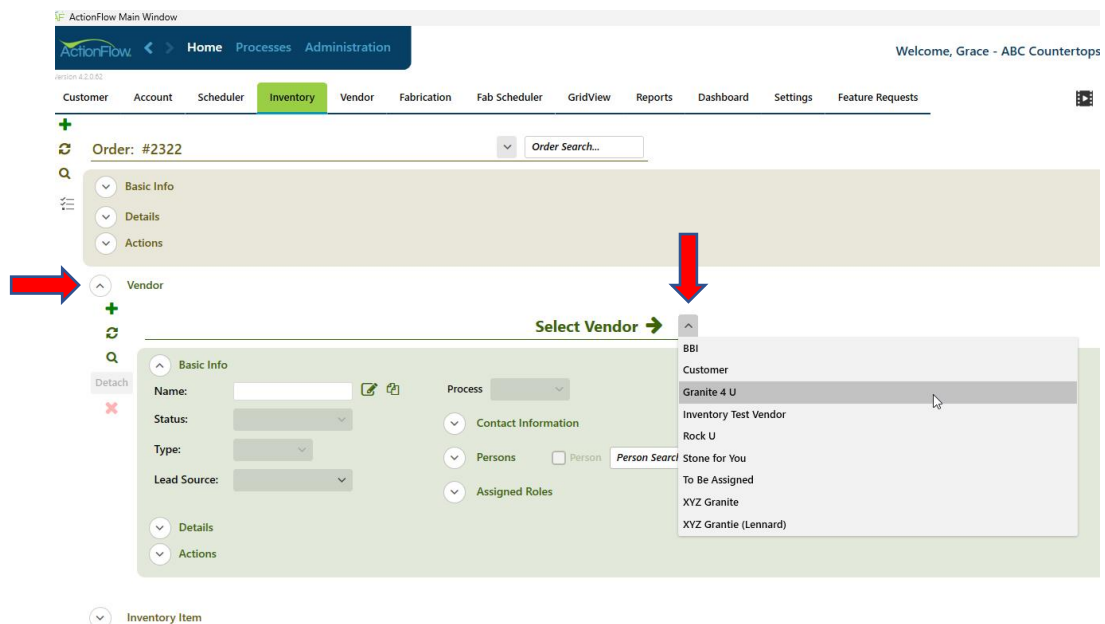
## Step 1- Entering Slabs in the Inventory Module (Create Order)

The only way to enter an inventory item into ActionFlow is by creating an inventory order and then adding items to that order. Here are the steps for creating an inventory order:

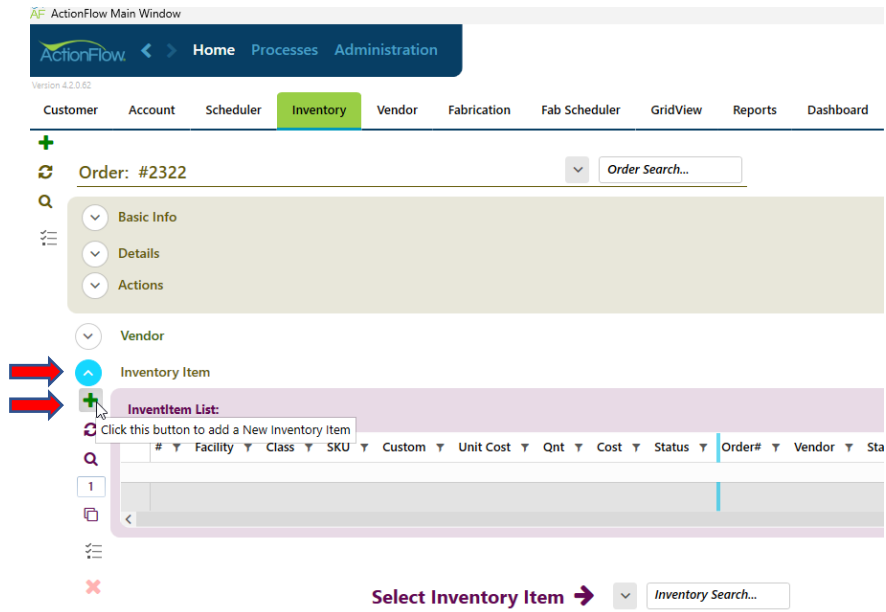
1. Go to the Inventory Tab to create a new order.
2. Click the Green Plus sign to the left side of the screen to create an order.



