InventoryWorks Quick Start Guide

Nothing is more frustrating than spending a significant amount of time configuring your system before you can get to what you really want to do-get visibility into your inventory! After you've installed the app into your org, follow these simple steps to immediately get visibility into your inventory quantities and valuation.

1 SETUP

- 1) Assign a license to the user(s) who will be using the app.
 - a) Go to Setup > Installed Packages > Manage Licenses
 - b) Select "Add Users" to assign the license(s) and select the user(s) who need access.

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Package Usage	the other features in setup or as a group by clicking Deploy. Depending on the links next to an installed package, you can take d To remove a package, click Uninstall. To manage your package licc						Visit AppExchange »
Didn't find what you're looking for? Try using Global Search.	Installed Package Action Uninstalled Package Uninstalled Package Uninstalled Package No uninstalled package data archives	Version Number Namespace Pref ortsDev6 1.2 InventoryMgr	is Status Allowed Licenses Use Active 1 1	d Licenses Enabled for Platform Integrations	Expiration Date Install Date Does not Expire 6/27/2024, 4-52 Ph		bjects AppExchange Ready 10 Passed

- 2) Add InventoryWorks Page Layouts to the profile of the users selected in Step 1.
 - a) In the Setup menu, go to Object Manager and select the "Product" object label.
 - b) Select Page Layouts and click on the "Page Layout Assignment" button.
 - c) Click on "Edit Assignments" button and assign the Inventory Product Layout to the profile of the user(s) who need access.

	Save Cancel
	Page Layout To Use: Inventory Product Layout 1 Selected 1 Changed
rofiles	Page Layout
Analytics Cloud Integration User	Product Layout
Analytics Cloud Security User	Product Layout
hatter External User	Product Layout
Chatter Free User	Product Layout
Chatter Moderator User	Product Layout
Chatter Only User	Product Layout
Company Communities User	Product Layout
Contract Manager	Product Layout
Customer Community Login User	Product Layout
Customer Community Plus Login User	Product Layout
Customer Community Plus User	Product Layout
Customer Community User	Product Layout
External Identity User	Product Layout
High Volume Customer Portal User	Product Layout
dentity User	Product Layout
Aarketing User	Product Layout
Minimum Access - API Only Integrations	Not Assigned
Minimum Access - Salesforce	Not Assigned
Partner Community Login User	Product Layout
Partner Community User	Product Layout
Read Only	Product Layout
Solution Manager	Product Layout
Standard Platform User	Product Layout
Standard User	Product Layout
System Administrator	Inventory Product Layout
Work.com Only User	Product Layout



2 ADD PRODUCTS AND INVENTORY

- 1) Go to the App Launcher waffle, search for and select Inventory Management
- 2) Select the Product down arrow and select "+New Product"
 - a) Add the product name, Product Code, and Last Landed Price (Cost)
 - b) Click on the "Active" box to activate the product and Save the record

		* = Required Informatio
* Product Name	Product Family	
Black Thermos	None	*
Product Code	Active	
THERM-BL		
Product SKU		
Last Landed Price	5	
\$10.00000		
Sell/Use Unit of Measure (UoM)		
EA		
Buy Unit of Measure (UoM)		
EA	· •	
Min Inventory 0		
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Product Description		
Black Thermos w/ straw and lid		
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- 3) Select the Inventory Adjustment down arrow and select "+Inventory Adjustment"
 - a) Type in the Product Name from Step 2
 - b) Add the initial inventory quantity to the "Adjustment Quantity" field
 - c) For the "Reason" field, we recommend "Initial Quantity"

New Invento	ry Adjustment
	* = Required Informatio
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Inventory Adjustment Name	Owner
Product 5	Inventory Log Created
Adjustment Quantity 0 5	Cycle Count Quantity 🚺
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4) Repeat steps 2 and 3 for all products and inventory.



3 VIEW INVENTORY QUANTITIES AND VALUATION

- 1) Click on the Reports tab
- 2) Go to All Reports and select "Inventory Valuation Report"
- 3) The report will show all products entered with their quantity, cost, and total value

Тс 3		Total Product: Las \$11.50000	st Landed Price Total Quant 2,125.00	and the second se		
	Product: Pro	duct Name 💌	Product: Product Code 💌	Product: Last Landed Price 🕴 💌	Quantity	fx Total Product Value
1	Black Thermos		THERM-BL	\$10.00000	175.0000	1,750.00
2	Lid, Clear		LID-CL	\$1.00000	975.0000	975.00
3	12" Straw		STRAW-12	\$0.50000	975.0000	487.50
4				\$11.50000	2,125.0000	3,212.50

