

# Add Items to Inventory & Product Database

1. Bulk Upload Item Database from Excel
2. Bulk Upload location specific Inventory Database from Excel
3. Add Individual Items to Private Database
4. Add Individual Items to Managed Inventory
  - Change/Update min/max
  - Change/Update On-Hand
  - Change/Update Bin Location

**Note:** Items must first be created in or added to the Product Private Database before they can be added to location managed inventory

Step 1 is to add items to the Products Private Database. Items must reside in the Private Database before they can be added to the Item Location Database.

Home Procurement Inventory Assets Work Orders Documents Reports Administration Help

Home

Customize

Orders

Issue/Order  
Scan items and create orders

Manage Orders  
View/Receive prior orders

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Manage your asset database of checkin/checkout inventory

Track Assets  
Check In/Check Out Items

Work Order Repo ...  
Manage Work Orders

Products

Manage Products  
Edit Product Database

Print Labels  
Print Barcode Labels

Inventory  
Manage your product inventory

Reports

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Create Order Reports

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Employees  
Edit Employee Settings

Locations  
Edit Location Settings

Suppliers  
Edit Suppliers

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View Settings

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- Units of Measure
- Product Tools...
- Manage Lists
- Manage Suppliers
- Locations
- Location Groups
- Employees
- Employee Groups
- Edit Tag Lists
- Upload Tag List
- Users
- User Groups
- Profiles
- Data Transfers
- Manage File Templates
- Change Email
- Change Password
- Change To Out of Office

Select to Manage Products

Select to add an individual item to the product database

Home Procurement Inventory Assets Work Orders Documents Reports Administration Help

Products

Actions...

Database: Private Database Preferred Supplier: - All - Favorites:  View All

Search: All Words Status: - All - Non-inventory item:  Search

Category: Please select Sort By: Barcode Asc Certification Req'd:

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0 items

Adding Individual items to the product database one-by-one

Note: ALL fields are searchable

**Products**

**ALL Barcode fields will scan. ALL barcode fields must be unique system wide**

Database: Private Database Preferred Supplier: - All - Favorites:  View All

Search: All Words Status: - All - Non-inventory item:  Search

Category: Please select Sort By: Barcode Asc Certification Req'd:

**Actions...**

### Add or Edit Product

**General** | **Supplier Specific Details**

**Category**: Please select **Preferred Supplier**: -Not Set-

**Barcode**: **"Barcode" is the primary value for scanning and reporting**

**Barcode 2**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Barcode 3**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Item #**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Cross Reference #**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Drawing #**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Manufacturer**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Account Number**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Description**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Keywords**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**Price**: 0 **Package Qty**: 1 **Pkg Price**: **Item is usually the OEM number and/or may be the same as any of the barcode fields**

**UOM for Issuing**: **UOM must exist in the UOM table**

**UOM for Ordering**: **UOM must exist in the UOM table**

**Lead Time**: 0 **Taxable**:

**Non-inventory item**:  **Managed item**:  **Certification Req'd**:

**Product Image**: Choose File no file selected

**Comments**: Add Comment...

**Active**:  **Copy To Inventory**

**Once an item exists in the Product database it may be added to Inventory Location by 1-click**

**Categories must first be created in the Category table**

Step 1 is to add items to the Products Private Database. Items must reside in the Private Database before they can be added to the Item Location Database.

Products

Database: Private Database Preferred Supplier: - All -  
 Search: All Words Status: - All -  
 Category: Please select Sort By: Barcode Asc