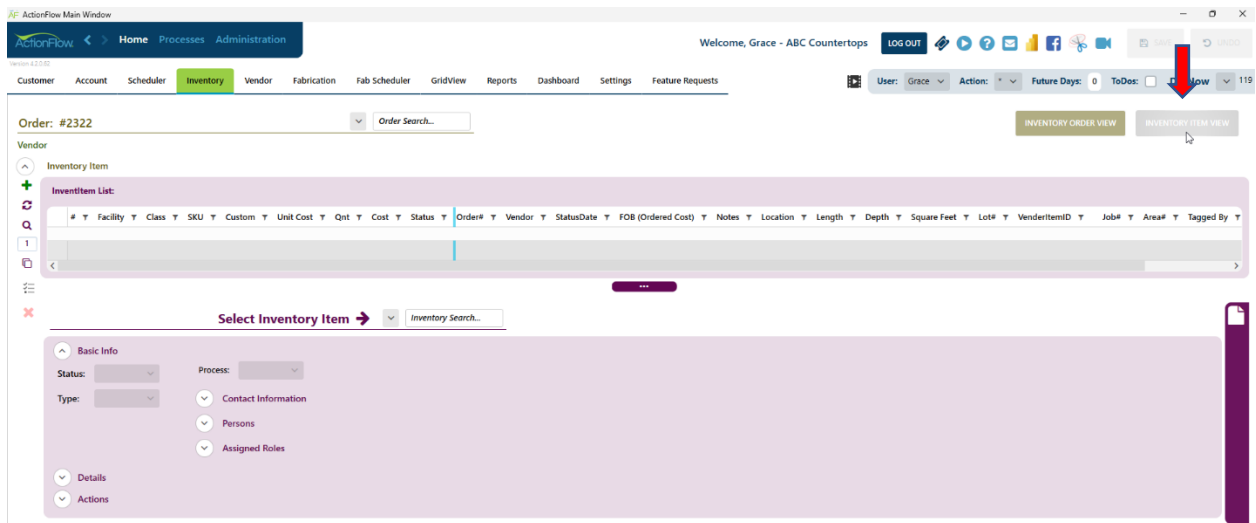
3. Click on the Vendor tab to open the section and select the supplier you will be ordering from under the drop-down box.



- Click the drop down for the Inventory Item Data Section and then click on the Green Plus sign in that section to add a slab.



We recommend switching to the “Inventory Item View” which expands the Inventory Item Data Section and hides the Order and Vendor data.



- From the drop downs, select the Class, SKU. If desired, you can enter the slab dimensions (length and depth). ActionFlow will automatically calculate the square feet once it refreshes. Click the Save button in the upper right-hand corner of the screen.

Order: #2322

Vendor: Granite 4 U

Inventory Item

InventItem List:

| #        | Facility         | Class       | SKU                | Unit Cost | Qnt    | Cost     | Status  | Order# | Vendor      | Length   | Depth   | Square Feet |
|----------|------------------|-------------|--------------------|-----------|--------|----------|---------|--------|-------------|----------|---------|-------------|
| > 3833   | Default Facility | Granite 3CM | Absolute Black 3CM | \$7.55    | 1.0000 | \$346.04 | Created | 2322   | Granite 4 U | 120.0000 | 55.0000 | 45.8300     |
| Count: 1 |                  |             |                    |           |        | \$346.04 |         |        |             |          |         |             |

#3833

Basic Info

Status: Created Process: Standard

Type: [dropdown]

- Contact Information
- Persons
- Assigned Roles

Details

Actions

- If you have multiple slabs to order, you can click on the Dup button to duplicate the slab. You can also enter in the number of slabs you want to duplicate in the box below the Dup button, and then click Dup to duplicate multiple slabs.

