

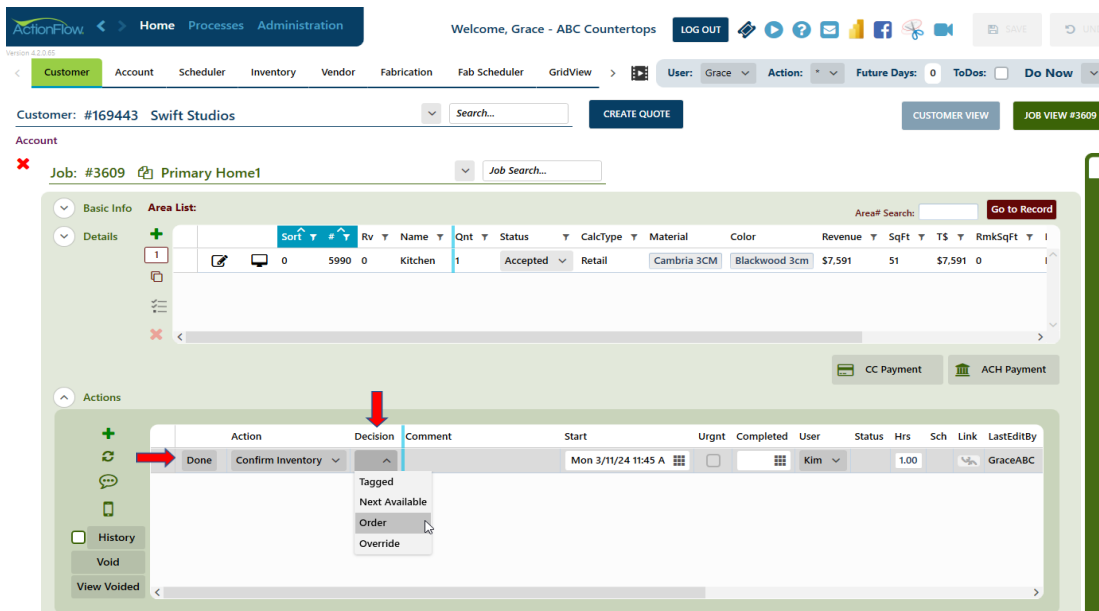
Order Inventory for a Specific Job Guide

Step 1- Review and Order Inventory

The Assigned User will get an Action to **Confirm Inventory**. There will be four decisions to choose from.

- Tagged- Stock Slabs that have been tagged for the job
- Next Available- Any available stock slab can be used for the job
- Order- Order Inventory
- Override- Special Circumstance that would not fall into the other decision types

Note: There may be slight differences in the process at your shop for confirming inventory. Work with your administrator or account manager to determine how your shop handles this process.

