

WMS: Did You Know?

From Professor Merlot



Inventory Snapshot - Get your current Inventory!

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To find the current status of your WMS Inventory, here's a tool that will allow you to tailor groups of your data into a report that you can run at any time. The Inventory Snapshot is a report that you can set up from the Products form. Here's how it's done for say, tracking all of your Bottles in the WMS database:

- First thing to do is create your own Inventory Types
- Open the Products form from the Purchasing Switchboard
- Click the “Add/Edit” button in the **Inventory** Group box
- This will display all of the groups currently in WMS
- If the group you want is here, as is **Bott**, for **Bottles**, then close the form using the door button.
- If the group is not here, add a **Group** and a **Description** to the bottom of the list (on the asterisk (New) line *)

ID	Type	Description	Include
3	Bott	Bottles	<input checked="" type="checkbox"/>
2	Fee	Service fees	<input type="checkbox"/>
5	GC	Gift certificates	<input type="checkbox"/>
6	Gift	Gifts only	<input type="checkbox"/>
1	Kits	All week kits	<input type="checkbox"/>
4	Ret	Retail sales items	<input type="checkbox"/>
7	Corks	All corks	<input type="checkbox"/>
*	(New)		<input type="checkbox"/>

- Open the Products form in the Purchasing Switchboard and using the Filter by Form button at the bottom of the form, select the **Sales Category = Bottles** for example
- In this case, the first one is “**Bottles Blue 375ml-12**” and we have **9** products in this Sales Category

- In the **Inventory** group, open the Drop Down button labeled **Type** and select **Bott**
- This means that **the above product is grouped with other in the Bott Inventory Type**

- Using the arrow buttons at the bottom of the form, move to each of the 9 bottle products and select the **Inventory Type = Bott** using the Drop Down button
- You should now have 9 bottle products in the Bott group
- Close the form and return to the Purchasing Switchboard



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- Select the **Inventory Switchboard**, then select **Reports** and then select the **Inventory Snapshot** report

- The **Inventory Snapshot Select** form will be displayed

Include	Inventory Type	Description
<input checked="" type="checkbox"/>	Bott	Bottles
<input type="checkbox"/>	Corks	All corks
<input type="checkbox"/>	Fee	Service fees
<input type="checkbox"/>	GC	Gift certificates
<input type="checkbox"/>	Gift	Gifts only
<input type="checkbox"/>	Kits	All week kits

- In this example, we choose the **Bott** Inventory Type for this report to include

- This report will give you the current status of all of the selected products in WMS at the current moment. Running this report at month end is usually a good method for tracking inventory

- Press the **Preview** button to open the report as below

- Notice the report is grouped by **Inventory Type**, so it is very easy to setup multiple groups to run at one time

Inventory Snapshot for Selected Inventory Types at: Shelley's Wine Emporium					
Type: Bott- Bottles					
Product Name	Supplier	Product Number	Units In Stock	Cost/Unit	S Value
Bottles Blue 375ml-12	Winexpert	86-0055	4	\$17.95	\$71.80
Bottles Bord Green 750ml	Winexpert	86-0000	7	\$6.50	\$45.50
Bottles Burgundy Amber 750ml	Winexpert	86-0040	6	\$8.00	\$48.00
Bottles Clear 375ml Bord Single	Winexpert	86-0035	59	\$0.60	\$35.65
Bottles Green 375ml Bord Single	Winexpert	86-0010	77	\$0.60	\$46.52
Bottles PET 1L Green	Winexpert	86-0065	7	\$7.50	\$52.50
Bottles PET 594 Amber	Winexpert	86-0068	0	\$8.50	\$0.00
Bottles PET 594 ml Clear	Winexpert	86-0069	6	\$8.50	\$51.00
Bottles Sparkling	Winexpert	86-0045	5	\$10.95	\$54.75
Total S Value for Inventory Type 'Bott' = \$405.72					
Report Total S Value = \$405.72					

- Also note, this report is for **Active Products Only**

- A **date and time stamp** is included at the bottom of the report for ensuring you know when this report was generated”.

