

How To: Manage Inventory



By C-Ware, Inc.

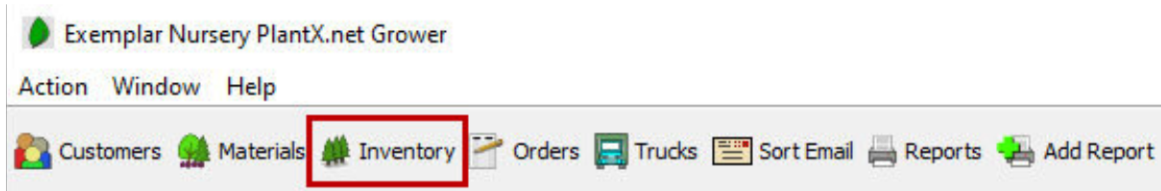


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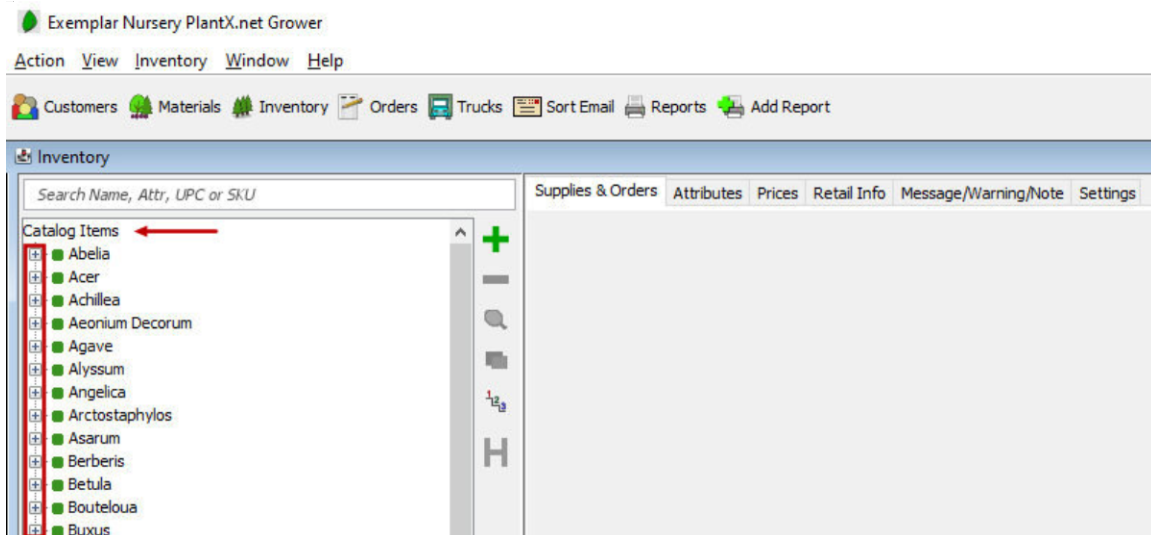
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How to Create an Inventory Item

- 1) After creating initial catalog items (see How To Manage Materials), select the Inventory button at the top.