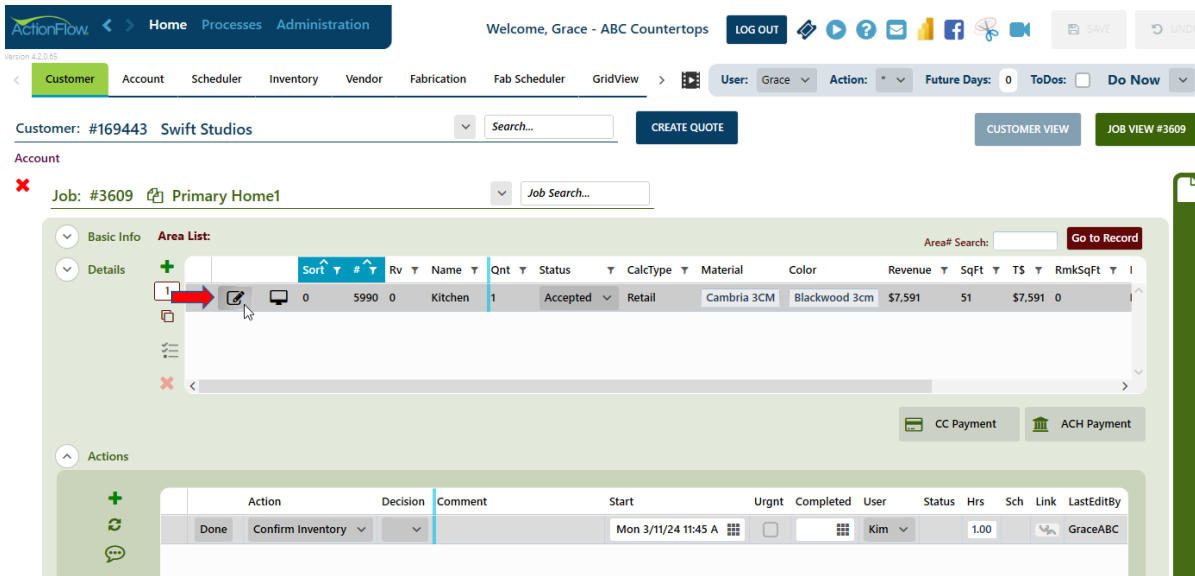


The screenshot displays the ActionFlow software interface. At the top, there is a navigation bar with 'Home', 'Processes', and 'Administration'. Below this, a header shows 'Welcome, Grace - ABC Countertops' and a 'LOG OUT' button. The main area is divided into several sections:

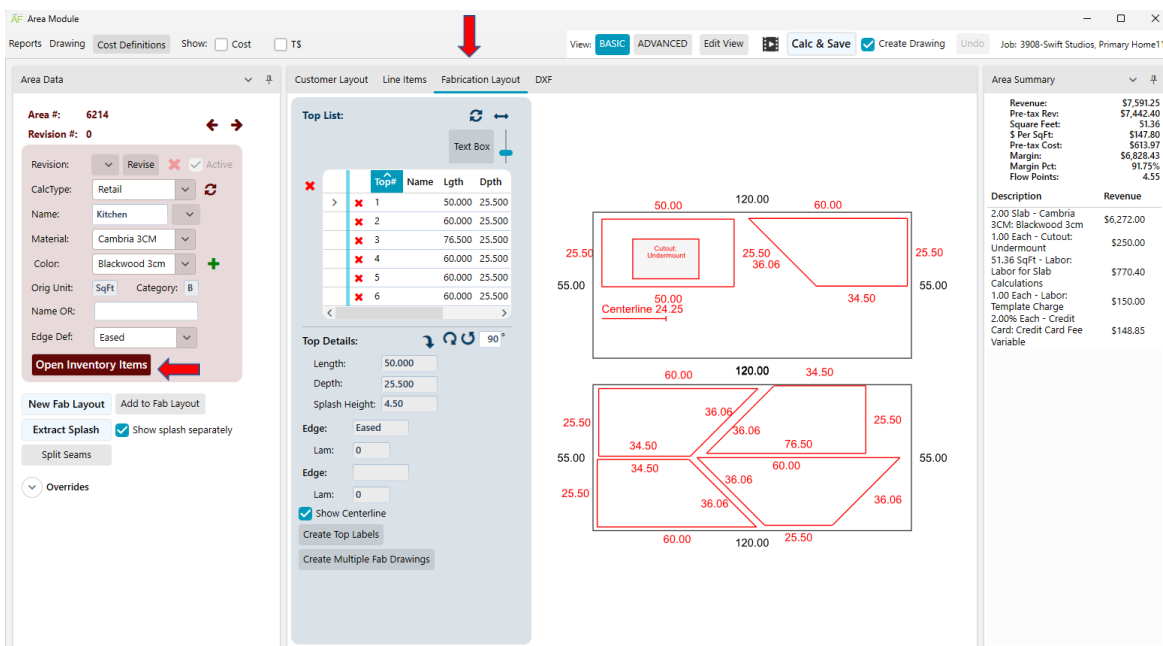
- Customer Information:** Customer: #169443 Swift Studios. Buttons for 'CREATE QUOTE', 'CUSTOMER VIEW', and 'JOB VIEW #3609' are visible.
- Account Information:** Job: #3609 Primary Home1. A 'Job Search...' field is present.
- Area List:** A table with columns: Rv, Name, Qty, Status, CalcType, Material, Color, Revenue, SqFt, TS, RmkSqFt. One row is visible for 'Kitchen' with a quantity of 1 and status 'Accepted'.
- Actions:** A table with columns: Action, Decision, Comment, Start, Urgnt, Completed, User, Status, Hrs, Sch, Link, LastEditBy. One action is listed: 'Done' with 'Confirm Inventory' as the decision. A dropdown menu is open for the 'Decision' column, showing options: 'Tagged', 'Next Available', 'Order', and 'Override'. A red arrow points to the 'Confirm Inventory' decision, and another red arrow points to the 'Order' option in the dropdown.

1. Confirm the number of slabs needed for the Job

- Edit the Area Module to review Slabs



- You can view the Fabrication Layout to see how many slabs will need to be ordered. (Please see Fabrication Layout video if layout still needs to be completed to determine slab quantity)
- Open the “Inventory Items” section to view the specific slabs.

