

Inventory Quantity Report

The Inventory Quantity report can be accessed from the Maintenance and Report menus. There are 2 report types to choose from: By Product or By Location and it is important to understand the distinction.

The Inventory Quantity report by **Product** shows inventory available for sale and allocated inventory still on premise.

The Inventory Quantity report by **Location** does not show allocated inventory-only inventory available for sale.

The Inventory Quantity report by **Product** report has the ability to show all inventory for sale and that inventory already sold but not recorded as having left the premise. This allocated inventory would include packing slips with a status of "Futures Hold", "Hold for Payment", "Hold for Pickup", "Invoiced", and "To be Shipped". If you wish to see all inventory, check the "Include Allocated Inventory" located in the "Wine Units" just above the Output Options. If you store your product that is due to be picked up by customers in areas where you store inventory for sale, such as the Tasting Room, you should run this report and display allocated inventory so you can accurately account for your inventory.

This report shows sold (allocated) inventory with an * (asterisk) next to the status. If there is no asterisk next to the product, the amount shown is inventory that is available for sale. The report will provide a Wine Inventory Alcohol Summary at the bottom of the report but it only includes inventory available for sale.

The Inventory Quantity report by **Location** report shows all inventory by location. This is only inventory that is available for sale and does not include allocated inventory. The report will also provide a Wine Inventory Alcohol Summary at the bottom of the report.

You have the four standard report output options for this report:

Display/Print the report- Will display the report as it is and you can choose just to look at it or select a printer.



Export to PDF -Will create the report in a PDF format exactly as it is.

Export to Excel - Will export the report to Excel exactly as it is.

Export to CSV – Will export all the details of invoices that make up the report in a CSV format.