

PSA Deep Dive

# Efficient Inventory Management

Tony Mehner



# Agenda

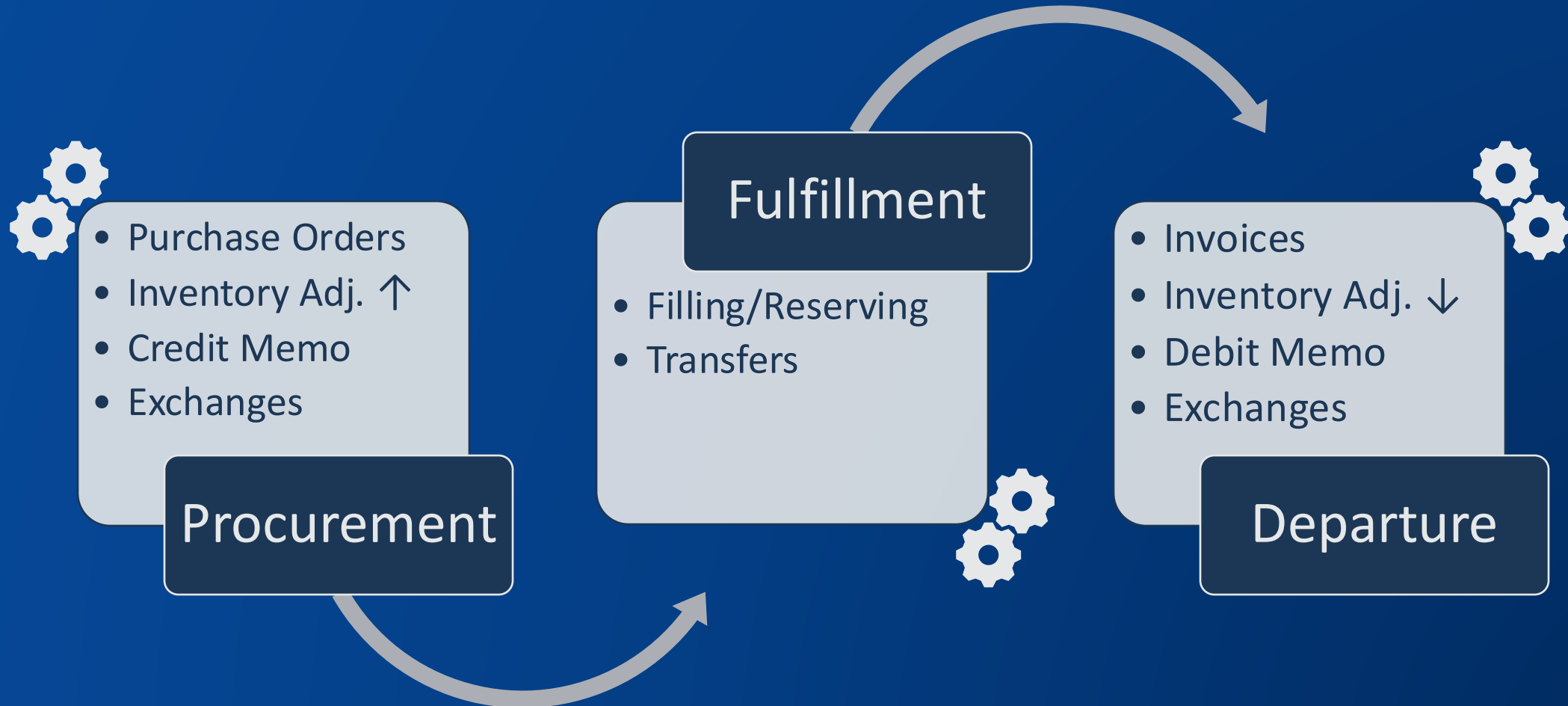
PSA Deep Dive: Efficient Inventory Management

- An Overview of the Inventory Process
- **Automation:** Automatically Create Purchase Orders (Auto PO)
- **Automation:** Automatically Fill When Receiving Materials
- **Automation:** Automatically Invoice Service Orders
- Question & Answer



# The Inventory Lifecycle

PSA Deep Dive: Efficient Inventory Management



# Automating Procurement

PSA Deep Dive: Efficient Inventory Management



- **Purchase Orders**
- Inventory Adj. ↑
- Credit Memo
- Exchanges

Procurement

- Auto Stock Manager
- Auto Purchasing



# Auto Stock Manager

## Automating Procurement

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]

File Edit View Tools Tasks Activities Reports Help Support Live Chat Academy User Forum

Back Forward History New Save Print Preview Fields Knowledge Groups Email Dial Help

View reminders for past due tasks VDC-242V03-2

View unread workflow notifications VDC-242V03-2 ( Bosch Dome CCTV Security Camera)

**FAVORITES**

- ACCOUNTS
- MATRIX
- SCHEDULING
- SALES & MARKETING
- SERVICE
- PROJECTS
- INVOICING
- TIME & EXPENSES
- INVENTORY**

Price Book Items

Price Book Item Detail

Import Related Price Book Items

Purchase Orders

Purchase Order Detail

Received Items

Reserved Items

Transfers

Physical Inventory

Build Finished Goods

Maintain Serial Numbers

Location Inquiry

**ITEM TYPE:**

Item ID: VDC-242V03-2

Part Number: B 4000 Dome CCTV

Key Description: Bosch Dome CCTV Security Camera

Item Type: Material

Subtype: <None>

Created On: 09/17/2018

Last Edited: 08/16/2022

Last Sold:

