Consumables and Inventory Management

Asset Panda is highly configurable when it comes to keeping track of assets and workflow management, and helps you to manage your workflow from the beginning to the end of an asset's life cycle.

You'll find the following topics covered in this article (click on any of the links to be taken straight there, if you wish):

- Create Groups and Fields
- Create Notifications
- Quantity Changes
- Data and Use
- Reports

First things first. A bit about inventory management is that it is different than asset management. Although the term for inventory and assets has been used interchangeably, there are key differences to be noted.

NOTE: Keep in mind that our screenshots are examples. Yours may be the same or it may differ. We recommend you provide the names and use verbiage that best suits your organization. It's okay. We won't hold it against you.

Let's get started with a quick summary of assets and inventory:

Assets

Assets are resources with economic value owned or controlled by an individual, corporation or country. There is an expectation that these assets will provide a future benefit. Assets can be almost anything and can consist of laptops, vehicles, pieces of equipment, and so forth.

An asset typically has a unique identifier to separate it from other assets, such as being in one location, having one owner, and so forth. For instance, you can think of it as a one to one relationship.

Inventory

Inventory are different than assets. Inventory consists of raw materials, work-in-process products, and finished goods that are considered to be the portion of a business's assets that are ready or will be ready for sale.

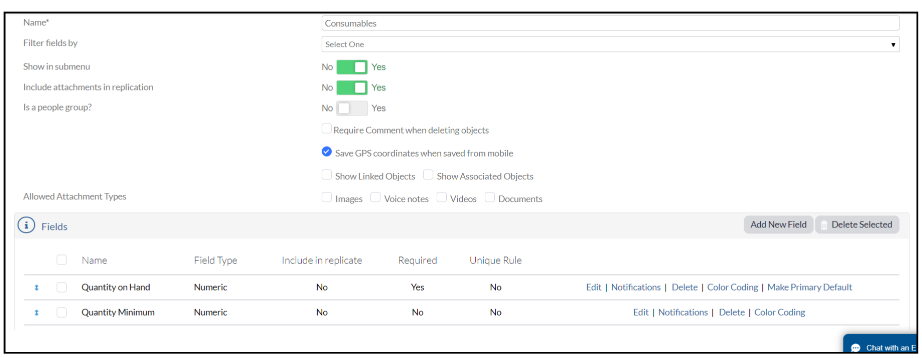
The key point about inventory is that it has a multiple to one relationship. In other words, inventory is quantity based. For instance, you can have one type of inventory item but have multiples of it, and the number would be reduced, or increased at varying points throughout its usefulness to the business.

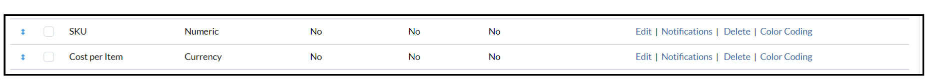
Pretty simple, huh? Proceed to Configuration to now delve into the fun stuff!

Configuration

Here at Asset Panda, the configuration from an asset record to an inventory record can be quite different. The following screenshot provides an example of what an inventory record and its fields of information typically consists of.

NOTE: Keep in mind that you can create as many custom fields of info you wish to create.



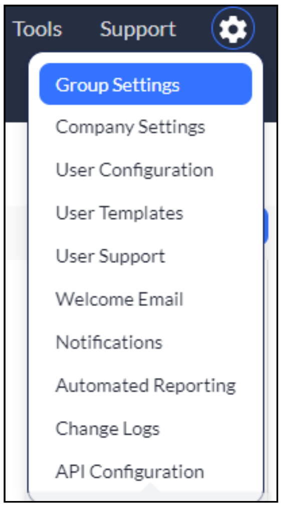


Create groups and fields

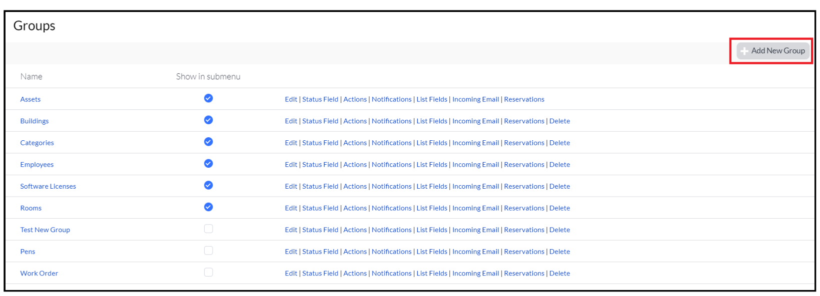
You just got a peek into a new group. We'll guide you through the configuration process so you can create one of your own.

