Inventory Inquiry / Transactional History Outline

**Reading Stock Card Inventory data**

* Quantity On Hand, Available, Allocated, and Scheduled and what each means.
* What other Warehouses stock this item?
	+ Item Details and SKU tab
* Location of material
	+ Warehouse Numbers
	+ Bin locations in Specific Warehouses
* Serial and Shading of inventory and how to read it.
* How to change the Unit of Measure to other options.
	+ Explain why and how those options exist.

**Available Options**

* Review Important fields that can be changed to fit your needs.
	+ Date
	+ Transaction type
	+ Location
	+ Serial#
	+ Warehouse
	+ Unit of Measure
	+ Record display amount
* Discuss Transaction Type definitions
	+ Drilldown to each transaction
		- Cost
		- Price
		- Account
		- Order#
		- Account#
		- Receipt#
		- Line #
	+ Locate customer Orders and Transfers
	+ Identify open Purchase Orders
	+ Review inventory receipts
* Common adjustment code review
	+ Lost or Found
	+ Cycle Count
	+ Damaged/ Defective
	+ Expired
	+ Measurement Change (Under 1 SF)
	+ Return to Stock (Customer Return)
	+ Vendor Return (Returning material to Supplier)

**Warehouse Associate**

**Let’s simulate an inventory review for some missing material.**

* The item number is SCHA100ACG
* We are short 8 PC and we could not fill the customers’ needs when we came to pick up.
* Steps to work through to try and determine what happened in this situation.
	+ Check to see if any other location in your WH holds this material. If so, count and see if that location is correct.
	+ Look for any adjustments in recent history that may be related to the shortage. Review any adjustment that could lead to the reason for the shortage.
	+ Check received POs and Stock Transfers for accidental over receipts. This could explain a shortage. A Tier 2 that is in process or that was not completed and corrected should be reviewed, if it exists.
	+ Look at recent closed orders or invoices. We could have over shipped this material, and this could be the reason for the shortage.
	+ Lastly, make sure to fix the inventory. Depending on what the original cause of the shortage was, will determine what adjustment code should be used to fix the discrepancy.