Mfg. List: \$200.00

Status: Active

**INVENTORY QUANTITIES**

On Hand: 150

Reserved: 0

Available: 150

On Order: 0

**ADDITIONAL DESCRIPTIONS**

Description 1:

Description 2:

Category: Camera

Subcategory: Dome Camera

**COMMENTS**

Must have CCTV viewing system

Pricing Discount Information **Purchasing** Features Locator Movement Log Admin Related Items

**VENDORS**

Vendor	Vendor Part Number	Cost	Core Charge	Lead Days
Ball Aerospace		\$158.00	\$0.00	3

**INVENTORY CONSTRAINTS**

Minimum Qty: 5

Maximum Qty: 150

Reorder Qty: 6

Needed to Fill: 0

Quantity Short: 0

**CASE ORDERING**

Case Item ID:

Case Description:

Case Unit of Meas.:

Quantity in Case: 0

Case Cost: \$0.00

**RECEIPTS**

Receiving Location: /WH1

Last Received: 09/17/2018

Last Cost Paid: \$158.00

☐ Print Single Receipt Labels

☐ Update Standard Cost/Prices on Receipt

☐ Update Vendor Cost on Receipt

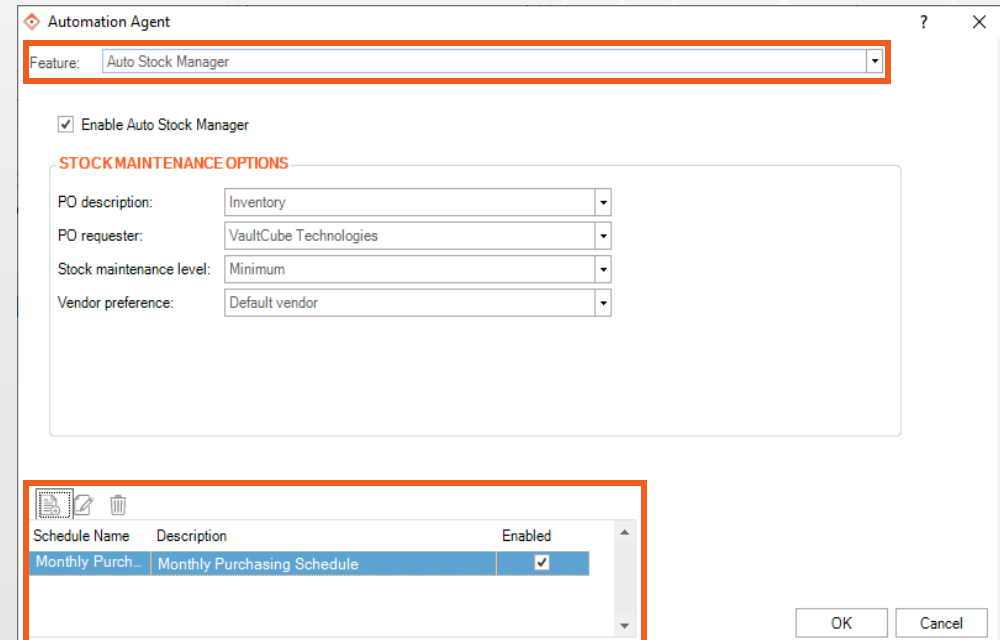
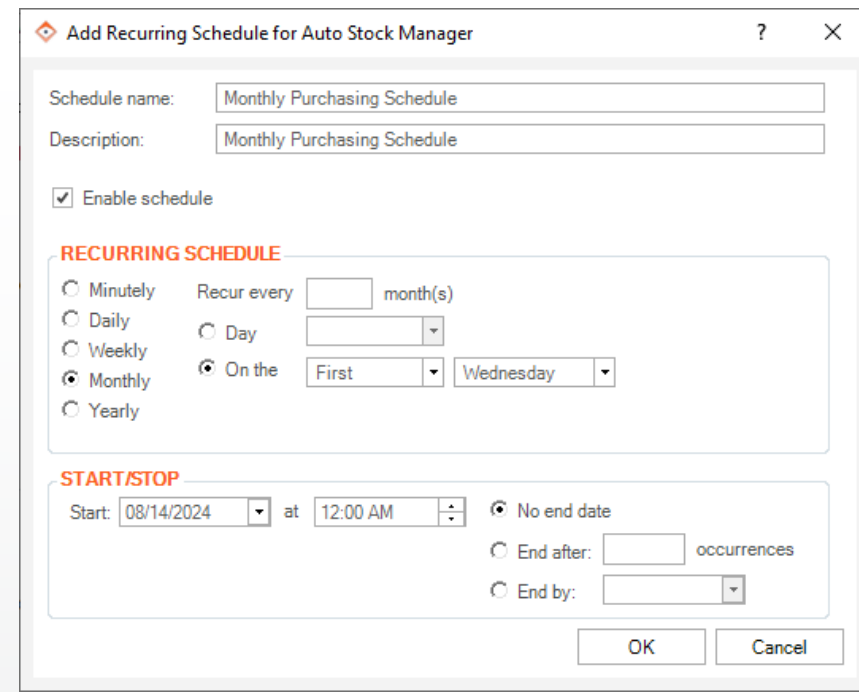
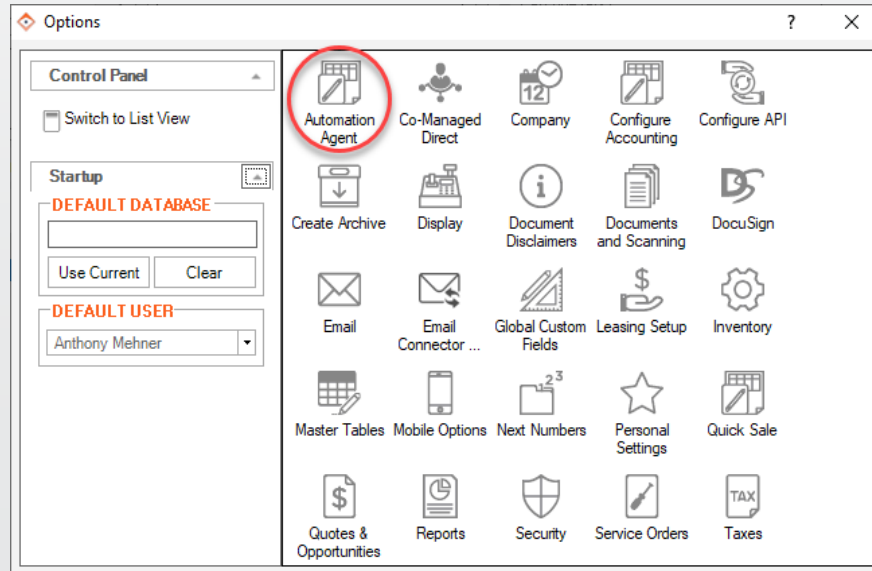
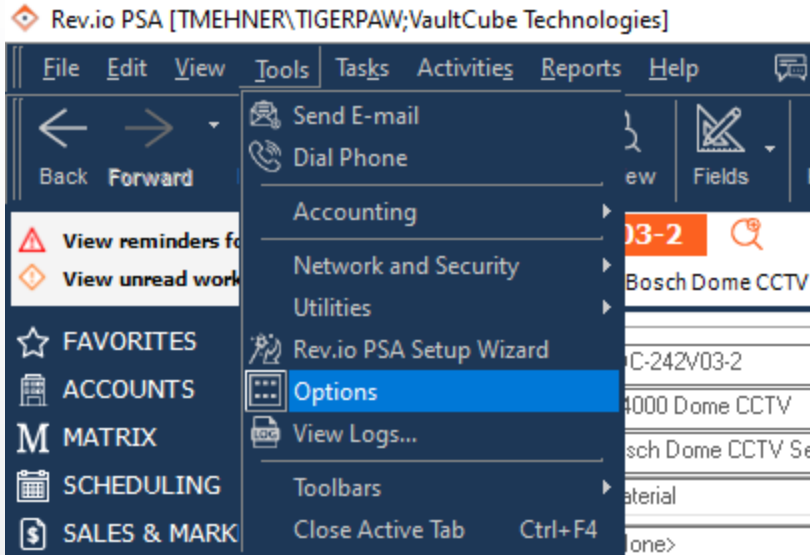
Import or Update Min/Max Settings