To create this group and its fields:

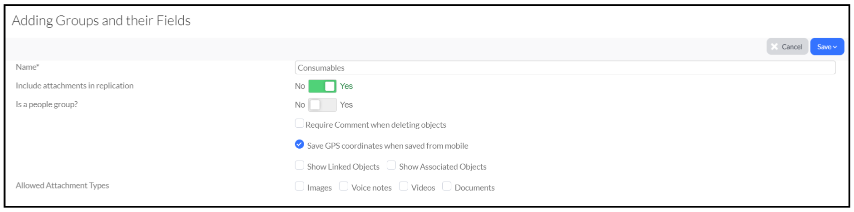
1. Click to select your settings  icon, and then select **Group Settings**.



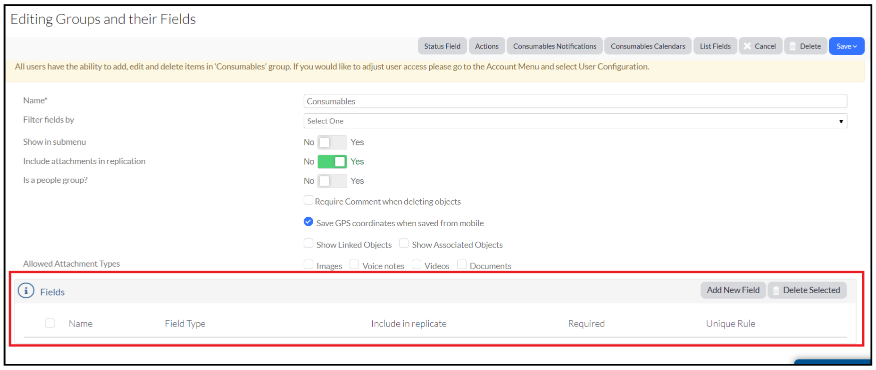
2. Click **Add New Group**.



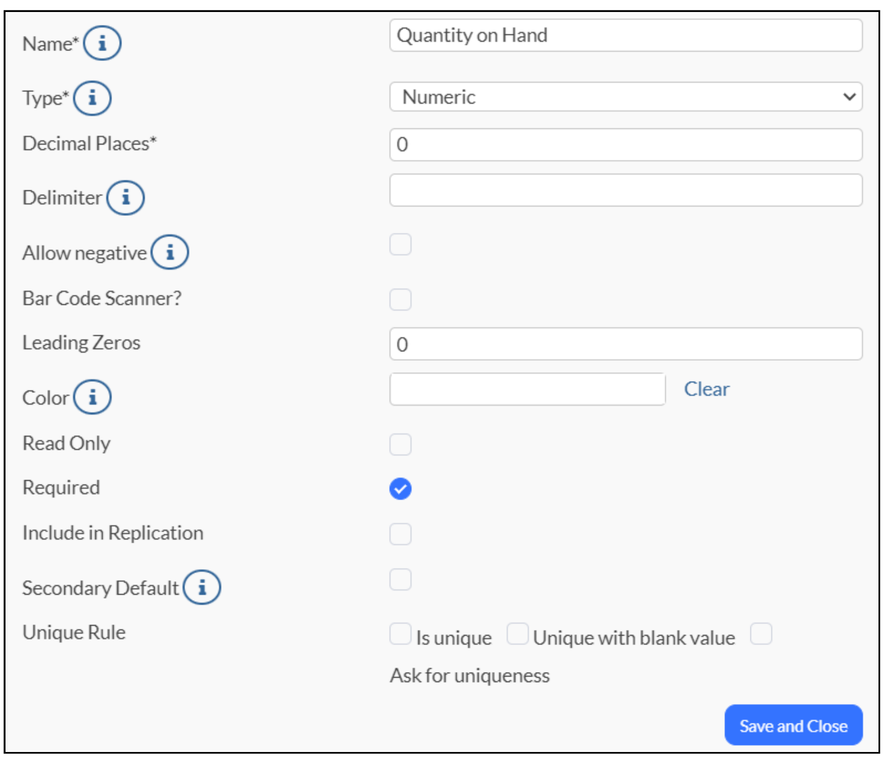
3. Provide the **Name** of your choice (we recommend and are using **Consumables** in our example), and then click **Save.**
Once you click **Save**, a **Fields** section displays on your screen, allowing you to begin to add new fields.



4. Navigate to the **Fields** section, and then click **Add New Field**.



5. Create and add the new field(s) you wish to add.
Keep in mind that the selections on this screen change depending on what you choose. You would of course repeat the field creation process for all new fields you wish to create. (We're using our **Quantity on Hand** field for our example below.)