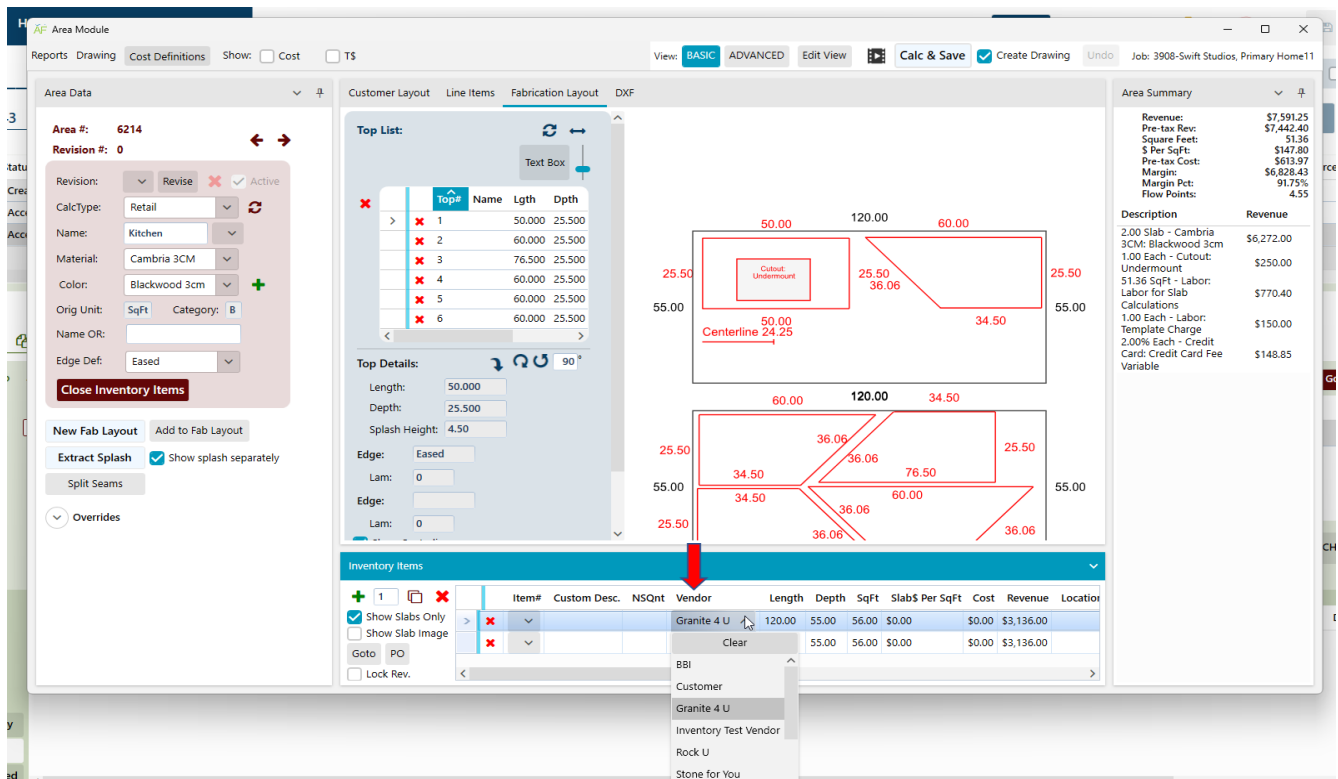


2. Assign Vendors to Inventory Items

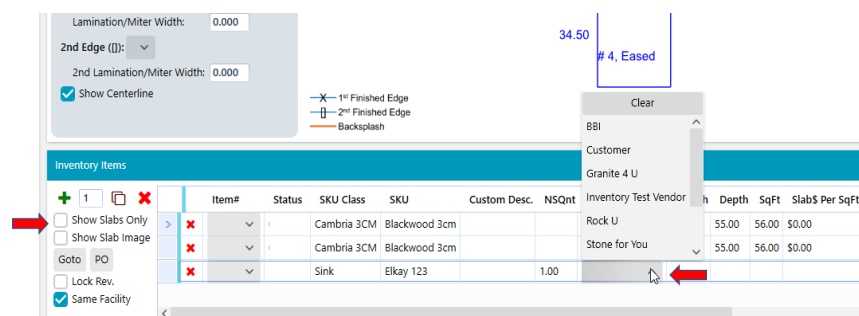
Once you determine the number of slabs, there are 2 places to assign vendors to the Inventory Items – which method you use depends on your role.

