



web based solutions

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Inventory

Consumable items that need to be tracked are considered Inventory. Among other things, this could include paper supplies, cleaning supplies, etc

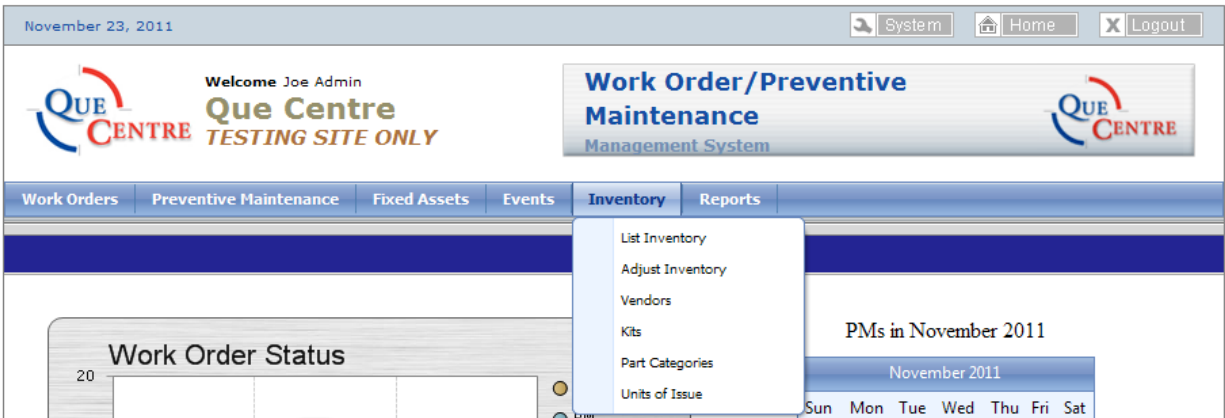


Figure 1 Dashboard - Inventory

Before an inventory part can be added to Que Centre, a Parts Category and units of issue must be created.

Parts Categories

Click on Parts Categories under the Inventory tab to display a list of Parts Categories

The 'Part Categories' page features a table with the following data:

Category Name	Description	Delete	Block
Cleaning Supplies		X	🔒
Grounds Supplies		X	🔒
Hardware Supplies		X	🔒
Mechanical Supplies		X	🔒
Office Supplies		X	🔒

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Figure 2 Inventory - Parts Category

Create New Parts Category

Click on Create New Category

Add New Part Category

Part Category Name: Description:

Reorder Contact User:

User Groups not allowed to view this category:

- Admin Assignee
- Admin Assistant
- Administrator
- Anonymous Event Requestor
- Basic Assignee
- Basic Requestor
- Dispatcher

User groups that can view this category:

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- Name the Part Category and add a description
- Select the User Groups that can view this category by clicking and dragging from the left side to the right side or by highlighting a user group and clicking the single right facing arrow.
- Click Add to save.

Units of Issue

Units of issue are also called units of measure. Clicking on Units of Issue under the Inventory tab opens a list of existing Units of Issue.

Units of Issue

Show Deleted

Unit of Issue Text	Unit Of Issue Value	Delete
Box	bx	<input type="button" value="X"/>
Case	cs	<input type="button" value="X"/>
Each	ea	<input type="button" value="X"/>
gallons	1	<input type="button" value="X"/>
Package	pk	<input type="button" value="X"/>
Quarts	Qts	<input type="button" value="X"/>

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Figure 3 Inventory - Units of Issue

Create New Unit of Issue

Click on Create New Unit of Issue

Add New Unit Of Issue

Unit of Issue Text: Unit of Issue Value:

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- Fill in the Unit of Issue Text. This will display in the Inventory Module.
- Assign a Unit of Issue Value, which is an abbreviation for the unit such as ea, cs, qt, etc
- Click Update to save

Vendors

Vendors can be added either under the Inventory tab or under the Fixed Asset tab. Clicking on Vendors under either tab will display a list of vendors. Both places will display the same list of vendors.

Inventory Vendors

Show Deleted

Vendor	Description	Contact	Phone	Delete	Block
▶ ABC Carpet				✗	🔒
▶ Ace Computing	Ace Computing			✗	🔒
▶ Amazon	Amazon			✗	🔒
▶ Apple Computer				✗	🔒
▶ Johnstone Supplies				✗	🔒
▶ Lowe's	Lowe's			✗	🔒
▶ Mary's Cleaning Supplies		Marv		✗	🔒
▶ Sam's Hardware Place				✗	🔒
▶ School Supply				✗	🔒
▶ Staples	Office Supplies			✗	🔒

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Figure 4 Inventory – Vendors

Create New Vendor

Click on Create New Vendor.