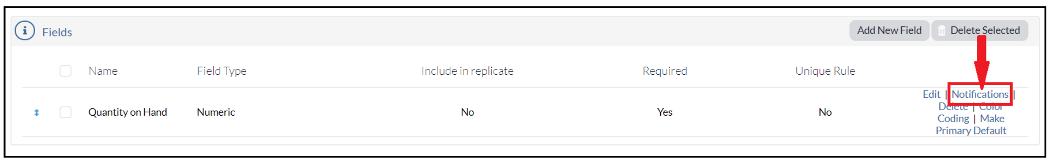
6. Click **Save and Close**. Just like that, your new field has been created and saved.

Create notifications

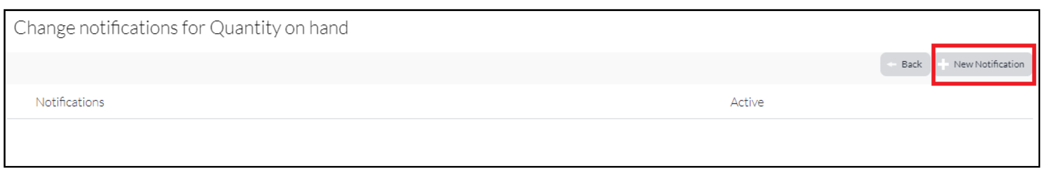
Notifications are good because they keep us on track and in the know, especially with our busy schedules. Asset Panda realizes this and provides you with the ability to be notified whenever an item and its quantity reach a breaking point (set by you!).

For example, say you've created a numeric field type for **Quantity on Hand** (shown below).

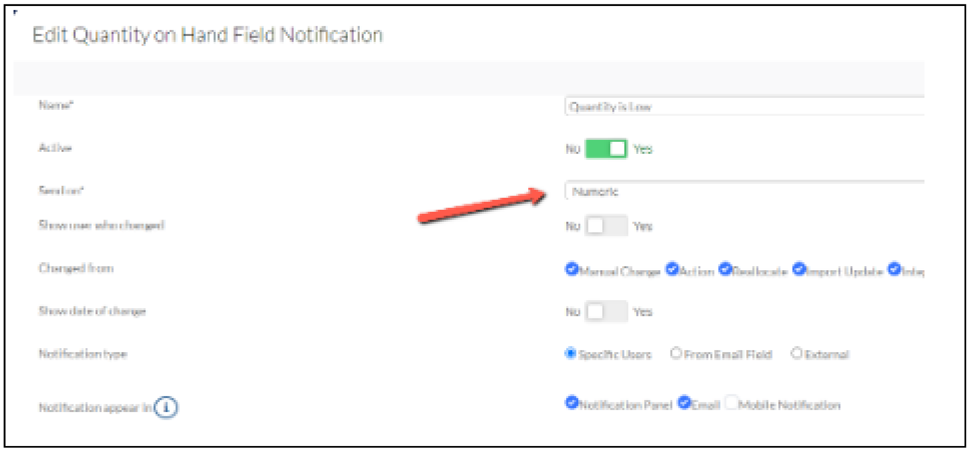
1. Navigate to the **Quantity on Hand** field, and then select **Notifications**.



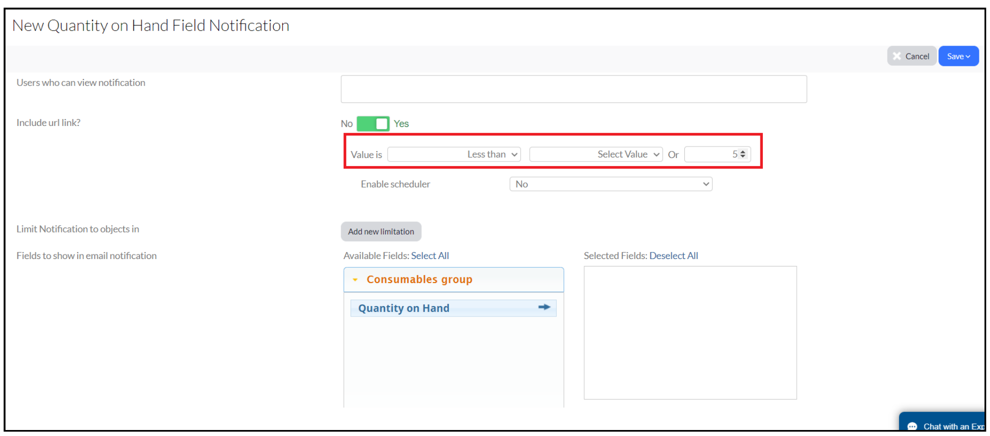
2. Click **New Notification**.



