3.17 Perpetual Inventory

Overview

The *Perpetual Inventory* option within Route Manager enables the ability to carry product inventory totals on your truck from day-to-day without having to unload inventory each afternoon. This is especially helpful for companies running coffee service, snack routes, or any other product where items are left on the vehicle each day. This document will guide you through setting up your system to use this feature on the handheld.

The topics are covered in the order listed below:

▶ Enable Perpetual Inventory

▶ Enable Take Inventory (Optional)

▶ Handheld Processing

▶ Desktop Reports
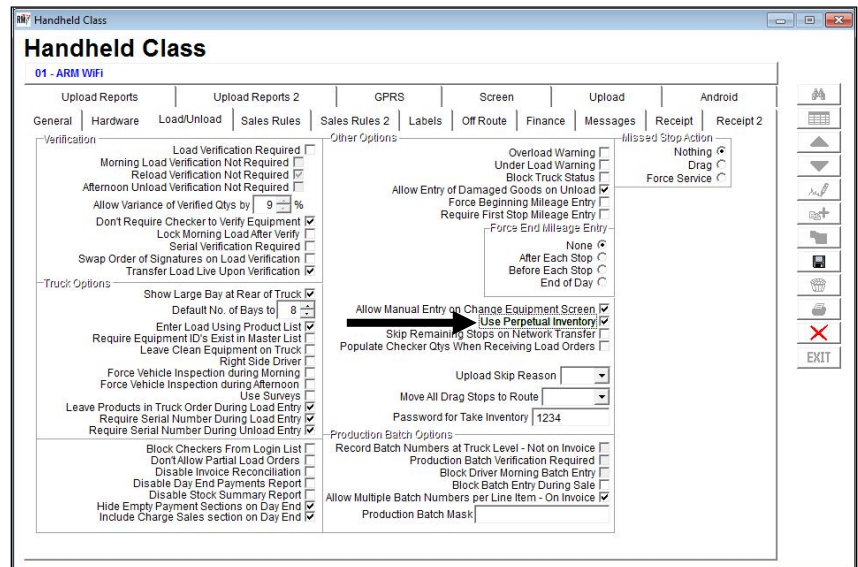
Continue to the next section to get started!

Enable Perpetual Inventory

With *Perpetual Inventory* enabled, drivers will not be required to unload all of the products from their trucks each day. Any products remaining on the truck will automatically show up on the handheld the next day and the driver can simply add to the quantities already available. All new stock added to the vehicle is recorded each day as it is received.

NOTE: Empty containers are still required to be unloaded from the delivery vehicles daily.
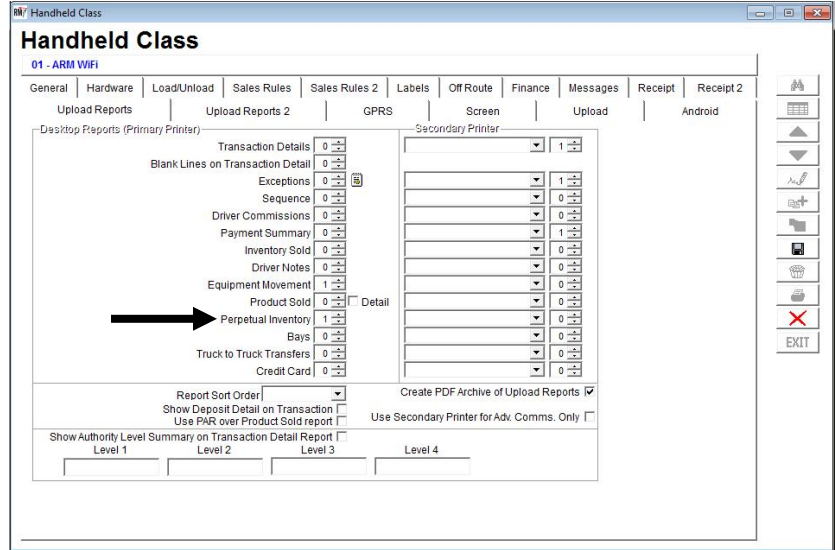
Handheld Class

To enable the *Perpetual Inventory* option, navigate to: *Lists > Routes > Handheld Class > Load/Unload* tab, and choose the 'Use Perpetual Inventory' option (below).

Next, enable the *Perpetual Inventory Report* that will provide you with daily perpetual inventory totals during the *Afternoon Card* process. This option can be found on the *Upload Reports* tab within the *Handheld Class* screen.

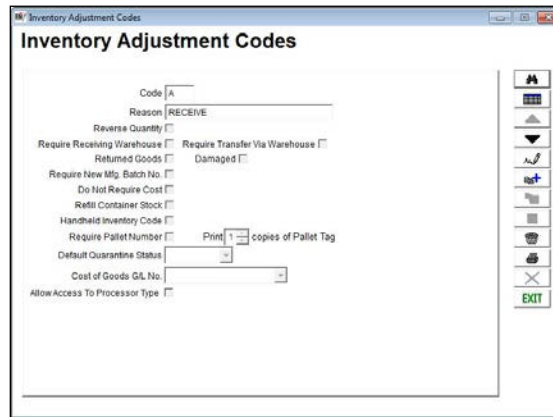Enter a 1 (or more) to receive a single copy of the report each day:

Continue to the next section to enable the optional *Take Inventory* feature, or skip to the *Handheld Processing* section.

Enable Take Inventory (Optional)

The *Take Inventory* option allows each driver to perform a stock count on the delivery vehicle to ensure that the quantities are accurate. This can be performed at any time and a report is provided on the handheld printer.

