

C. 7. Optional: If using the Inventory Module, enter beginning levels

What's the purpose of this setup step?

The purpose of this step is to get your inventory opening on-hand balances into Control.

- 1) Click **Setup**.
 - a) Click **Pricing Setup**.
 - b) Click **Adjust Part Inventory & Cost**.
- 2) In the **Categories and Parts** column, click the "+" sign next to the category called Materials. Keep clicking the "+" signs of the categories under **Materials** until you see the parts within the category that needs inventory on-hand balances added into Control.
- 3) Enter your on hand balances under the **Quantity** main column heading and the **Billed** column. Continue entering balances for all the parts that you want to add balances into Control. You will notice that **On-Hand** and **Available** columns will be updated for your inventory opening on-hand balances.
- 4) Click **Save** once you have finished adding inventory quantity numbers:
 - a) Enter in the dialog box a reason for the part edit a description, such as "Starting Inventory Balance." Click **yes** to confirm the Inventory update.
- 5) To verify amounts, click **Reports**.
 - a) Click **Parts & Inventory**
 - b) Click **List**.
 - c) Click **Inventory Listing**.
 - d) Click **Preview** or **Print** to view the report.

Now you're ready for the next transition task.