

CartGenie v5.0+: Inventory Manager

Applies To:

CartGenie v5.0+ Enterprise Editions only

Summary:

There are several steps that need to take place for the Inventory Manager to be utilized.

Here are the steps that need to be done for the Inventory Manager to work properly:

NOTE: *The Display Location field in the Location Manager MUST be set to YES for the Check Availability feature to display.*

Make sure that you have entered the Quantity on Hand and Reorder Point in the Product Manager> Inventory Manager for each product you want to track.

When you are processing orders in the Order Manager you will need to Update Inventory as well. In addition to clicking the 'Ship All-Yes' button to update the Ship field for the line item and clicking Add/Update you will need to Click the Update Inventory button at the bottom of the screen.

The Inventory Update will display the items and quantities for that particular order. You will also see the 'Inv. Adjustment' field which displays the quantity that will be deducted from your inventory. Click the Add/Update button at the bottom of the screen. You will see a pop-up screen indicating that the update was successful.

If you then go back to the Product Manager and look at the Inventory Manager for that product you will see that the quantity listed in the 'Inv. Adjustment' has been deducted from the Q.O.H for the item.

Learn more about the Inventory Manager in the Help menu (by Interface: Inventory Manager).

REPORTS

You can review what items are below your Q.O.H at Reports> Inventory> Inventory Reorder. This report will show all the items that have reached the Reorder Point.

ENABLE AUTO CART DISPLAY

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NOTE: The merchant must utilize the Inventory Manager feature to accurately control quantity on hand (QOH).

You can also have items that have a Q.O.H. of '0' stop displaying for purchase on your site by enabling the 'Enable Auto Cart Display' in the Profile Manager.

When Auto Cart Display is set to Yes, an item number will be set by CartGenie to No immediately following placement of a new order if an item has reached a quantity of '0'. Please note that a customer can still order more than what is in stock until the QOH is '0'.

For example: Let's say that you have an item that has a QOH of 5. A customer can place an order for 6 of this item (because there is 5 in stock). Once the order is placed and inventory is updated, your QOH would be less than 0 so the item would become unavailable for purchase on your site

When the QOH has reached '0' for an item, the message 'This item is not currently available' on the item's order page instead of 'Place Order Here' option on your site.

ENABLE AUTO ITEM DISPLAY

NOTE: The Enable Auto Item Display feature should only be enabled if you are using the Inventory module in CartGenie to control inventory.

Enable Auto Item Display allows the system to automatically set the product display field to No for an item when it runs out of stock. For more information on using this feature, see CartGenie Desktop Engine's Help menu (Keyword - Utilities)

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