

U.M.D.N.J

Inventory Management System

Non-UH Warehouse Staff

MarketPlace
[Pick the date]

Procurement Coordinator

One time set-up:

You will need to should change your default tabs that display. These will assist you in getting to the areas that you will need to perform your job functions.

1. Log into my.UMDNJ.edu
2. Select the MarketPlace icon (eProcurement test icon for training and testing)
3. Select the drop down (far right) select **customize**
4. Select the **Navigation Setup** tab
5. Select the second drop down; select **inventory management**
 - a. **Items/price**
6. Select **Update**

Setting up your Profile

Since you will be placing order to outside vendor there is required information that has to be entered on your **Profile** area in MarketPlace. There is a separate sheet (**Setting up your profile**) that goes through that process.

Dashboard

To view the dashboard follow the below two steps. Once you have done this once, when you come back into MarketPlace it might already be open for you.

1. Select **home/shop** tab
2. Select **inventory** tab (next level right under home/shop)

The dashboard is broken down into sections (Inventory Action Items & Inventory Status) that will give you quick access to reports, replenishment items and inventory breakdown. Any words that are in a blue color are considered links that will take you to that area of information.

Order Supplies

If the replenishment link is set up for item, it will be as simple as put the item in your cart and submitting.

From the dashboard:

1. Select **Totals Needing Attention** under the *Replenishment Items* area
2. The items will display, you will be able to see items on hand, pending sales orders, etc.
3. To the right of the item you will have a quantity field that you can adjust
4. Select the *add to cart icon* – this will place the item into your cart.
5. After you have entered all of the items into the cart
6. Select the cart icon in the upper right hand corner
7. Select your cart – follow the directions on **Finalizing the cart**
 - a. When you get to the cart area you have to make sure that the commodity codes is filed in.
 - b. After you select the **Proceed to checkout**
 - c. Make sure you review the **Final Review** area – each item will have a green check mark in the field for *Replenish stock*

From the **Inventory Management** tab

1. Select the **Inventory Management** tab
2. From the **Show** drop down select **Replenishment**
3. *Optional* – enter in keywords, part number, etc
4. *Optional* – Select **Fulfillment center** from the drop down (if you have more than one)
5. From the **Report Type** drop down select your option
 - a. Required Attention
 - b. At or Below order point
 - c. Below Minimum Inventory Level
 - d. Above Maximum Inventory Level
 - e. At or Below % Reorder Point
 - f. Backordered
 - g. All
6. *Optional*- you can select a specific supplier from the drop down **Preferred Replenishment Supplier**
7. Select **Search**
8. The items will display, you will be able to see items on hand, pending sales orders, etc.
9. To the right of the item you will have a quantity field that you can adjust
10. Select the *add to cart icon* – this will place the item into your cart.
11. After you have entered all of the items into the cart
12. Select the cart icon in the upper right hand corner
13. Select your cart – follow the directions on **Finalizing the cart**
 - a. When you get to the cart area you have to make sure that the commodity codes is filed in.
 - b. After you select the **Proceed to checkout**
 - c. Make sure you review the **Final Review** area – each item will have a green check mark in the field for *Replenish stock*

Receiving

One time set-up:

You will need to change your default tabs that display. This will assist you in getting to the areas that you will need to perform your job functions.

1. Log into my.UMDNJ.edu
2. Select the MarketPlace icon (eProcurement test icon for training and testing)
3. Select the drop down (far right) select **customize**
4. Select the **Navigation Setup** tab
5. Select the second drop down; select **sales orders**
 - a. Select the other drop downs for the following options:
 - i. **sales invoice**
 - ii. **inventory management**
- [Note: Make sure that the History tab is there. That is needed as well.]**
6. Select **Update**

Receiving order from a PO

1. Select the **History** tab
2. Verify that you are on the **by PO No.** sub-tab
3. In the **Purchase Order No.** field type in the PO number on the packing slip
4. Select **Search**
5. The information will display
6. Review the notification in the **Settlement Status** column
 - a. If it states **Fully Received** that is an indicator that the order has been received.
7. Select the check box to the right of the purchase order
8. In the above drop down select **Create Qty Receipt**
9. Select **Go**
10. The purchase order receipt will display
11. Scroll down to the **Receipt Summary**
12. In the **Quantity** field type in the number received
13. Verify that the **Action** drop down states **Received**
14. Select **Save**
15. Select **Complete** from the top area

Note: If you have another order to receive then select **Create Qty Receipt** button. Then follow the steps above.