Order: #2322

Vendor: Granite 4 U

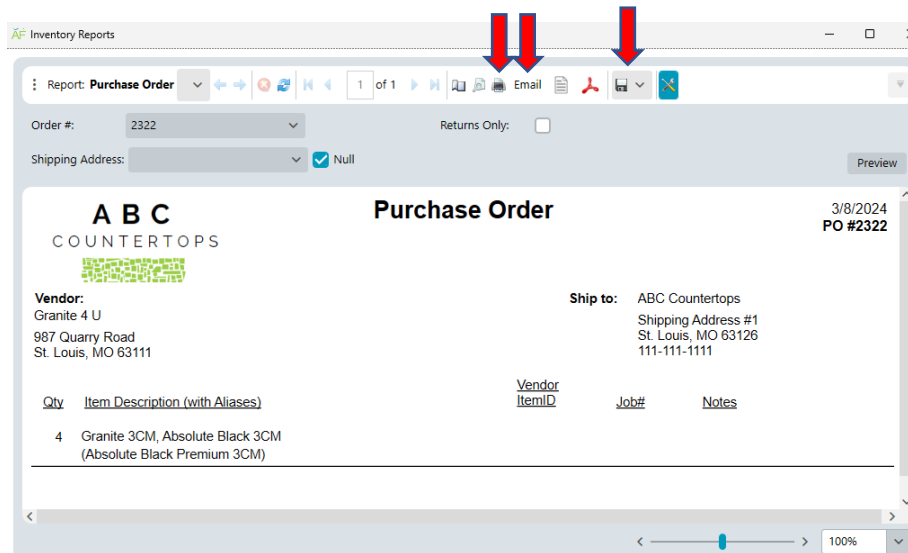
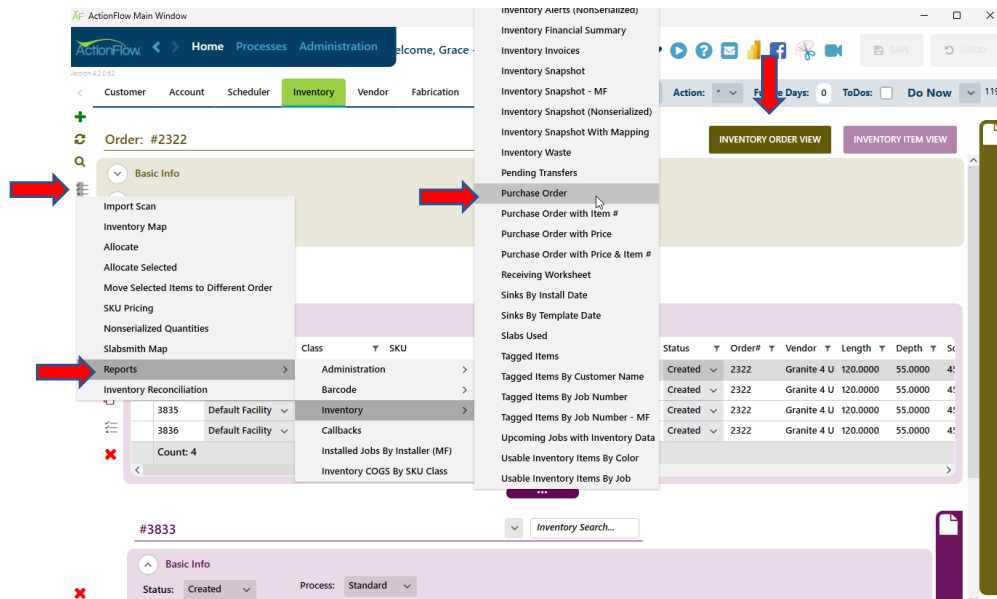
Inventory Item

InventItem List:

