

COR•REC[®] Inventory Overview

Terms Used:

Inventory Type:

Base Type: There are seven (7) base inventory types pre-qualified within the COR•REC[®] Inventory. They are Flammable, Gas, Hazardous, Gel, Liquid, Perishable and Solid. This is by no means extensive and may be extended by a user.

Compound Type: Compound types contain multiple base types and are created by a user. For example, a user might create the compound type Flammable Liquid which would contain the base types Flammable and Liquid.

Identifier:

Inventory Identifiers represent something you'd like to keep track of. An identifier does not need to represent a physical entity but at the same time may be accurately thought of as an inventoried item.

Identifier Audit:

An Identifier audit is a collection of movement records describing the changes to Identifier quantities and costs.

Product:

Inventory products are a collection of one or more Identifiers or Ad hoc elements. Inventory products generate an inventory identifier to represent the product in inventory. Ad hoc elements are added by a user. The product requires assembly before affecting inventory levels.

Purchase Order:

It is a record created from within COR•REC[®] describing the number of inventory Identifiers required and at what price from a particular supplier.

Batch:

A Batch ticket is a record describing a unique quantity of an Inventory Identifier created when receiving on a purchase order.

Produce Assembly:

Product Assemblies are work orders that reduce identifier quantities associated

with an Inventory Product and increase the in-stock value of the inventory identifier that represents the product. Once saved they allow limited modification until they are designated closed.

Work Order Requisition:

Requisition work orders allow for Identifiers, Product Assembly, and Ad hoc elements. A requisition remains open for modification and may have additional elements added over time until closed.

Liminal:

A record not yet saved to the data store.

Gotcha:

Are explanations of feature effects, explaining actions and results that may not be obvious at the time they occur. Gotcha's that may affect this walk-through are listed at the end of this document.

Walk Through

The purpose of this walk-through is to present an overview of the various inventory aspects and how they work together within the COR•REC[®] Inventory system. This walk through does not cover all the capabilities and options available within COR•REC[®] Inventory. For detailed information refer to the documentation.

During this walk through you will be directed to open workspaces and add views via the COR•REC[®] menu system. When direct to add or open a view it is assumed that you have an opened workspace. Unless otherwise stated, the view will always be found under the Aspects menu > Inventory... Many views contain light blue sash lines separating panels. Depending on your chosen screen resolution you may need to adjust the size of panels by grabbing and sliding a sash line vertically or horizontally.

Preferences/Settings:

Preferences are accessed via the Help menu, menu item Preferences. Settings/Preferences are available on Mac only under the COR•REC[®] menu, menu item Setting/Preferences. Settings and Preferences open the same dialog. The settings/preferences listed below are examples only.

Open Preferences/Settings

From the left side panel list, select Inventory Preferences.

Settings

Invoice Item Schedule: Material Non-Taxable Invoice Item

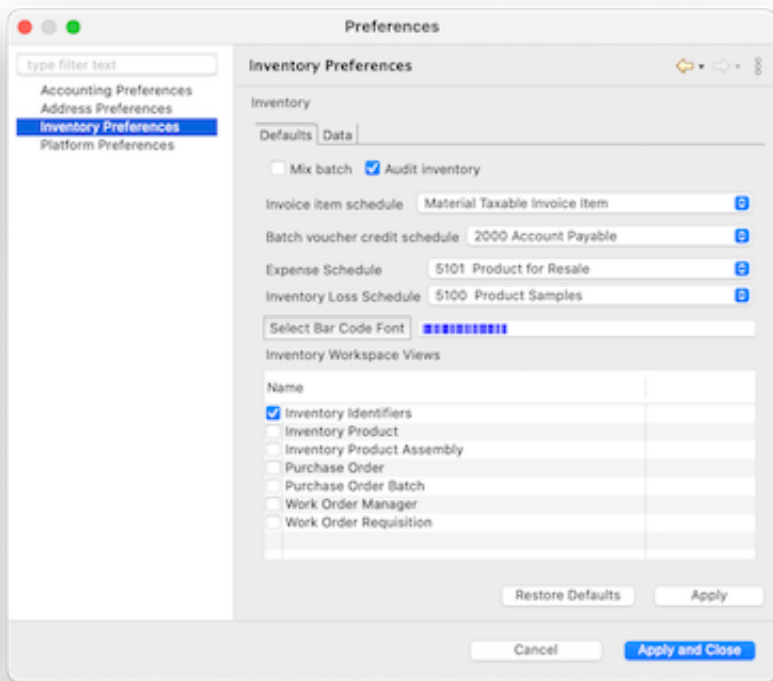
Liability Schedule: 2000 Account Payable

Expense Schedule: 5101 Product for Resale

Inventory Loss Schedule: 5100 Product Samples

Select Bar code: This requires that your system has a bar code font. Free barcode fonts such as Code 3 de 9 may be found online.

Inventory Workspace Default Views: Select/check Inventory Identifiers.



Administrative Settings:

Administrator is accessed via the Help menu, menu item Administration > Administrator > Inventory Tab. Inventory Administrator settings are required for various operations throughout the inventory plugin. The Inventory Tab View displays an upper and lower panel. The upper panel contains the required fields.