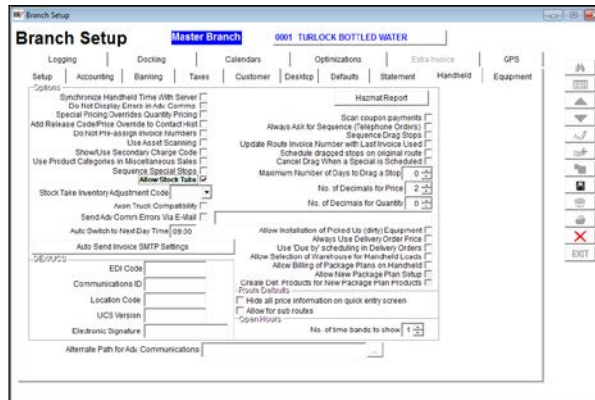Follow the steps below to enable the *Take Inventory* feature:

1. Create a unique 'Inventory Stock Take' adjustment code within *Lists > Product Codes > Inventory Adjustment Codes:*
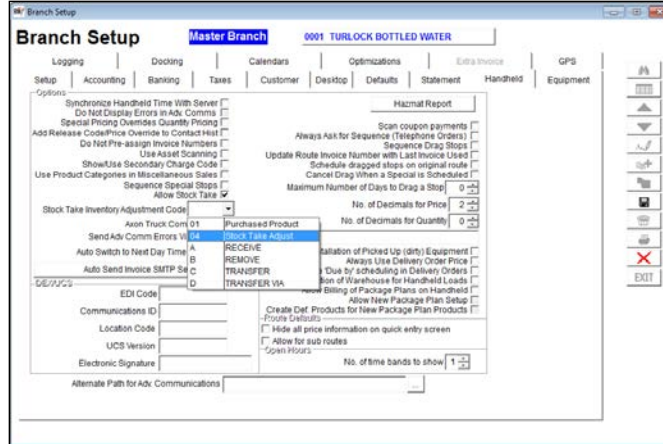

NOTE: This adjustment code will be used if the driver makes an adjustment to the inventory.

2. Select the option 'Allow Stock Take' within *File > Branch Setup*, on the *Handheld* tab.

3. Select the new inventory code created earlier from within the *Stock Take Inventory Adjustment Code* field on the *Handheld* tab:

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4. *Save* your changes and continue to the next section.

Handheld Processing

The *Perpetual Inventory* option is managed entirely on the handheld. The handheld will automatically carry-over inventory from one day to the next. This section will guide you through the changes and processes that should be followed on the handheld.
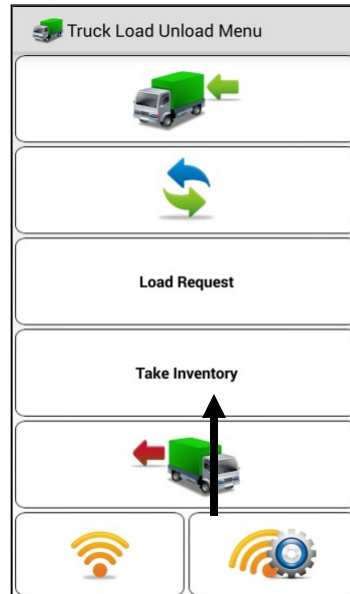
Morning Load

Perpetual Inventory enables two new icons on the *Bay* screen of the handheld, you can now see the *Start* column, which is the inventory carried over from the previous day and the *Add* column, which is the inventory added to the truck today. This gives you a very clear picture of what inventory is currently on the truck, as well as the items that have been added today.

Take Inventory (Optional)

Occasionally, the driver may need to do a manual count of the truck to make sure the totals are accurate. If the 'Take Inventory' option has been enabled (covered earlier), the driver can select a new icon on the *Load/Unload Truck* screen of the handheld:

Follow the steps below to take inventory on the vehicle and print a report to the handheld printer:

1. Choose *Take Inventory*.

2. Select the correct *Bay*.

3. Tap on the product and enter the quantity on the truck. Repeat this step for each product in the *Bay*.

4. Tap *Exit*.

5. Repeat for all additional Bays.

6. After all *Bays* have been entered, tap the **Save** option on the bottom of the *Take Inventory* screen.

7. You will be prompted to print the *Inventory Stock Take Reports*. Select *Yes* or *No* to print the report.

8. Tap *Exit*.

Ideally, the variances in the report should remain at zero (0). If the count is off, the driver may need to correct the problem by doing a recount. If the stock count is still in error, then you will need to make a correcting entry within the 'Previous' section of the *Bay* screen.

Perpetual Inventory Report

The *Perpetual Inventory Report* displays product carry-over and variance information from day-to-day. This report will print automatically during the *Afternoon Card* process.

This example illustrates perpetual data for product code '308':

	Perpetual Inventory						
				ROUTE A		DAY B04	
				ON	07/10/2008		
Charge Code	Description	Carry Over	Additional	Returned	Qty Sold	End of Day	Stock Take	Variance
308	7 lb Bag	600	0	0	100	500	0	0

Product '308' had a carry-over of 600 from the previous day and 100 were sold on the current day – leaving 500 on the truck for the next day.

NOTE: This report can be reprinted by navigating to *Reports > Route Reports> Reprint > Reprint Perpetual Inventory Report.*

Summary

The *Perpetual Inventory* option is extremely helpful for companies that send their drivers out with one load for multiple days or do not offload their trucks each day. Please contact Advantage Route Systems if you have any questions about this feature.

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Warning

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