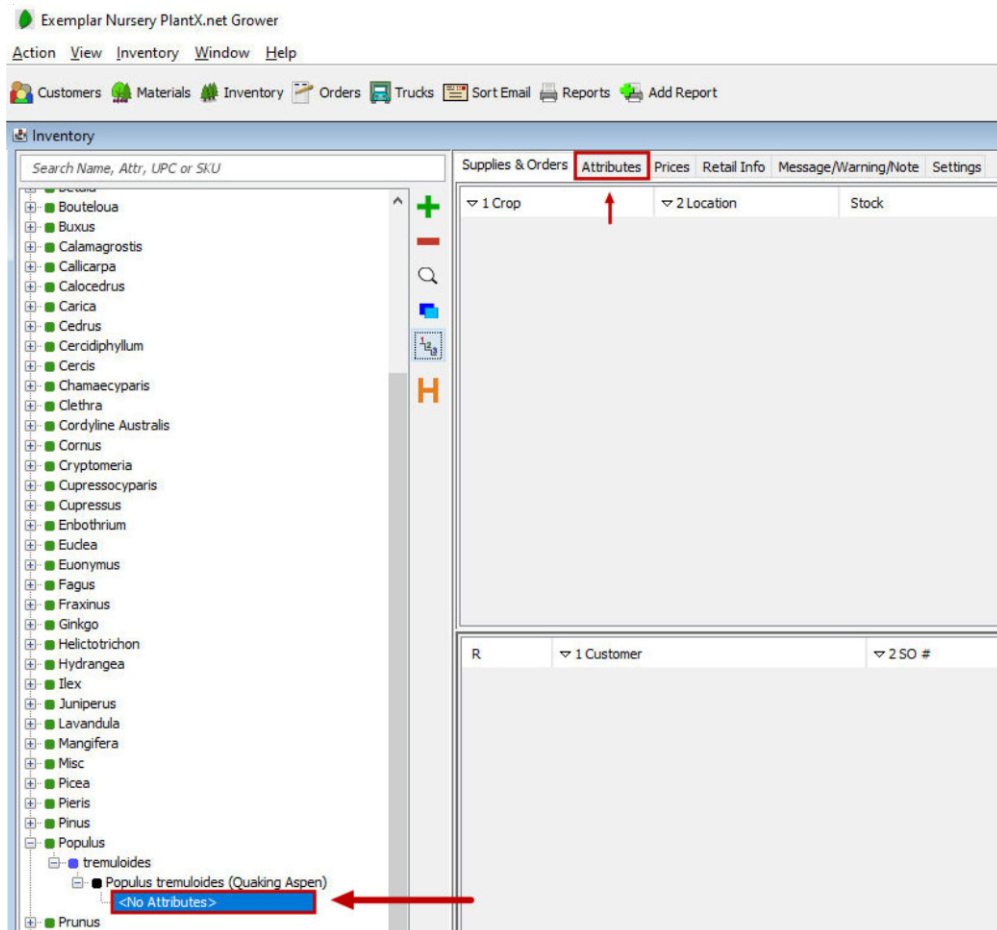


- 2) Select the genus and species from Catalog Items list using the small plus button or double clicking the name.