Purchase Order Presets:

***Purchase Order No.:** When creating a purchase order, the next purchase order number will be automatically assigned to it. This number will serve as a unique identifier for the purchase order.

Sales/Use Tax: User directed text.

***Sold To:** Identifier, drop-down entry. Allows for multiple single-line entries.

***Bill To:** Identifier and address, drop-down entry opens an address entry dialog. Allows for multiple entries.

***Ship To:** Identifier and address, drop-down entry opens an address entry dialog. Allows for multiple entries.

Liability Schedule: The Liability Schedule is used when creating a voucher. If vouchers are managed exclusively within the Account Payable this may be left empty.

Shippers: When the Accounts radio button is selected then all Account Payable Accounts are listed. Selections made at this time are displayed as a group when a Shippers radio button is selected.

Accounts: Display all Account Payable Accounts in the Shipper drop-down list.

Shippers: Display selected Account Payable Accounts in the Shipper drop-down list.

Agent: Contact for company creating the Purchase Order.

Email: Agent Email address.

Phone: Agent telephone number.

* Required fields

Inventory Assemblies and Work Orders

Fabricators: Drop-down list of single-line entries. To add a fabricator enter a description, name, or title then tab out.

Suppliers: A list of Account Payable Accounts. Each selected account will be made available as a known supplier.

Sample Entries:

Purchase Order Defaults

Purchase Order Number

Sold To

Bill To

Ship To

Liability Schedule

Shippers AAA Shipping Accounts Shippers

Agent

Agent

eMail

Phone

Fabricator

Fabricator

Suppliers

Account Payable

AAA Shipping

BBB Freight Lines

CCC Trucking

Thing to Purchase

Widget Warehouse

Save Inventory Administrator. 

Create Inventory types, Identifiers, and Identifier Groups.

Select the Inventory button on the action card. If the identifier View is not located within the Inventory Workspace add the Identifier View. The view is divided horizontally with both compound and base types above the Identifier group and detail section.

Add an Inventory type: Right-click in any open area within the Base Type section. Select the pop-up menu item “Add Inventory Type”. Name your inventory type.

Inventory Types


Compound Types

Base Types

Flammable Gel Inert Perishable

Gas Hazardous Liquid Solid

To create a base type select the save button. 

To create a compound type, select two or more base types and then click the save button. 

Create Inventory Identifiers:

Located in the center of the lower section is a list titled “Inventory Identifiers”. Right-click

within the list and select the menu item “Add Identifier”. The Identifier detail section is located to the right of the list and will now accept data.

Identifier Detail Section:

Name: User-supplied may contain any character but %.

In Stock: Value set by batch tickets created when receiving on purchase orders. Virtual Identifiers may have their in-stock value manually entered.

On Order: List of open purchase orders containing this identifier.

Mixed batch: Allow batches of the identifier to be seen as a single batch.

Virtual: Allow batches of the identifier to be seen as a single batch.

Disabled: Prevent an Identifier from being added to newly created products.

Discontinued: For your internal use.

Out of Stock: When an Identifier is marked as “Out of Stock”, the item is not immediately available.

Bar Code: Numeric values are required to produce a unique bar code image.

Unit of Measure: Selectable value – see: Help Menu > Administration > Administrator > Unit of Measure.

Inventory Type: Selectable value of Base and Compound types.

Expiry: Number of days an Identifier is valid for use. This is applied to batch records when created. Zero designates an Identifier as having no expiration date.

Identifier: A unique value entered by the user or generated by the selection of the Generate Button. 📄 The Generate Button is best used after filling in all other fields.

Expense Schedule: List of available schedules. Default from Preferences is selected. Used when receiving on a Purchase Order when initiated by the user.

Additional Services: Services offered from other COR•REC® plugins.

Description: User-directed text.

Image: Select to assign an image to an Identifier. Image Dialog


Sample Identifier is shown here.

Inventory Identifier

In Stock On order


Mix batch
 Virtual
 Disable
 Discontinued
 Out of Stock

Name

Barcode 


Unit of Measure

Inventory Type Expiry

Identifier 


Expense Schedules


Additional Services

Description
This is a tutorial inventory identifier 





Open Batch Tickets Last Cost 0.00

PO No.	Ordered	Received	Expires	Quantity	In Stock

The image was selected from the filing system. Select the image box or image. The Image Dialog box shown here is opened. Select the Find Button  and select "Open from the..." menu item.

Navigate your file system and select an image. PNG is suggested but GIF, TIFF, and others do work. A name is suggested for the image. You may change the name now. Select the Check Button  to save. The image has been saved to the COR•REC® data source and may be retrieved using the Find on a name menu item.

Name

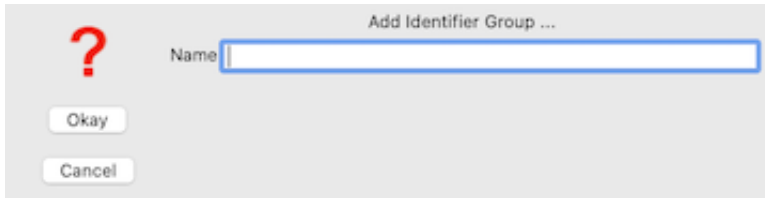
Find on name

Open from...