Material Handler

One time set-up:

You will need to should change your default tabs that display. These will assist you in getting to the areas that you will need to perform your job functions.

1. Log into my.UMDNJ.edu
2. Select the MarketPlace icon (eProcurement test icon for training and testing)
3. Select the drop down (far right) select **customize**
4. Select the **Navigation Setup** tab
5. Select the second drop down; select **sales orders**
 - a. Select the other drop downs for the following options:
 - i. **sales invoice**
 - ii. **inventory management**
6. Select **Update**

Sales Orders – Fully Allocated

1. Select the **sales orders** tab
2. The orders that have been assigned to you will appear in **My Sales Orders**. You should have received an email as well when the orders were assigned.
3. Review the Allocation Status
4. Put a check mark by the order(s) that you want to go pull at this time – **Fully allocated**
5. Select the drop by **Apply action to selected sales orders** (on top of My Sales Orders) – select **Print Picklist and Packing Slip**
6. Select **GO**
7. The image will appear – right click (with the mouse) and select print [or File > Print]
8. The print dialog box will appear, select the printer and select **Print** (multiple pages will print)
9. Select **Close** (after it prints out)
10. On the **PickList** the location of the item will be displays
11. Go pick the items
12. On the **Order – Packing Slip** review the **SHIP TO INFO** box
If the customer wants to pick up the item you will see **PICK UP**. If they want it delivered their bldg, floor and room number will be displayed
13. Go back to **My Sales Orders**
14. Verify that the order(s) you just picked are selected (if not select them)
You can find the Sales Order No or PO No on the packing slip
15. Select the drop by **Apply action to selected sales orders** – Select **Complete Shipment**
16. Select **GO**
17. A **Complete Shipments** box will appear
18. In the **Shipment Note** box type in information to the customer.
This is where you can put that it is ready for pick up or when you will be delivering the order.
19. Select **Complete**
This will send the customer an email and close the sales order

Sales Orders – Partially Allocated

1. Select the **sales orders** tab
2. The orders that have been assigned to you will appear in **My Sales Orders**. You should have received an email as well when the orders were assigned.
3. Review the Allocation Status
4. Put a check mark by the order(s) that you want to go pull at this time – **Partially allocated**
5. Select **view** by the Sales Order no
6. Select the **Allocations** tab
7. In the **Pending Backorder** column review and see if any field has a number.
8. The number that is in the **Backordered** field type in the **Cancelled** field
9. Put an **0** (zero) in the **Backordered** field
10. Select **Save**
11. Select the drop by **Available Actions** (up to the right) – select **Print Picklist and Packing Slip**
12. Select **GO**
13. The image will appear – right click (with the mouse) and select print [or File > Print]
14. The print dialog box will appear, select the printer and select **Print** (multiple pages will print)
15. Select **Close** (after it prints out)
16. Select the **sales order fulfillment** tab – to select another order that is partially allocated
17. Follow steps 5 - 16
18. On the **PickList** the location of the item will be displays
19. Go pick the items
20. On the **Order – Packing Slip** review the **SHIP TO INFO** box
If the customer wants to pick up the item you will see **PICK UP**. If they want it delivered their bldg, floor and room number will be displayed
21. Go back to **My Sales Orders**
22. Verify that the order(s) you just picked are selected (if not select them)
You can find the Sales Order No or PO No on the packing slip
23. Select the drop by **Apply action to selected sales orders** – Select **Complete Shipment**
24. Select **GO**
25. A **Complete Shipments** box will appear
26. In the **Shipment Note** box type in information to the customer.
This is where you can put that it is ready for pick up or when you will be delivering the order. Also let them know to reorder the item that was canceled. If you know when a shipment is being delivered give them that information.
27. Select **Complete**
This will send the customer an email and close the sales order

Refreshing Allocation

Before you print the picklist and packing slip you should refresh the allocation to see if items have been received that will change your allocations.

1. Select the **Select** check box (on the main label area) to select all of the orders
2. Select the drop by **Apply action to selected sales orders** (on top of My Sales Orders) – select **Refresh Allocations**
3. Select **GO**
4. Select **OK** on the information box regarding FIFO based algorithm

Adjusting Inventory

1. Select the **Inventory Management** tab
2. Select **Items** from drop down for **Show**
3. Type in a **Keyword/Manufacturer/Part number/UPC** in the that field
4. Select **Search**
5. The list of items will display
6. Select the **adjust/receive** link next to the item
7. In the **Inventory by Location** box; select the **adjust inventory** link
8. The **Adjust / Receive** box will appear
9. The drop down for **Adjustment type** has three options (see below) select the one you would like to use
 - a. **Correct Quantity** – what the quantity should be
 - b. **Increment quantity by** – how many to be added to the old quantity
 - c. **Decrement quantity by** – how many to be subtracted from the old quantity
10. Select the **Adjustment reason** from the drop down
11. *Optional* – you can type in **Additional information** if needed
12. Select **Adjust Receipts**
13. Select **Finish**

You can also **Request Export** and follow the same steps under **Cycle Count** for export and import.