Add New Vendor

Vendor Name: Vendor Number:

Description: Contact Name:

Address: Phone Number:

Logo Filename: Fax Number:

Email Address:

Notes:

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Figure 5 Inventory - Create Vendor

- Fill in Vendor name and other information as needed.
- A logo may be uploaded from your computer by clicking the upload logo button.
- Click Add to save

List Inventory

Clicking on List Inventory under the Inventory tab displays a list of Inventory in Que Centre.

Inventory Parts

Vendor: Category: Inventory Threshold:

Show Backorder Show Deleted

Name	Description	Category	Unit	Unit Cost	Qty	Reorder Threshold	Delete	Block
3 M Glass Cleaner Concentrate	Non streaking General Purpose glass cleaner.	Cleaning Supplies		\$13.00	59	10	✗	🔒
3 M Heavy Duty Multi surface cleaner	Heavy Duty Multi surface cleaner	Cleaning Supplies	Case	\$10.00	68	5	✗	🔒
3434234	43234234	Cleaning Supplies	Case	\$12.00	123	112	✗	🔒
3H 3M Neutral Cleaner 3H	No rinse cleaner can be used in automatic scrubber	Cleaning Supplies	Case	\$10.00	48	5	✗	🔒
3M Fresh Scent Deodorizer	2L bottle	Cleaning Supplies	Case	\$10.00	144	5	✗	🔒
3M Doodle Bug	Blue Pad Refills for medium scrubbing jobs	Cleaning Supplies	Each	\$10.00	78	5	✗	🔒
AAA 5" blue Batteries	AAA 5" Batteries	Cleaning Supplies	Box	\$10.00	170	5	✗	🔒
AMD Degreaser Safety Solvent	Silicone aerosol spray lubricant	Cleaning Supplies	Case	\$10.00	21	5	✗	🔒
Anchor Plastic 3/8	Anchor Plastic 3/8	Hardware Supplies	Case	\$10.00	160	5	✗	🔒
Broom	Broom	Cleaning Supplies	Each	\$10.00	4	2	✗	🔒
Cop tubing-1	Plumb 1/4	Hardware Supplies	Case	\$10.00	27	5	✗	🔒

Figure 6 Inventory - List Inventory

The list can be filtered by Vendor, Category and Inventory Threshold. Details about the inventory can be seen by clicking on the name of supply.

Create New Part

Click on Create New Part

Add New Part

Category:

Part Name:

Description:

Manufacturer:

Vendor:

Model #:

Stock #:

Unit Of Issue:

Notes:

Logo Filename:

Campus:

Building:

Floor:

Room:

Location:

In Stock:

Backorder:

Cost:

Reorder Threshold:

Include In Equipment Materials:

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Figure 7 Inventory - Create New Part

- Select Category
- Name the Part and add a description.
- Select a Vendor from the dropdown box
- Select Unit of Issue from the dropdown box
- Select a location by using the dropdown boxes
- Add number in stock
- All inventory must have a price and a reorder threshold.
- Fill in backorder if appropriate
- Check the box next to Include in Equipment Materials if appropriate
- Click Add to save

Adjust Inventory

Inventory amounts can be adjusted from the Parts detail screen or from the Adjust Inventory Screen. Clicking Adjust Inventory from the Inventory tab opens a list of Inventory

The screenshot shows the 'Adjust Inventory' interface. At the top, there are dropdown menus for 'Vendor: Select', 'Category: Select', and 'Default Operator: +', along with an 'Apply Global Comment' button. Below this is a table with two columns of parts. Each row contains a 'Part Name', 'Cur', 'B/O', and 'Qty' field. The 'Qty' field includes a numeric input box, a dropdown for the operand (+, -, =), and a button with an ellipsis (...). At the bottom of the table, there are two buttons: 'Update' (with a green checkmark) and 'Reset Form' (with a red X).

Part Name	Cur	B/O	Qty	Part Name	Cur	B/O	Qty
2223	123	1	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	22332	122	12	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3 M Glass Cleaner Concentrate	59	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3 M Heavy Duty Multi surface cleaner	68	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3434234	123	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3H 3M Neutral Cleaner 3H	48	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
3M Fresh Scent Deodorizer	144	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	3M Doodle Bug	78	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
AAA 5" blue Batteries	170	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	AMD Degreaser Safety Solvent	21	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Anchor Plastic 3/8	160	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Broom	4	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Cop tubing-1	27	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Disposable Latex gloves -small	0	3	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Drain Opener	10	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Ice Scraper	3	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Jim	1	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	New Item	33	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>
Paper	10	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>	Plumbing-110	13	0	<input type="text"/> <input type="button" value="±"/> <input type="button" value="⋮"/>

Figure 8 Inventory - Adjust Inventory

Adjustments can be made to multiple Inventory Parts at once.