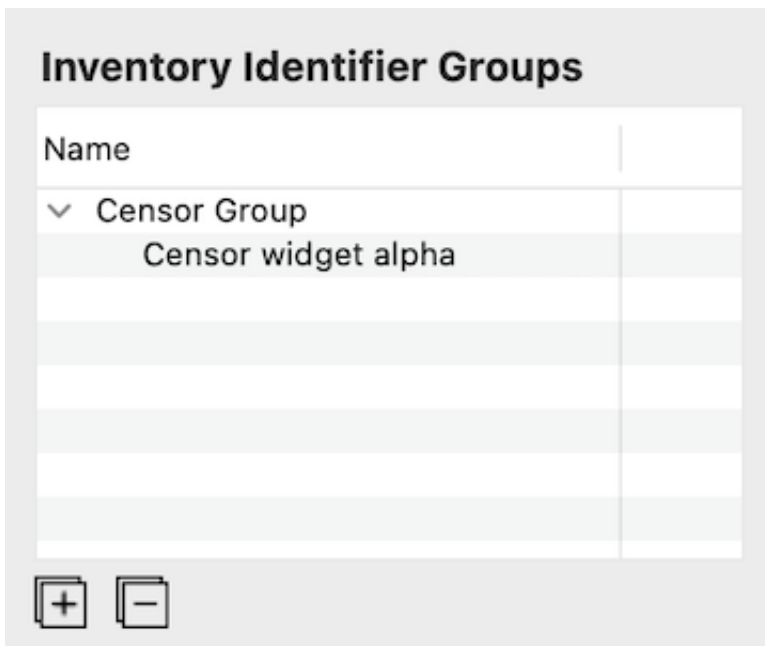
Save the newly created inventory Identifier. 

Create Inventory Identifier Group:

Located to the left in the lower section is a tree titled “Inventory Identifiers”. Right-click within the tree area and select the menu item “Add Identifier Group”. From within the Add Identifier Group dialog give your group a name and select Okay. This action does not save the group.



Select the previously entered and saved Inventory Identifier and drag it over the top of the newly created group. Select [Save](#). The newly created group saves along with the tree node representation of the inventory identifier. An Identifier may be placed in any number of groups.



Create Inventory Product

Open the Inventory Product view. The view is divided horizontally. The upper panel contains Inventory Products and the lower panel contains the Inventory Identifier selection section.

Begin by right-clicking in the Inventory Products List located in the center of the top section and selecting the menu item “Add Inventory Product”. The Inventory Product detail section is located to the right of the list and will now accept data.

Inventory Product Detail Section:

Disabled: When selected the product will not be available for Product Assembly.

Product Name: User-supplied may contain any character but %.

Product Price: The value entered here is qualified by one of the following radio buttons.

Fixed Amount: Use the Product Price without modification.


Cost Plus: The total listed cost of the product plus the value contained in the Product Price.

Percentage Plus: The total listed cost plus the percentage value found in the Product Price.

Undetermined: Behaves as Fixed Amount. It's intended to flag not yet determined.

Bar code: Numeric values are required to produce a unique bar code image.

Unit of Measure: Selectable value – see: Help Menu > Administration > Administrator > Unit of Measure.

Identifier: A unique value entered by the user or generated by the selection of the Generate Button.  The Generate Button is best used after filling in all other fields.

Invoice Item Schedule: List of available schedules. Default from Preferences is selected.

Additional Services: Services offered from other COR•REC[®] plugins.

Description: User-directed text.

Required Inventory: Table of Identifier and ad hoc items that make up the product. Editable cells within the table depend on the row type. Identifier rows allow editing of quantity and cost. Ad hoc rows allow editing of all cells.

Sample Inventory Product shown here.


Inventory Product

Disable

Product Name

Product Price

Fixed Amount
 Cost Plus
 Percentage Plus
 Undetermined

Barcode 

Unit of Measure

Identifier

Invoice item schedule

Additional Services

Description

Product contains two Identifiers and one labor element. Censor widget beta was added as an Identifier while creating this product.





Required Inventory

Quantity	Name	Identifier	UofM	Cost
1	Censor widget alpha	1-0224552902pc	pc	20.00
1	Censor widget beta	1-0224280005pc	pc	30.00
2	Assembly time		hours	100.00
				250.00

There are a few things in this section that require elaboration. Let's start from the top. The image used here is the same one used in the Identifier "Censor widget alpha". However, this time we are fetching the image from the data store, instead of the file system. To select the image, click on it and the Image Dialog box will open. In the "name" field, enter the name of the image, or at least part of it, followed by the wildcard character "%". Next, select "Find on a name" from the "Find" menu. This will generate a list of images that match your query.

Choose the image you require and then click on the Check Button  to confirm your selection.

Name







Find on name

Open from...