1. Inventory Item Section of the Area Module

- In the Inventory Items section of the Area Module, select the Vendor from the **Vendor** drop down box to indicate who to order the material from.



- Uncheck the “Show Slabs Only” checkbox to ensure there are no other inventory items that need to be ordered. If there are, ensure the Vendor is assigned for those items as well.



2. Fabrication Tab

Depending on your role, you may use the Fabrication Tab more often than the Area Module to assign vendors.

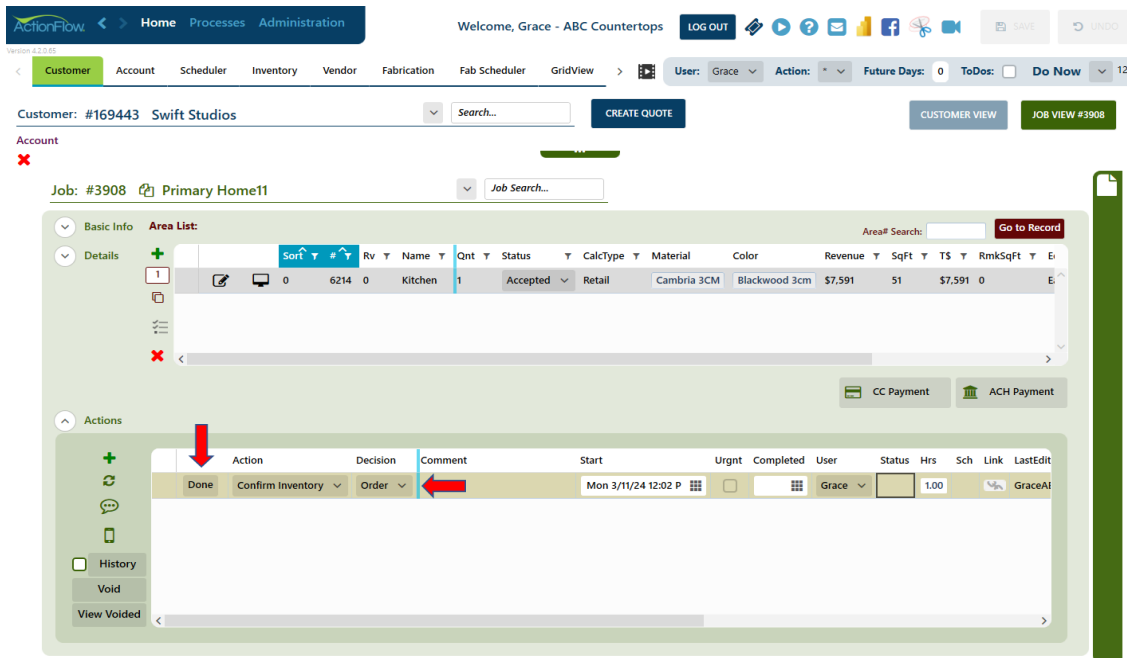
The screenshot shows the ActionFlow Main Window with the Fabrication tab selected. The interface includes a navigation bar with tabs like Customer, Account, Scheduler, Inventory, Vendor, and Fabrication. A search bar and various filters are visible. The main area displays a table of inventory items with columns for Item#, Status, SKU Class, SKU, NSQnt, Length, Depth, Loc, Vendor, Vndritem#, Lot#, and Multitite. A dropdown menu is open for the Vendor column, showing a list of vendors: BBI, Customer, Granite 4 U, Inventory Test Vendor, Rock U, and Stone for You. Red arrows indicate the location of the Fabrication tab and the dropdown menu.

Item#	Status	SKU Class	SKU	NSQnt	Length	Depth	Loc	Vendor	Vndritem#	Lot#	Multitite
>	Use	Cambria 3CM	Blackwood 3cm		120.00	55.00		Granite 4 U			
>	Use	Cambria 3CM	Blackwood 3cm		120.00	55.00		Granite 4 U			
>	Use	Sink	Elkay 123	1.00							