Adding Inventory Item

1. Select the **inventory mangement** tab
2. Select **Items** from drop down for **Show**
3. Type in a **Keyword/Manufacturer/Part number/UPS** in that field
4. Select **Search**
5. The list of item(s) will display
6. Select the **adjust/receive** link next to the item
7. The **Adjust / Receive** box will appear
8. Select **Receive Inventory**
9. From the **Fulfillment Center** drop down, select the area
10. For the **Location** select the **Select location...** link
11. Find the location and select the link **Select...**
12. Type in the **Quantity**
13. Type in the **Unit Cost** (no dollar sign \$)
14. Type in **Expiration Date** and **Lot Number** if it applies
15. Select **Receive Inventory**

Cycle Count (Annual Cycle Count)

You can get the cycle count two ways – Dashboard and Inventory Management tab

1. One Way is on the dashboard under **Cycle Count Items**. It shows **Items due now** and **items due soon**. If you select the words (which is a link) the information will appear
- or
2. Select **inventory management** tab
 3. In the **Show** drop down **Cycle count** should be active if not select it
 4. In the **Include** drop down select one of the following
 - a. **Items due for counting now**
 - b. **Items due for counting soon**
 - c. **All items**

[**Note** – items due for counting soon and all items will give you additional fields you can fill in]
 5. *Optional* - Fill in the **Keyword/Manufacturer/Part number/UPC** field.
 6. *Optional* - Select a **Fulfillment center** from the drop down
 7. *Optional* - Select the link **select location...** to count a specific location
 8. Select **Search** (the information will appear)
 9. There are two options that you can do:
 - a. **Print Count Sheets**
 - i. A **Print Count Sheets** box will appear
 - ii. Select the check box **Hide Quantity on Hand (Blind Count)**
 - iii. *Optional* - Select check box **Show Fulfillment Center**
 - iv. Type the number of rows to display per page in **Rows per page** field
 - v. Select **Print**
 - vi. The pages will appear – select **Print**
 - b. **Request Export**
 - i. A **Request Export** box will appear
 - ii. Type in a title or brief description in the **Description** box
 - iii. Select **Submit Request**
 - iv. A **Request Export** box will appear
 - v. Select the link **Click here to view the export results**
 - vi. This will take you to the **import/export** tab
 - vii. Locate your file under **Recent Activity**
 - viii. Select **Click to download....**
 - ix. Save the file
 - x. Once you have made any adjustments on the file, you are ready to import
 10. After you have chosen your option then you need to update the information
 - a. If the option was **Print Count Sheet**
 - i. Pull up the list with the same options as you used to print the list out
 - ii. Once you are viewing the list – Select the checkbox next to individual items that are correct (no adjustment needed)
 - iii. Then from the drop down **For selected items** – select **Mark as counted**
 - iv. Select **Go**
 - v. The **Mark as Counted** box will appear; you have the option to change the **Adjustment Type** drop down and type a note in the **Notes** box.
 - vi. Select **OK**
 - vii. You should be back on the list with the items that need the quantities adjusted.
 - viii. Select the checkbox from the main header row and this will select the rest of the items that need to be adjusted
 - ix. Then from the drop down **From selected items** – select **Adjust quantities**
 - x. Select **Go**

- xi. The **Cycle Count Adjustment** box will appear; you have the option to change the **Adjustment Type** drop down and type a note in the **Notes** box.
- xii. Then type in the number for the **New Quantity** for each item
- xiii. Select **OK**
- b. If the option was **Request Export**
 - i. Select the **import/export** tab under **inventory management** tab
 - ii. In the **Request** box select the **Supplier/Catalog** from the drop down
 - iii. Select **Cycle count** from the **Import Type** drop down
 - iv. Select **Import** from the **Action** drop down
 - v. Type information in the **Description** box
 - vi. Select **Browse...** to find the **File Name**
 - vii. Select **Submit**