There are three elements in the Required Inventory table. The first "Censor widget alpha" existed before creating the Inventory Product. The second "Censor widget beta" was created while creating the Inventory Product using the Identifier panel. The third

“Assembly time” was added as an ad hoc element.

To add an Identifier to the product it must first be displayed in the Identifier panel Inventory Identifier list. Identifiers are added to the list in one of three ways. One is as described in this document’s “Create Inventory Identifier” section. This was the method used to add “Censor Widget beta” to the product. The second is to select an Identifier from the Inventory Identifier Group tree. Third is the lookup method. The Identifier Name field above the Identifier list is a quick lookup field. This is identified by the image  followed by a text field. Enter characters into the text field, the wildcard character may be used. Tab out of the field to initiate a lookup. All Identifiers matching the search will be added to the list.

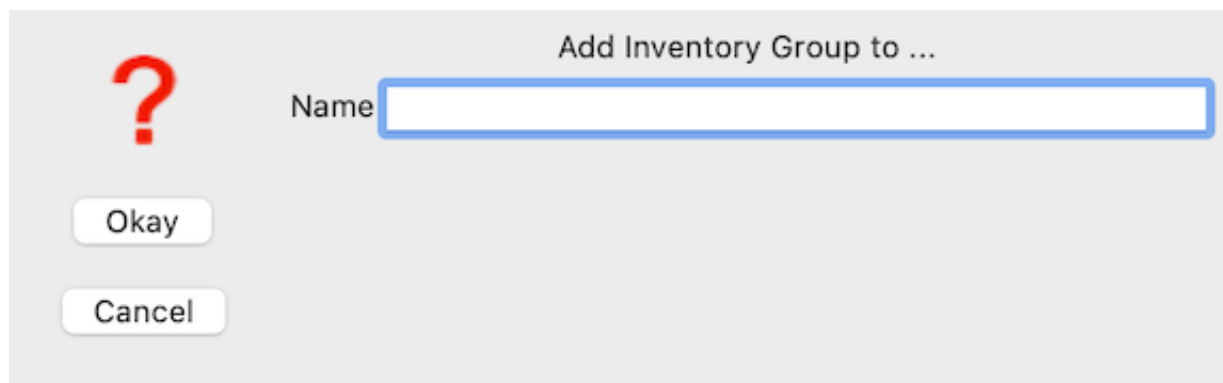
Identifiers from the list may be added in one of two ways. Right-click selection of an Identifier will present a list of actions as menu items, select “Add Identifier to [Product Name]”. The second method is to drag the Identifier from the list to the product table.

Ad hoc items are added by right-clicking in the table and selecting the menu item “Add hoc”. This will add an empty row to the table allowing the user to edit as required.

Save the newly created Inventory Product. 

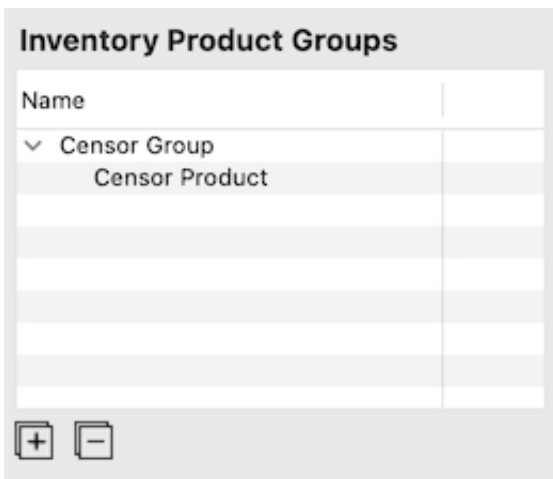
Create Inventory Product Group:

On the upper left section, you will find a tree labeled “Inventory Product Groups”. To add a new inventory product group, right-click within the tree area and select “Add Inventory Product Group” from the menu. A dialog box will appear where you can give your group a name and click “Okay”. Please note that this action does not automatically save the group.



The screenshot shows a dialog box titled "Add Inventory Group to ...". On the left side, there is a large red question mark icon. To the right of the icon is a text input field with the label "Name". Below the input field, there are two buttons: "Okay" and "Cancel".

Select the previously entered and saved Inventory Product and drag it over the top of the newly created group. Select Save. The newly created group saves along with the tree node representation of the inventory product. An Inventory Product may be placed in any number of groups.



Create Purchase Order

The Purchase Order view is divided vertically. To the left is an Identifier tree and an Identifier list used to supply line items for the purchase order on the right. All purchase orders are started by selecting a Supplier. If suppliers have been identified in the Inventory Administrator, they are listed in the Supplier drop-down list. Otherwise, all Account Payable Accounts are listed.

Purchase Order Detail Section:

Supplier

Supplier: Drop down list of possible suppliers.

Contact: The contact field can be edited and will be automatically filled with information from the chosen supplier.

Email: The Email field can be edited and will be automatically filled with information from the chosen supplier.

Phone: The phone field can be edited and will be automatically filled with information from the chosen supplier.

Date Required: User-supplied date.

Shipping Method/Shipper: Two-part entry part one is user-defined, and part two is a drop-down list of designated shippers.