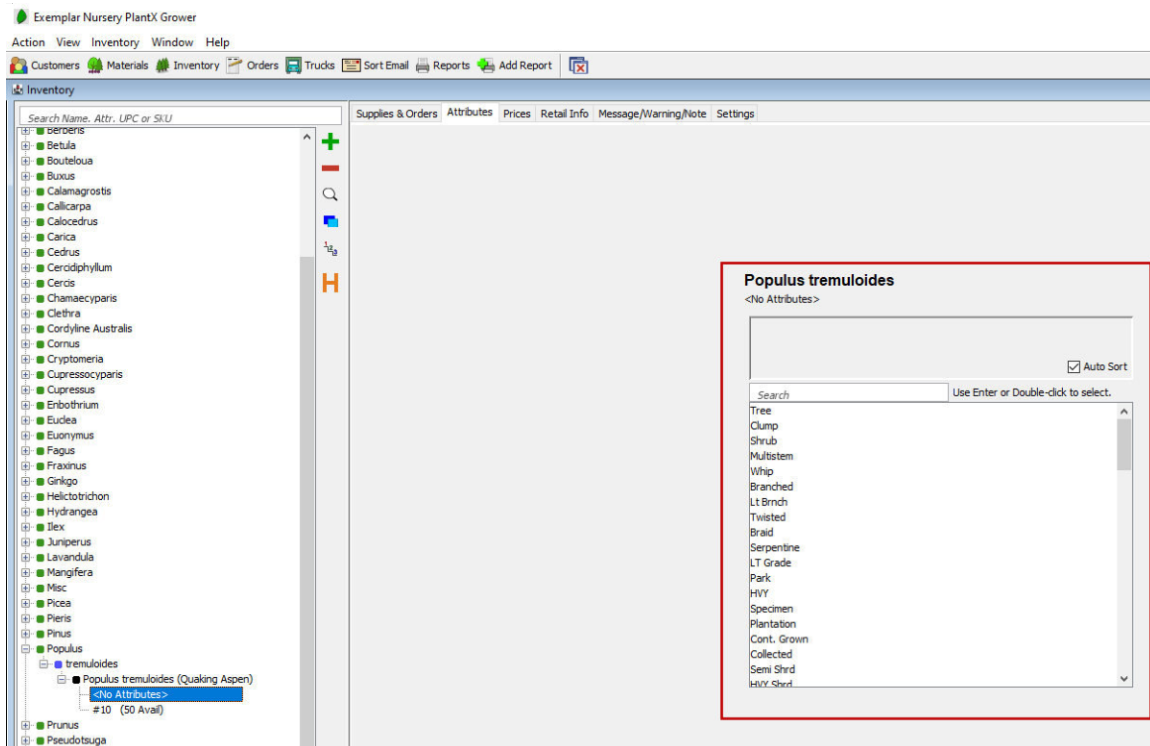


- 3) Attributes are the various container sizes, heights, styles etc. that you sell. For example, a #10 gallon size Acer Palmatum (Japanese Maple) vs a B&B 5'HT Acer Palmatum (Japanese Maple). Once the genus and species have been selected, click the <No Attributes> item. Then select the Attributes tab towards the top of the screen.

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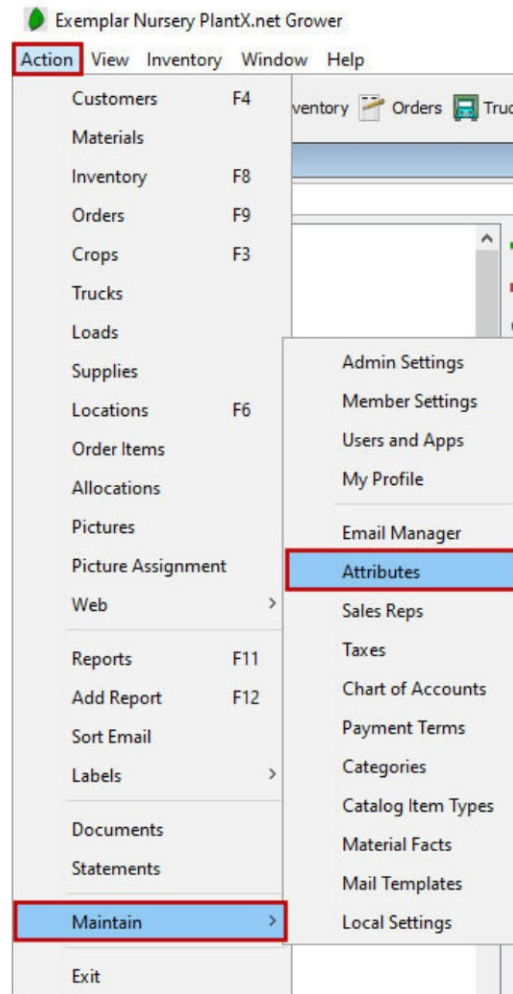
- 4) Using the search field find the attribute that you want to attach to this item. You can select multiple attributes for one item, for example you can select a #10 gallon size and 4-5' HT. However, DO NOT select multiple of the same sizes, heights, etc. for one item. For example a #10 gallon size AND #12 gallon size, since the inventory item cannot be both a #10 and a #12 at the same time.
- 5) Highlight the desired attribute and use the Enter key, or double click to select it. You can add multiple attributes in this step.



- 6) If you do not see the attribute you would like to add, you can create a custom attribute using the search field. Type in the new attribute name and press the enter key or double click the (custom attribute) option in the attribute list. You can add multiple custom attributes in this step.
- 7) Once all the attributes for this inventory item show in the box above the search field, you can move on to the next inventory item.

8) If you are consistently using a custom attribute, you can add it to the master list. The master attribute list holds all commonly used attributes for quick selection during the creation of new inventory items.

I) To access the master attributes list, go to Action > Maintain > Attributes.



- II) To add a new attribute to the master list: Push the green plus button on the right-hand side. Note that you can also select an existing attribute to edit it.
- III) On the smaller pop-up enter the attribute name (i.e. 3' HT, Pot #10, 18" Sprd, etc.) Then select the type of attribute this belongs to. (#10 would be a container, 4-5' HT would be a height)
- IV) You can also add Alt names for this attribute. For example, if the attribute is a 1 inch you could list the metric measurement in Alt 1 as 25mm.

