



## Inventory Analysis

Megan De Freitas - 2024-11-22 - Inventory

### Overview

The Inventory Analysis module allows users to easily view inventory movement, usage, and trends. Users can analyze inventory sales over a specified time frame and make decisions on how to best adjust item resource planning values based on sales averages and months availability. Item resource planning values can be updated manually for individual items or for multiple selected items.

Inventory Analysis data comes from the Data Warehouse tables used by SalesPad and populated by running the sppUpdateDW stored procedure.

**Note:** For more information on using Inventory Analysis, please contact your Account Manager.

**Note:** For Inventory Analysis to run properly, and for data to appear in the Item Analysis tab, the SQL Job sppUpdateDW must be running. This stored procedure is available in SalesPad's [Sales Analysis Report](#) documentation. A default warehouse (the warehouse which the user is anticipating to sell from) must also be set on each Customer card in order for customer sales to be reflected in Inventory Analysis. Finally, make sure the shipping information on the sales document is populated.

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### Security

In order to allow access to the Inventory Analysis module, Inventory Analysis should be checked in the Security Editor.

Tabs on the lower half of the Inventory Analysis module are each enabled separately in the Security Editor. These tabs are the same as in the Inventory Lookup module and are enabled with the same security settings; refer to the SalesPad [Inventory Lookup](#) document

to determine which tabs to enable. (If you are already using Inventory Lookup, the same security will apply and you will not have to make any changes to view the tabs in Inventory Analysis beyond enabling the Inventory Analysis module.)

**Usage**

Navigate to Modules > Inventory Analysis. Enter search criteria for the item(s) you want to analyze. You can search by Item Number, Class, Generic Description, Location, or Vendor. Select **Match Exact** to search for an exact term, or unselect to search for words containing the entered criteria. Click **Search** or hit **Enter**.

**Note:** You can also select values from the dropdowns. Click the down arrow next to either field to view selections.

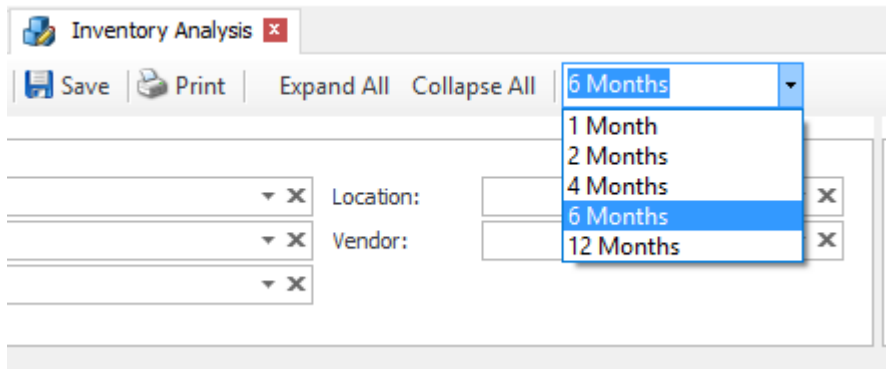
Results will display in the Search Results grid.

Selected	Item Number	Item Description	Location	Qty Avail	Mths Avail	Prev 12 Mths S...	On Order	On Order Mths ...	Cust. Cnt.	Reorder Pt	1 Mth Avg	2 Mth Avg	4 Mth Avg	6 Mth Avg	12 Mth Avg	High Sale	Primary Vendor
<b>Item: HD-20   RM-ACT   Currently Available: 7.0 -(10.5 Months)   Currently Ordered: 194.0 -(291.0 Months)   Based on current usages of 0.7 per month over 6 months</b>																	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	WC2	7	0.0		194	291.00	0	0	0	0	0	0	0	0.00	
<b>Item: HD-20   RM-ACT   Currently Available: 38433.0 -(57649.6 Months)   Currently Ordered: 72.0 -(108.0 Months)   Based on current usages of 0.7 per month over 6 months</b>																	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	WAREHOUSE	38,433	57,649.56		72	108.00	2	0	0	0	0	1	1	4.00	ACETRAVE0001
<b>Item: HD-20   RM-ACT   Currently Available: 3.0 -(4.5 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months</b>																	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	WC1	3	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<b>Item: HD-20   RM-ACT   Currently Available: -27.0 -(40.5 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months</b>																	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	RETURNS	-27	0.0		0	.00	0	0	0	0	0	0	0	0.00	TIMELYSH0001
<b>Item: HD-20   RM-ACT   Currently Available: 0.0 -(0.0 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months</b>																	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	01-N	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	01-NW	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	NORTH	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	P-TOWN	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	PAINT	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	
<input type="checkbox"/>	HD-20	20 Gig Hard Drive	SOUTH	0	0.0		0	.00	0	0	0	0	0	0	0	0.00	

Results are listed by item, displaying the total availability and ordered quantity over all locations on the Item summary line. Each item is then broken down by location, and each location displays on a separate row (click the +/- on the Item summary line to show/hide the breakdowns, or use the Expand All and Collapse All buttons in versions 4.0+ only).