Tracking No.: User-supplied.

Purchase Order

Purchase Order Number: The system suggests a Purchase Order Number that can be edited by the user as needed.

Date: Date purchase order is created.

Status: Managed by the COR•REC® system.

Agent: Default supplied from administrator, editable.

Email: Default supplied from the administrator, editable.

Phone: Default supplied from the administrator, editable.

Basis:

Stock: When this box is unchecked, the purchase order is considered to be associated with a particular client. Select the client from the accompanying drop-down list.

Product:

Unspecified: When this box is unchecked, select a product listed in the accompanying drop-down list. When a product is selected the Identifier associated with the product is added to the Purchase Order Items table.

Note: User-supplied.

Sold To

Sold To: Drop down list of names supplied through Inventory Administrator.

Bill To: Drop down list of addresses supplied through Inventory Administrator.

Ship To: Drop down list of addresses supplied through Inventory Administrator.

Purchase Order Items

Table: Adding items can be done in the following ways. Right-click on Identifier in the Identifier List or Identifier tree and select the menu item “Add to Purchase Order”. Drag an Identifier from the Identifier list or Identifier tree to the table. Specify a product.

Supplier

Supplier

Contact Date required

eMail Shipping method

Phone Tracking No.

Purchase Order Number Agent

Date eMail

Status Phone

Basis Stock Client

Product Unspecified

Note

Purchase order specifically to fulfill Customer First Censor Product. Date required ASAP. Waiting on tracking number

Sold To

Sold To

Bill To Ship To

Purchase Order Items

Quantity	Received	UofM	Identifier	Name	Cost
5	0	pc	1-0224552902pc	Censor widget alpha	20.00
10	0	pc	1-0224280005pc	Censor widget beta	10.00

Subtotal

Freight

Tax

Total



Save Menu containing the following menu items.

Post: Change a purchase order state from liminal to posted and save.

Retain: Change a purchase order state from liminal to retained and save.

Cancel: Cancels the creation or edits of a purchase order

Post the newly created Purchase Order. 

Receive on Purchase Order

The Purchase Order Batch view is a feature that allows you to receive purchase order line items into the inventory system. The view is divided into two vertical panels. The left panel contains search criteria fields and a results list of purchase orders, while the right panel displays Purchase Order Batch Tickets.

Search Criteria: You can search for a purchase order by using any of the following search criteria:

Supplier: A drop-down list of suppliers. This field is optional.

PO Number: A value used to retrieve a specific purchase order. This field is optional.

Date: A date range that is inclusive. You can enter the date range in two fields.

Status:


Outstanding: Posted purchase orders not yet closed or canceled.

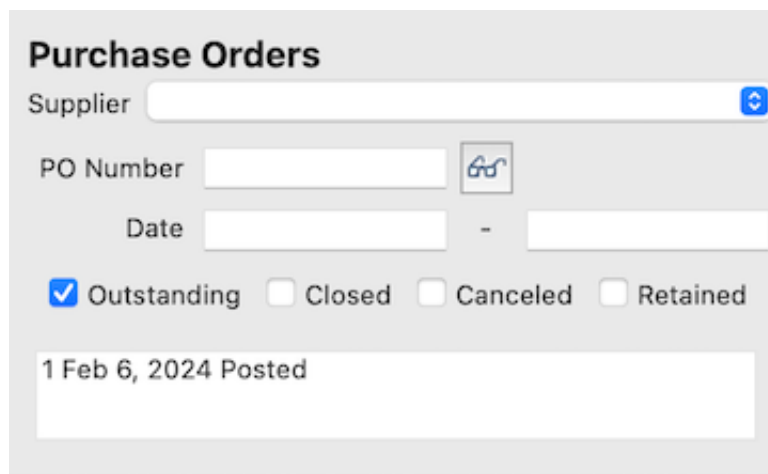
Closed: Posted and closed purchase orders.

Canceled Posted or retained but not yet received.

Retained Not yet posted or canceled.

To search for a purchase order, enter the necessary search criteria. You can leave all fields blank, but you must select at least one status type. By default, the status type

"Outstanding" is selected. Once you have entered the search criteria, click on the  lookup icon to initiate a search.



The screenshot shows a web interface for searching purchase orders. It features a title "Purchase Orders" and several input fields: "Supplier" (a dropdown menu), "PO Number" (a text field with a magnifying glass icon), and "Date" (two text fields separated by a hyphen). Below these fields are four radio buttons for status selection: "Outstanding" (checked), "Closed", "Canceled", and "Retained". At the bottom, a search results list displays one entry: "1 Feb 6, 2024 Posted".

The search results will be displayed in a list. Each entry in the list will show the Purchase Order Number (e.g., 1), the date it was issued (e.g., Feb 6, 2024), and its current status

(e.g., Posted).

Create Batch Ticket

Select a purchase order from the left panel list. The right-side lower panel will display the selected purchase order.

