

How do I manage my inventory?



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With the inventory, you can easily access and update your parts, tires, labor, vendors, and fees. There are many uses and capabilities with the inventory that can be seen and accessed throughout Shopmonkey. You will be able to track your inventory so you'll know what you have on hand, what is currently assigned to estimates, and what is short or needs to be reordered.

To view your inventory, click the **Inventory icon**  in the left-side menu.

Get to know your inventory

The information provided at the top-left of the page is a snapshot of your inventory:

- Total Quantity is the current number of parts and tires in your inventory.
- Total Cost is the total actual cost of all of your current parts and tires.
- Total Value is the total retail amount of all of your current parts and tires.

Below this area are the Parts, Tires, Labor, Vendors, Purchase Orders, and Fees tabs.

91 Total Quantity	More	\$2,957.81 Total Cost	More	\$4,594.41 Total Value	More
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Click "More" to view a breakdown of each category's total.

Parts 26	Tires 5	Labor 31	Vendors 13
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Creating New Items

Click a tab to access that category's page. Each page contains a list of respective inventory items, with the ability to add/edit/delete items, as well as import and export them. You can also sort and add filters to your data to customize your view.



To add a new inventory item, click the + Add or + Create New button at the top-right of each page.

Fill out the item's information, turn applicable toggles on or off, then click **Save** or **Create** to add the item to your Inventory.

Each inventory item's information and settings can be edited by clicking on the item, then making changes in the menu that appears.

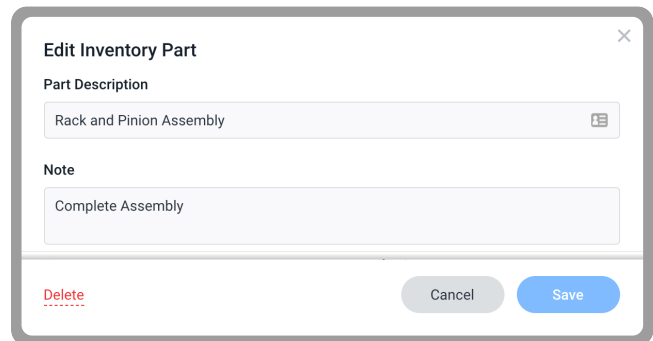
Your Inventory will track the quantity of your parts and tires on hand. You can set a Critical Qty for a part or tire so that a Reorder label will appear when the quantity on hand dips below your set Critical Qty, including the number you need to reorder to get back to your Critical Qty.

Likewise, a Shortage label will appear for any item that has its quantity dip below zero, with the number again representing the number you need to reorder to get back to your Critical Qty.

Note: to view all parts or tires that need to be reordered or are short, click on the **Status** filter and click on the desired status.

How to save items to your inventory from an estimate

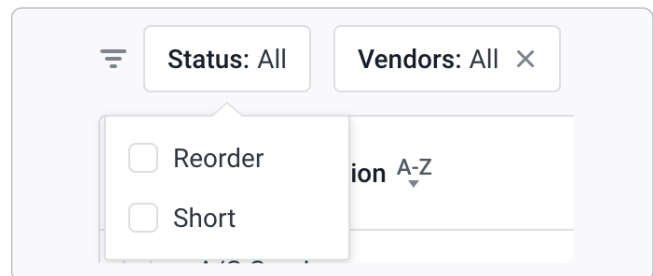
You can save a part, tire, or labor item in your service to your inventory, including items from canned services. The following example explains how to add a part to your inventory, though the same procedure can be followed for tires and labor items.



This menu appears by clicking on an individual item.



Reorder and shortage labels will appear on tires or parts.



Click on the desired status in the **Status** filter.

1. While in an estimate, click on a part, then scroll to the bottom of the right-side menu that appears. Click Add Part To Inventory.

2. A prompt will appear asking you to enter a quantity. Enter the quantity of the part you want added to your Inventory, then click Add To Inventory. This part is now added to your parts list in your Inventory! It is also now searchable from within an estimate so you can add it to any service.

When an inventory item is added to a service, it will keep its saved information and settings. Additionally, once an estimate containing an inventory item is converted to an invoice, the item's quantity in your Inventory will be reduced by the quantity included on the estimate.

How to import inventory items

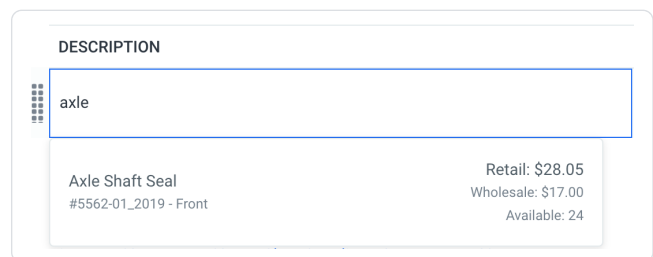
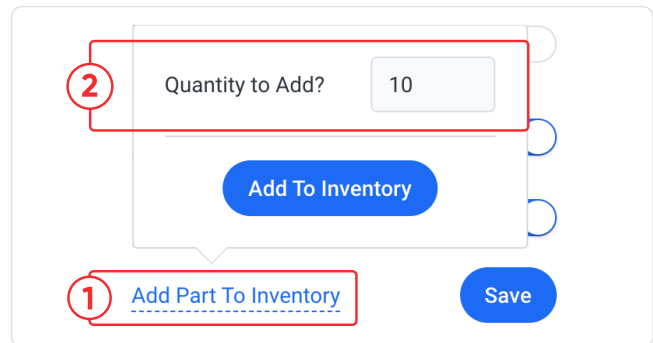
If you have your [QuickBooks](#) account connected, you will be able to import your QuickBooks inventory from the Parts Inventory page, and even set up your inventories to automatically sync between Shopmonkey and QuickBooks. For more info, [click here](#).