Action	Manufacturer	Barcode	Item #	Description
	Seco Part 13654	00008750000103	00008	R395.19-3232.3-14A
	Seco	00042000000109	335.18-613F	335.18-613F Diamond Coated Carbide Insert for applications
		00236000	00236000	6 Ft. High Type IA Rating Fiberglass Step Ladder
	Approved Manufacturer	00936240	00936240	THERMOCOUPLE- 30 INCHES LONG
	MOBIL OIL	01-10070	SHC 626	LUBRICANTS; OIL-BASED; SUPREME PERFORMANCE BEARING OIL; 275 GAL TANK; ; ; AMBER; ; MOBILE DISPENSED FROM OIL BAR - T13
	MOBIL OIL	01-54641	VELOCITE 6	LUBRICANTS; OIL-BASED; PREMIUM PERFORMANCE GAL TANK ; AMBER MOBIL OIL; VELOCITE 6 DISPENSED FROM OIL BAR - T08
	MOBIL OIL	01-55198	VACUOLINE 1405	LUBRICANTS; OTHER; LUBRICANT MOBIL VACUOLINE DRUM MOBIL; 1405

- General
- Manage Products**
- Product Categories
- Units of Measure
- Product Tools...
- Manage Lists
- Manage Suppliers
- Locations
- Location Groups
- Employees
- Employee Groups
- Edit Tag Lists
- Upload Tag List
- Users
- User Groups
- Profiles
- Data Transfers
- Manage File Templates

To upload from spreadsheet

Products

Database: Private Database Preferred Supplier: - All - Favorites  
 Search: All Words Status: - All - Non-inventory item  
 Category: Please select Sort By: Barcode Asc Certification Req'd

- Actions...
- Print Labels
- Upload
- Download...

Manage File Templates is a valuable resource for updating specific records within file

The complete upload includes the following fields in the precise order shown

- Barcode
- All items checked
- Check All
- Active
- Barcode2
- Barcode3
- ItemNumber
- Description
- Manufacturer
- Package Qty
- Unit Of Measure Name
- Price
- Keywords
- Supplier Id
- Account Number
- Taxable
- Managed Item
- LeadTime
- Non Inventory
- Certification Required
- crossReferenceNumber
- drawingNumber

Note: Items must first be created in or added to the Private Database (Item database) before they can be added to location managed inventory

Home Procurement **Inventory** Assets Documents Reports Administration Help

**Manage Inventory**

Location: -All Groups Preferred Supplier: - All - Search: [ ]

Sort By: Barcode Asc then by: On Hand Desc

Value: \$3,498,342.79

Actions... Duplicate Print Print Labels Download Upload

Select to upload from Excel

Upload Inventory

Action	Location	#	Description	Pkg	On Hand	On Order	Min	Max	Price	Com
	Akron Fastenal consigned	Fastenal 0003 6675	0003 6675 SERVICE KIT AIR SECTION	1 EA	5	0	3	5	5.84	
	719 Akron A-1-20	supplier 3 00042	00042 COUPLING 7/8	1	10	1	0	0	36.00	
	Akron 5	Fastenal 00042	00042 COUPLING 7/8	1	2	0	1	2	36.00	
	Vending Machine X PLATING	supplier 3 00042	00042 COUPLING 7/8	1	1	0	0	0	36.00	
	Hammond PLATING	supplier 3 00042	00042 COUPLING 7/8	1	1	0	1	2	36.00	
	719 Akron Bin 522	Smith LLC 003-2468-01/H3L3	003-2468-01/H3L3 HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	10	0	0	0	20.00	
	Hammond Bin 522	Smith LLC 003-2468-01/H3L3	003-2468-01/H3L3 HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	10	0	1	2	20.00	
	Vending Machine X M03E08	Smith LLC 003-2468-01/H3L3	003-2468-01/H3L3 HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	4	0	3	6	20.00	
	Akron 4 R1-S2-B5	Fastenal 003048	003048 VISUAL FLOW INDICATOR- 1/4 IN- * FMI	1 EA	145	0	100	200	60.21	✓
	Paris	Smith LLC 003048	003048 VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	15	0	0	0	60.21	
	Vending Machine X M03F04	Mom & Pop 003048	003048 VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	1	0	1	1	60.21	
	Hammond M03F04	Smith LLC 003048	003048 VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	1	0	1	1	60.21	
	Vending Machine X M03F04	Smith LLC 003049	003049 INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1	4	0	3	6	67.61	
	Hammond M03F04	Smith LLC 003049	003049 INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1	4	0	3	6	67.61	