# Auto Stock Manager

Automating Procurement



# Auto Stock Manager

Automating Procurement

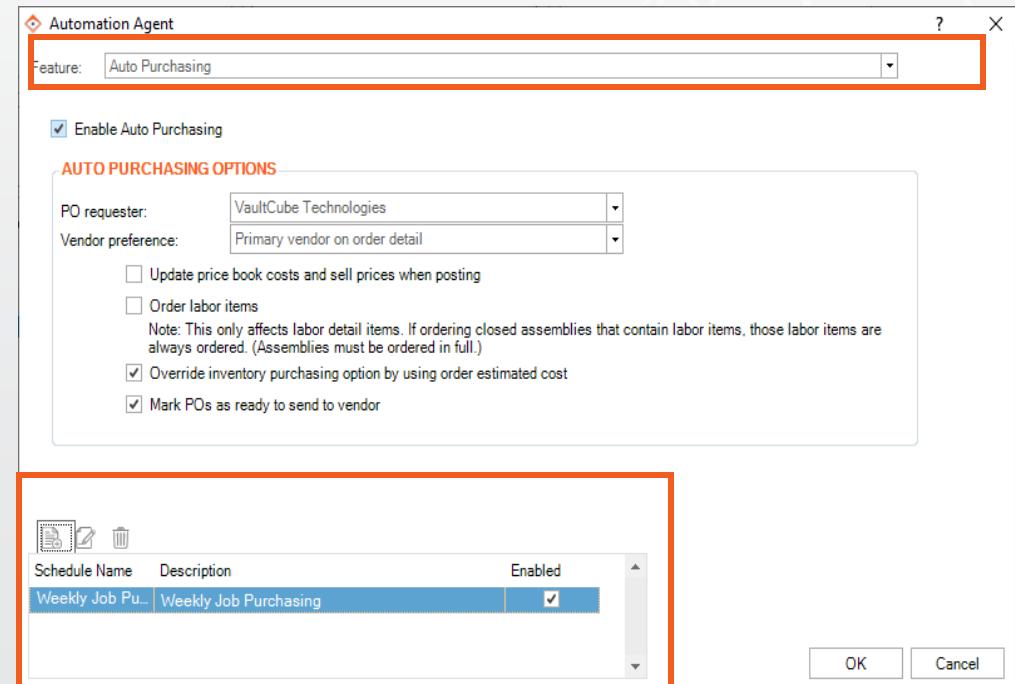
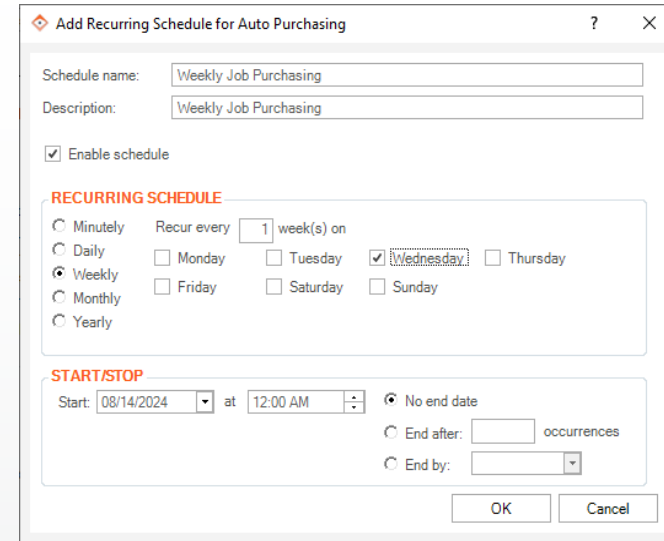
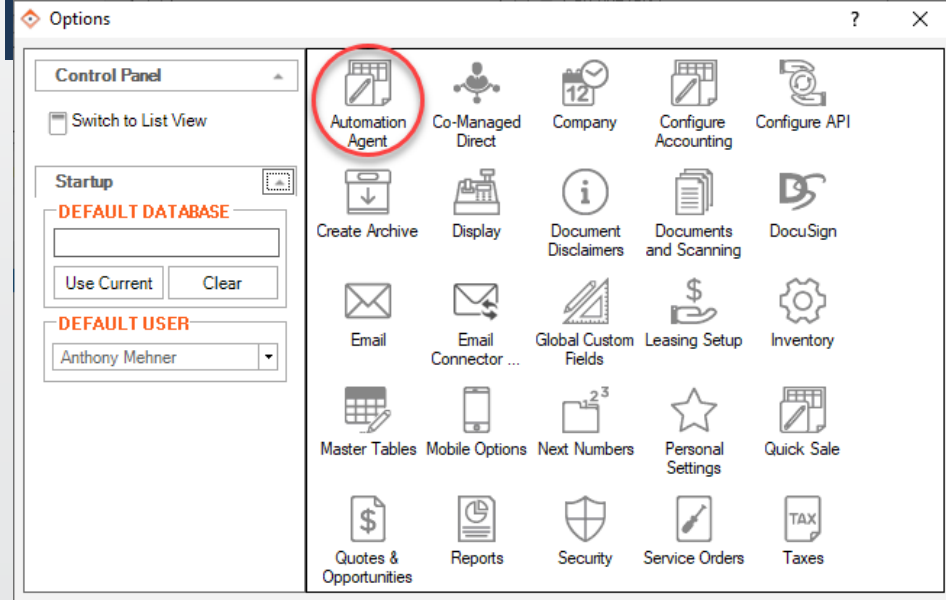
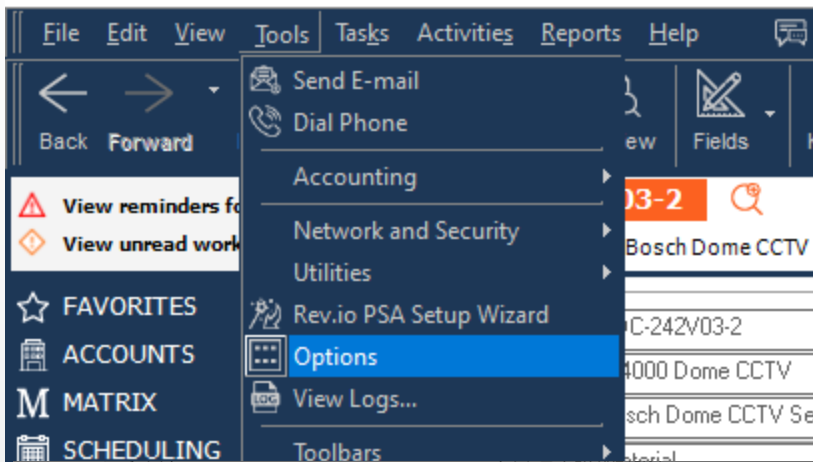
- Rev.io PSA will now automatically check your inventory levels on the first Wednesday of every month and create Purchase Orders to replenish stock.
- Your procurement team can then review these POs and submit the orders with ease!