- V) Look in the suggestions section to find attributes that you commonly use but are not in the master list yet. Push OK at the bottom of the pop-up to apply changes.
- VI) Once you have added all the attributes, you can organize the order they show on the plant by either clicking and dragging or highlighting and using the arrows on the right-hand side.
- VII) When all the attributes have been added and correctly ordered, push the Apply button at the bottom of the master attribute list screen.

Add Attribute

Name: 2 Year

Type: Age

Alt 1:

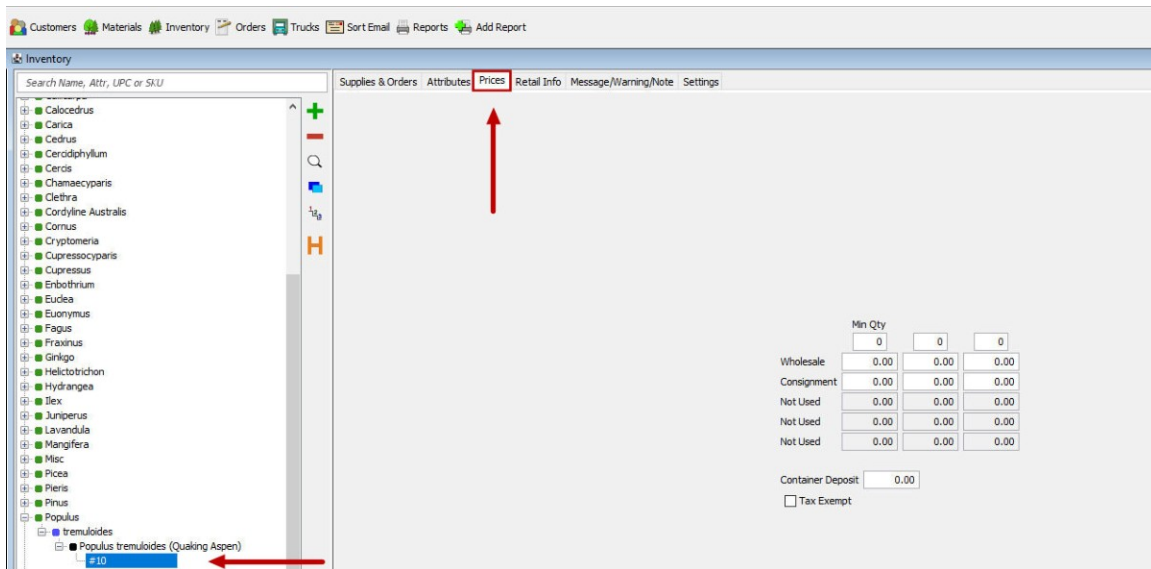
Alt 2:

Suggestions	
Attribute	Uses
1 Year	1

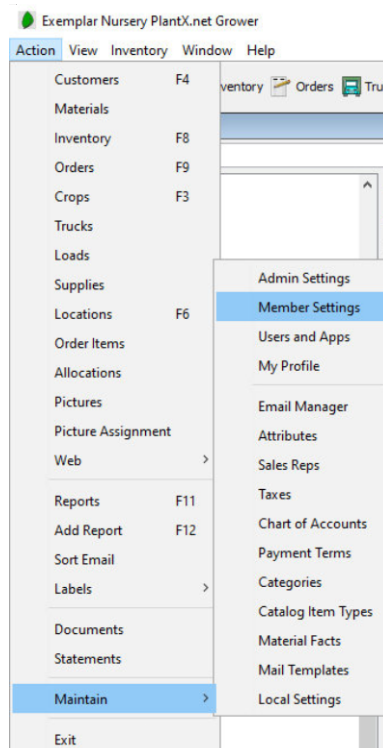
OK Cancel

How to Set Pricing

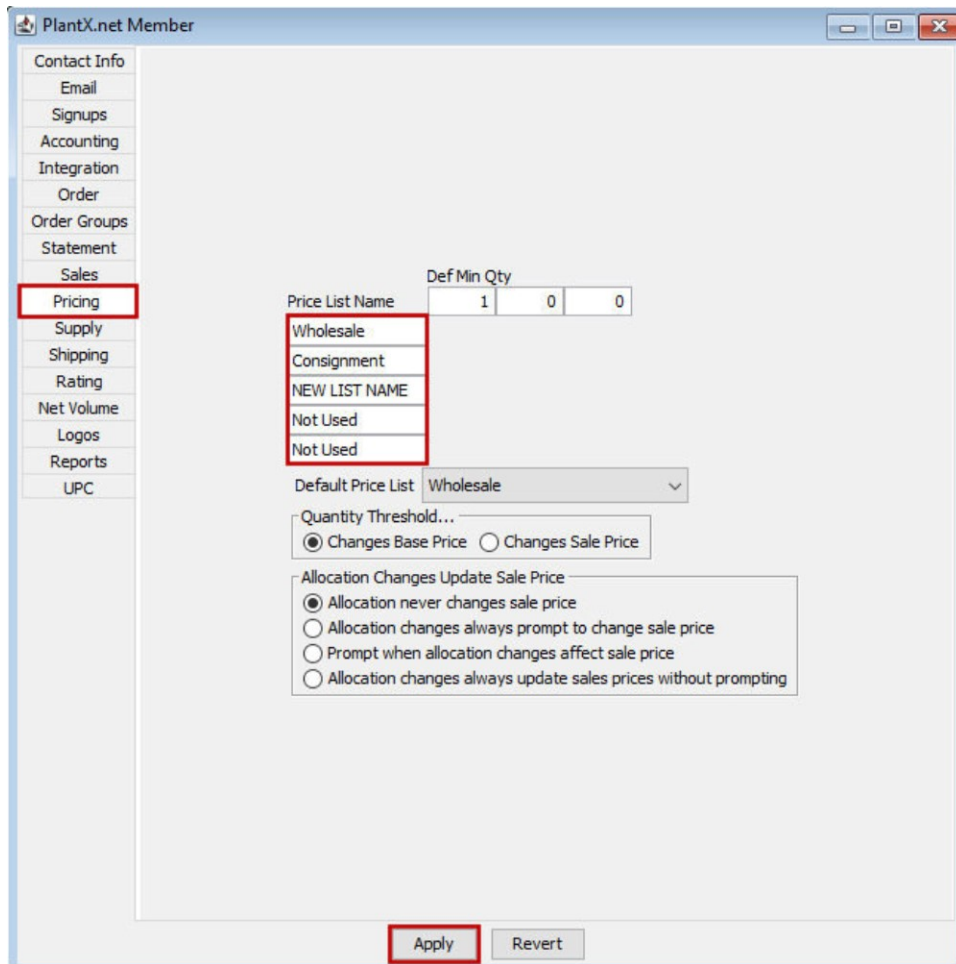
- 1) Select the inventory item of the desired plant. Then push the Prices tab at the top of the screen.



- 2) The pricing table is set up to allow 5 price lists and 3 quantity breaks. This allows for quantity discounting. To create a new price list, go to Action > Maintain > Member Settings.



3) Select the Pricing tab and enter the Price List Names in the boxes.



4) Go back to the inventory item and the select the Prices tab again.

5) Enter in the price per list for the plant and include quantity discounts if desired. You can have up to five different price lists. When done click Apply.

	Min Qty		
	1	10	25
Wholesale	100.00	90.00	80.00
Consignment	0.00	0.00	0.00
Not Used	0.00	0.00	0.00
Not Used	0.00	0.00	0.00
Not Used	0.00	0.00	0.00

Container Deposit

Tax Exempt

How to Use Settings

- 1) Select the inventory item and select the Settings tab.