The complete upload includes the following fields in the precise order below. See Manage File Templates from Administration Dropdown

Barcode

Location

All items checked

- Check All
- Onhand
- Onhand2
- Min
- Max
- Comments
- BinLocation
- Account#
- DoNotReorder
- SetUsage=Order
- OverrideQuantity

# Preferred Customer

Tofino Resource Management Suite

Home Procurement Inventory Assets Documents Reports Administration Help

**Products**

Print Labels Download Upload

Database: Private Database Favorites Preferred Supplier: - All - View All  
 Search: All Words Sort By: Barcode Asc Search  
 Category: Please select

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Action	Manufacturer	Barcode	Item #	Description	Pkg	UOM	Price	Lead Time
	ARO	0003 6675	0003 6675	SERVICE KIT AIR SECTION	1	EA	71.00	0
	FASTENAL	00042	00042	COUPLING 7/8	1		36.00	0
	PARKER	003-2468-01/H3L3	003-2468-01/H3L3	HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1	EA	20.00	0
	MACHINE PRODUCTS CORP.	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN-	1	EA	60.21	0
	MACHINE PRODUCTS CORP.	003049	003049	INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1		67.61	0
	MACHINE PRODUCTS CORP.	003050	003050	VISUAL FLOW INDICATOR-1/2 IN	1		78.33	0
	MACHINE PRODUCTS CORP.	003051	003051	VISUAL FLOW INDICATOR- 3/4in	1		92.63	0
	MACHINE PRODUCTS CORP.	003054	003054	VISUAL FLOW INDICATOR- 1in	1		147.55	0
		006-00008-010	006-00008-010	GLYDE RING - MAIN RAM	1		241.00	0
		006-00012-210	006-00012-210	WEAR STRIP	1		208.00	0
	FASTENAL	006-00085-002	006-00085-002	OIL SEAL	1		78.70	0
	BIMBA MFG.	0071.5-DXP	0071.5-DXP	CYLINDER	1	EA	30.00	0
	FASTENAL	00936240	00936240	THERMOCOUPLE- 30 IN LONG	1	EA	61.00	14
		00947165	00947165	SEAL KIT- A4V540	1		9.22	0
	WILDEN	01-9553-58	01-9553-58	REPAIR KIT- WET END- P100	1		98.00	0
	WILDEN	01-9660-99	01-9660-99	REPAIR KIT- AIR SECTION- P100	1		283.00	0
	WILDEN	01-9669-99	01-9669-99	REPAIR KIT- WILDEN	1		356.65	0
	PARKER	01.50J2H-UVS19A0.437	01.50J2H-UVS19A0.437	CYLINDER HEAD	1		9.19	0
	PARKER	01.50J2HCT14A1.000	01.50J2HCT14A1.000	CYLINDER- HYDRAULIC- S/N GG764627A- 1500PSI	1		301.00	0
	PARKER	01.50J3LCUV14-3.000	01.50J3LCUV14-3.000	CYLINDER- HYDRAULIC- S/N GG764721C- 1400PSI	1		290.01	0

10888 items

Items that already exist in the Product database may be added to Inventory by 1-click

# Preferred Customer

Adding Items that already exist in the product database to the inventory database

Home Procurement Inventory Assets Documents Reports Administration Help

**Manage Inventory**

Actions...