Purchase Order

Purchase Order Number Supplier Account
Date Supplier Name
Status Opened Closed Canceled

Purchase Order Items

Quantity	Received	UofM	Identifier	Name	Status
5	0	pc	1-0224552902pc	Censor widget alpha	Opened
10	0	pc	1-0224280005pc	Censor widget beta	Opened

The purchase order shows two line items, with all items outstanding. They indicate that no batch tickets have been generated from the purchase order. Just above the purchase order items table is the button “Receive All”. Selecting “Receive All” will generate a batch ticket for each outstanding quantity.

Select a line item. A liminal batch ticket is created for the outstanding quantity.

Batch Ticket: Censor widget alpha 1-0224552902pc

PO No. 1 Censor widget alpha 1-022455

Purchase Order Number	1	Quantity Ordered	5
Supplier	Things to Purchase	Account No.	1
Supplier Item Name	Censor widget alpha		
Supplier Identifier	1-0224552902pc		

Quantity Date Received
Date Verified Expiration Date
Supplier Batch ID

The batch ticket generated may be modified.

Quantity: Cannot exceed the suggested amount, equal to Quantity minus Received.

Date Received: Date item was received.

Date Verified: The date item was verified as ordered.

Expiration Date: This may be left blank or a date the item is no longer viable.

Supplier Batch ID: May be left blank or enter a value either supplied or user generated. If no value is entered the COR•REC[®] system will provide a unique value.

Save the batch ticket.

Select the “[Clear List](#)” button located just below the batch ticket list.

Select the “[Receive All](#)” button.

Multiple tickets are listed. The batch ticket that was just posted is listed along with a liminal batch ticket for the un-received item. Selecting the posted batch ticket displays additional information and may not be modified. Select the liminal batch ticket, modify the quantity to five (5), and save.

Select the recently created batch ticket. It will now display additional information indicating that the purchaser’s order item associated with this ticket has only been partially received.

Select the “[Clear List](#)” button.

Select the “[Receive All](#)” button.

Multiple tickets are again listed. All tickets created from this purchase order and a liminal ticket representing the outstanding quantity not yet received here.

Saving now will create another batch ticket. It will also recognize that all items on this purchase order have been received automatically and change the purchase order status to CLOSED. Select [Save](#).

Create Inventory Product Assembly

Open Product Assembly view. The view is divided both vertically and horizontally. The left side panel contains the Inventory Product Group tree above the Inventory Product list. The right side panel contains the Product Assembly detail panel above the Inventory Product Detail section. A product assembly is an order to assemble an Inventory Product, a work order. An Inventory Product Assembly requires an Inventory Product.

Use the search function above the list or select a product from the inventory tree to generate a list of inventory products. When a product is selected from the tree it is added to the list and is selected from the list propagating the Inventory Product Detail section. The inventory Product displayed in the Inventory Product detail section is the product that is assembled when the inventory product assembly process is initiated. Once an inventory product is displayed the inventory product assembly may begin.

To assemble a product in the inventory, right-click on the Inventory Product Assemblies list and select “Assemble Product [name].” If you have been following this walkthrough, your display should resemble the image below. Depending on your display resolution, you may need to adjust the panel sash controls. This document section titled Inventory

Product describes the lower panel of the two shown in the image. Meanwhile, the upper panel, Inventory Product Assemble, is explained below the image.

Inventory Product Assemblies

Censor Product

240220--1167

Name Stock Purchaser

Quantity Assign to Start Due

Note

Batches Select Assistant

Name	Reserve	Available	Ordered	Received	Expires	Supplier
<input checked="" type="checkbox"/> Censor widget alpha	1	5	Feb 6, 2024	Feb 7, 2024		Things to Purchase
<input checked="" type="checkbox"/> Censor widget beta	1	5	Feb 6, 2024	Feb 7, 2024		Things to Purchase
<input type="checkbox"/> Censor widget alpha	0	10	Feb 8, 2024	Feb 9, 2024		Things to Purchase
<input type="checkbox"/> Censor widget alpha	0	120	Feb 20, 2024	Feb 20, 2024		Virtual
<input type="checkbox"/> Censor widget beta	0	5	Feb 6, 2024	Feb 7, 2024		Things to Purchase
<input type="checkbox"/> Censor widget beta	0	20	Feb 8, 2024	Feb 9, 2024		Things to Purchase
<input type="checkbox"/> Censor widget beta	0	30	Feb 20, 2024	Feb 20, 2024		Virtual

Inventory Product

Disable

Product Name

Product Price

Fixed Amount
 Cost Plus
 Percentage Plus
 Undetermined

Barcode

Unit of Measure

Identifier

Invoice item schedule

Purchasers

Additional Services

Description

Required Inventory

Quantity	Name	Identifier	UofM	Cost	Ext.Cost
2	Assembly time		hours	100.00	200.00
1	Censor widget alpha	1-0224552902pc	pc	20.00	20.00
1	Censor widget beta	1-0224280005pc	pc	30.00	30.00

250.00

Product Assembly Detail Section:

Header: The left side contains the assembly number generated by the system “240220--1167” The number shown indicates the assembly is in the liminal state (not yet persisted) and will change to a unique value when persisted.

Name: User-supplied. The default value supplied is the product name.