Enter the quantity you want to adjust up or down in the Qty box then make sure the operand is set to + or - or = as appropriate.

Enter comments for that part by clicking on the button with the ellipsis (...). These comments will be displayed on an Inventory Report. Click Update to save the changes

Kits

Kits are groups of parts that might be used together or for a specific process. Clicking on Kits under the Inventory tab displays a list of Kits created in Que Centre.

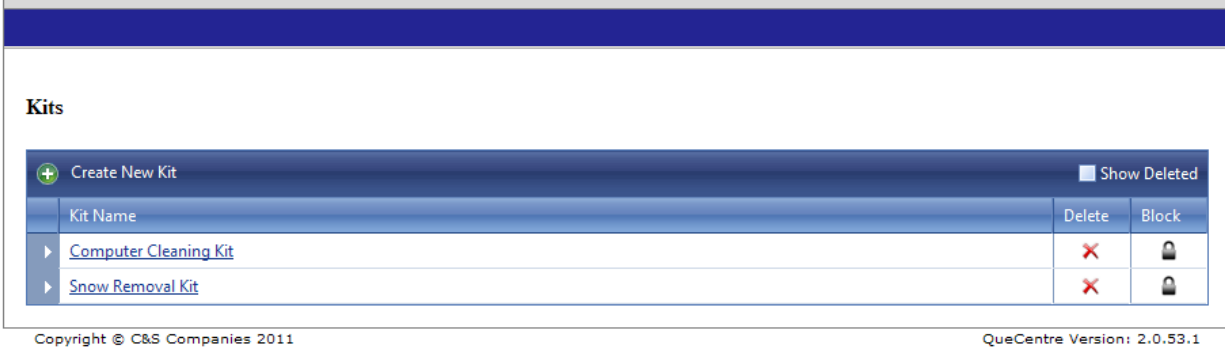


Figure 9 Inventory – Kits

Create New Kit

Click Create New Kit

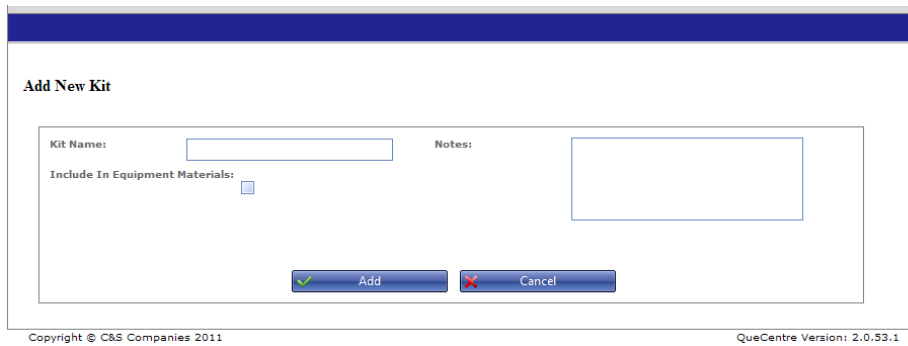


Figure 10 Inventory - Create New Kit

- Name the kit and add notes as needed
- Check the Include in Equipment Materials if appropriate
- Click Add to save

Once saved parts can be added to the kit.

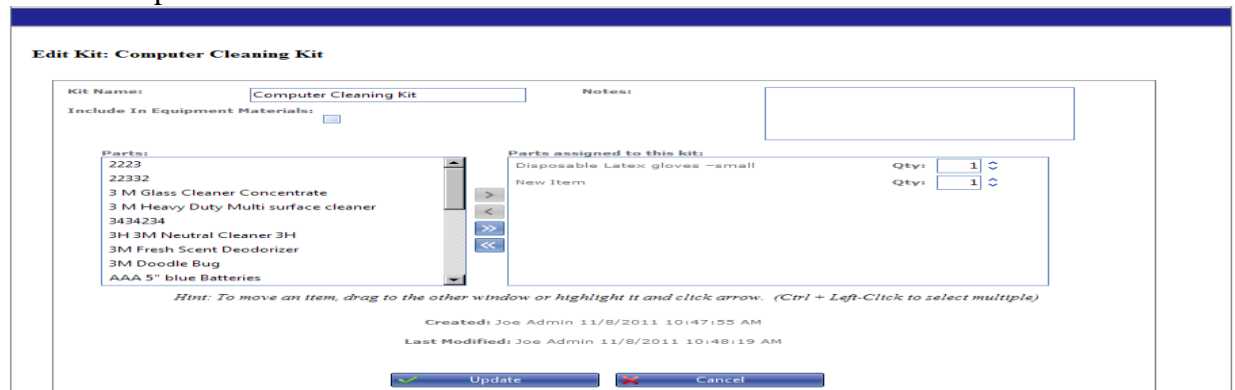


Figure 11 Inventory - Edit Kit

Move parts from the left side of the screen to the right by clicking and dragging or highlighting the part and clicking the single right facing arrow Click Update to save the changes.

