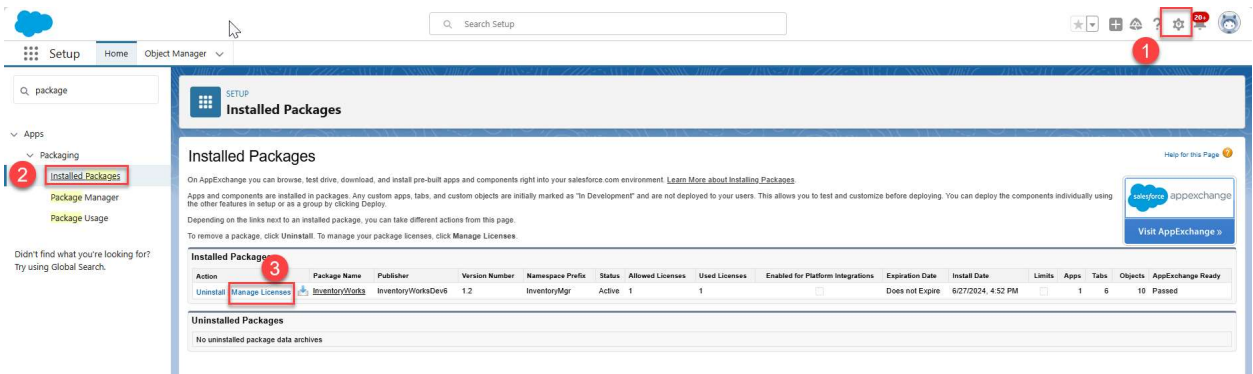


InventoryWorks Quick Start Guide

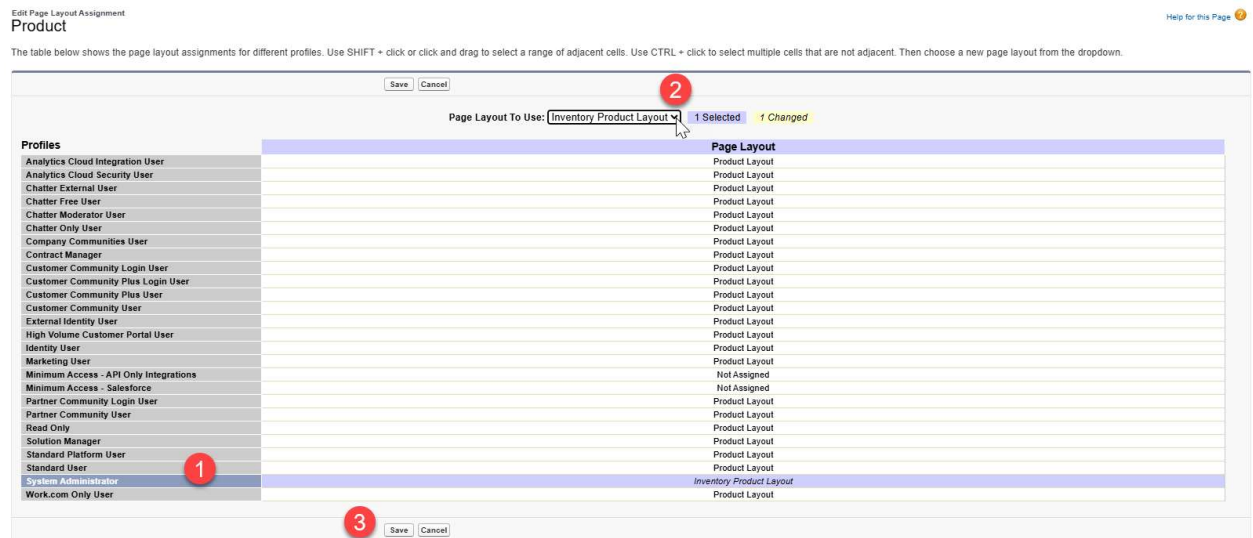
Nothing is more frustrating than spending a significant amount of time configuring your system before you can get to what you really want to do—get visibility into your inventory! After you’ve installed the app into your org, follow these simple steps to immediately get visibility into your inventory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



- 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.



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

Form titled "Edit Black Thermos" with a legend indicating that asterisks denote required information. Fields include: Product Name (Black Thermos), Product Family (None), Product Code (THERM-BL), Product SKU, Last Landed Price (\$10.00000), Sell/Use Unit of Measure (EA), Buy Unit of Measure (EA), Min Inventory, and Product Description (Black Thermos w/ straw and lid). The "Active" checkbox is checked. Buttons at the bottom are "Cancel", "Save & New", and "Save".


- 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”

Form titled "New Inventory Adjustment" with a legend indicating that asterisks denote required information. Fields include: Inventory Adjustment Name, Product (Black Thermos), Adjustment Quantity (100.0000), UoM (EA), Date (6/28/2024), Time (9:39 AM), Reason (Initial quantity), and Cycle Count Quantity. The "Owner" is IW Admin. Buttons at the bottom are "Cancel", "Save & New", and "Save".

- 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

 Report: Inventory Summary with Product
Inventory Valuation Report
Includes a list of all products and their quantity multiplied by the Last Landed Price.

Total Records	Total Product: Last Landed Price	Total Quantity	Total Total Product Value
3	\$11.50000	2,125.0000	3,212.50

	Product: Product 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