

PSA Deep Dive Efficient Inventory Management

Tony Mehner

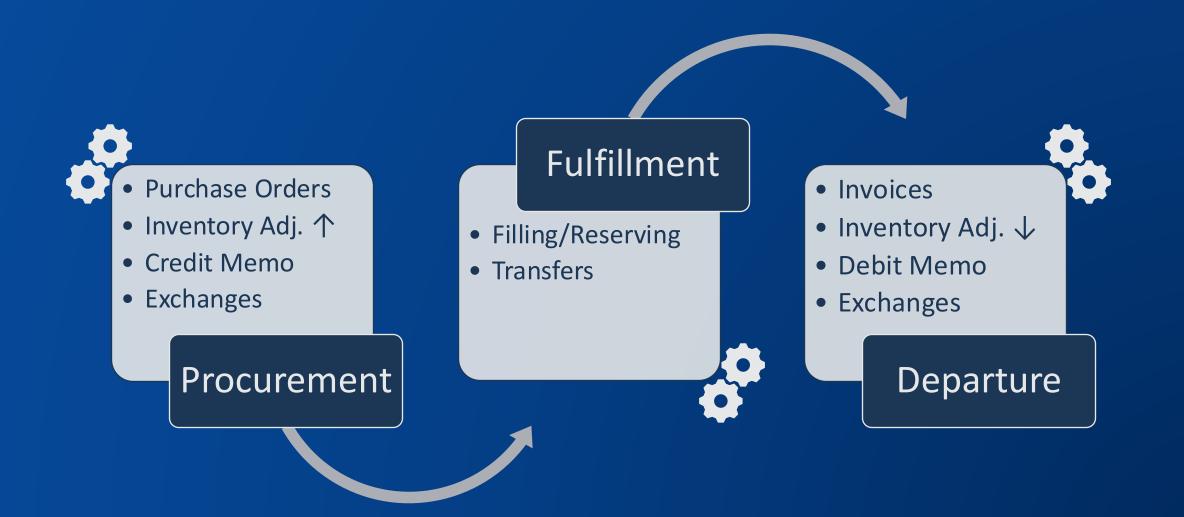


- An Overview of the Inventory Process
- Automation: Automatically Create Purchase Orders (Auto PO)
- Automation: Automatically Fill When Receiving Materials
- Automation: Automatically Invoice Service Orders
- Question & Answer



The Inventory Lifecycle

PSA Deep Dive: Efficient Inventory Management



Automating Procurement

PSA Deep Dive: Efficient Inventory Management



- Purchase Orders
- Inventory Adj. ↑

Procurement

- Credit Memo
- Exchanges

Auto Stock Manager Auto Purchasing

Auto Stock Manager

Automating Procurement

\diamond	Rev.io PSA [TMEHNER\TIGERPAW;	VaultCube Technologies]
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6	Back Forward History New	Save Print Preview Fields Knowledge Groups Email Dial Help
	View reminders for past due tasks	🗘 VDC-242V03-2 🔍
0	View unread workflow notification	🗂 VDC-242V03-2 (Bosch Dome CCTV Security Camera)
5	• FAVORITES	LITEM TYPE:
		Item ID: VDC-242V03-2 Created On: 09/17/2018 On Hand: 2 150
	MATRIX	Part Number: B 4000 Dome CCTV Last Edited: 08/16/2022 Reserved: 0
	SCHEDULING	Key Description: Bosch Dome CCTV Security Camera Last Sold: Available: 150
	SALES & MARKETING	ltem Type: Material
	SERVICE	Subtype: Status: Active
-	PROJECTS	ADDITIONAL DESCRIPTIONS
		Description 1: Must have CCTV viewing system
	INVOICING	Description 2:
_	TIME & EXPENSES	Category: Camera
ŝ	INVENTORY	Subcategory: Dome Camera
	Price Book Items	Delaine Discourt Information Developing Factories Maximum Maximum Advis Delated Berry
>		Pricing Discount Information Purchasing Features Locator Movement Log Admin Related Items
	Import Related Price Book Items	
	Purchase Orders	
	Purchase Order Detail	Vendor Vendor Part Number Cost Core Charge Lead Days Maximum Qty: 150 Image: State St
	Received Items	Heorder W(r)
	Reserved Items	Needed to Fill:
	Transfers	Quantity Short: 0
	Physical Inventory	CASE ORDERING
	Build Finished Goods	Case Item ID: Receiving Location: WH1
	Maintain Serial Numbers	Case Description: Last Received: 09/17/2018
	Location Inquiry	Case Unit of Meas.: Last Cost Paid: \$158.00
		Quantity in Case: 0 Print Single Receipt Labels
		Case Cost: \$0.00 Update Standard Cost/Prices on Receipt