Stock: General indicator as to the purpose of the assembly.

Purchaser: A purchaser drop-down list displays customers who have previously purchased the product. Any product assembled for a purchaser is isolated for invoicing.

Quantity: Number of products to assemble.

Assign To: Individual or group responsible for the assembly process.

Start: Date to begin assembly.

Due: Date assembly is to be complete.

Note: User-supplied.

Select Assistant: Batch selection assistant. The system will automatically select batches required to assemble a product.

Batch Table

List of batches available to assemble a product. When an assembly is ordered COR•REC[®] lists open batches capable of fulfilling the requirements of the Inventory Product.

COR•REC[®] selects batches needed to assemble one inventory product. The documentation describes the selection procedure in detail. You can select or de-select the “Select Assistant” option based on your requirements. Ensure that there are enough batches available to meet the quantity entered.

Selecting batches alters the reserved column for the selected batch. Make selections that are required or leave the default selections. The name, quantity, assign to, start and due date, and note fields are user-defined. Selecting save reduces the required inventory and batches. If a batch required quantity equals the batch available quantity the batch ticket is closed.

It's important to note the concepts of Virtual Batches and Mix Batches. A virtual batch is created for any Inventory Identifier that has been designated as virtual. On the other hand, an Inventory Identifier that has been designated as “Mix Batch” removes the restriction that all Identifiers of a single type must be available from a single batch.

Save the Inventory Product Assembly. 

Requisition Work Order

Work Order Requisition

Open the Work Order Requisition view. The view is divided into two sections both vertically and horizontally. On the left-hand side, you will find two search panels and an Identifier tree panel. The top search panel, labeled Work Order Requisitions, is used to fetch saved requisition-type work orders. The center search panel, labeled Product Assemblies, is used to fetch saved product assemblies that can be added to the requisition. The lower panel contains the Identifier Tree, which allows you to add relevant identifiers to the requisition.

The right side panel contains two panels. The top panel displays a requisition. The bottom panel reflects the choice made from the Product Assemblies list or Identifier Tree.

Work Order Requisition Search Panel:

Values enter represent the search criteria to fetch Work Order Requisitions.

Work Order No: Work order numbers are divided into two parts. The left portion of the number may or may not be unique. The right portion is always unique. If a value is entered into the right portion then all other search criteria values are ignored.

Date Start: Limit search to entered start date.

Date Due: Limit search to entered due date.

Assign to: Limit search to the selected assignee.

Purchasers: Limit search to the selected purchaser.

Pending: Limit search to requisitions designated pending.

In Progress: Limit search to requisitions designated in progress.

Paused: Limit search to requisitions designated paused.

Complete: Limit search to requisitions designated complete.

Extended

Identifier Id: Limit result to only requisitions that contain the entered numeric value representing an Identifier.

Batch Id: Limit result to only requisitions that contain the entered numeric value representing a Batch Ticket.

Product Assemblies Search Panel:

Values enter represent the search criteria to fetch Inventory Product Assemblies.

Work Order No: Work order numbers consist of two parts. The left portion of the number may or may not be unique, while the right portion is always unique. If a value is entered into the right portion, then all other search criteria values are ignored.

Date Start: Limit search to entered start date.

Date Due: Limit search to entered due date.

Assign to: Limit search to the selected assignee.

Purchasers: Limit search to the selected purchaser.

Pending: Limit search to requisitions designated pending.

In Progress: Limit search to requisitions designated in progress.

Paused: Limit search to requisitions designated paused.

Complete: Limit search to requisitions designated complete.

Extended

Identifier Id: Limit result to only requisitions that contain the entered numeric value representing an Identifier.

Batch Id: Limit result to only requisitions that contain the entered numeric value representing a Batch Ticket.

Identifier Tree Search Panel:

Searches only the tree. Values entered represent the search criteria to locate an Identifier in the tree.

Name: Name of the Identifier. Wild card character is ignored.

Identifier: Identifier of the Identifier. The wild card character is ignored.

Requisition Detail Panel

Header: The left side contains the assembly number generated by the system "240220--1167" The number shown indicates the assembly is in the liminal state (not yet persisted) and will change to a unique value when persisted. The left side contains the requisition number generated by the system "240220--1168" The number shown indicates the requisition is in the liminal state (not yet persisted) and will change to a unique value when persisted.

Name: User-supplied value.

Purchaser: Drop down list of customers. If a requisition is created for a purchaser,

it will be isolated during invoicing for selection.

Quantity: User-supplied value.

Assign To: Individual or group responsible for the requisition.

Start: Date to begin.

Due: Date expected to be complete.

Note: User-supplied.

Parts Table

It may contain Identifiers, Product Assemblies, and Ad hoc items.

Create a Requisition

Right-click in the Work Order Requisition list. Select the menu item “Create Requisition Work Order”. A temporary work order identifier is supplied. Enter a name for the work order, make selections, and enter information as required in the detail panel fields. Identifiers, Inventory Product Assemblies, and Ad hoc items may be added to the requisition parts table.