Supplies & Orders Attributes Prices Retail Info Message/Warning/Note **Settings**

I → Product Type <None> v

II → UPC Code [] Result None/Invalid

III → SKU []

IV → Load Factor [0.0000]

V → Weight (Lbs) [0.0]

VI → Parcel [pallet/rack]

VII → Per Parcel [0] Current: 0.0%

VIII → Root Ball Size [0]

IX → Tag Color []

X → Optional Sort [] (10 characters max)

XI → Revenue Account [40000: Sales]

XII → Export ID [] (overrides revenue account export ID)

XIII → Max Discount [100]

XIV → Default Cost [0.00]

XV → Running Special

XVI → Include in tag charges

XVII → Maximum Listed [9999999]

XVIII → Hide

- 2) Fill in the settings that you will use. None of these are required, but can be useful.
 - I) Product Type: Only one type per product. Used to differentiate products.
 - II) UPC Code: Universal Product Code this can be used for barcodes.
 - III) SKU: Stock Keeping Unit for internal use and labels.
 - IV) Load Factor: This number is used to calculate how many items can fit on a truck. This is usually tied closely to footage. The default is a 1:1 ratio.
 - V) Weight (Lbs): This is the average weight of one item.
 - VI) Parcel: Defines the shipping package. (pallet, box, etc.)
 - VII) Per Parcel: How many items fits into it's parcel. (24 fit on a pallet)
 - VIII) Root Ball Size: Defines the root ball size.
 - IX) Tag Color: If your company uses color coded tags, you can keep track of that here.
 - X) Optional Sort: This is a special field that allows you to group plants in any way.
 - XI) Revenue Account: If you track revenue for different types of catalog items, you can assign a revenue account to it here. (e.g. B&B vs Containers)
 - XII) Export ID: QuickBooks override id. (Use Revenue account first.)
 - XIII) Max Discount: This is the maximum discount percentage allowed for the catalog item. (e.g. If a 25% discount is applied to an order but the max discount is set to 10% the item will only be discounted 10%)
 - XIV) Default Cost: Is the default cost for one catalog item.

- XV) Running Special: The catalog item is marked as special on orders and some reports.
- XVI) Include in tag charges: This item will be included on orders that have tags calculated.
- XVII) Maximum Listed: The maximum number of plants that will show up on availability reports and the website. (e.g. 10,000 plants listed as available but only 1,000 will show.)
- XVIII) Hide: Hides the catalog item and all supplies associated with it.

How to Use Message/Warning/Note

- 1) Select the inventory item and select the Message/Warning/Note tab.

The screenshot shows a software interface with a navigation bar at the top containing the following tabs: Supplies & Orders, Attributes, Prices, Retail Info, Message/Warning/Note (which is highlighted with a red border), and Settings. Below the navigation bar, the main content area contains the following text and form elements:

These fields optionally appear on supply reports.

