

## Barcoded Inventory –New ServTraq Solution

### Background

We've recently completed the development of a new ServTraq © solution designed for **Inventory Management Control**. This new solution offers the ability to barcode all warehouse items by *Item SKU number* or by *Item SKU and Lot Number*. Included in this solution, is the ability to check items in and out from one location to another for easier item tracking.

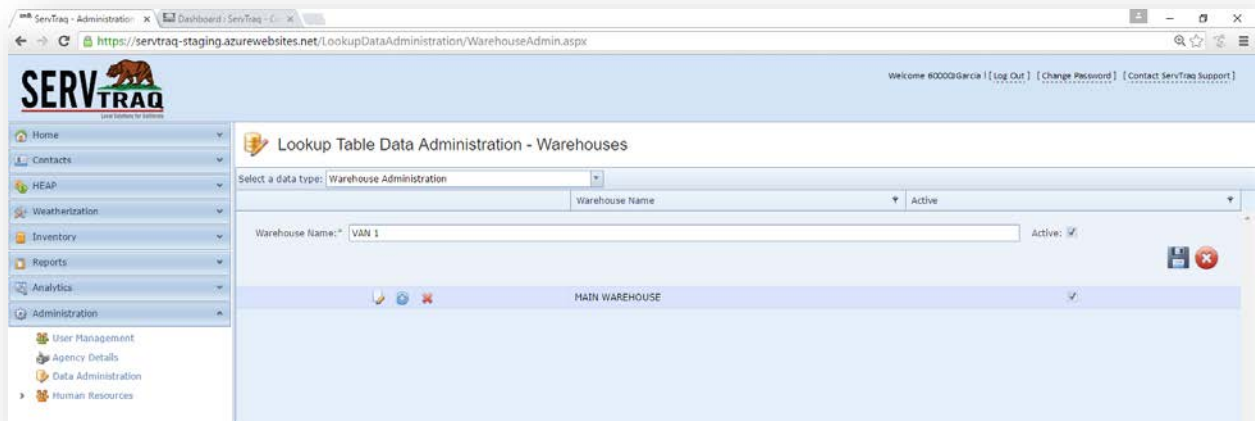


### Solution

#### Step 1: Set up Warehouse Locations

Go to **Admin>Data Admin>Warehouse Admin**

Enter as many warehouse locations needed and mark them as "Active".



#### Step 2: Barcode Inventory

To print Barcode labels go to **Inventory>Inventory and Value**. Click the *SKU number* to open the Inventory Item Details page.

Save Save and Close Exit Delete Refresh Inventory Labels Barcode Label

**Sections**

- Item Details
- Stock Level
- Vendors
- Transactions
- Notes

**Edit Inventory Item**  
0104-001, MICROWAVE, 1000 WATTS, SIZE: 1.1 CU. FT.

**Item Details**

SKU: 0104-001  
Description: MICROWAVE, 1000 WATTS, SIZE: 1.1 CU. FT.  
Unit: EACH  
Measure Category: MICROWAVE OVEN  
Reorder: 25  
Reporting Accounts: 14400 - CONSTRUCTION MATERIALS STOCK  
Active: ☒  
Show On Crew Inventory Sheet: ☒

**Stock Level - Lots**

	Lot ID	Order Quantity	Remaining	Cost
>	46266	24	8	
>	47512	1	1	
>	49522	24	24	
>	51729	1	1	

Labels can be printed at the Item Level by clicking the Barcode Label button on the top ribbon.

D=32952 delete Refresh Inventory Labels Barcode Label

**Inventory Item**  
4-001, MICROWAVE

SKU: 0104-001  
MICROWAVE, 1000 WATT  
Unit: EACH  
ICROWAVE OVEN

**Barcode Label**

0 329520 000001  
SKU: 0104-001

Or can be printed at the Item & Lot Level by clicking the Barcode button located next to the Lot ID column.

**Stock Level - Lots**

	Lot ID	Order Quantity	Remaining	Cost	Entry Date
>	46266	24	8	\$103.14	9/16/2013

**Barcode Label**

0 329520 462663  
SKU: 0104-001

### Step 3: Inventory Checkout

Go to **Inventory>Inventory Checkout** to assign materials from the Main Warehouse to another warehouse or vehicle location.

