

# ADM Maintaining Accurate Inventory

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# ADM Maintaining Accurate Inventory

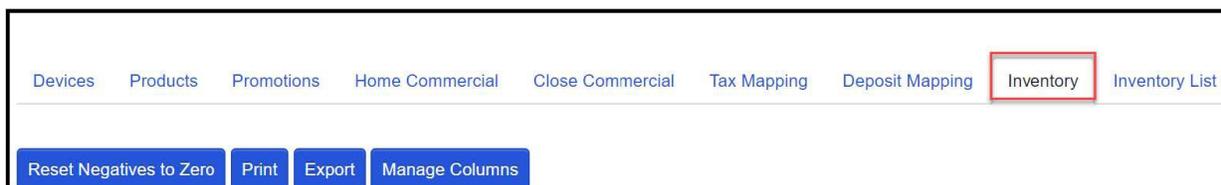
## Introduction

This guide will show you how you can get a fresh start on inventory and maintain accurate levels. You can also use it as a refresher to see if you are using ADM to its fullest potential.

**Note:** This guide pertains to the V5 platform using ADM but the principles in this guide still apply if you are using SmartHQ on the Legacy platform.

## Viewing your current inventory levels for a single location

- Choose the location where you want to view the inventory levels in ADM.
- Scroll down to the bottom of the **Location Summary** page and click on the **Inventory** tab.



- The *In Inv* column shows the current inventory levels for each item at that location.

**Note:** If the *In Inv* column is not visible, click on the **Manage Columns** button as shown in the picture above to display that column.

You can manually adjustments inventory levels in the *In Inv* column for each item. **This is ideal for fine tuning your inventory levels on just a couple items at a time.**

You may need to get inventory levels back to a specific level if the numbers are not what you expected or are off by a large amount.

- ADM keeps track of all items sold and will start going negative on an item as soon as the first item is sold. No worries! You can easily fix this by clicking on the **Reset Negatives to Zero** button as shown in the picture above step 3.
- If you have never used our system to take inventory, you will notice a lot of negatives in the *Inventory* column. This is because all inventory levels start at zero unless you tell the system otherwise.

Now let's look at how to get inventory back on track!

## Taking a Physical Inventory

The best way to get your inventory levels back on track if you are not sure whether the numbers showing are accurate, is to take a physical inventory through <https://www.365mobileinventory.com/>

This document, [Mobile Inventory Guide](#), will guide you through taking a physical inventory.



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When you count all your items and submit the count through the mobile inventory website, it will update ADM with the new quantity levels you just entered.

Now that your inventory numbers are where they need to be, make sure you maintain accurate inventory levels going forward using the Pick List Manager Feature in ADM.

**Note:** You do not have to use the Pick List in ADM. You can take physical inventories when on-site on at a set schedule if you prefer.

The benefit of the Pick List is that it will show you how much product you should be bringing to your market to stock back up to max levels.

## Product Level Management (Min, Max, Pick List Actions)

To accurately use the Pick List, you will need to setup the Min and Max levels for each item in ADM. This will ensure accurate numbers based on your market needs and will display when you generate a Pick List.

Each product will have its own **Min** and **Max** fields. You can access them from the ADM Menu Bar by clicking on the **Product** category > **Global Product** > **click on an individual product**. The **Product Summary** page for the individual product that you selected will display.

**Min** – The minimum amount of product to maintain on your shelves.

**Max** – The maximum amount you want to have on your shelves.

The numbers you choose for Min and Max will be up to you and will vary based on market needs. You can change these numbers at any time.

You will also need to choose when you want your items to display on your Pick Lists by choosing from the Pick List Action drop-down menu.

- At or Below Min
- Below Max
- 1+ Cases Needed – Must choose a rounding option with this selection
- Hide from Pick list – Best used when discontinuing an item

Please see [ADM Pick List Overview](#) for more information regarding how the rounding options work when picking by cases.

After your items have been setup with their Min, Max and Pick List actions, you can start using the Picks Lists in ADM.

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## Generating a Pick List

The **Refresh** button will update your Pick List numbers. This looks at your current inventory levels for each item, the Min, Max, and Pick List actions and generates a number in the *Need* column that will return you to the Max level that you set for each item.

**Note:** You cannot adjust the *Need* column manually if you cannot pick the amount that is displayed.

**Note:** If you are on-site and notice that the numbers in the Pick List do not bring the items back up to their max levels, it is possible that customers purchased items between the time the Pick List was generated and when you arrived on-site to stock the market. Check the **Sold Detail Report** in ADM and run it for that specific time frame to see if that item(s) was purchased.

There is much more that you can do using the Pick List Manager feature in ADM. For more information, see the following article [ADM Pick List Overview](#).

## Submitting Inventory into ADM

There are two methods in which to submit inventory:

1. Push to Inventory
2. 365 Mobile Inventory Website

Choose one or the other but not both, as that can create duplicate inventory levels.

### First Method (Push to Inventory)

Click the **Push to Inventory** button in the *Pick List Manager* page. This will update all items to new quantity levels based on the *Need* column in the Pick List.



**Example:** The *In Inv* column shows **5**, the *Need* column shows **10**, click on the **Push to Inventory** button to change the *Items on Hand* quantity to **10** in the ADM system.

**Note:** You can pick multiple items to Push to Inventory by holding down the **Ctrl** key while clicking on the items you want. The **items selected are highlighted in blue**. You can also choose **Select All** as shown in the picture below.

**Note:** If you are using Lightspeed, the **Push to Inventory** button will not be visible. Instead you will see the **Send to Lightspeed** button.



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Select All		Select Location(s) and Product(s)										Deselect All	
Location	Route	Product Name	UPC	Product Id	Category 1	Category 2	Pick List Action	Case Ct	Min	Max	In Inv	Need	
New Imp Templates		1/2 Pastrami and Swiss on Multigrain	2923	2923	71-BRANDED FOOD		1- Cases Needed	24	0	0	0	5	
New Imp Templates		100 Grand	123456898541		CANDY		At or Below Minimum	0	12	24	0	24	
New Imp Templates		100 Grand	028000208307		CANDY		At or Below Minimum	0	12	24	0	24	
New Imp Templates		20 Dt Dr Pepper	078000083408	1238	COLD BEVERAGE		At or Below Minimum	0	4	5	0	5	

## Second Method (365 Mobile Inventory Website)

The second method you can use to update your inventory is to use the Mobile Inventory website that was mentioned previously in this guide.

If you choose this method, you can still use the Pick List in ADM to see how much product you need to pick. But instead of clicking on **Push to Inventory** to update your inventory levels, you will click on the **Refresh** button after submitting the inventory on the Mobile Inventory website.

When you click **Refresh** on the **Pick List** page, it will update the numbers in the *In Inv* and *Need* columns.

## Conclusion

There are different ways to keep track of the inventory at your market. This guide is designed to show you the ways you can use our systems to maintain inventory and to help you decide what best fits your needs.