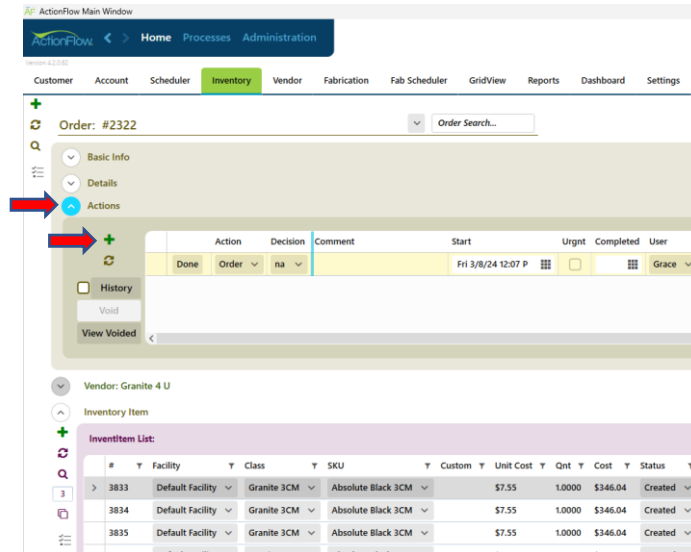
| #        | Facility         | Class       | SKU                | Unit Cost | Qnt    | Cost       | Status  | Order# | Vendor      | Length   | Depth   | Square Feet |
|----------|------------------|-------------|--------------------|-----------|--------|------------|---------|--------|-------------|----------|---------|-------------|
| > 3833   | Default Facility | Granite 3CM | Absolute Black 3CM | \$7.55    | 1.0000 | \$346.04   | Created | 2322   | Granite 4 U | 120.0000 | 55.0000 | 45.8300     |
| > 3834   | Default Facility | Granite 3CM | Absolute Black 3CM | \$7.55    | 1.0000 | \$346.04   | Created | 2322   | Granite 4 U | 120.0000 | 55.0000 | 45.8300     |
| > 3835   | Default Facility | Granite 3CM | Absolute Black 3CM | \$7.55    | 1.0000 | \$346.04   | Created | 2322   | Granite 4 U | 120.0000 | 55.0000 | 45.8300     |
| Count: 4 |                  |             |                    |           |        | \$1,384.16 |         |        |             |          |         |             |

#3833

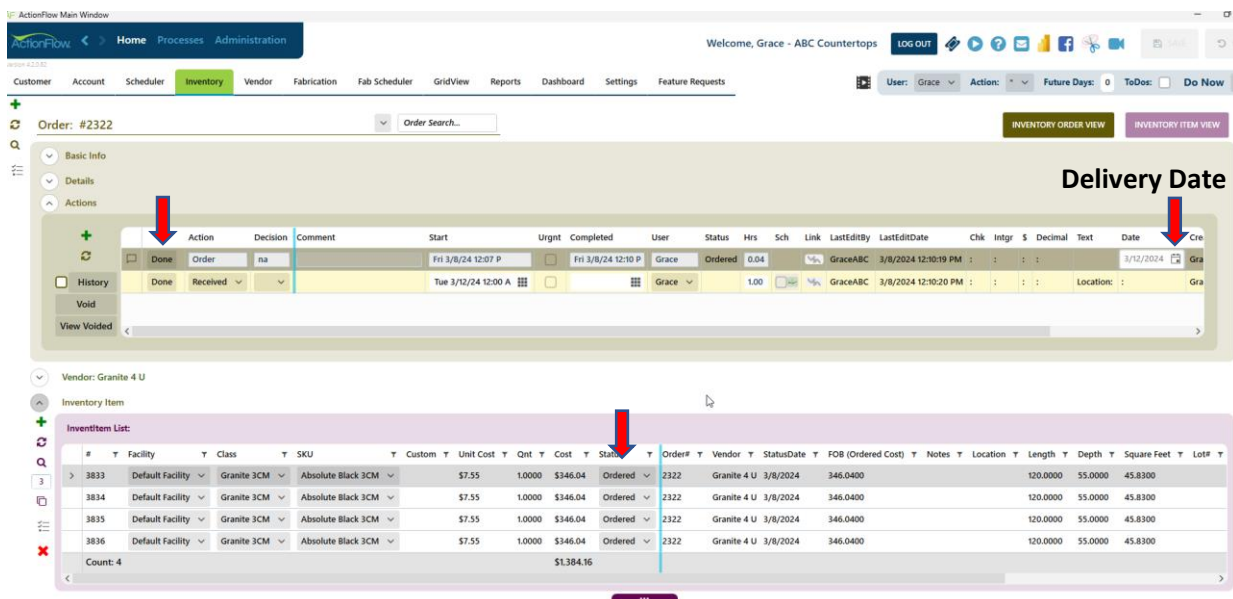
- To run the Purchase Order report, go back into the “Inventory Order View.” Click on the Task menu, Reports and then Purchase Order. (This can also be located under the Reports Tab). You can email, print, or save the PO to send to the vendor to order the slabs.