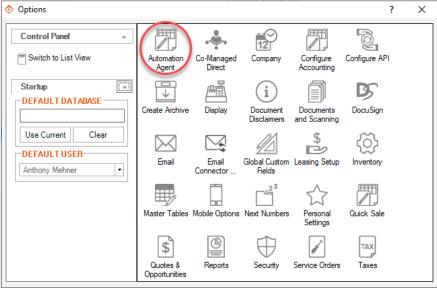
Import or Update Min/Max Settings

Auto Stock Manager

Automating Procurement

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♦ Add Recurring Schedule for Auto Stock Manager ? ×									
Schedule name: Monthly Purchasing Schedule									
Description: Monthly Purchasing Schedule									
✓ Enable schedule									
RECURRING SO	CHEDULE								
C Daily C Weekly	Recur every month(s) Day • On the First • Wednesday •								
START/STOP	C End after: cccurrences C End by:								
	OK Cancel								

Automation Agent								
Feature: Auto Stock Manager			•					
Enable Auto Stock Manager STOCK MAINTENANCE OPTIONS PO description: Inventory PO requester: VaultCube Te Stock maintenance level: Minimum Vendor preference: Default vend	chnologies	• • • • •						
Schedule Name Description Monthly Purch Monthly Purchasing St	Enabled hedule	•	Olt	Grand				
		*	OK	Cancel				



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!



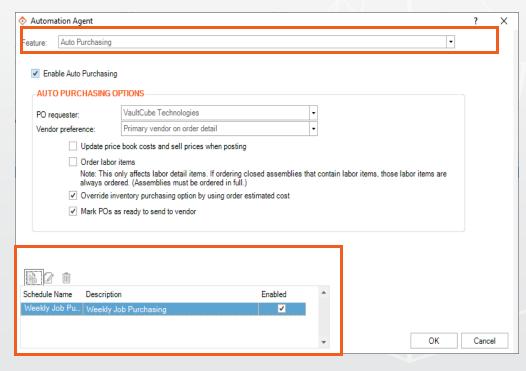
Auto Purchasing

Automating Procurement

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

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	Quotes & Reports Security Service Orders Taxes	

chedule name:	Weekly Job Purchasing
escription:	Weekly Job Purchasing
Enable schedu	ule
RECURRINGS	SCHEDULE
C Minutely C Daily C Weekly C Monthly C Yearly	Recur every 1 week(s) on Monday Tuesday Wednesday Thursday Friday Saturday Sunday
START/STOP - Start: 08/14/20	24 🔹 at 12:00 AM 🕂 🖸 No end date
	24 • at 12:00 AM • O No end date



Auto Purchasing

Automating Procurement

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	Sanf Industries (10068) > Ruth Parr > Service Order 10018							
☆ FAVORITES	GENERAL INFORMATION							
	Brief Desc: Incident Security - Tirreal Status: Assigned Tasks Parts & Labor Printed							
M MATRIX	Contact Ruth Parr Type: Service Call Ref No.							
SCHEDULING	Phone: [402] 815 9237 / Main Pionity: Emergency (1 hrs 24x7 Cust. PD: 6 SD notes © Documents © Custom fields							
SALES & MARKETING	Email: Indh.parr@gmail.com Severity: High Severity: Gill Gill Gill Constraints and Call Const							
	Acc. Phone [402] 3244051 / Main Zone: Display on customer portal Expenses Not Invoiced							
Service Orders								
 Service Order Detail Contracts 	Sweep and secure area due to threat							
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Recurring Agreements								
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	Anthony Mehner							
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G TIME & EXPENSES								
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 INTEGRATIONS STATUS AND SETUP 								
(1) STATUS AND SETUP								