Credit Memo

1. In the **Search for** area (at the very top) select **Sales Order No.** from the drop down
2. Type in the number in the field
3. Select **GO**
4. The **Available Actions** drop down, select **Create Credit Memo**
5. Select **Go**
6. Scroll down to the **Line Item Details** box
7. Select the red **X** by the items that are NOT being returned
8. In the **Quantity** field put in (or verify) the amount that is being returned
9. Select **Save**
10. The message – "*Document successfully saved*" will appear at the top of page
11. Under the **Part No.** of the item being returned, select **adjust/receive** link
12. In the **Inventory by Location** box; select the **adjust inventory** link
13. The **Adjust / Receive** box will appear
14. The drop down for **Adjustment type** select **Correct Quantity**
15. Type in the **Correct Quantity** in the field
16. Select the **Adjustment reason** from the drop down
17. *Optional* – you can type in **Additional information** if needed
18. Select **Adjust Receipts**
19. Select **Finish**
20. Select **Send to Customer**

Distribution / Warehouse Manager

One time set-up:

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3. Select the drop down (far right) select **customize**
4. Select the **Navigation Setup** tab
5. Select the second drop down; select **inventory management**
 - a. Select the other drop downs for the following options:
 - i. **sales invoice**
 - ii. **sales orders**
 - iii. **item/price**
 - iv. **history** (might already be a tab)
6. Select **Update**

Dashboard

To view the dashboard follow the two steps listed below. Once you have done this once, then you come back into MarketPlace it might already be open.

1. Select **home/shop** tab
2. Select **inventory** tab (next level right under home/shop)

The dashboard is separated into sections (Inventory Action Items & Inventory Status) this will give you quick access to reports, sales orders and inventory breakdown. Any words that are in a blue color are considered links that will take you to that area of information.

Cycle Count (Annual Cycle Count)

You can get the cycle count two ways – Dashboard and Inventory Management tab

1. One Way is on the dashboard under **Cycle Count Items**. It shows **Items due now** and **items due soon**. If you select the words (which is a link) the information will appear
- or
2. Select **inventory management** tab
 3. In the **Show** drop down **Cycle count** should be active if not select it
 4. In the **Include** drop down select one of the following
 - a. **Items due for counting now**
 - b. **Items due for counting soon**
 - c. **All items**

[**Note** – items due for counting soon and all items will give you additional fields you can fill in]
 5. *Optional* - Fill in the **Keyword/Manufacturer/Part number/UPC** field.
 6. *Optional* - Select a **Fulfillment center** from the drop down
 7. *Optional* - Select the link **select location...** to count a specific location
 8. Select **Search** (the information will appear)
 9. There are two options that you can do:
 - a. **Print Count Sheets**
 - i. A **Print Count Sheets** box will appear
 - ii. Select the check box **Hide Quantity on Hand (Blind Count)**
 - iii. *Optional* - Select check box **Show Fulfillment Center**
 - iv. Type the number of rows to display per page in **Rows per page** field
 - v. Select **Print**
 - vi. The pages will appear – select **Print**
 - b. **Request Export**
 - i. A **Request Export** box will appear
 - ii. Type in a title or brief description in the **Description** box
 - iii. Select **Submit Request**
 - iv. A **Request Export** box will appear
 - v. Select the link **Click here to view the export results**
 - vi. This will take you to the **import/export** tab
 - vii. Locate your file under **Recent Activity**
 - viii. Select **Click to download....**
 - ix. Save the file
 - x. Once you have made any adjustments on the file, you are ready to import
 10. After you have chosen your option then you need to update the information
 - a. If the option was **Print Count Sheet**
 - i. Pull up the list with the same options as you used to print the list out
 - ii. Once you are viewing the list – Select the checkbox next to individual items that are correct (no adjustment needed)
 - iii. Then from the drop down **For selected items** – select **Mark as counted**
 - iv. Select **Go**
 - v. The **Mark as Counted** box will appear; you have the option to change the **Adjustment Type** drop down and type a note in the **Notes** box.
 - vi. Select **OK**
 - vii. You should be back on the list with the items that need the quantities adjusted.
 - viii. Select the checkbox from the main header row and this will select the rest of the items that need to be adjusted
 - ix. Then from the drop down **From selected items** – select **Adjust quantities**
 - x. Select **Go**