There are import templates available for all inventory item types. While in your inventory, click on the **ellipsis** button at the top-right of the page, then click **Import**.

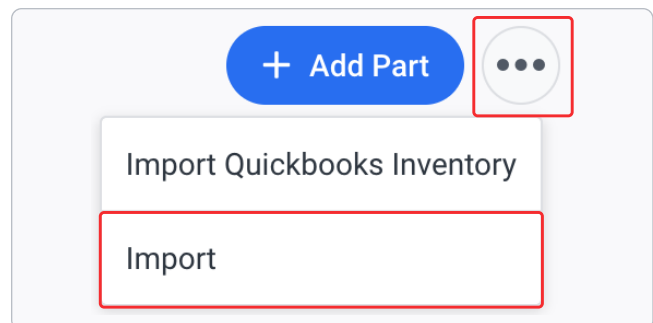
After clicking **Import**, the import menu will appear. Click **Download Template**, and enter the necessary information into the downloaded spreadsheet. Information is required to be entered into any field where the column header does not have "(optional)" in the title.

Once you have your template completed, go ahead and save it. Then in Shopmonkey, click the **ellipsis** button > **Import** once more from the Inventory page, and then upload the file:

Click **Import** to import your items and complete the import process.

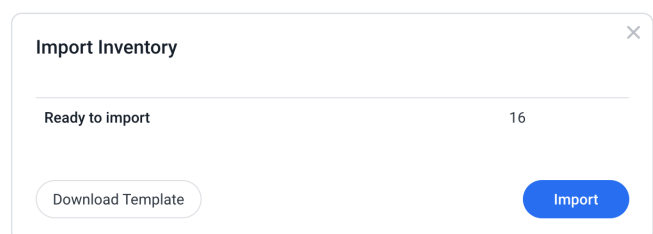


Note: you can also search for inventory items in canned services.



Part Description	Note (optional)	Part Number (optional)

Info is required in all fields except "(optional)" fields.



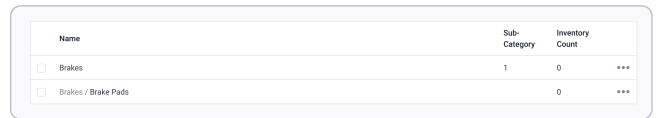
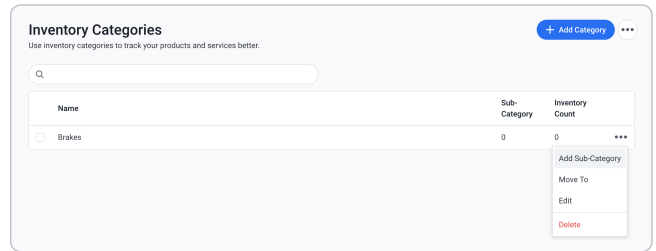
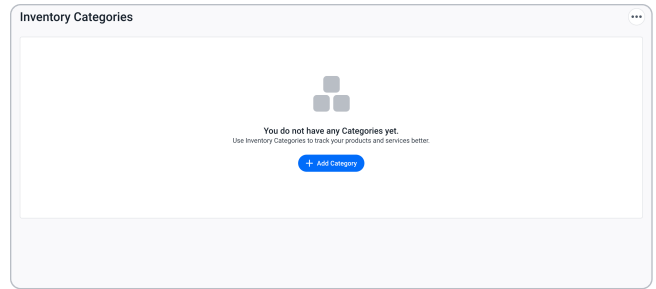
How to create and use Inventory Categories

With inventory categories you can organize your inventory into both categories and sub-categories, allowing you to manage two levels of categorization and apply it to any type of inventory item.

To create a new category, navigate to Lists > Inventory Categories, and click **+ Add Category**.

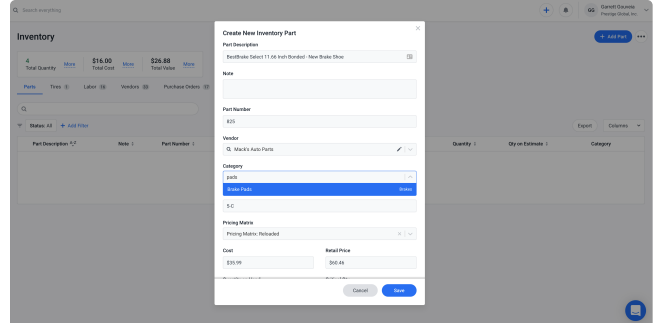
Enter the name of the category, and click **Save**. Now that your category is created, you can create a sub-category and add it to your new category, making it a "parent" category. To create a sub-category, click the **ellipsis** button to the far-right of your parent company and click **Add Sub-Category**.

Enter a name for the sub-category and click **Save**. The sub-category will now be listed, with its gray text signifying the parent category it belongs to.



Assigning a category to an inventory item

When creating or editing an inventory part, tire, labor, or fee, you can assign it to a category or sub-category. Simply click on the **Category** drop-down and click on a category, or type the category name and click on the desired search result.



Inventory reports

Analyze data related to inventory categories moving quickly through your shop - or those staying stagnant - by utilizing any of the Parts & Line Items Sold reports. Click **+ Add Filter** at the top of any of these reports, and then click **Category**.