Using Inventory on Work Orders

If the logged in user has privileges to use inventory, the Inventory tab will appear on the create work order screen next to the Work Order Detail tab. Clicking the Inventory tab will result in displaying the Inventory selections. Users may see different Inventory Categories based on their view privileges.

Create New Work Order

Work Order Contact Please be as detailed as possible.

Contact Information: Edwards, Ann

Save

Save & Print

Work Order List

Work Order Details | Inventory

Parts not currently assigned:

- Office Supplies
- Custodial Supplies
- AV Supplies
- Art Supplies

Parts assigned:

Parts Total Cost: \$0.00

Kits not currently assigned:

Kits assigned:

Kits Total Cost: \$0.00

Total Cost: \$0.00

Hint: To move an item, drag to the other window or highlight it and click arrow. (Ctrl + Left-Click to select multiple)

Figure 12-Inventory tab

Inventory Categories

Expand the Inventory Categories by clicking on the plus sign next to the category name. This will expand to show a list of inventory items under that category

Work Order Details | Inventory

Parts not currently assigned:

- Office Supplies
 - O-pencils #2 (box of 12)
 - O-Letterhead antique gold vellum (ream)
 - O-Letterhead gray vellum (ream)
 - O-Copy Paper 8.5"x11" white

Parts assigned:

Parts Total Cost: \$0.00

Kits not currently assigned:

Kits assigned:

Figure 13-Inventory Category Expanded

Inventory Selections

Once the Inventory Categories are expanded, select the individual pieces of inventory by either highlighting the item and clicking the single right facing arrow, or clicking and dragging the item from the left box to the right box

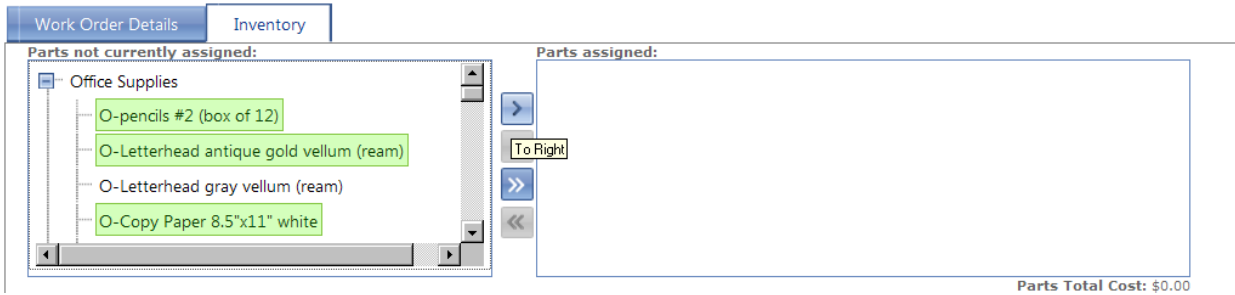


Figure 14-Inventory Selected

Adjusting Quantities

Once the individual items have been added to the right side of the box, the amounts can be adjusted. A number can be typed into the box, or the up and down arrows can be used to adjust the amount.

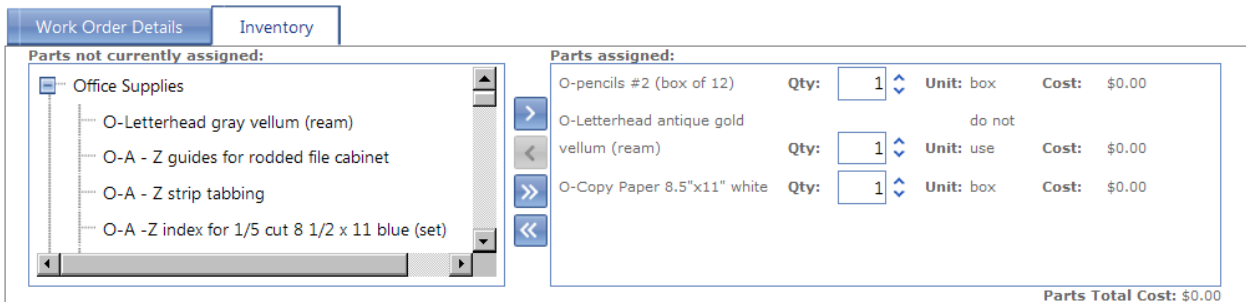


Figure 15-Inventory Added

Work Order Main Details

If the main details tab has not already been filled out, make sure to complete the information as for a normal work order. Click the save button to save your work order and inventory selections.