Open Parts & Labor on a Service Order

Auto Purchasing Automating Procurement	Parts and Labor Item Detail Item Detail Item Notes Features and Comments Purchasing Installation 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. Item can be discounted Drop ship item from vendor
Change Log Totals Image Log Totals Image Log Totals Image Log Totals Image Log Item ID Description Qty Price Total Ordered Received Filled Invoiced Posted Shipped Exchange Under Contract Taxed Image Log VDC:242/03/2 Bosch Dome CCTV 1.00 \$200.00 0 0 0.00 0.00 0.00 Image Image Image	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 () QUANTITIES AND SELL PRICE 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 Quantity: Cost Code: Quantity Filed: Income Code: Quantity Invoiced:
Expenses Document Number Expense Date Time Tech Approval Status Expense Type Amount Comments Odometer Start Odometer End Distance Billable	Attached to Item Serviced: + * Cost used to calculate profitability and for ordering; does not propagate to accounting. OK Cancel

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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

PSA Deep Dive: Efficient Inventory Management

Fulfillment

- Filling/Reserving
- Transfers

Auto Fill When Received



Auto Fill When Received

Automating Fulfillment

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

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				Master Tables	Mobile Options	Next Numbers	Personal Settings	Quick Sale
				Quotes & Opportunities	Reports	Security	Service Orders	Taxes

Inventory Options						? ×
nventory <u>D</u> iscountin	g <u>R</u> eal-Tim	e Lookup <u>E</u> tilize			PURCHASING	OK Cancel
Default warehouse:	WH1			-	Cost for new POs: Standard	
Repair location:	Repair			•	Update standard cost when posting receipts	
0 1 1 2					 Update vendor cost when posting receipts 	
Staging location:	Staging			•	✓ Use PO wizard from menu bar	
Vendor repair location	Repair			-	Copy item descriptions from SO/WO	
					 Default new POs to allow backorders 	
PICTURES PATH					Limit receipts on POs to quantity ordered	
R:\Drop\Tony\Price E	look Images\			B	✓ Fill items to applicable SOs when PO receipt is posted	
ORDERS AND INV	DICES				LOCATOR	
Print on orders and inv	oices:	ItemID	-		 Keep items with zero quantities and no bin in the locator Keep items with zero quantities and a bin in the locator 	
Default labor Item ID:		Labor				
Default progressive in	voice Item ID:	Progressive Sales		î		
Default MSP prorated I	billing Item ID:	Percent Discount		î		
 Default price book 	select to activ	e items only				



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



- ullet Inventory Adj. \downarrow
- Debit Memo
- Exchanges

Departure

• Auto Invoicing Service Orders



Auto	Invoic	ing S	ervic	e Orde	C & Edit Recurring Schedule for
Automating Dep		118 3		c oruc	Schedule name: Daily SO I Description: Daily SO
 ♦ Rev.io PSA [TMEHNER] File Edit View Tool Forward ♦ Porward ♦ View reminders fo ♦ View unread work ♦ FAVORITES 	TIGERPAW;VaultCube Tech Is Tas <u>k</u> s Activitie <u>s R</u> e Send E-mail Dial Phone Accounting Network and Security Utilities Rev.io PSA Setup Wizard		R		 ✓ Enable schedule RECURRING SCHEDULE ○ Minutely ○ Every [○ Daily ○ Every we ○ Weekly ○ Monthly ○ Yearly START/STOP Start: 08/14/2024 ▼ at
	Options View Logs	1000 Dome CCTV			
Options			? ×	Automation Agent	
Control Panel Switch to List View Startup DEFAULT DATABASE Use Current Clear DEFAULT USER Anthony Mehner	Automation Agent Co-Managed Direct Create Archive Email Connector	Company Company Configure Accounting Document Disclaimers Global Custom Fields	<u>جې</u>	Complete tasks fo Invoicing rep: VaultCube Email invoice	NNS d orders: ders that meet the criteria for closing r closed orders Technologies
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	Quotes & Reports Opportunities	Security Service Order	s Taxes		

📀 Edit Recurring Sci	hedule for Auto Invoicing		?	×
Schedule name: Description:	Daily SO Invoicing Daily SO Invoicing			
 Enable schedule 				
RECURRING SC	HEDULE			
Daily Daily Weekly O Monthly	Every day(s) Every weekday			
C Yearly		C 11		
Start: 08/14/2024	▼ at 12:00 AM ÷		rrences	
		ОК	Cancel	