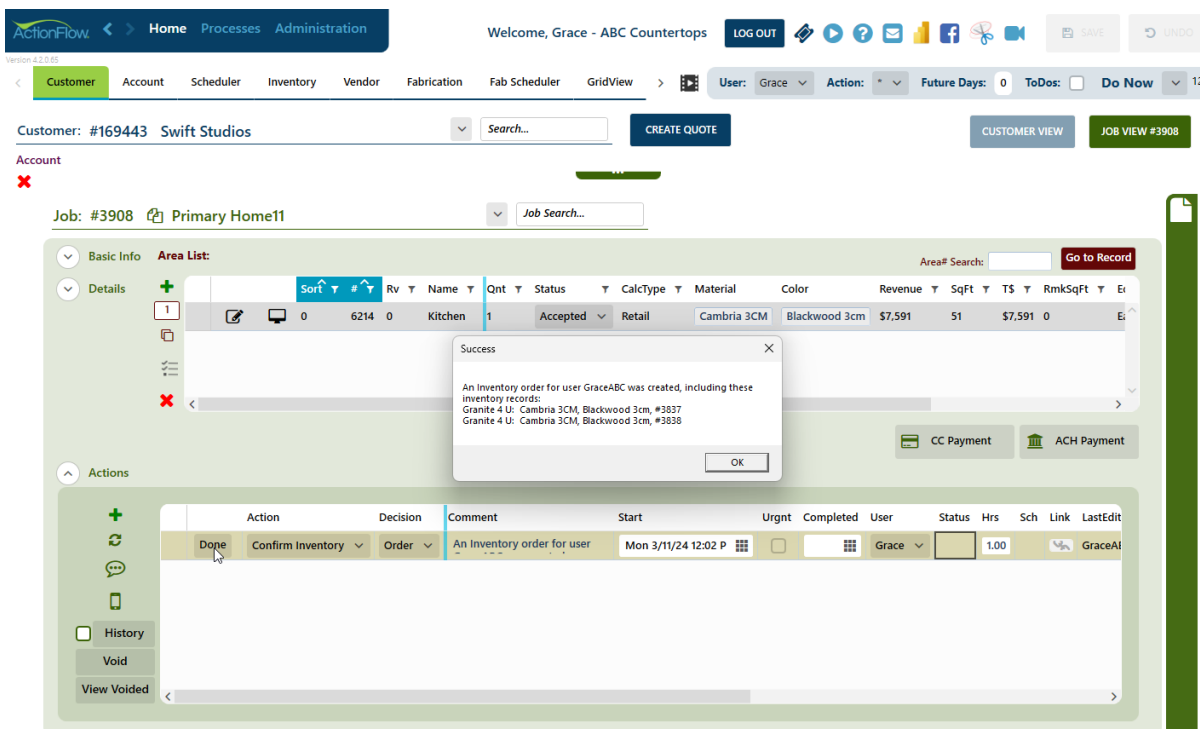
3. Order Inventory

There are 2 ways to Order Inventory once you have assigned a vendor to the inventory items. Work with your administrator or account manager to determine which method works best for your shop.

- Order Inventory Using the Job Actions
 - Select the Order Decision and Click Done.



- A Pop-up Box will indicate an Inventory Order has been created. The Item # will indicate the inventory item number.



2. Order Inventory Using the PO Button

- Click the “PO” button in the Area Module Inventory Items section and confirm you would like to create an order.

The screenshot shows the ActionFlow software interface for the Area Module. The main window displays a kitchen layout with three islands labeled #1, #2, and #3. The #1 island is a square with a side length of 50.00 and a centerline of 24.25. The #2 island is a trapezoid with a top width of 60.00, a bottom width of 34.50, and a height of 25.50. The #3 island is a trapezoid with a top width of 76.50, a bottom width of 34.50, and a height of 25.50. The interface includes a 'Top List' table, 'Top Details' panel, and an 'Inventory Items' table.

Item#	Custom Desc.	NSQnt	Vendor	Length	Depth	SqFt	Slab\$ Per SqFt	Cost	Revenue	Location	Multitem#	Used
1	Granite 4 U	1		120.00	55.00	56.00	\$0.00	\$0.00				
2	Granite 4 U	1		120.00	55.00	56.00	\$0.00	\$0.00				

This screenshot shows the same software interface as above, but with a 'Create Slabs' dialog box open. The dialog box contains the text: 'Click "OK" to create an inventory slab record for each item in the list.' There are 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button. The 'Inventory Items' table at the bottom of the screen is visible, showing the same data as in the previous screenshot.

- A Pop-up Box will indicate an Inventory Order has been created.
The Item # will indicate the inventory item number.

The screenshot displays the ActionFlow software interface for a kitchen layout design. The main workspace shows a top-down view of a kitchen island with dimensions and labels like "# 1, Eased" and "# 3, Eased". A pop-up box in the center reads: "An Inventory order for user GraceABC was created, including these inventory records: Granite 4 U: Cambria 3CM, Blackwood 3cm, #3839 Granite 4 U: Cambria 3CM, Blackwood 3cm, #3840". Below the pop-up is an "Inventory Items" table.