3. Enter a name for your notification. (We've used **Quantity is Low** for our example.)
4. Set the **Send on** field to **Numeric**.
5. Decide your **Notification** type.
Selecting **Email** will require you to enter **Users who can view notification** and a **Subject**.



6. Set the **Value is** as **Less than** and then select your less than value number. You could also opt to select another field from the second drop-down menu rather than a specific number. It really all depends on the fields that you have created. For instance, we have a **Quantity Minimum** field (shown in the first screenshot of this article). We could have selected that rather than an actual number.

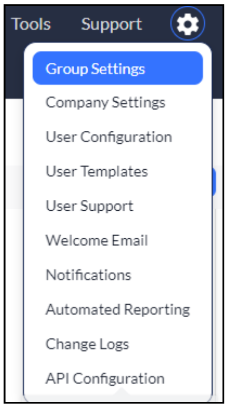


7. Add any other options you wish to add to your new notification.
8. Click **Save** to save it.

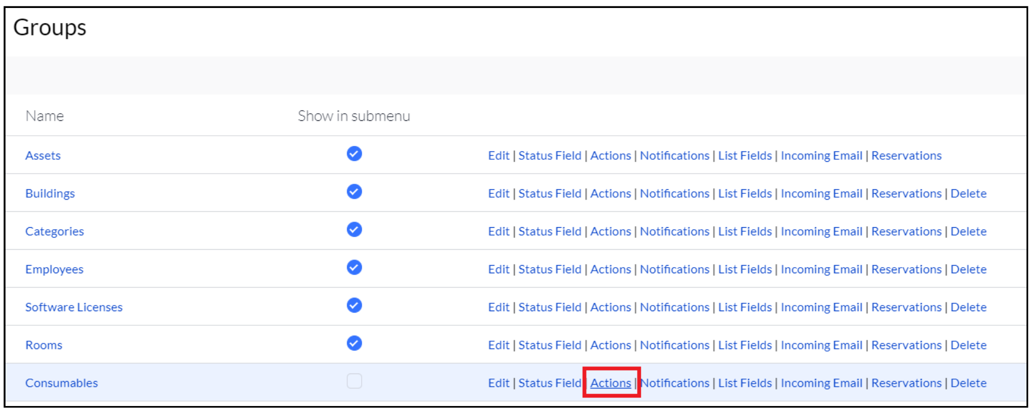
Quantity Changes

By this point, you've likely created your fields of information about an inventory item. Now, it's time for the next step which is to create the functions to quickly increase or reduce the quantities on a daily basis.

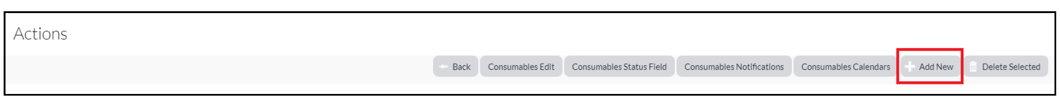
1. Click the settings  icon, and then select **Group Settings**.



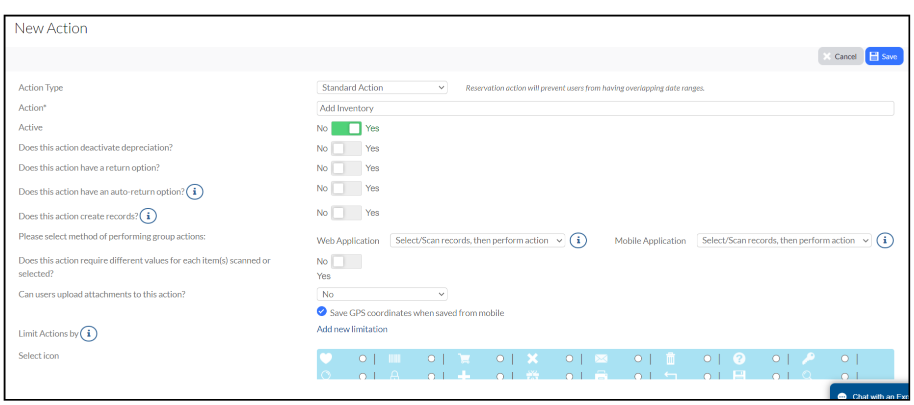
2. Locate your new group (we're using our new example **Consumables** group), and then click the **Actions** link.



