



## Is The Warehouse Feature Right for My District?

The warehouse feature can have great value for districts who have centralized warehouses to manage their inventory. As you're investigating the feature compatibility for your needs, you'll want to review the items below to ensure you understand the feature prior to authorizing its activation. (**Once enabled, the feature cannot be turned off**)

### The Warehouse Concept

Warehouses are special kinds of sites. They are centralized locations allowing the tracking and storage of tagged and untagged inventory. Inventory in a warehouse is managed via Rooms, Containers, and Staff. Depending on the district, a warehouse could be a small portable building or a large facility capable of housing a significant quantity of goods and assets. In addition, a district could have multiple warehouses of varying sizes.

### Considerations to keep in mind when determining if this functionality is a good fit.

Districts who find benefit have processes to manage substantial amounts of untagged inventory mainly for **Surplus** (excess inventory that is available for sites to request when needed) and **Disposal** (auction, recycling, or other means of disposal). Most successful use cases are managing Surplus inventory like furniture.

Managing assets (tagged and untagged) in the warehouse will require added steps.

- Untagged items must be *initialized* into containers for storage and transfer.
- Tracking of Untagged items can include overall value but does not include cost or vendor data.
- Tagged assets must be received to a room and cannot directly be added to a container at asset creation via Purchase Order or Initialization. The user will need to transfer the assets to a container after they have been added to the application.

Non-optimal use cases are for managing consumables.

- The Warehouse feature is NOT a parts tracking system that communicates reorder points.

### Factors:

Your district will want to consider how your warehouse currently operates and what the expectation is for tracking and reporting on those operations moving forward.

- Does my district have a centralized location(s) allowing the tracking and storage of inventory?
- Does my district have drivers who transport assets? Are there varied levels of driver roles?
- Does my district manage a large volume of asset delivery and pickup that would benefit from being able to schedule those events in advance?
- Does my district wish to allow sites to request surplus inventory from the warehouse?
- Does my district require the approval of asset movement prior to the physical transfer of those assets?

The Warehouse feature has added opportunities for approval and denial of transfers and drivers can manage transfers throughout the process (scheduling of pickup and delivery, collection of digital signatures and edit of assets) of a transfer.



**Feature Review:**

The warehouse feature has opportunity to have great value for districts to manage their inventory. Training is necessary to ensure setup and configuration in your application meet your district’s needs.

**Training Notes:**

- Recommendation is the (2) 2-HR Warehouse training session to work through the feature and apply the districts processes.
- There is a Condensed (1) 2-HR Warehouse training that can be provided but will not be complete content or as customized.

**Training Agenda:**

<b>Custom Warehouse Training</b>	<b>Condensed Warehouse Training</b>
<ul style="list-style-type: none"> <li>• <b>Customized conversation on your districts process and procedures</b></li> <li>• <b>Full hands-on experience</b></li> <li>• (2) 2-hour sessions, webcast</li> <li>• Attendees: 15 people</li>   <li>• Warehouse Set up discussion.</li> <li>• Inventory Storage- Tagged and Untagged Inventory</li> <li>• Inventory Transfers</li> <li>• Request Transfers</li> <li>• Managing Rooms &amp; Containers</li> <li>• Reports</li> <li>• Purchasing, as needed</li> <li>• Inventory Grid, as needed</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Condensed version on topics with light process and procedures</b></li> <li>• (1) 2-hour session, webcast</li> <li>• Attendees: 15 people</li>   <li>• Warehouse Overview</li> <li>• Rooms &amp; Containers</li> <li>• Inventory Storage Overview</li> <li>• Transfers</li> <li>• Basic Reports</li> </ul>