Smarter Inventory Management for Small Business

InventoryWorks User Guide

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2. Introduction

InventoryWorks is an ERP-lite application for small businesses looking to manage supply chain operations from inventory management to order fulfillment from within the Salesforce platform. It includes six essential modules: Purchase Requisitions, Purchase Orders, Production Logs, Bill of Materials, Inventory Management, and Inventory Adjustments. The app leverages Salesforce standard objects like Products, Orders, and Accounts as the foundation for its inventory platform.

3. Setting Up Your Environment

3.1 License Assignment

Users needing Create, Read, Edit, or Delete (CRED) permissions on InventoryWorks objects must have a license assigned. Objects include Purchase Requisitions, Purchase Orders, Production Logs, Inventory Logs, Inventory Summary, and Inventory Adjustments. To assign, navigate to Setup → Installed Packages → Manage Licenses → Add Users.

3.2 Permissions and Post-Install Updates

3.2.1 Assign permission sets:
- InventoryWorks Admin – Full access
- InventoryWorks User – Create, Read, Edit only
- InventoryWorks Read-Only – View only

3.2.2 Apply layouts and Lightning Record Pages

Assign the following layouts. If you choose to use your own layout, please refer to section 0 and section 8 for required fields to be added to your layout.

- Product Object → Inventory Product Layout
- Order Object → Inventory Order Layout
- Order Product Object → Inventory Order Product Layout

Activate Lightning Record Pages as Org Defaults for consistency.

- Product Object → Inventory Product Record Page
- Purchase Order Object → Purchase Order Record Page

Add Purchase Order Path. This path can be used to visually see the progress of the Purchase Order life cycle. Help instructions can be added for users to process the Purchase Order correctly according to a company's unique processes.

4. Creating and Managing Data

4.1 Create Vendors

Products must be tied to vendors. To create a new Vendor, go to Accounts → New → Record Type = Vendor. Convert existing accounts manually or via Data Loader.

4.2 Create Products

Products must have:

- Active box checked
- Assigned to Standard Price Book
- Linked Vendor through Product Vendor Record relationship
- Buy Unit of Measure field populated
- Sell Unit of Measure field populated

Additional recommended fields:

- Product SKU
- Last Landed Price – This is a calculated field that changes over time if the product is purchased at variable prices.
- Minimum Inventory – Can provide insight into products that need to be ordered

4.3 Bills of Material (BOM)

To track assemblies or kits:

1. Create product records for components and the kit or assembled item.
2. Open the kit/assembled product → Related tab → Bill of Materials → New.
3. Add components and quantities.
4. Save and continue adding as needed.

5. Purchase Management

Purchase Requisitions signal the need for materials. Purchase Orders formalize vendor orders.

Purchase Orders can be created manually, or by converting a Purchase Requisition. Purchase Order workflow:

- New – Initial status
- Placed – Set manually by the user
- Partially Received – Set automatically when only some line items are received
- Received – Set automatically if all line items are received when the PO is in Placed or Partially Received status.
- Hold – Set manually by the user

Receiving line items updates inventory automatically when the received date is populated.

6. Production Logs

Production Logs record manufacturing activity. When created, InventoryWorks increments finished product inventory and decrements component inventory based on the BOM.

7. Inventory Management

Inventory is managed through Purchase Orders (receipts), Orders (shipments), and Adjustments (manual updates).

- Inventory Adjustment: Adjust stock for cycle counts or corrections. The adjustment quantity modifies the quantity of an item by the set amount. The cycle count quantity sets the total inventory of an item to the set amount.
- Inventory Logs: Tracks every change in inventory automatically.
- Inventory Summary: Shows current product quantities.

Inventory Logs and Inventory Summary records should not be created by an admin user. They are calculated records based on transactions.

8. Order Fulfillment

Orders in InventoryWorks are essential for managing product fulfillment and maintaining accurate inventory levels. They record when products are shipped or returned, automatically updating stock quantities and providing a complete audit trail of customer deliveries and inventory movement.

Administrator Setup:

1. Ensure "Enable Orders" checkbox is marked under Order Settings.
2. Ensure that the "Enable Negative Quantity" checkbox is marked in Order Settings if you need to create return orders.

3. Assign the Inventory Order Layout to all profiles. If you do not want to use the provided layout, simply add the "Fulfill Order" button to your Order page layout.
4. Assign the Inventory Order Product Layout to all profiles. If you do not want to use the provided layout, simply add the "Date Fulfilled" field on the Order Product object layout
5. Add a Picklist value to your "Status" field on the Order Object named "Shipped" (API Name = "Shipped" and should be an "Active" Status Category.) If you will be using the "Fulfill Order" button in step 3, this step is required.

Inventory increments when the fulfilled date is populated. When the "Fulfill Order" button is activated, tracking information can be recorded and then all items will be populated with a fulfilled date. The Order Status is then updated to Shipped.

9. Inventory Reports

InventoryWorks includes these prebuilt reports:

- Where Used Report – Displays BOM components and their corresponding parent assemblies.
- Inventory Valuation Report – Provides each product quantity × Last Landed Price.
- Reorder Report – Lists products below minimum inventory threshold.

10. Frequently Asked Questions (FAQ)

Q: Why can't I assign a license to some users?

A: Only Salesforce license types that support the Product object (not Platform licenses) are compatible with InventoryWorks licenses.

Q: How do I bulk convert existing accounts to vendors?

A: Use Salesforce Data Loader to update the Account Record Type to 'Vendor'.

Q: Why doesn't my product appear in the Purchase Order picklist?

A: Ensure it is Active, assigned to a Standard Price Book, and linked to a Vendor.

Q: Can I customize the Purchase Order layout?

A: Yes, but ensure required fields like Status and Received Date remain present for automation.

Q: How is inventory quantity updated?

A: Automatically when Purchase Orders are received, Production Logs are saved, or Orders are fulfilled.

Q: Can I track partial receipts?

A: Yes. The Receive PO Lines button splits line items automatically to reflect partial receipts.

Q: What is the difference between Inventory Logs and Inventory Summary?

A: Inventory Logs track all transactions; Inventory Summary shows the current total quantity per product.

Q: Can I return products to inventory?

A: Yes. Create an Order with a negative quantity and ensure 'Enable Negative Quantity' is checked in Order Settings.

Q: What if I don't have an account record type tied to my existing customers and vendors?

A: Create separate account record types for customers vs. vendors.

11. Appendix: Salesforce Basics for InventoryWorks

If you're new to Salesforce, familiarize yourself with these key terms:

- Objects: Data tables like Products, Orders, Accounts.
- Record Types: Categories within an object (e.g., Vendor, Customer).
- Tabs: Navigation shortcuts to objects.
- Page Layouts: Define visible fields and buttons.
- Permission Sets: Control access to objects and features.