3. Click **Add New**.

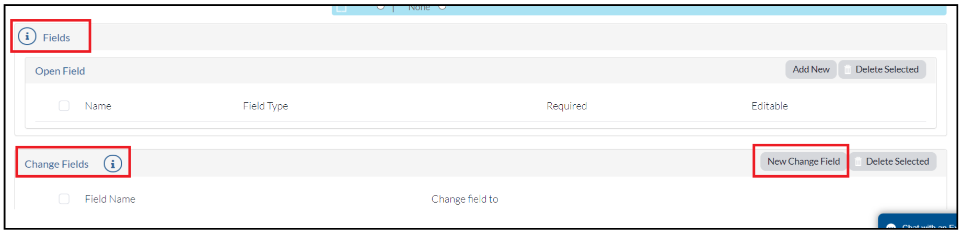


4. Provide a name for your **Action** (we've used **Add Inventory** as our example), and then click **Save**.



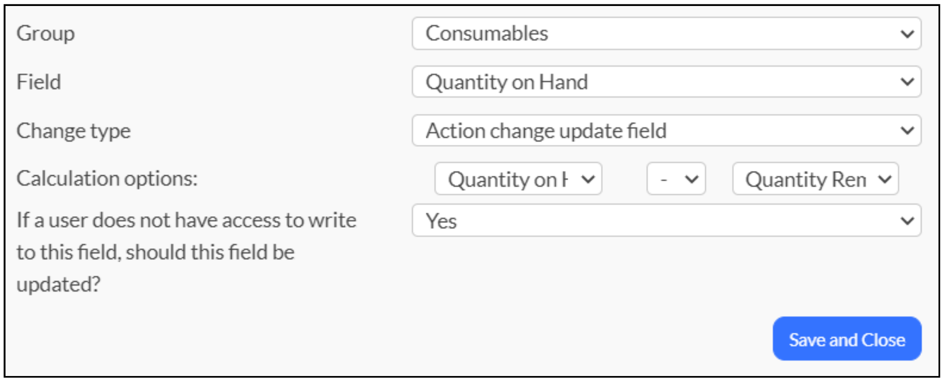
We'll now create an action that will remove a quantity from a specific item. Keep in mind that you can have as many fields as you like within the action but for our example, we will focus on when an item is being removed (by having a date time stamp to automatically capture this) and by how many (with a numeric field for the quantity removed).

5. Scroll down to your **Fields** section and locate the **Change Fields** section.
6. Click **New Change Field**.



Our next goal is to let Asset Panda remove quantities from the quantity we have on-hand. Just so you know, the drop-down options contained within the **Calculation options** fields are pulling from fields contained within the group (the **Consumables** group in our example). (See [Create groups and fields] if you need help or a reminder for how to create groups and fields.)

- **Group:** Select the Group that is being changed.
- **Field:** Select the Field that is being changed (pulling from the Group and the Fields contained within that Group).
- **Change Type:** Select how the field needs to be changed. (We've selected **Action change update field**, which directs our system to take the existing quantity on hand and reduce its value.)
- Calculation options: We've selected from two of our existing **Consumables** Group fields, **Quantity on Hand** and **Quantity Removed**. We selected the (**-**), asking the new Change Field to remove the Quantity Removed from the Quantity on Hand.
- **If a user does not have access to write to this field, should this field be updated:** Users aren't usually automatically given the ability to manually change certain fields. We recommend setting this to **Yes**.



7. Click **Save and Close** once you have finished creating your new Change Field. Remember, your own preferences and settings may or may not match those we've used in our examples.

Data and Use

So we've got our functions and parameters set. Now, we'll add some data.

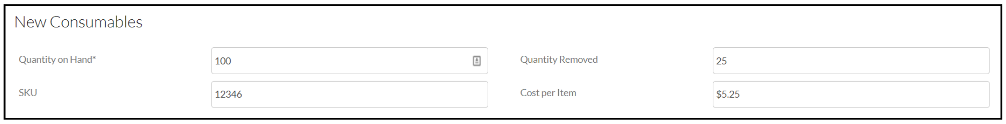
Just as with assets, you can manually add an inventory record via both the browser or mobile, or by importing through the browser.

To add a new record:

1. Navigate to your **Consumables** group, and then click **Add New**.

The fields shown on this screen are pulling from the fields you've added to your **Consumables** group. As a result, yours will likely differ from what you see in our example below. (See [Create groups and fields]() if you a refresher with adding more fields.)

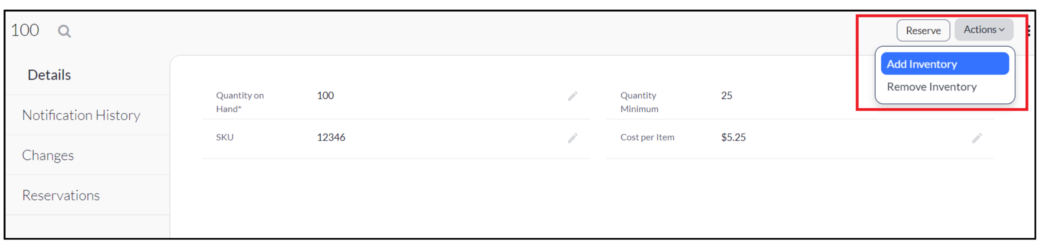
2. Enter the information you wish to enter into your fields, and then click **Save**.