#### Checkout Parameters

Entry Field	Description
Checkout To	Select the new item location
Checkout Date	Select the date the transaction occurred (defaults to today)
Barcode	Scan or Manually enter the barcode number

If you would like to increase the quantity of items to post to a new location, click the pencil icon. Otherwise move to the next step.

Inventory Checkout

Checkout Parameters

Checkout To:\* VAN 1

Checkout Date:\* 7/8/2016

Barcode:\*

Item	Lot ID	Quantity	Lot Quantity	Warehouse Qty	Posted
0103-008 - ELECTRIC PORTABLE HEATER	87286	1	36	36	<input type="checkbox"/>

Item	Lot ID	Quantity	Lot Quantity	Warehouse Qty	Posted
0103-008 - ELECTRIC PORTABLE HEATER	87286	1	36	36	<input type="checkbox"/>

Click **Post Checkout** to complete the transaction.

Inventory Checkout

Items have been transferred successfully

Checkout Parameters

Checkout To:\* VAN 1

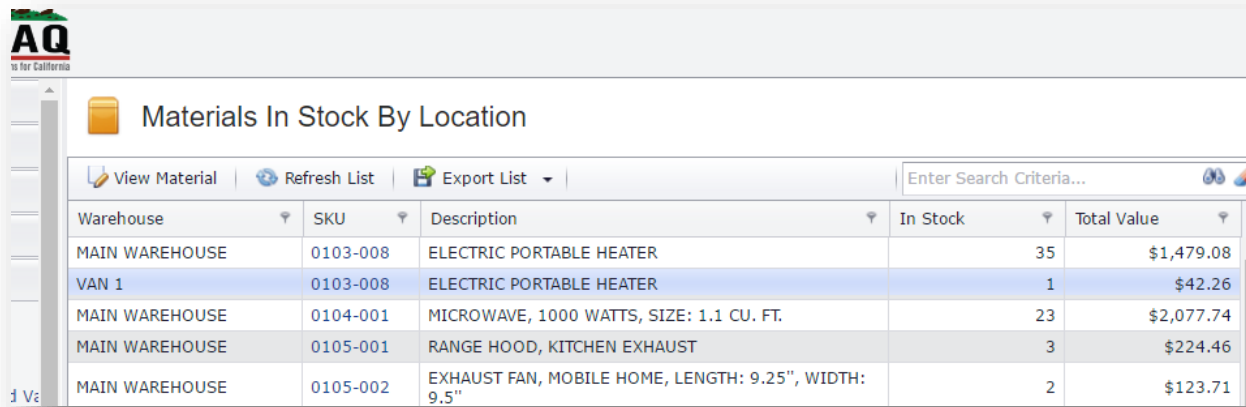
Checkout Date:\* 7/8/2016

Barcode:\*

Item	Lot ID	Quantity	Lot Quantity	Warehouse Qty	Posted
0103-008 - ELECTRIC PORTABLE HEATER	87286	1	36	35	<input checked="" type="checkbox"/>

## Track Inventory By Location

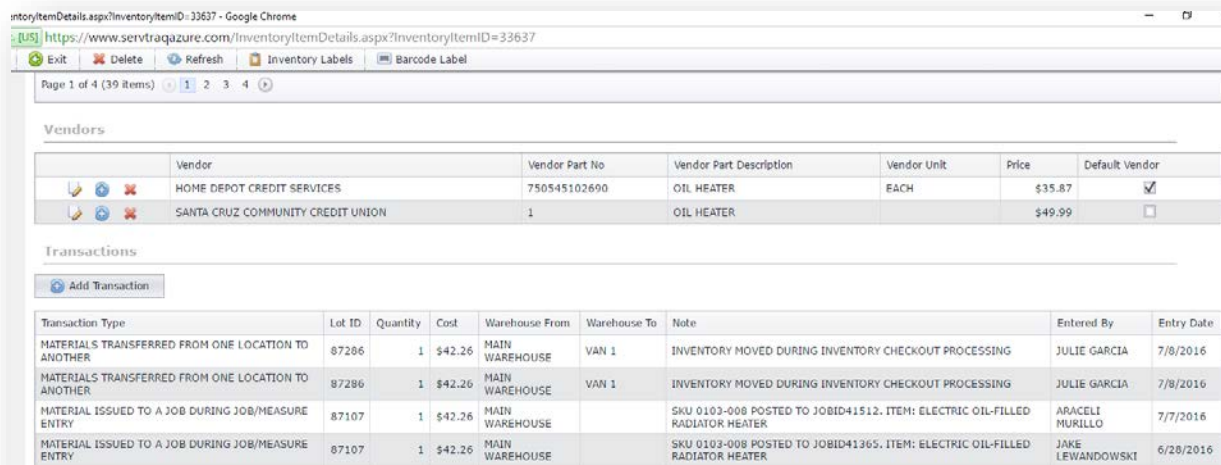
Inventory can be tracked by Warehouse via the Materials in Stock by Location screen. To access this page go to **Inventory>Inventory on Hand by Location**.