Location

Preferred Supplier   No reorder

Search  All Words Sort By  Asc then by  Desc

Value: \$3,498,334.44 /Value2: \$1,169.12

Select

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Action	Location	Supplier	Barcode	Item #	Description	Pkg	On Hand	On Order	Min	Max	Price	Com
	Akron Fastenal consigned	Fastenal	0003 6675	0003 6675	SERVICE KIT AIR SECTION	1 EA	5	0	3	5	5.84	
	719 Akron A-1-20	supplier 3	00042	00042	COUPLING 7/8	1	10	1	0	0	36.00	
	Akron 5	Fastenal	00042	00042	COUPLING 7/8	1	2	0	1	2	36.00	
	Vending Machine X PLATING	supplier 3	00042	00042	COUPLING 7/8	1	1	0	0	0	36.00	
	Hammond PLATING	supplier 3	00042	00042	COUPLING 7/8	1	1	0	1	2	36.00	
	719 Akron Bin 522	Smith LLC	003-2468-01/H3L3	003-2468-01/H3L3	HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	10	0	0	0	20.00	
	Hammond Bin 522	Smith LLC	003-2468-01/H3L3	003-2468-01/H3L3	HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	10	0	1	2	20.00	
	Vending Machine X M03E08	Smith LLC	003-2468-01/H3L3	003-2468-01/H3L3	HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1 EA	4	0	3	6	20.00	
	Akron 4 R1-S2-B5	Fastenal	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN- * FMI	1 EA	145	0	100	200	60.21	✓
	Paris	Smith LLC	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	15	0	0	0	60.21	
	Vending Machine X M03F04	Mom & Pop	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	1	0	1	1	60.21	
	Hammond M03F04	Smith LLC	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN-	1 EA	1	0	1	1	60.21	
	Vending Machine X M03F04	Smith LLC	003049	003049	INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1	4	0	3	6	67.61	
	Hammond M03F04	Smith LLC	003049	003049	INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1	4	0	3	6	67.61	
	Vending Machine X M03F05	Smith LLC	003050	003050	VISUAL FLOW INDICATOR-1/2 IN	1	5	0	3	6	78.33	
	CMI/VMI 6798	Smith LLC	003050	003050	VISUAL FLOW INDICATOR-1/2 IN	1	5	0	5	10	78.33	
	Hammond 6798	Smith LLC	003050	003050	VISUAL FLOW INDICATOR-1/2 IN	1	5	0	5	10	78.33	
	Vending Machine X M03F04	Smith LLC	003051	003051	VISUAL FLOW INDICATOR- 3/4in	1	5	0	3	6	92.63	
	Hammond M03F04	Smith LLC	003051	003051	VISUAL FLOW INDICATOR- 3/4in	1	5	0	3	6	92.63	
	Vending Machine X M03F05	Smith LLC	003054	003054	VISUAL FLOW INDICATOR- 1in	1	5	0	3	6	147.55	