You will receive the message that your record was successfully saved. Click on any of the pencil icons to make any needed changes.

You can now perform an action.

3. Click the **Actions** button, and then select the action you wish to perform.



4. Enter the applicable information, and then click **Save and Close**.

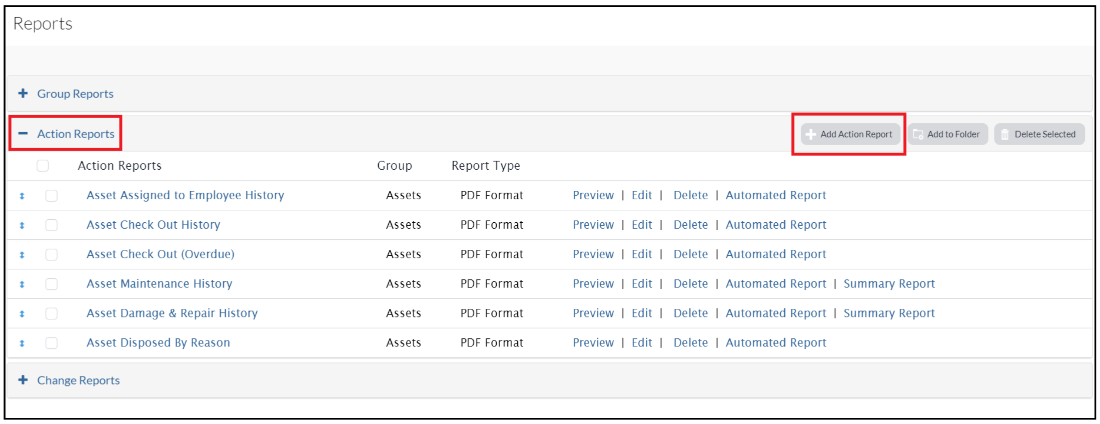
This changes the amount shown in your inventory. The history of this action can also be pulled into a report.

Reports

Now that you've set actions to reduce inventory items, you can also create a report to summarize which items were reduced over time.

To create such a report:

1. Click **Reports** from your dashboard or click **Tools**, and then select **Reports**.
2. Scroll down to, and then select **Action Reports**.
3. Click **Add Action Report**.



4. You'll now need to set your parameters:

- **Name:** Enter the name you wish to give your report. (We've used **Removed Consumables Log** in our example but of course you can use whatever name you wish to use.)
- **Group:** Set the report to pull from your **Consumables** group (or whatever you named your specific group, if different).
- **Select Action:** Set the report to pull from the removal action you created (our example is from our **Remove Inventory** action).
- **Action Objects:** Set the report to pull only consumable items via the **Only objects that have had this action** option. In this case, it is objects that have had the removal action performed.

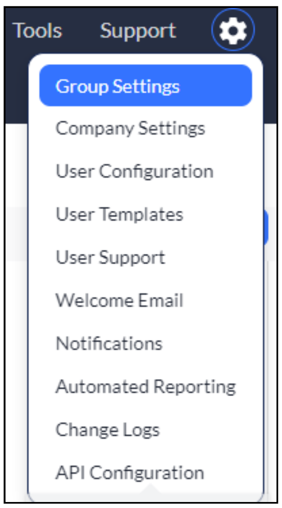
New Action Report

Linked and Associated Tabs

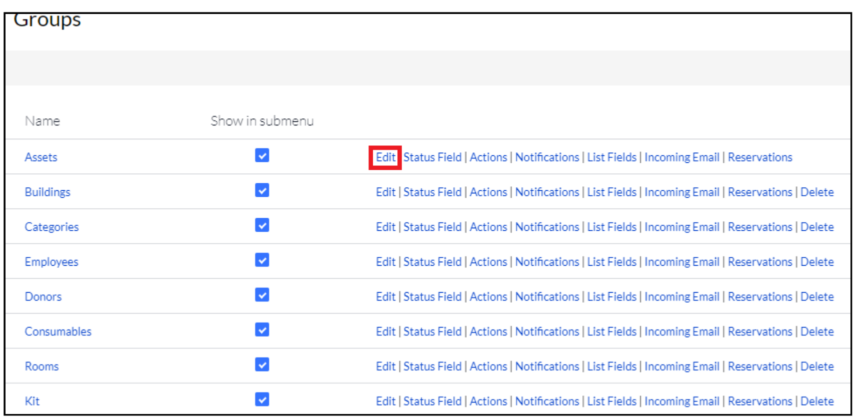
This article describes how to activate linked and associated tabs, along with how they can be used.