Message

Characters Remaining for Message | 100

Specifications

Characters Remaining for Specifications | 100

Warning

Characters Remaining for Warning | 100

Note

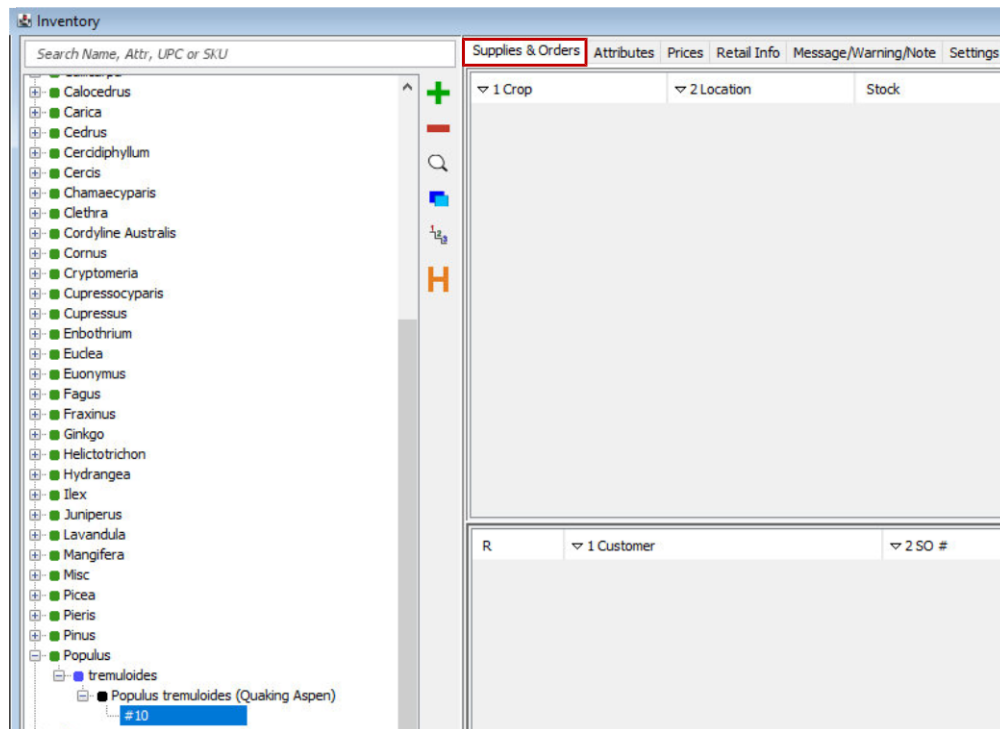
Characters Remaining for Note | 100

Four red arrows point to the input boxes for Message, Specifications, Warning, and Note.

- 2) Fill in the Messages box to show a message on a report to a customer.
- 3) Fill in the Specifications box to keep notes about additional catalog item specifications, this will optionally show up on reports.
- 4) Fill in the Warnings box to provide a warning when this plant is shipping to a specific state, customers will not see this. (e.g. CA – Requires paperwork)
- 5) Fill in the Note box to keep notes on catalog items for internal use only, customers will not see this.

How to Input Supplies

- 1) Select Inventory item and then the Supplies & Orders tab.



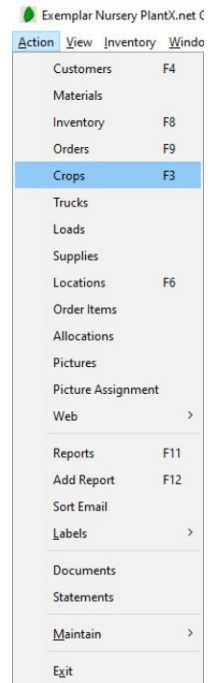
- 2) Click the green plus button on the right-hand side.
- 3) Fill in the pop-up and push OK when done.

The 'Add Supply' dialog box is shown. It has a title bar with a green leaf icon and a close button. The fields are: 'Crop' (dropdown menu with 'Production' selected), 'Location' (dropdown menu with 'A1-1' selected), 'Stock Quantity' (text input field), 'Cost Per' (text input field with '0.00'), 'Start' (text input field) with a checked 'List Available' checkbox, 'Ready' (text input field) with a checked 'Auto-Allocate' checkbox, 'Source' (text input field), a text area containing 'Supply created.', 'Reason' (text input field), and 'Note' (text input field). At the bottom are 'OK' and 'Cancel' buttons.

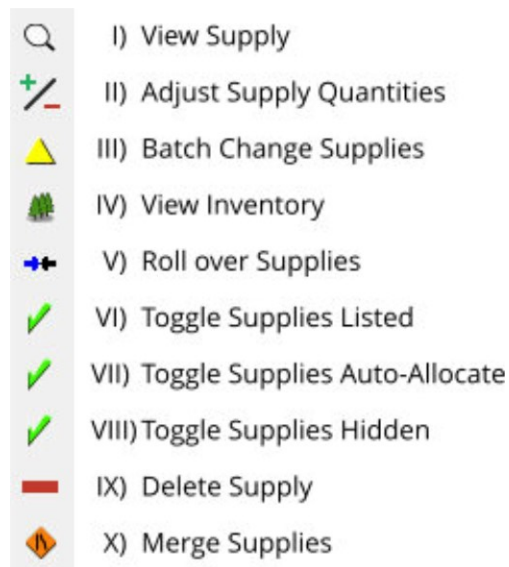
- I) A crop is a section of inventory. Usually a sales year or season. Crops are a great way to group inventory. To create a new crop, see How to Manage Crops.
- II) A location is usually a physical location, for example Field A or Greenhouse 1. To create a new Location, see How to Manage Locations.
- III) Stock Quantity is the total number of plants in that crop and location.
- IV) Cost Per is the cost per plant.
- V) Start and Ready are both dates. Start dates are when you plant or buy inventory. Ready dates are when you expect them to be ready, these are usually estimates.
- VI) If the List Available checkbox is checked, the plants are marked as available for sale. These plants will show up on your availability and website.
- VII) If the Auto-Allocate checkbox is checked the supply can be automatically allocated from. *This is a special feature used for allocating plant material.*
- VIII) Source is a place to keep track of where you got the plants from. Usually a vendor or seed source.
- IX) The Reason will always be Supply Created unless changed.
- X) The Note field is where you can enter any notes for the supply.