- To track the Order, open the Actions Tab and click the green plus sign. This will create a new Order action for the Order.



- Enter the delivery date of the slabs and click on the Done button. As you can see this changed the status of the order and the slabs to Ordered. This will also create a Received Action for the slabs.



## Step 2- Receiving an Order

- When the slabs arrive, enter the slab location for storage in the text box. Enter your decision in the drop-down box and click Done. Please note the status of the Order has changed to received and the status of the slabs have changed to available.

Order: #2322

Basic Info

Details

Actions

| Action | Decision | Comment | Start | Urgnt | Completed |
|--------|----------|---------|-------|-------|-----------|
| Done   | Received | Full    |       |       |           |

Vendor: Granite 4 U

Inventory Item

Order: #2322

Basic Info

Status: Received

Process: Standard

Details

Actions

| Action | Decision      | Comment | Start               | Urgnt | Completed          | User  | Status   | Hrs  | Sch | Link | LastEditBy | LastEditDate         | Chk | Intrg | S | Decimal | Text         | Dat |
|--------|---------------|---------|---------------------|-------|--------------------|-------|----------|------|-----|------|------------|----------------------|-----|-------|---|---------|--------------|-----|
| Done   | Received      | Full    | Tue 3/12/24 12:00 A |       | Tue 3/12/24 1:00 A | Grace | Received | 1.00 |     |      | GraceABC   | 3/8/2024 12:15:26 PM |     |       |   |         | Location: A1 |     |
| Done   | Invoice Entry | na      | Fri 3/8/24 12:15 P  |       |                    | Kim   |          | 1.00 |     |      | GraceABC   | 3/8/2024 12:15:27 PM |     |       |   |         |              |     |

Vendor: Granite 4 U

Inventory Item

| #    | Facility         | Class       | SKU                | Custom | Unit Cost | Qty    | Cost     | Status    | Order# | Vendor      | StatusDate | FOB (Ordered Cost) | Notes | Location | Length   | Depth   | Squ  |
|------|------------------|-------------|--------------------|--------|-----------|--------|----------|-----------|--------|-------------|------------|--------------------|-------|----------|----------|---------|------|
| 3833 | Default Facility | Granite 3CM | Absolute Black 3CM |        | \$7.55    | 1.0000 | \$346.04 | Available | 2322   | Granite 4 U | 3/12/2024  | 346.0400           |       | A1       | 120.0000 | 55.0000 | 45.8 |
| 3834 | Default Facility | Granite 3CM | Absolute Black 3CM |        | \$7.55    | 1.0000 | \$346.04 | Available | 2322   | Granite 4 U | 3/12/2024  | 346.0400           |       | A1       | 120.0000 | 55.0000 | 45.8 |
| 3835 | Default Facility | Granite 3CM | Absolute Black 3CM |        | \$7.55    | 1.0000 | \$346.04 | Available | 2322   | Granite 4 U | 3/12/2024  | 346.0400           |       | A1       | 120.0000 | 55.0000 | 45.8 |
| 3836 | Default Facility | Granite 3CM | Absolute Black 3CM |        | \$7.55    | 1.0000 | \$346.04 | Available | 2322   | Granite 4 U | 3/12/2024  | 346.0400           |       | A1       | 120.0000 | 55.0000 | 45.8 |

Count: 4

## Barcodes

If you have a barcode printer set up, print out barcodes using the “Barcode” reports which can be found in the Inventory Order Task Menu.

