

Inventory Viewers

Andrew:

Hey Robert, I've been tasked to audit some of our inventory. Got any tips on where to start?

Robert:

Sure, you should familiarize yourself with the Inventory Viewers. They're useful to display, search, and print inventory information. Reviewing that data and cross checking it with our physical inventory is a great place to start.

Andrew:

Perfect, can you show me the basics?

Robert:

Sure, why don't you pick a topic and we'll get started!

Topics

- Accessing
- Formatting
- Using

Accessing

The inventory viewer shows you details about your products.

You can access this viewer from several places in Eagle, including Inventory Maintenance, Point of sale, Purchasing, and Business Advisor.

You can also open the viewer by typing INV in the Launch bar.

When opened, either the Inventory Viewer or the High Performance Inventory viewer displays.

The High Performance viewer runs faster but limits the fields searched or displayed.

Use system option 8288 to set the default viewer.

Regardless of the option setting, it's easy to switch between the two.

To open the standard viewer from the High Performance viewer, select the Inventory Viewer link.

To open the High Performance viewer from the standard viewer, choose the Misc. KPad option in the ribbon, and select High Performance Inventory Viewer from the menu.

Formatting

You can configure the Inventory Viewer to display in three different formats to suit your needs.

Set the viewer format in Options Configuration with Option ID 8287.

Select the dropdown in the Current Value column to choose your options.

The standard and expanded formats change which columns are available to view.

When selecting the columns to view, options with a plus sign are exclusive to the Expanded format.

For hardware, home stores, or automotive type businesses, you can select one of the special formats that include columns specific to your business type.

For hardware or home center businesses, set this to HWHC. To include the expanded columns for an automotive type business, select Yes.

The Flexible Attributes option removes some hardware specific columns, while adding them for Color, Size, and Style. Select No to use the standard format.

With Option 8287 set to H, S, or Y, you can add an Extended Description column that displays item notes in the viewer. Option 8618 controls this function.

When set to yes, Eagle first checks for a type 2 note. If it doesn't find one, it checks for a type 4 note.

The first 50 characters of the note display in the viewer.

Viewers may perform slower when you enable this. Set this option to no to improve performance.

Using

The inventory viewer allows you to identify useful information quickly.

In Inventory Maintenance, the field that the cursor is in sets the lookup that the viewer opens with.

Here's an example, if you want to open a viewer that uses vendor for its lookup, put the cursor in the vendor field and select Viewer.

In the viewer, enter your search criteria, and see the products from the selected vendor.

Use the change lookup link to adjust the field by which Eagle filters the results.

Using the right-click menu from the header row, you can select or insert the columns you want to see.

You can save and load these customized views using the file menu.

This makes it easy to preserve useful viewers without having to build them each time you want to look up information.

You can use the Inventory Viewer to uncover issues, like identifying overstocked or unmoving inventory.

You can create a view that shows the quantity on hand, the total cost of that inventory, and the last date it was sold.

This could help you quickly identify products that you may need to put on clearance or reduce your ordering point.

You can select a column to further limit the results to by right clicking and selecting the filter on options.

You may want to do a couple quick checks for issues to fix.

Filter for blank location codes, and enter the correct data. Items that have this field blank may be missed in cycle counts.

A negative quantity on hand indicates that Receiving may have made an error that needs correcting.

You can even print a copy to carry with you while double checking if the quantity on hand is accurate.

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