# Auto Purchasing

Automating Procurement

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]





# Auto Purchasing

## Automating Procurement

Rev.io PSA [TMEHNER,TIGERPAW,VaultCube Technologies]

File Edit View Tools Tasks SOs Activities Reports Help Support Live Chat Academy User Forum

Back Forward History New Save Print Preview Journal Related Notes Items Svcd Parts Tasks Docs Quotes Contracts SOs Assets Passwords Invoices Projects Fields Folders Accounting Knowledge Groups Email Dial Merge Help

View reminders for past due tasks SO 10018 View unread workflow notifications Sarif Industries (10068) > Ruth Parr > Service Order 10018

FAVORITES

ACCOUNTS

MATRIX

SCHEDULING

SALES & MARKETING

SERVICE

Service Orders

Service Order Detail

Contracts

Contract Detail

Recurring Agreements

Enter Time

Symptoms

RMAs

Exchanges

Poll MSP Assets

SO Templates

Data Collection Import

EZ Order

Manage DCA Asset Imports

PROJECTS

INVOICING

TIME & EXPENSES

INVENTORY

REPORTS & ANALYTICS

INTEGRATIONS

STATUS AND SETUP

GENERAL INFORMATION

Brief Desc: Incident Security - Threat

Contact: Ruth Parr

Phone: (402) 815-9237

Email: ruth.parr@gmail.com

Acc. Phone: (402) 324-4051

Type: Service Call

Priority: Emergency (1 hrs 24x7)

Severity: High

Zone:

Status: Assigned

Ref No:

Cust. PO:

Board: [all]

Display on customer portal

SUMMARY

Tasks

Parts & labor

Printed

Items serviced

Time logs

Signature

SO notes

Documents

Custom fields

Recurring orders

Related SOs

Expenses

Not Invoiced

WORK REQUESTED

Sweep and secure area due to threat

INTERNAL COMMENTS

WORK PERFORMED

Detail Billing Shipping Codification Subcontractors Account Related Documents Totals Analysis

DATES AND TIMES

Received: 09/17/2018 at 9:17 AM by Al Powell

Requested: at by

Opened: at

Closed: at

Verified: by Repeat Count: 0

Resolved by phone

TECHNICIANS

Primary: Anthony Mehner

Associated Technicians

Rep

Tasks

Logged Hours

Billable Hours

Expenses

Mileage

Anthony Mehner

Al Powell

Contract

Contract No:

Basis:

Expires on:

Description:

Remaining:

Estimated Time: 0 hr 00 m No time logged

System:

Open Parts & Labor on a Service Order



# Auto Purchasing

## Automating Procurement

Parts/Labor Used on Service Order 10018

File View Filter Tools Defaults Help

New Invoice Print Preview Pkg Slip Invoices New PO Ready to auto create PO Search Parts & Labor Item ID Help

**Detail** Change Log Totals

Parts and Labor

Line Item #	SN	Item ID	Description	Qty	Price	Total	Ordered	Received	Filled	Invoiced	Posted	Shipped	Exchange	Under Contract	Taxed
1		VDC-242V03-2	Bosch Dome CCTV	1.00	\$200.00	\$200.00	0	0	0.00	0.00	0.00	0.00			

Time Logs

Start Date	Time	End Date	End Time	Actual Time	Billable/Contract Time	Approval Status	Tech	Reason	Work Performed	On Contract	Billable	Un
------------	------	----------	----------	-------------	------------------------	-----------------	------	--------	----------------	-------------	----------	----

Expenses

Document Number	Expense Date	Time	Tech	Approval Status	Expense Type	Amount	Comments	Odometer Start	Odometer End	Distance	Billable
-----------------	--------------	------	------	-----------------	--------------	--------	----------	----------------	--------------	----------	----------

Parts and Labor Item Detail

**Item Detail** Item Notes Features and Comments Purchasing Installation

**ITEM INFORMATION**

Item ID: VDC-242V03-2

Description: Bosch Dome CCTV Security Camera

Item Type: Material

Tax Status: Subject to Sales Tax

This Item will post to Customer Inventory.

☐ Covered Under Contract

☒ Stock Item

☒ Print on Invoice

☒ Item can be discounted

☐ Drop ship item from vendor

**INVENTORY QUANTITIES**

On Hand: 150 On Order: 0 Reserved: 0 Needed to Fill: 1

**Available: 150** Available not in special locations: 150

**PRICES, COST & G/L CODES**

Manufacturer's List: \$200.00

Price Level Price: \$200.00

After Qty. Discount: \$0.00

Estimated Cost\*: \$158.00

☐ Use this Estimated cost when purchasing

Cost Code:

Income Code:

**QUANTITIES AND SELL PRICE**

Price Level: 01 - List Price

☒ Use Price Level/Quantity Discount Price

☐ Sell For: \$200.00

Quantity: 1

Quantity Filled: 0

Quantity Invoiced: 0.00

Attached to Item Serviced:

\* Cost used to calculate profitability and for ordering; does not propagate to accounting.

OK Cancel



# Auto Purchasing

Automating Procurement

- Rev.io PSA will now automatically review your Service Orders every Wednesday and generate Purchase Orders to procure the necessary parts for each job.
- Your procurement team can then review these POs and submit the orders with ease!



# Automating Fulfillment

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## Fulfillment

- **Filling/Reserving**
- Transfers



- Auto Fill When Received



# Auto Fill When Received

## Automating Fulfillment

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]

File Edit View Tools Tasks Activities Reports Help

Back Forward

Send E-mail  
Dial Phone

Accounting  
Network and Security  
Utilities

Rev.io PSA Setup Wizard  
Options  
View Logs...