6255 items

# Preferred Customer

Tofino Resource Management Suite

Home Procurement Inventory Assets Documents Reports Administration Help

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**Products**

Database: Private Database    Search:     All Words    Category: Please select

Supplier: - All -    Sort By: Barcode    Asc    Search

Print Labels    Download    Upload    View All

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Action	Manufacturer	Barcode	Item #	Description	Pkg	UOM	Price	Lead Time
	ARO	0003 6675	0003 6675	SERVICE KIT AIR SECTION	1	EA	71.00	0
	FASTENAL	00042	00042	COUPLING 7/8	1		36.00	0
	PARKER	003-2468-01/H3L3	003-2468-01/H3L3	HOME/LIMIT SENSOR-4" TO 6" CABLE-NO-NPN-4.5-30VDC-SINKING	1	EA	20.00	0
	MACHINE PRODUCTS CORP.	003048	003048	VISUAL FLOW INDICATOR- 1/4 IN-	1	EA	60.21	0
	MACHINE PRODUCTS CORP.	003049	003049	INDICATOR-FLOW-VISUAL-3/8 NPT-MODEL 202	1		67.61	0
	MACHINE PRODUCTS CORP.	003050	003050	VISUAL FLOW INDICATOR-1/2 IN	1		78.33	0
	MACHINE PRODUCTS CORP.	003051	003051	VISUAL FLOW INDICATOR- 3/4in	1		92.63	0
	MACHINE PRODUCTS CORP.	003054	003054	VISUAL FLOW INDICATOR- 1in	1		147.55	0
		006-00008-010	006-00008-010	GLYDE RING - MAIN RAM	1		241.00	0
		006-00012-210	006-00012-210	WEAR STRIP	1		208.00	0
	FASTENAL	006-00085-002	006-00085-002	OIL SEAL	1		78.70	0
	BIMBA MFG.	0071.5-DXP	0071.5-DXP	CYLINDER	1	EA	30.00	0
	FASTENAL	00936240	00936240	THERMOCOUPLE- 30 IN LONG	1	EA	61.00	14
		00947165	00947165	SEAL KIT- A4V540	1		9.22	0
	WILDEN	01-9553-58	01-9553-58	REPAIR KIT- WET END- P100	1		98.00	0
	WILDEN	01-9660-99	01-9660-99	REPAIR KIT- AIR SECTION- P100	1		283.00	0
	WILDEN	01-9669-99	01-9669-99	REPAIR KIT- WILDEN	1		356.65	0
	PARKER	01.50J2H-UVS19A0.437	01.50J2H-UVS19A0.437	CYLINDER HEAD	1		9.19	0
	PARKER	01.50J2HCT14A1.000	01.50J2HCT14A1.000	CYLINDER- HYDRAULIC- S/N GG764627A- 1500PSI	1		301.00	0
	PARKER	01.50J3LCUV14-3.000	01.50J3LCUV14-3.000	CYLINDER- HYDRAULIC- S/N GG764721C- 1400PSI	1		290.01	0

10888 items

1. Search or navigate to the item you wish to add

2. Select the item



# Preferred Customer



## Tofino Resource Management Suite

### Manage Inventory

Update complete

Actions...

Location:    
 Preferred Supplier:   
 Category:   
 Search:   Sort By:   then by    
 Only show asset re-order barcodes  
 No inventory reorder

### Add/Edit Inventory Item

#### Item Details

<b>Barcode</b>	01.50J3LCUV14-3.000	<b>Manufacturer</b>	PARKER	
<b>Item #</b>	01.50J3LCUV14-3.000	<b>New/Rework</b>	This item is purchased new	
<b>Preferred Supplier</b>	Smith LLC	<b>Package Qty</b>	1	
<b>Description</b>	CYLINDER- HYDRAULIC- S/N GG764721C-...	<b>Price</b>	290.01	<input type="button" value="Edit Item..."/>

#### Inventory Details

<b>Location</b>	<input type="text" value="719 Akron"/>	<b>Do Not Reorder</b>	<input type="checkbox"/>	<b>Average Used</b>	0.00
<b>Bin Location</b>	<input type="text" value="Bin R7SU3B654"/>	<b>Override Quantity</b>	<input type="checkbox"/>	<b>Average Ordered</b>	0.00
<b>Preferred Supplier</b>	<input type="text" value="-Not Set-"/>	<b>Set Usage=Order</b>	<input type="checkbox"/>	<b>Last Received</b>	Unknown
<b>Account #</b>	<input type="text"/>	<b>Comments</b>	<input type="button" value="Add Comment..."/>		
<b>Description</b>	<input type="text"/>				
<b>On Hand</b>	<input type="text" value="5"/>				
<b>On Hand 2</b>	<input type="text" value="0"/>				
<b>Min Reorder Point</b>	<input type="text" value="3"/>				
<b>Max Reorder Target</b>	<input type="text" value="5"/>				

1. Select the location

Note: Overrides global supplier for location specific purchasing

2. Enter values as appropriate

3. Select

Move   units to location

Value: \$0.00

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Show Images

Page Length: 20

Action	Location	Supplier	Barcode	Item #	Description	Pkg	On Hand	On Order	Min	Max	Price	Com
	719 Akron	Not assigned	S0636196394458599317	TEST123456789	Test Cable tie	1 EA	0	0	0	0	0.00	
	719 Akron	Fastenal	S0636104938016840881	12345TEST	32" widescreen monitor	1 EA	0	0	0	0	499.99	

2 items