Item#	Custom Desc.	NSQnt	Vendor	Length	Depth	SqFt	Slabs Per SqFt	Cost	Revenue	Location	Multitem#
3839			Granite 4 U	120.00	55.00	56.00		\$0.00	\$0.00		
3840			Granite 4 U	120.00	55.00	56.00		\$0.00	\$0.00		

On the left side, the "Area Data" panel shows: Area #: 6214, Revision #: 0, Name: Kitchen, Material: Cambria 3CM, Color: Blackwood 3cm, Edge Def: Eased. The "Top List" table shows 4 items with quantities of 1. The "Top Details" panel shows Length: 50.000, Depth: 25.500, Splash Height: 4.500, Edge (X): Eased, and Lamination/Miter Width: 0.000.

Step 2- Send Purchase Order and Track Inventory Order

1. Click on the Inventory Tab. Click in the "Inventory Item" dropdown to find the "Inventory Item" search. Search for your Inventory Item number to locate your order. You can also select your order from the drop-down box as well if you know it.

Order: #2316

Vendor: XYZ Granite

Inventory Item

#	Facility	Class	SKU	Custom	Unit Cost	Qnt	Cost	Status	Order#	Vendor	StatusDate	FOB (Ordered Co
3143	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$1,604.17	Installed	2316	XYZ Granite	1/30/2024	1,604.1700
3144	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$1,604.17	Installed	2316	XYZ Granite	1/30/2024	1,604.1700
3145	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$1,604.17	Available	2316	XYZ Granite	1/30/2024	1,604.1700
3146	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$1,604.17	Available	2316	XYZ Granite	1/30/2024	1,604.1700
3147	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$1,604.17	Available	2316	XYZ Granite	1/30/2024	1,604.1700
3144-01	Default Facility	Granite 3CM	African Sunset 3CM		\$35.00	1.0000	\$802.14	Available	2316	XYZ Granite	1/30/2024	802.1400
Count: 6							\$8,822.99					

#3143

Status: Installed Process: Standard

Type: Contact Information

Order: #2323

Vendor: Granite 4 U

Inventory Item

#	Facility	Class	SKU	Custom	Unit Cost	Qnt	Cost	Status	Order#	Vendor	StatusDate	FOB (Ordered C
3837	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3838	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3839	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3840	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3841	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3842	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
Count: 6							\$0.00					

#3839

Status: Created Process: Standard

Type: Contact Information Persons

2. Click on the **Actions** Drop down to start your order

The screenshot shows the ActionFlow interface for order #2323. The 'Inventory' tab is active. In the left sidebar, the 'Actions' dropdown is expanded, and the 'Order' option is selected. The main table shows a single action record with the following details:

Action	Decision	Comment	Start	Urgnt	Completed	User	Status	Hrs	Sch	Link	LastEditBy	LastEditDat
Done	Order	na	Mon 3/11/24 12:04 P			Grace		1.00			GraceABC	3/11/2024 1

Below the table, the 'Inventory Item List' is visible, showing two items:

#	Facility	Class	SKU	Custom	Unit Cost	Qnt	Cost	Status	Order#	Vendor	StatusDate	FOB (Ordered Cost)
3837	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000
3838	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Created	2323	Granite 4 U	3/11/2024	0.0000