The screenshot shows the ActionFlow Main Window interface. The top navigation bar includes "Home", "Processes", and "Administration". Below this, a secondary navigation bar highlights the "Inventory" tab. The main content area displays "Order: #2322" and a search box. A sidebar menu on the left is open, showing options like "Import Scan", "Inventory Map", "Allocate", etc. The "Reports" option is selected, opening a dropdown menu. This menu is further expanded to show "Administration", "Barcode", "Inventory", "Callbacks", "Installed Jobs By Installer (MF)", and "Inventory COGS By SKU Class". The "Barcode" sub-menu is open, listing various barcode report types such as "Barcode - Thin", "Barcode - Thin (Selected)", "Barcode - Vertical", "Barcode - Vertical (Selected)", "Barcode - Vertical Thin", "Barcode - Vertical Thin (Selected)", "Barcode 22Up", "Barcode 22Up (Selected)", "Barcode 3 x 1", "Barcode 3 x 1 (Selected)", "Barcode 4 x 2", "Barcode 4 x 2 (Selected)", and "Barcoded Locations".

The screenshot shows the "Inventory Reports" interface. The top bar displays "Report: Barcode - Thin" and navigation controls. Below this, there are filters for "Single Item#" (set to "Null") and "Sort Order" (set to "Item Number"). The main content area shows a barcode with the number "3833" below it. To the right of the barcode, the text reads: "Granite 3CM, Absolute Black 3CM - 120 x 55" and "Ord# 2322-Granite 4".



# Receiving Worksheet

The Receiving Worksheet allows you to check in slabs once they have been received. This is a popular report, so we wanted to bring attention to it here.

Report: **Receiving Worksheet** | 1 of 1 | Email | Print | Refresh

Order #: 2322 | Preview

## Receiving Worksheet

3/8/2024  
PO #2322

**Vendor:**  
Granite 4 U  
987 Quarry Road  
St. Louis, MO 63111

**Ship to:** ABC Countertops  
Shipping Address #1  
St. Louis, MO 63126  
111-111-1111

| Item Description                | Vendor ItemID | Item # | Job# | Loc. | Ordered Size | Sq Ft  | Measured Size   |
|---------------------------------|---------------|--------|------|------|--------------|--------|-----------------|
| Granite 3CM, Absolute Black 3CM |               | 3833   |      | A1   | 120 x 55     | 45.83  | ___ x ___ = ___ |
| Granite 3CM, Absolute Black 3CM |               | 3834   |      | A1   | 120 x 55     | 45.83  | ___ x ___ = ___ |
| Granite 3CM, Absolute Black 3CM |               | 3835   |      | A1   | 120 x 55     | 45.83  | ___ x ___ = ___ |
| Granite 3CM, Absolute Black 3CM |               | 3836   |      | A1   | 120 x 55     | 45.83  | ___ x ___ = ___ |
|                                 |               |        |      |      |              | 183.32 |                 |

**Expected delivery date: Tuesday, 03/12/24**

Received By: \_\_\_\_\_  
Date: \_\_\_\_\_

100%

AF ActionFlow Main Window | Version 4.2.0.62

Home Processes Administration

Customer Account Scheduler **Inventory** Vendor Fabrication Fab

Order: #2322

Basic Info

Process: Standard

- Import Scan
- Inventory Map
- Allocate
- Allocate Selected
- Move Selected Items to Different Order
- SKU Pricing
- Nonserialized Quantities
- Slabsmith Map
- Reports >
- Inventory Reconciliation
- Inventory Item

- Contact Information
- Persons
- Assigned Roles
- Administration >
- Barcode >
- Inventory >
- Callbacks
- Installed Jobs By Installer (MF)
- Inventory COGS By SKU Class

- Available Inventory Items
- Confirm Stone Order With No Slabs
- Consigned Slabs
- Consigned Slabs To Pay For
- Cost of Goods Sold
- Inventory Alerts
- Inventory Alerts (NonSerialized)
- Inventory Financial Summary
- Inventory Invoices
- Inventory Snapshot
- Inventory Snapshot - MF
- Inventory Snapshot (Nonserialized)
- Inventory Snapshot With Mapping
- Inventory Waste
- Pending Transfers
- Purchase Order
- Purchase Order with Item #
- Purchase Order with Price
- Purchase Order with Price & Item #
- Receiving Worksheet
- Sinks By Install Date
- Sinks By Template Date
- Slabs Used
- Tagged Items
- Tagged Items By Customer Name