Managing a Warehouse

Create a new warehouse to house your parts. Create as many warehouses as you need if you store your parts in multiple physical locations. A warehouse can also be a truck that hold parts.

Add a new warehouse and assign it a name, code, address, link to a GL account, and provide a brief description of the warehouse.

After you create a new warehouse, you can view the warehouse details and start building its inventory contents. When viewing the warehouse details, you can find the following tabs:

- *Inventory*: Lists the parts on hand in that warehouse.
- *Purchase Orders*: Lists the POs associated with this warehouse.
- *Physical Inventory*: Physical Inventory audits associated with this warehouse.
- *Technicians*: A list of technicians assigned to this warehouse.
- *Part Ledger*: All the ledger transactions affecting parts in that warehouse.

Add parts to the warehouse under the inventory tab. You will be prompted to fill out the following details for each new part:

- *Part*: Choose the part you are adding from the dropdown of parts list.
- *Row*: Identify the assigned row for this part's physical location in the warehouse.
- *Shelf*: Identify the assigned shelf for this part's physical location in the warehouse.
- *Bin*: Identify the assigned bin for this part's physical location in the warehouse.
- *Minimum*: Identify what you want the minimum stock amount for this part to be in the warehouse. This will be used to indicate when it is time to reorder the part.
- *Maximum*: Identify what you want the maximum stock amount for this part to be in the warehouse. This number will indicate if you have overstock of the part.
- *Reorder Threshold*: Identify what the minimum quantity is to reorder this part.
- *Optimal Quantity*: The optimal order quantity number is used to indicate what your preferred order amount is for the part. For example, if you receive a discount for ordering 25 units, your optimal quantity will likely be 25. This quantity is used when adding parts to new purchase orders. By default, the optimal quantity will be set to 1 for new parts unless you override it.

Technicians

To add technicians to a warehouse, they must first be identified as a Technician in the employee editor menu. In the employee setup window, check "Technician" to identify the employee as a technician. You can also assign a default warehouse for this technician.

Once employees are associated with a warehouse, you can start adding them as technicians to the respective warehouse.