Options

Control Panel

Switch to List View

Startup

DEFAULT DATABASE

Use Current Clear

DEFAULT USER

Anthony Mehner

Automation Agent Co-Managed Direct Company Configure Accounting Configure API

Create Archive Display Document Disclaimers Documents and Scanning DocuSign

Email Email Connector ... Global Custom Fields Leasing Setup **Inventory**

Master Tables Mobile Options Next Numbers Personal Settings Quick Sale

Quotes & Opportunities Reports Security Service Orders Taxes

Inventory Options

Inventory Discounting Real-Time Lookup Utilize

**LOCATIONS**

Default warehouse: WH1

Repair location: Repair

Staging location: Staging

Vendor repair location: Repair

**PICTURES PATH**

R:\Drop\Tony\Price Book Images\

**ORDERS AND INVOICES**

Print on orders and invoices: ItemID

Default labor Item ID: Labor

Default progressive invoice Item ID: Progressive Sales

Default MSP prorated billing Item ID: Percent Discount

☒ Default price book select to active items only

**PURCHASING**

Cost for new POs: Standard

☐ Update standard cost when posting receipts

☒ Update vendor cost when posting receipts

☒ Use PO wizard from menu bar

☐ Copy item descriptions from SO/WO

☒ Default new POs to allow backorders

☐ Limit receipts on POs to quantity ordered

☒ Fill items to applicable SOs when PO receipt is posted

**LOCATOR**

☒ Keep items with zero quantities and no bin in the locator

☒ Keep items with zero quantities and a bin in the locator

OK Cancel



# Auto Fill When Received

## Automating Fulfillment


- Rev.io PSA will now automatically allocate received items to the corresponding service orders for which the purchase orders were created.
- This eliminates the need for your inventory team to manually transfer items from the purchase order to the service order.
- A Workflow can be created to automatically notify the dispatch team when all items have been received for the job.





# Automating Departure

PSA Deep Dive: Efficient Inventory Management

- 
- A diagram consisting of a light gray rounded rectangle containing a bulleted list. To the right of the rectangle are two interlocking white gear icons. Below the rectangle is a dark gray rounded rectangle with the word 'Departure' in white text.
- **Invoices**
  - Inventory Adj. ↓
  - Debit Memo
  - Exchanges