The screenshot shows a requisition form with the following elements:

- Header: 240223--1208, with radio buttons for Pending (selected), In progress, Paused, and Complete. There are printer and save icons on the right.
- Name field: Requisition Work Order Walk Through
- Purchasers field: Stock Item
- Quantity field: 1
- Assign to field: (empty)
- Start field: (empty)
- Due field: (empty)
- Note field: (empty text area)
- Parts table with columns: Quantity, Name, Identifier, UofM, Supplier, Supplier Batch, Cost, Ext.Cost
- Total: 0.00


Add Identifier: Select an Identifier from the Identifier tree. The selected Identifier will be displayed in the right side lower right panel. Locate the Open Batch table just below the Identifier details. Shown here:

Inventory Identifier

Name In Stock
 Mix batch Virtual Disable Discontinued
 Out of Stock

Unit of Measure Type Identifier

This is a tutorial inventory identifier



Open Batch Tickets

PO No.	Ordered	Received	Expires	Quantity	In Stock	Available	Supplier
1	Feb 6, 2024	Feb 7, 2024		5	4	4	Things to Purchase
n/a	Feb 23, 2024	Feb 23, 2024		109		109	Virtual



The second batch listed represents the total in stock for the selected Identifier. It is offered as a selectable option when an Identifier is designated as Virtual.


Right-click a listed batch selecting the “Add to Requisition” menu item. The batch will be added in its entirety. From within the requisition Parts Table select the quantity cell of the batch just selected and enter the quantity required.


Add Inventory Product Assembly:

Generate a list of Product Assemblies. The simplest is to select Pending and In Progress and select. Select an Inventory Product Assembly from within the list. The assembly will be displayed in the lower right panel on the right side. Right-click an Inventory Product Assembly from the list selecting the “Add to Requisition” menu item. Product Assembly line items may not be modified.

Add Ad hoc item: Right-click within the Parts Table selecting “Add ad hoc” menu item. Ad hoc rows allow editing of all cells.

240223--1208 Pending In progress Paused Complete  

Name Purchasers 

Quantity Assign to  Start Due

Note

Parts

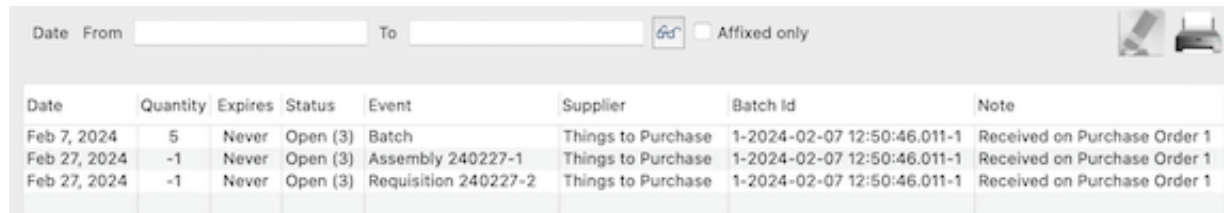
Quantity	Name	Identifier	UoFM	Supplier	Supplier Batch	Cost	Ext.Cost
10	Repair Department	Labor	Hrs.	In house		150.00	1500.00
1	Censor widget alpha	1-0224552902pc	(pc) Piece	Things to Purchase	1-2024-02-07 12:50:46.01	20.00	20.00
1	Censor Product	240222-1	(pc) Piece	Assembly Line		150.00	150.00

1670.00

Save the Requisition Work Order.

Identifier Audit

The Identifier Audit is a process that records the movement of inventory identifiers and any changes made to the audit records themselves. The Identifier Audit view can be accessed through the Aspects menu or by right-clicking on a specific inventory identifier from the identifier list. The image below shows the results of selecting "Censor Widget Alpha" from the identifier list and clicking "Audit Movement."



The screenshot shows a software interface for an Identifier Audit. At the top, there are input fields for "Date From" and "To", a search icon, and a checkbox labeled "Affixed only". Below this is a table with the following data:

Date	Quantity	Expires	Status	Event	Supplier	Batch Id	Note
Feb 7, 2024	5	Never	Open (3)	Batch	Things to Purchase	1-2024-02-07 12:50:46.011-1	Received on Purchase Order 1
Feb 27, 2024	-1	Never	Open (3)	Assembly 240227-1	Things to Purchase	1-2024-02-07 12:50:46.011-1	Received on Purchase Order 1
Feb 27, 2024	-1	Never	Open (3)	Requisition 240227-2	Things to Purchase	1-2024-02-07 12:50:46.011-1	Received on Purchase Order 1

THE END

This concludes the Inventory walk-through. Our goal was to help you become comfortable with how the major parts fit together. We suggest you explore the documentation that explain the myriad of options not covered here.

Gotcha Editable table cell: When an editable cell within a table is selected, the cell enters the edit mode. Right-clicking on a cell in edit mode on some operating systems like OS X will display the operating system's menu items, not COR•REC[®] application menu items. To access COR•REC[®] menu items you must first exit the edit mode. This is easily done by clicking on an open area of the table. You may then right-click on a table row or open area of the table to access the COR•REC[®] menu items.