For the following example, we'll be using the **Linked** and **Associated** tabs within our **Assets** group.

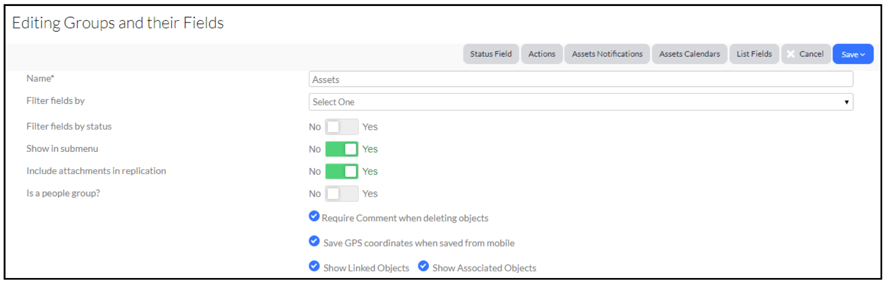
1. Click to select your settings  icon, and then select **Group Settings**.



2. Locate your **Assets** group, and then select the **Edit** link.

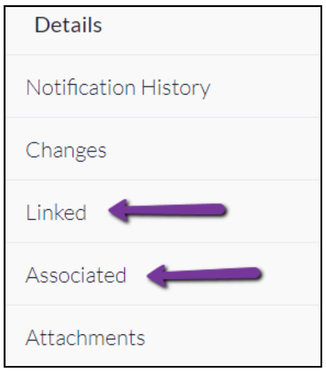


3. Click to select both **Show Linked Objects** and **Show Associated Objects**.



4. Click **Save**.

You'll then see these tabs on the left side of your screen when viewing an asset.



The **Linked** tab is used when a group list of the group you are currently viewing, exists in another group.

For example, let's say I have a Work Order group that has an Asset Group List. I can see the Work Order that is related to this asset, from within Linked Work Orders.

The **Associated** tab is used when the group you are currently viewing contains group lists of other groups.

For example, let's say I have an Employees Group List, Categories Group List, etc. within my **Assets** group. I can see associated records in the **Associated** tab.

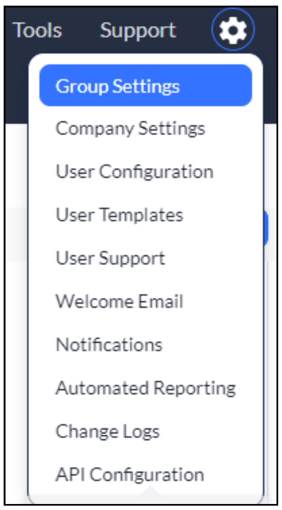
By selecting one of the options in the drop-down list, I can view the associated records.

Default Statuses

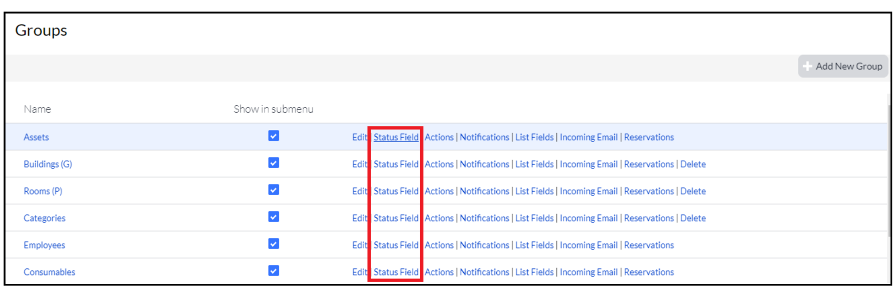
A Default Status can be set for each group, so that when a new record is added, it automatically contains value within the **Status** field.

To do this:

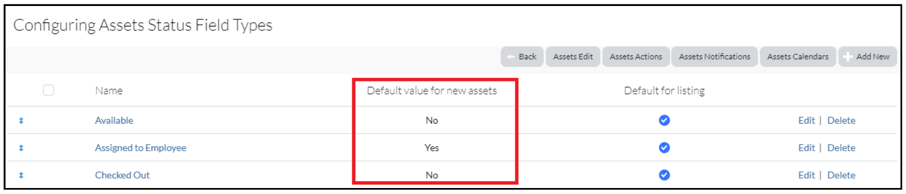
1. Click to select your settings  icon, and then select **Group Settings**.



