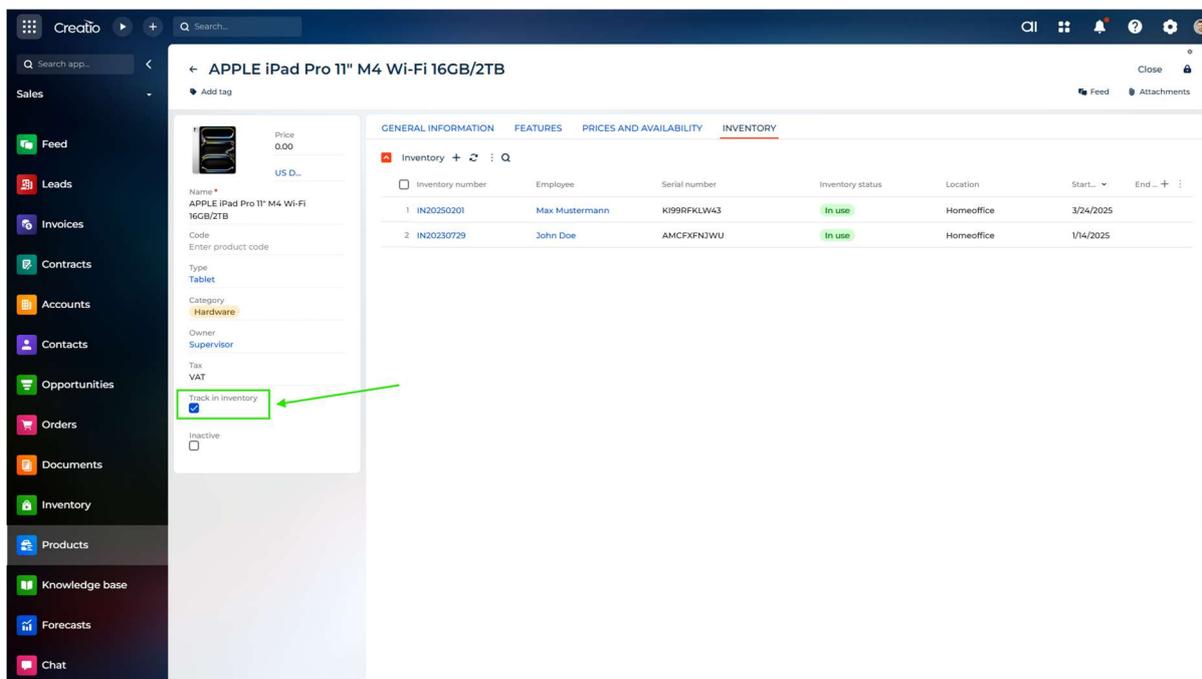


Inventory Master for Creatio



Setup

After successful installation of application “Inventory Mater for Creatio”, it is needed to “mark” which products are being tracked in your inventory, by checking “Track in inventory” checkbox on each product you would like to be tracked in Inventory:



When you have a lot of items you would like to mark to be tracked in your Inventory, you can do this with help of standard Creatio “Excel import” functionality on Product section.

Products that are marked with “Track in inventory” flag will be available in Product lookup on Inventory section.

Inventory data

To enter Inventory data in Creatio you have several possibilities:

1. Enter data on Inventory section
2. Enter data on Product page by Inventory tab
3. Enter data on Contact page by Inventory tab
4. Excel import on Inventory section (for mass import)

Inventory historical data

You can track historically which changes happened with Inventory item, by Inventory history detail on Inventory page.

Changes are tracked historically when values are changed by any of following columns by Inventory item: Employee, Owner, Location, Inventory status.