3. Use the scroll bar to scroll over to enter a **Delivery Date** in the **Date** column.

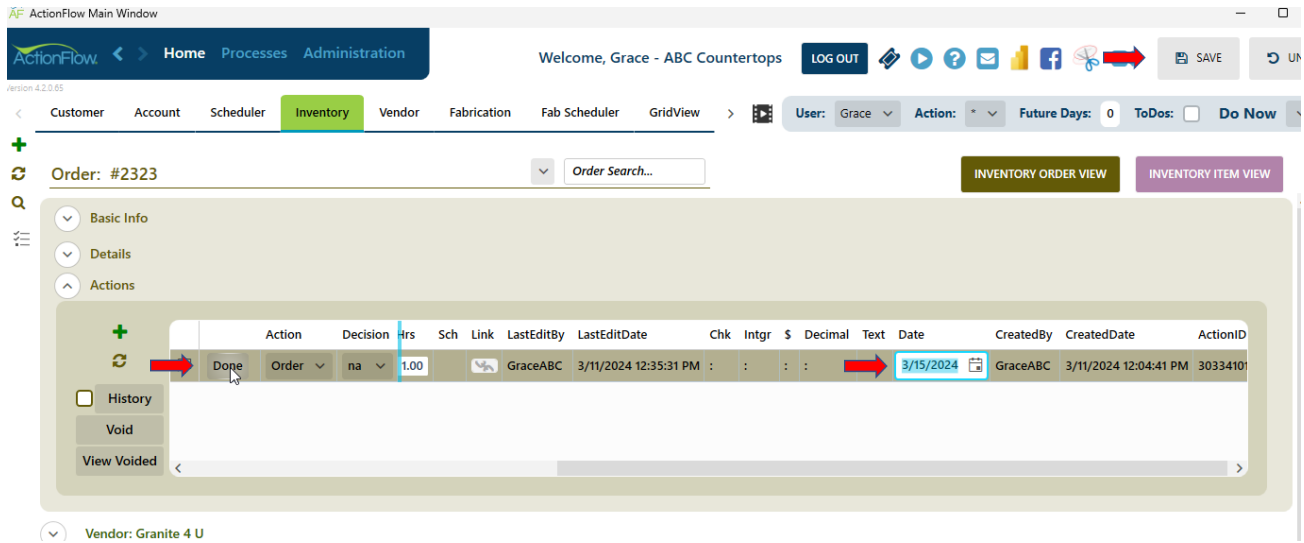
- Enter the delivery date

The screenshot shows the ActionFlow interface for order #2323. The 'Inventory' tab is active. In the left sidebar, the 'Actions' dropdown is expanded, and the 'Order' option is selected. The main table shows a single action record with the following details:

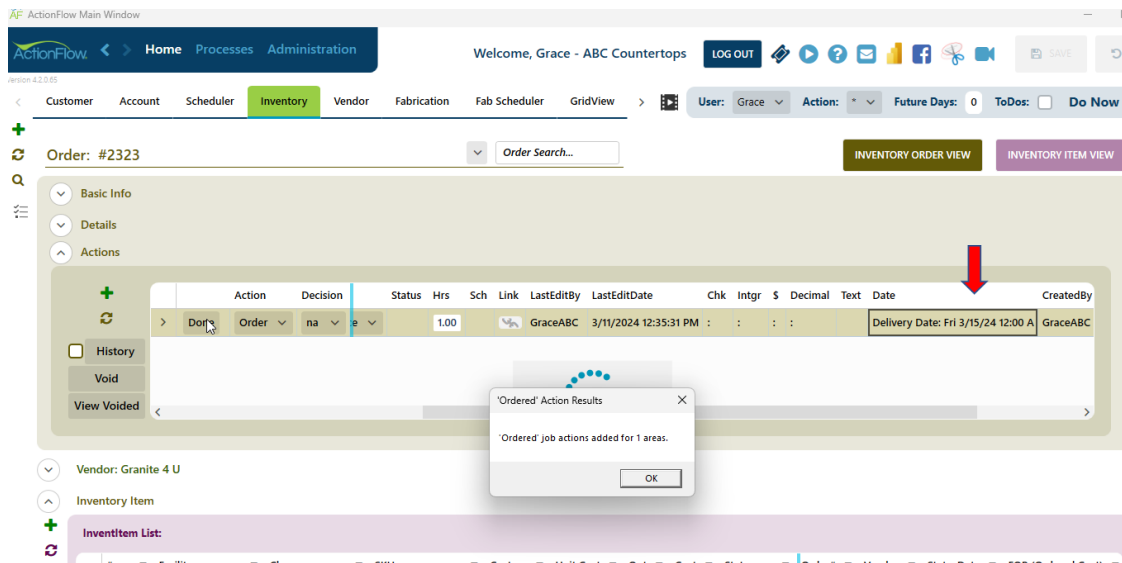
Action	Decision	Hrs	Sch	Link	LastEditBy	LastEditDate	Chk	Intgr	\$	Decimal	Text	Date	CreatedBy	CreatedDate	ActionID
Done	Order	na	1.00		GraceABC	3/11/2024 12:04:41 PM	:	:	:	:		Delivery Date:	GraceABC	3/11/2024 12:04:41 PM	3033410

The 'Date' column is highlighted, and a red arrow points to the 'Delivery Date' text input field. A scroll bar is visible at the bottom of the table, and a red arrow points to it, indicating that the user should scroll to the right to reach the 'Date' column.

- Click Save
- Click the **Done** button



- You will see a Pop-Up box indicating that the order has been completed.



- The status for both the order and the inventory items will change to Ordered.
- The **Received Action** will be added as the next Action.