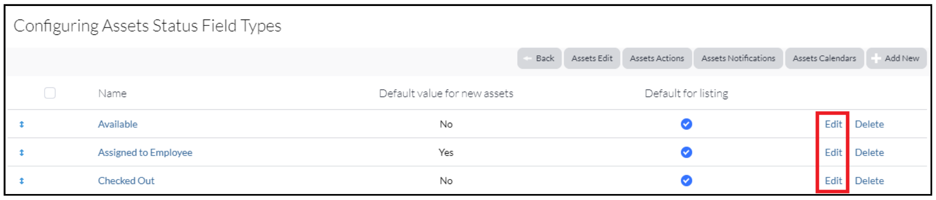
2. Navigate to the group you wish to edit, and then select the **Status Fields** link.



If a default status is set, you'll see **Yes** within the **Default value for new (Group name)** column.



3. Select the **Edit** link to change or set the default status.



4. Select **Yes** for the **Is default for new (Group name)** feature.

Group Settings

Your **Group Settings** page is where a lot of the magic happens because this is where you access all of the settings within a specific group.

You can access settings such as:

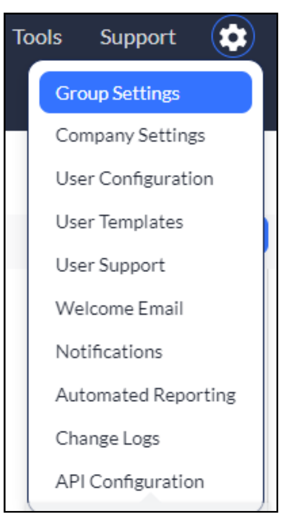
- Add Groups
- Edit Groups
- Status Field
- Actions
- Notifications
- List Fields
- Incoming Email
- Reservations
- Delete Groups

Each of these topics is contained within its own section to give you more information. Just click on any of the links above to learn out more.

Access group settings

To access your group settings:

1. Click to select your settings  icon, and then select **Group Settings**.



Your group settings display from your **Groups** page.

Groups

Add New Group

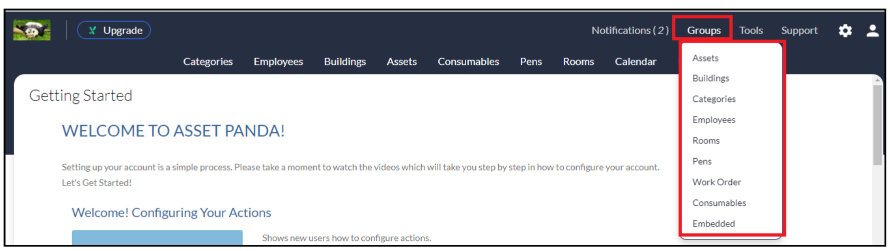
Name	Show in submenu	
Assets	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations
Buildings	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete
Categories	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete
Employees	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete
Donors	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete
Consumables	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete
Rooms	☑	Edit | Status Field | Actions | Notifications | List Fields | Incoming Email | Reservations | Delete

About Groups

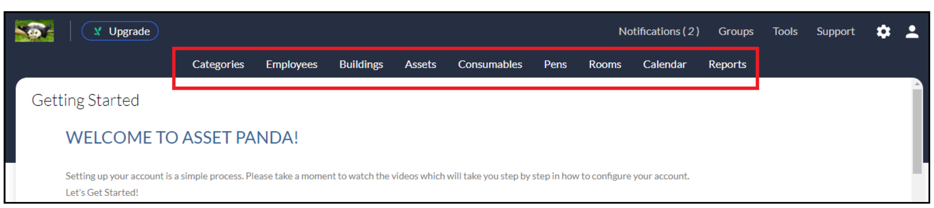
Think of Asset Panda groups as file folders within your file cabinet, or the pages within your Excel file. Each group is basically a division of your assets.

You may choose to configure each of your groups separate however, the functionality of each group is essentially the same. For instance, your **Assets** group is where you will find all your assets, while your **Employees** group hosts a directory of all your employees. Regardless of the group type, data is stored within each one.

You'll find a full list of your groups within the navigation of Asset Panda. (Your groups may differ from ours.)



Note that this can differ from your list of favorites, because you can customize which groups show in your favorites.



You must have a minimum of three groups to start. We suggest (as a best practice) to create **Assets**, **Employees**, and **Asset Type** (Categories) groups.

Related Topics

[Add Groups]

[Edit Groups]

[Delete Groups]

[Group Settings]