➔	Item: HD-999   RM-ACT   Currently Available: 0.0 -(0.0 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months
➔	Item: HD-90   ATT CORD   Currently Available: 0.0 -(0.0 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months
➔	<b>Item: HD-60   RM-ACT   Currently Available: 5.0 -(3.8 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months</b>
⌵	Item: HD-60   RM-ACT   Currently Available: 479.0 -(3.8 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months
<input type="checkbox"/>	HD-60   60 Gig hard drive   WAREHOUSE
⌵	Item: HD-60   RM-ACT   Currently Available: 4.0 -(3.0 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months
<input type="checkbox"/>	HD-60   60 Gig hard drive   RETURNS
⌵	Item: HD-60   RM-ACT   Currently Available: 2.0 -(1.5 Months)   Currently Ordered: 0.0 -(0.0 Months)   Based on current usages of 0.7 per month over 6 months
<input type="checkbox"/>	HD-60   60 Gig hard drive   WC1

To change the time period being analyzed, use the Time Period dropdown in the upper right of the screen.



Results will adjust automatically after you make a selection.

Use the Location dropdown to filter which location to toggle (ALL for all).

**Note:** Only displayed results will be updated. Use the auto-filter row, accessible from the orange triangle in the top left of the grid, to further filter the displayed results.

### RESULTS COLUMNS

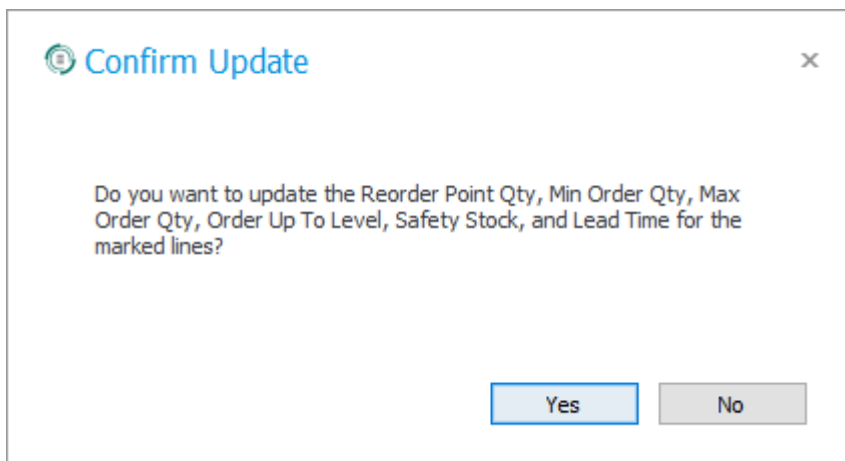
Quantities are displayed in base unit of measure.

**Note:** Demand is based on shipments from the default warehouse. Sales from customers who do not have a default warehouse set will not show.

- The Location column indicates the warehouse/site being analyzed in that row.
- Qty Avail displays the quantity of available stock that has not yet been allocated or fulfilled elsewhere. If the item is on backorder, this quantity may be negative.
- The Mths Avail column displays number of months' supply available, based on current average usage. It calculates availability based on the rate of use per month (ex. Average 3 items sold per month for 4 months).
- Prev 12 Mths Sales displays the quantity of the item sold in the past 12 months.
- The On Order column displays the PO quantity of the item currently on order for that location.
- On Order Mths Available calculates how many months' worth are on order, based on the rate of use per month.
- Cust. Cnt. indicates the number of different customers who have ordered the item.
- Average item unit sales are displayed across multiple Mths Avg columns, including 1, 2, 6, and 12 month averages.
- The Allocated column displays the quantity of the item that has been allocated.
- The OnHand column displays the quantity of the item that is actually currently on hand at the location, which may be different than the quantity available.
- High Sale displays the quantity of the largest individual sale of the product for that location.

- Primary Vendor displays the primary vendor for this item at this location.
- Reorder Pt displays the item's reorder point in this location. Edit the ReOrder Point Qty Sugg column if you wish to update this value when saving.
- Max Order Qty displays the item's maximum order quantity. Edit the Max Order Qty Sugg column if you wish to update this value when saving.
- Min Order Qty displays the item's minimum order quantity. Edit the Min Order Qty Sugg column if you wish to update this value when saving.
- Order Up To Level displays the item's order up to level value. Edit the Order Up To Level Sugg column if you wish to update this value when saving.
- Purchase Lead Time is an updatable column than can be saved to update the item's purchasing lead time.

In order to save the changes you've made in the Suggested column or Purchase Lead Time column, first, in the rows you wish to update, select the check box that appears in the Selected column, then click Save. The following message will appear:



Click **Yes**.

### ANALYSIS TABS

Item-specific information is displayed in the tabs on the lower half of the Inventory Analysis module, based on the row that is selected in the Search Results grid. Click on a row in your results set to view information on that item.

Location	Description	Onhand	Allocated	Backordered	Onorder	Available	Next Expected Receipt	Location	Bin	Qty Type	Quantity	Qty Allocated
NORTH	NORTH WAREHOUSE	0	0	102	0	0		WAREHOUSE	AUTO...	On Hand	2,000	1,272
SOUTH	South store	0	0	100	0	0		WAREHOUSE	E0153	On Hand	1,568	1,532
WAREHOUSE	Main Site	3,009	2,339	71,249	2,374	670	9/10/2008					
WC1	Work Center 1	0	0	0	0	0						
WC2	Work Center 2	0	0	1	0	0						
WC3	Work Center 3	0	0	0	0	0						
		3,009	2,339	71,452	2,374	670		<input type="checkbox"/> Hide Empty Bins			3,568	2,804

**Note:** The tabs displayed in Inventory Analysis are the same as those in the Inventory

Lookup module. Refer to the SalesPad [Inventory Lookup](#) document for more information on the use of each tab.

**Note:** The Item Inventory Analysis tab displays the same information for the selected item as the Search Results grid displays, but you cannot adjust the reorder point from this tab.