How to Manage Crops

- 1) The crops window allows you to see all crops and their status in an overview perspective. Go to Action > Crops to find this window.
- 2) All your crops will be in the top left. The percentages for Listed, Auto-Alloc, and Hidden show the percentage of each crop's supplies that correspond to the title. Select a crop to view all supplies that belong to that crop.
- 4) You can add a new crop using the green plus icon on the top right.
- 5) Give the new crop a name, and a date. This date is a sorting date to sort your crops.
- 6) You will then see the crop's information on the right hand side.
- 7) The Report Title is a way to group crops on your reports. For example, if you want crop A and crop B to be combined on a report you would name them the same in the Report Title, something like crop AB.
- 8) The Reporting Year is a way to sort crops on a report by year.



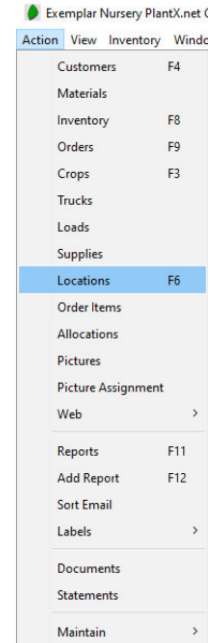
- 9) On the bottom half of the crop window all the supplies that belong to that crop will be listed. To the right of this list are buttons.



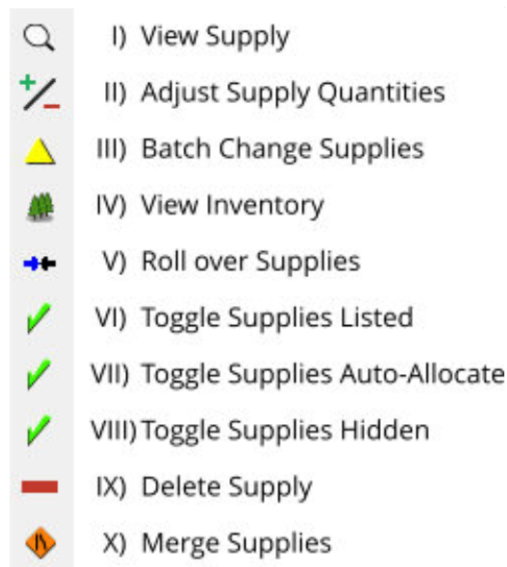
- I) This button will show up if only a single supply is selected, and it lets you view the single supply.
- II) This button allows you to adjust the stock number and give a reason why (disease, recount, etc.). This button only shows up when one supply is selected.
- III) The batch change button allows you to change all supply fields for the one or more selected supplies.
- IV) This button opens the inventory window for one selected supply.
- V) This is usually used as an end-of-year operation. Here you can roll over any unallocated quantities to a new crop. For example, you could move unsold 2020 crops to 2021. This can be used for one or more selected supplies.
- VI) This button will swap the check or uncheck in the Listed column for one or more selected supplies.
- VII) This button will swap the check or uncheck in the Auto Alloc column for one or more selected supplies.
- VIII) This button will swap the check or uncheck in the Hidden column for one or more selected supplies.
- IX) This button will delete the one or more selected supplies.
- X) This button will allow you to merge two or more supplies if they are the same catalog item.

How to Manage Locations

- 1) The locations window allows you to see all locations and their status in an overview perspective. Go to Action > Locations to find this window.
- 2) All your locations will be in the top left. Select a location to view all supplies that belong to that location.
- 4) You can add a new location using the green plus icon on the top right.
- 5) Now select the location you just created from the list. Group 1, 2, and 3 are a way to group your locations together. You can input the group name in the box. You can add each location to up to 3 groups.
- 6) If the plants require digging, you can check the box next to Plants Require Digging for Harvest.
- 7) You can also hide the location using the Hide checkbox.



- 8) On the bottom half of the locations window all the supplies that belong to that location will be listed. To the right of this list are buttons.



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