Departure

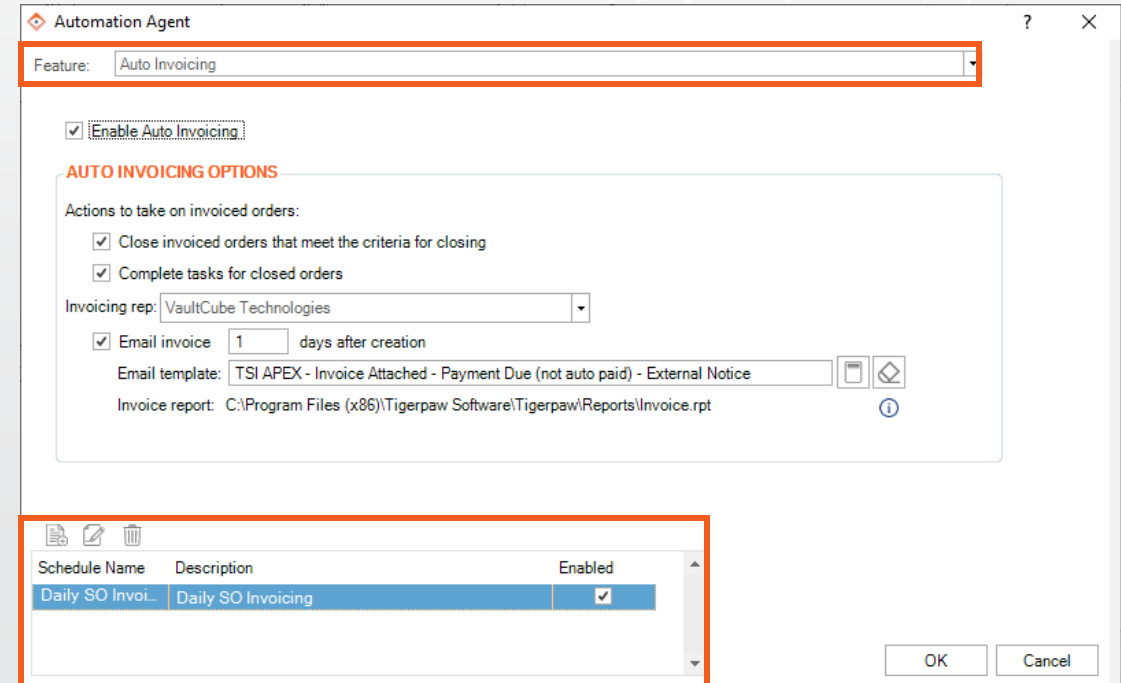
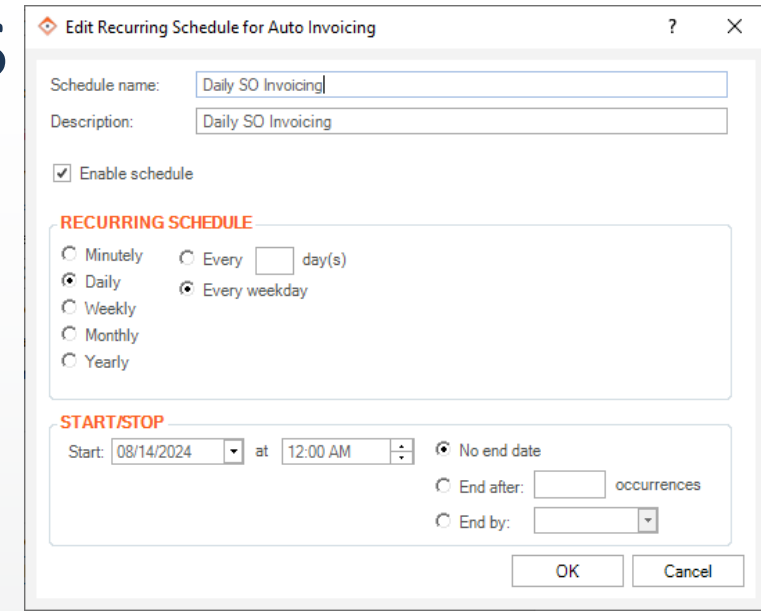
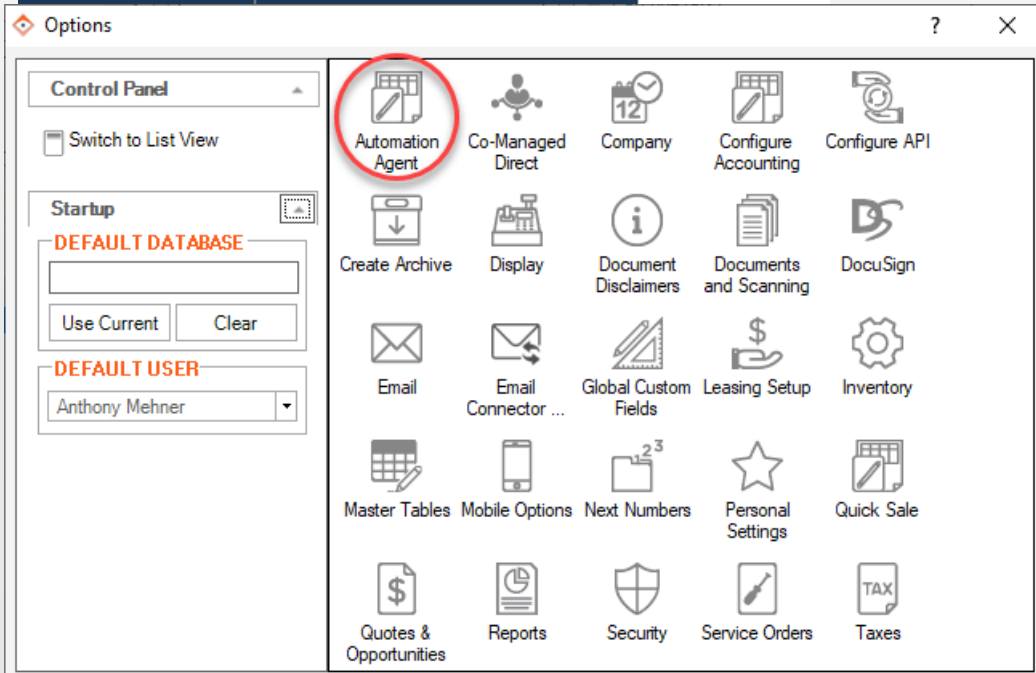
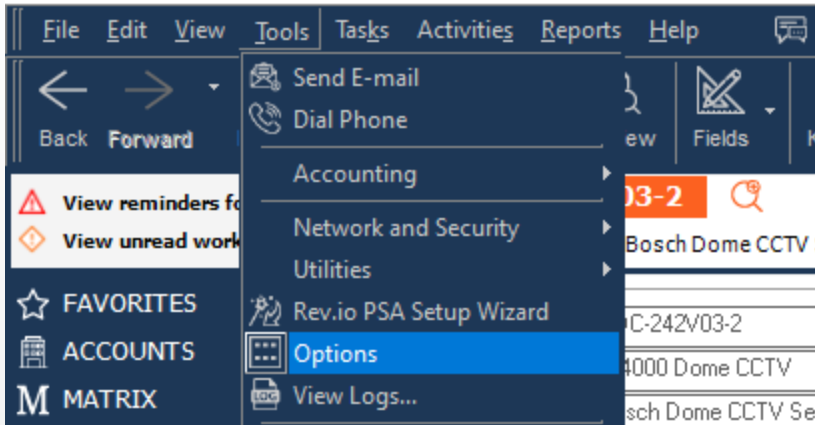
- Auto Invoicing Service Orders



# Auto Invoicing Service Orders

Automating Departure

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]



# Auto Invoicing Service Orders

## Automating Departure

Rev.io PSA [TMEHNER\TIGERPAW\VaultCube Technologies]

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Back Forward History New Save Print Preview Journal Related Notes Items Svcd Parts Tasks Docs Quotes Contracts SOs Assets Passwords Invoices Projects Fields Folders Accounting Knowledge Groups Email Dial Merge Help

View reminders for past due tasks **SO 10018** View unread workflow notifications Sarif Industries (10068) > Ruth Parr > Service Order 10018

FAVORITES ACCOUNTS MATRIX SCHEDULING SALES & MARKETING SERVICE Service Orders Service Order Detail Contracts Contract Detail Recurring Agreements Enter Time Symptoms RMAs Exchanges Poll MSP Assets SO Templates Data Collection Import EZ Order Manage DCA Asset Imports

**GENERAL INFORMATION**

Brief Desc: Incident Security - Threat Status: Assigned

Contact: Ruth Parr Type: Service Call Ref No:

Phone: (402) 815-9237 Main Priority: Emergency (1 hrs 24x7) Cust. PO:

Email: ruth.parr@gmail.com Severity: High Board: (all)

Acc. Phone: (402) 324-4051 Main Zone: Display on customer portal

**SUMMARY**

- Tasks
- Parts & labor
- Printed
- Items serviced
- Time logs
- Signature
- SO notes
- Documents
- Custom fields
- Recurring orders
- Related SOs
- Expenses
- Not Invoiced

**WORK REQUESTED**

Sweep and secure area due to threat

**INTERNAL COMMENTS**

**WORK PERFORMED**

**Detail** Billing Shipping Codification Subcontractors Account Related Documents Totals Analysis

**DATES AND TIMES**

Received: 09/17/2018 at 9:17 AM by Al Powell

Requested: at by

Opened: at

Closed: at

Verified: by Repeat Count: 0

**TECHNICIANS**

Primary: Anthony Mehner

Associated Technicians

Rep Anthony Mehner Tasks Logged Hours Billable Hours Expenses Mileage

Al Powell

**CONTRACT**

Contract No.: Basis: Expires on:

Description: Remaining:

Estimated Time: 0 hr 00 m No time logged

System:

When service order is complete, just check 'Ready to auto invoice'



# Auto Invoicing Service Orders

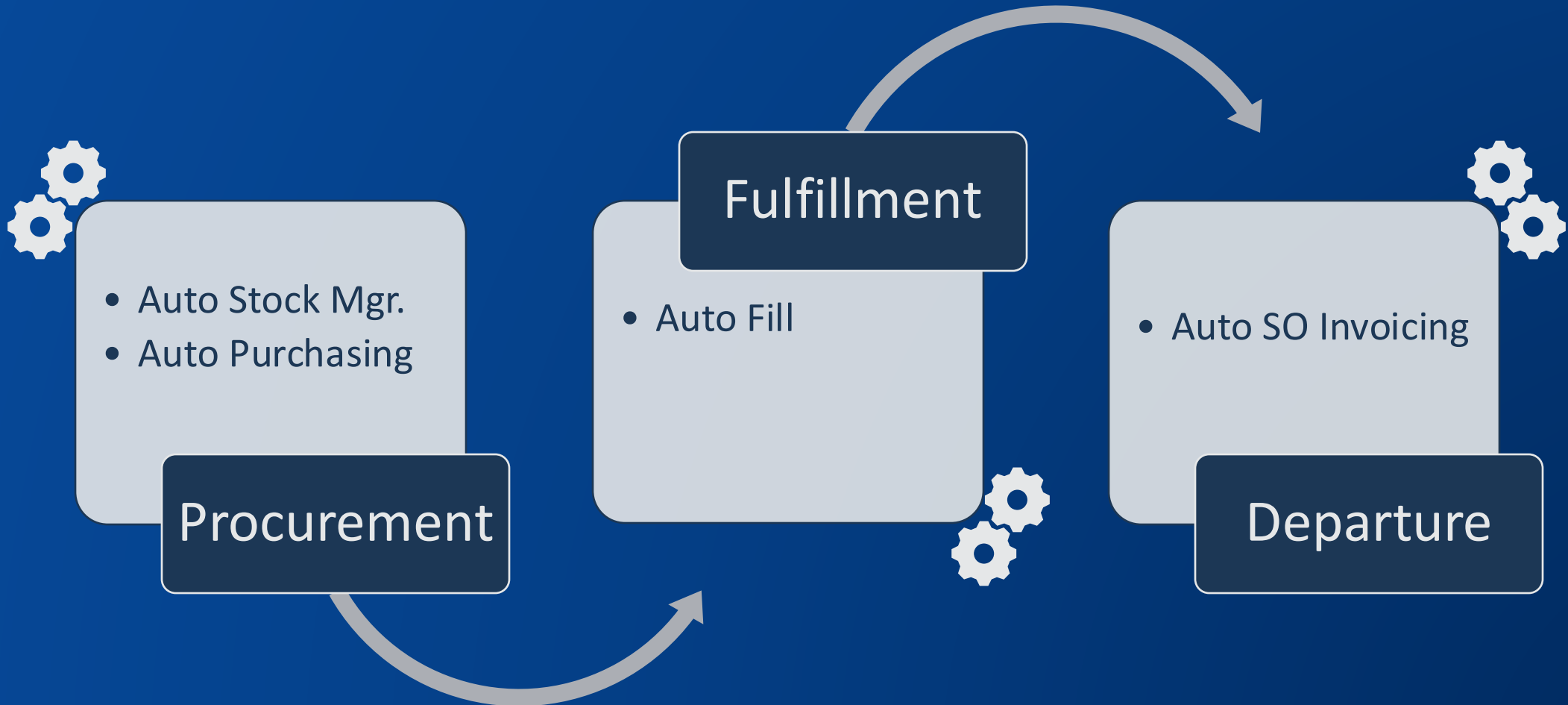
Automating Departure

- Rev.io PSA will now automatically review your Service Orders daily and invoice any that have the “Ready to Auto Invoice” option checked.
- This eliminates the need for your invoicing staff to manually create invoices for each service order.
- Additionally, the system will automatically email the invoice to your customer!



# The Inventory Lifecycle

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# Questions?

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