- xi. The **Cycle Count Adjustment** box will appear; you have the option to change the **Adjustment Type** drop down and type a note in the **Notes** box.
- xii. Then type in the number for the **New Quantity** for each item
- xiii. Select **OK**
- b. If the option was **Request Export**
 - i. Select the **import/export** tab under **inventory management** tab
 - ii. In the **Request** box select the **Supplier/Catalog** from the drop down
 - iii. Select **Cycle count** from the **Import Type** drop down
 - iv. Select **Import** from the **Action** drop down
 - v. Type information in the **Description** box
 - vi. Select **Browse...** to find the **File Name**
 - vii. Select **Submit**

Assigning Sales Orders (forward)

1. Select the **sales orders** tab
2. The orders that have been placed to the Warehouse will appear in **Warehouse Orders**.
3. Put a check mark by the order(s) that you want to assign
4. Select the drop down by **Apply action to selected sales orders** (on top of warehouse Orders) – select **Forward**
5. Select **GO**
6. Type in the **First Name** or **Last Name** of the staff member
7. Select **Search**
8. List of name(s) will appear, select the radio button next to the person
9. Select **Choose Selected User**
10. An **Add Note – Forward** box will appear; you can type a note to the staff member in this area regarding the orders.
11. Select **Forward** (This will send an email to the staff member)

[**Note:** If you review the **Assignee** column the staff member name will appear]

Un-assign Sales Order

1. Select **view** next to the sales order number
2. Select the drop down by **Available Actions** (up to the right) – select **Assign to myself**
3. Select **Go**
4. An Un-**Assign** box will appear – you can type a note to yourself
5. Select Un-**Assign**
6. Select **Sales order fulfillment** tab
7. Then the order will be in your **My Sales Orders**
8. If you have more orders to un-assign repeat step 1 – 6.
9. Select the **Select** check box (on the main label area) to select all of the orders in **My Sales Orders**
10. Select the drop down by **Apply action to selected sales orders** (on top of My Sales Orders) – select **Return to Shared Folder**
11. Select **GO**

[**Note:** Now the order will be back in **Warehouse Orders** to be assigned to someone else. Follow the steps for **Assigning Sales Orders** to re-assign the order.]

Adjusting Inventory

1. Select the **Inventory Management** tab
2. Select **Items** from drop down for **Show**
3. Type in a **Keyword/Manufacturer/Part number/UPC** in the that field
4. Select **Search**
5. The list of items will display
6. Select the **adjust/receive** link next to the item
7. In the **Inventory by Location** box; select the **adjust inventory** link
8. The **Adjust / Receive** box will appear
9. The drop down for **Adjustment type** has three options (see below) select the one you would like to use
 - a. **Correct Quantity** – what the quantity should be
 - b. **Increment quantity by** – how many to be added to the old quantity
 - c. **Decrement quantity by** – how many to be subtracted from the old quantity
10. Select the **Adjustment reason** from the drop down
11. *Optional* – you can type in **Additional information** if needed
12. Select **Adjust Receipts**
13. Select **Finish**

You can also **Request Export** and follow the same steps under **Cycle Count** for export and import.

Adding Inventory Item

1. Select the **inventory mangement** tab
2. Select **Items** from drop down for **Show**
3. Type in a **Keyword/Manufacturer/Part number/UPS** in that field
4. Select **Search**
5. The list of item(s) will display
6. Select the **adjust/receive** link next to the item
7. The **Adjust / Receive** box will appear
8. Select **Receive Inventory**
9. From the **Fulfillment Center** drop down, select the area
10. For the **Location** select the **Select location...** link
11. Find the location and select the link **Select...**
12. Type in the **Quantity**
13. Type in the **Unit Cost** (no dollar sign \$)
14. Type in **Expiration Date** and **Lot Number** if it applies
15. Select **Receive Inventory**

Credit Memo

1. In the **Search for** area (at the very top) select **Sales Order No.** from the drop down
2. Type in the number in the field
3. Select **GO**
4. The **Available Actions** drop down, select **Create Credit Memo**
5. Select **Go**
6. Scroll down to the **Line Item Details** box
7. Select the red **X** by the items that are NOT being returned
8. In the **Quantity** field put in (or verify) the amount that is being returned
9. Select **Save**
10. The message – “*Document successfully saved*” will appear at the top of page
11. Under the **Part No.** of the item being returned, select **adjust/receive** link
12. In the **Inventory by Location** box; select the **adjust inventory** link
13. The **Adjust / Receive** box will appear
14. The drop down for **Adjustment type** select **Correct Quantity**
15. Type in the **Correct Quantity** in the field
16. Select the **Adjustment reason** from the drop down
17. *Optional* – you can type in **Additional information** if needed
18. Select **Adjust Receipts**
19. Select **Finish**
20. Select **Send to Customer**