Warehouse	SKU	Description	In Stock	Total Value
MAIN WAREHOUSE	0103-008	ELECTRIC PORTABLE HEATER	35	\$1,479.08
VAN 1	0103-008	ELECTRIC PORTABLE HEATER	1	\$42.26
MAIN WAREHOUSE	0104-001	MICROWAVE, 1000 WATTS, SIZE: 1.1 CU. FT.	23	\$2,077.74
MAIN WAREHOUSE	0105-001	RANGE HOOD, KITCHEN EXHAUST	3	\$224.46
MAIN WAREHOUSE	0105-002	EXHAUST FAN, MOBILE HOME, LENGTH: 9.25", WIDTH: 9.5"	2	\$123.71

## Revert a Transaction

To move an item back from to the *Main Warehouse*, you'll need to create a **Transaction**. Open the *Materials* page, and click the SKU number to open the *Inventory Item Details* page. Scroll to the *Transactions* section and click the addition icon. Use the transaction code "TX" to move items from one location to another.




Vendor	Vendor Part No	Vendor Part Description	Vendor Unit	Price	Default Vendor
HOME DEPOT CREDIT SERVICES	750545102690	OIL HEATER	EACH	\$35.87	<input checked="" type="checkbox"/>
SANTA CRUZ COMMUNITY CREDIT UNION	1	OIL HEATER		\$49.99	<input type="checkbox"/>



  

Transaction Type	Lot ID	Quantity	Cost	Warehouse From	Warehouse To	Note	Entered By	Entry Date
MATERIALS TRANSFERRED FROM ONE LOCATION TO ANOTHER	87286	1	\$42.26	MAIN WAREHOUSE	VAN 1	INVENTORY MOVED DURING INVENTORY CHECKOUT PROCESSING	JULIE GARCIA	7/8/2016
MATERIALS TRANSFERRED FROM ONE LOCATION TO ANOTHER	87286	1	\$42.26	MAIN WAREHOUSE	VAN 1	INVENTORY MOVED DURING INVENTORY CHECKOUT PROCESSING	JULIE GARCIA	7/8/2016
MATERIAL ISSUED TO A JOB DURING JOB/MEASURE ENTRY	87107	1	\$42.26	MAIN WAREHOUSE		SKU 0103-008 POSTED TO JOBID41512. ITEM: ELECTRIC OIL-FILLED RADIATOR HEATER	ARACELI MURILLO	7/7/2016
MATERIAL ISSUED TO A JOB DURING JOB/MEASURE ENTRY	87107	1	\$42.26	MAIN WAREHOUSE		SKU 0103-008 POSTED TO JOBID41365. ITEM: ELECTRIC OIL-FILLED RADIATOR HEATER	JAKE LEWANDOWSKI	6/28/2016

**Transactions**

 Add Transaction

Transaction Type	Lot ID	Quantity	Cost	Warehouse From	Warehouse To	Note	Entered By	Entry Date
Transaction Type: TX - MATERIALS TRANSFERRED FROM ONE LOCATION TO ANOTHER	Lot Number: 13898 -	Warehouse From: VAN 1	Warehouse To: MAIN WAREHOUSE	Quantity: 1	Cost:			

## Specifications

This feature requires the use of the following equipment:

- Label Printer (i.e. Dymo, WASP)
- Barcode Scanner that reads EAN13 Format (wireless scanner recommended)