💠 Automation Agent	? ×
Feature: Auto Invoicing	
 Enable Auto Invoicing AUTO INVOICING OPTIONS Actions to take on invoiced orders: Close invoiced orders that meet the criteria for closing Complete tasks for closed orders Invoicing rep: VaultCube Technologies Email invoice 1 days after creation Email template: TSI APEX - Invoice Attached - Payment Due (not auto paid) - External Notice Invoice report: C:\Program Files (x86)\Tigerpaw Software\Tigerpaw\Reports\Invoice.rpt 	
Schedule Name Description Enabled Daily SO Invoic Daily SO Invoicing Image: Comparison of the second seco	
- OK	Cancel

Auto Invoicing Service Orders

Automating Departure

Rev.io PSA [TMEHNER\TIGERPAW;V	/aultCube Technologies]				
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☆ FAVORITES	GENERAL INFORMATION SUMMARY				
	Brief Descr. Traces Status: Assigned 🔽 Tasks • Parts & labor • Printed				
M matrix	Contact Ruth Parr • Type: Service Call • Ref No.				
🛗 SCHEDULING	Phone: [402] 815-9237 x[Main Q Priority: Emergency (1 hrs 24x7] Cust. PG: S0 notes © Documents © Custom fields				
SALES & MARKETING	Email: ruth.parr@gmail.com Severity: High Board: [all] Expenses Net Invoiced				
	Acc. Phone [402] 324-4051 x Main Zone: Display on customer potal Expenses Not Invoiced				
Service Orders	WORK REQUESTED - SO Call				
 Service Order Detail Contracts 	Sweep and secure area due to threat				
Contracts Contract Detail					
Recurring Agreements					
Enter Time					
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SO Templates					
Data Collection Import					
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Manage DCA Asset Imports					
Detail Billing Shipping Codification Subcontractors Account Related Documents Totals Analysis					
	DATES AND TIMES TECHNICIANS Received: 09/17/2018 al 9:17 AM by Al Powell Pinnay: Anthony Mehner				
	Requested is in Color in a Color in Col				
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R INTEGRATIONS	System.				
STATUS AND SETUP					

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

Auto Invoicing Service Orders

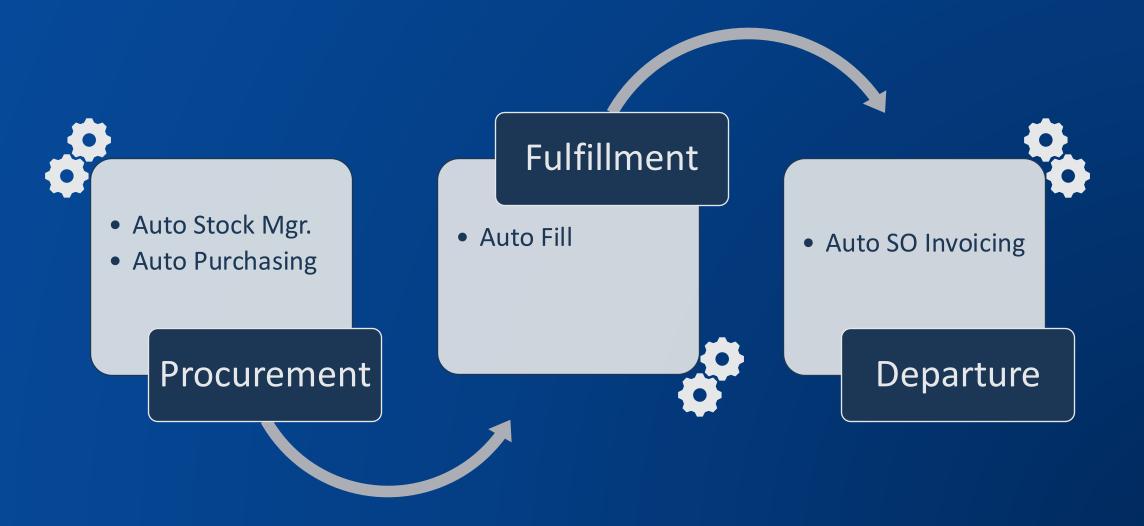
Automating Departure

- 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

PSA Deep Dive: Efficient Inventory Management



Questions?

PSA Deep Dive: Efficient Inventory Management