Order: #2323

INVENTORY ORDER VIEW | INVENTORY ITEM VIEW

Basic Info

Details

Actions

Action	Decision	Status	Hrs	Sch	Link	LastEditBy	LastEditDate	Chk	Intgr	\$	Decimal	Text	Date
Done	Order	na	0.54			GraceABC	3/11/2024 12:37:18 PM						Delivery Date: Fri 3/15/24 12:00 A
Done	Received		1.00			GraceABC	3/11/2024 12:37:18 PM						Location: :

Vendor: Granite 4 U

Inventory Item

Inventory Item List:

#	Facility	Class	SKU	Custom	Unit Cost	Qnt	Cost	Status	Order#	Vendor	StatusDate	FOB (Ordered Cost)
3837	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Ordered	2323	Granite 4 U	3/11/2024	0.0000
3838	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Ordered	2323	Granite 4 U	3/11/2024	0.0000
3839	Default Facility	Cambria 3CM	Blackwood 3cm		\$0.00	1.0000	\$0.00	Ordered	2323	Granite 4 U	3/11/2024	0.0000

- If you navigate to the Customer tab and then the Job Actions, you may see 3 new actions:
 - Comment – this indicates to the project manager that the stone has been ordered with the order #
 - Notify Dealers – this action is relevant if there is a dealer who needs to be informed
 - Receive Stone – this action is assigned to the project manager on the day after the delivery date set on the “Order” action

Customer: #169443 Swift Studios

Job: #3908 Primary Home11

Area List:

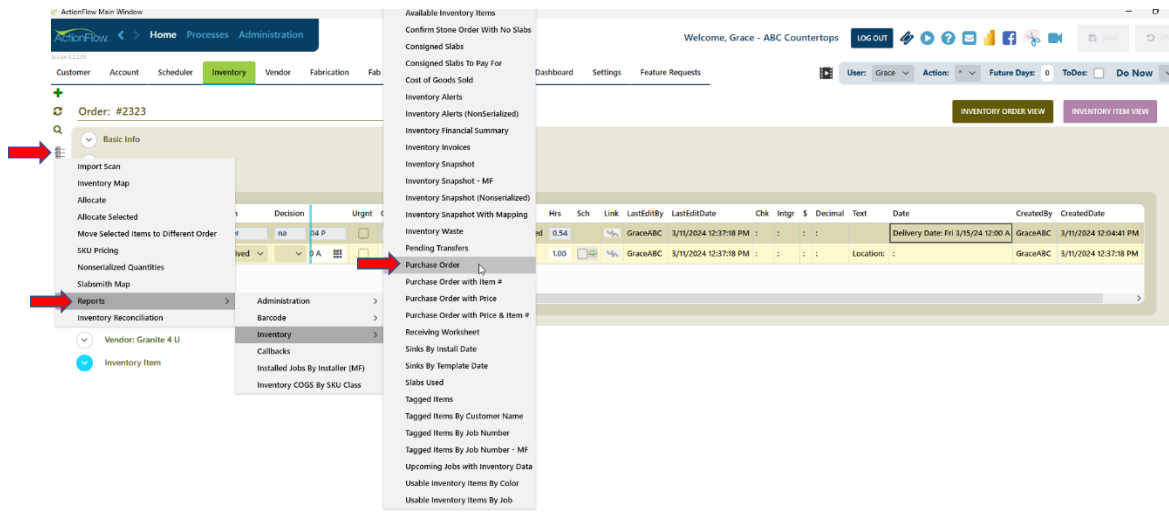
Area#	Rv	Name	Qnt	Status	CalcType	Material	Color	Revenue	SqFt	TS	RmkSqFt	E
0	6214	Kitchen	1	Accepted	Retail	Cambria 3CM	Blackwood 3cm	\$4,662	51	\$3,560	0	E

Actions

Action	Decision	Comment	Start	Urgnt	Completed	User	Status	Hrs	Sch	Link	LastEditBy
Done	Comment	na	Stone Ordered, Order#2323	Mon 3/11/24 12:36 P		Kim		1.00			GraceABC
Done	Notify Dealers	na	Inventory has been ordered.	Mon 3/11/24 12:37 P		Kim		0.00			GraceABC
Done	Receive Stone	na	Order#2323	Sat 3/16/24 12:00 A		Kim		1.00			GraceABC

4. Send PO to the Vendor. (Optional if needed to send PO to Vendor. Sometimes you may order through a vendor portal)

- Task Menu >Reports>Purchase Order or Purchase Order with Price



5. Once the Inventory has been received, click on Full or Partial in your drop-down decision. You will need to select a **Location**. Click **Done**.

