



USER GUIDE

SalamanderLive™
INVENTORY MANAGEMENT
User Guide
Version 2.0

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1 ABOUT THIS GUIDE

This user guide provides all the information necessary to help SalamanderLive™ INVENTORY MANAGEMENT account users navigate and operate the features of INVENTORY MANAGEMENT within SalamanderLive SalamanderLive.

2 REQUIRED MATERIALS

An email containing important information regarding the organization's SalamanderLive account and the Salamander License Keys document are required to begin setting up SalamanderLive. On top of the SalamanderLive account information, INVENTORY MANAGEMENT is a paid feature; the account must be set up with this paid feature in order for these functions and features to be accessible to users.

3 INTRODUCTION

Operating through SalamanderLive and the INVENTORY APP, this is a tool that will help you to manage inventory, resourcing, restocking/reordering, and more.

To access the INVENTORY MANAGEMENT portion of SalamanderLive, go to <https://app.salamanderlive.com/v2>. To download the app, refer to the INVENTORY APP User Guide.

4 ACCOUNT SETUP

INVENTORY MANAGEMENT is a paid feature within SalamanderLive. Users who have subscribed to the INVENTORY MANAGEMENT feature will have access on SalamanderLive as well as in the INVENTORY APP based on their SalamanderLive credentials. Refer to the SalamanderLive User Guide for details on creating various user roles in SalamanderLive for access.

5 INVENTORY MANAGEMENT

Before you can utilize INVENTORY MANAGEMENT, you'll need to add and/or import equipment and/or inventory items into SalamanderLive. To do so, refer to the SalamanderLive User Guide for process details. Once information is input, from the Events List in SalamanderLive, you can do the following:

- Create Consumable Items
- Create and Edit an Inventory Alert
- Manage Existing Alerts
- View Inventory related reports
- Subscribe Users to Receive Inventory Alerts Emails

5.1 Creating Consumable Items

When manually adding or importing inventory items into SalamanderLive, items can be marked as a fixed asset or consumable. Consumables are items that are intended to be used up or discarded once issued out. Once used or discarded, these items would need to be replaced.

NOTE: Consumables can be issued out during the INVENTORY APP. Refer to the INVENTORY APP User and Installation Guide for details on this process.

To manually create a new consumable item:

- Step 1:** Click **Equipment** from the navigational menu or click **Quick Add** and then select **Equipment**. The Create New Equipment window will open.
- Step 2:** Click the dropdown next to the Fixed Asset field and select **Consumable**.
- Step 3:** Enter in the rest of the required information.
- Step 4:** Click the **Save** button.

To change the status of an existing item to Consumable:

- Step 1:** Select the desired item from the Equipment list.
- Step 2:** Click the **General** heading.
- Step 3:** Click the dropdown next to Fixed Asset and select **Consumable**.
- Step 4:** Click the **Save** button.

On the General profile page of the item, because Consumable was selected, an Inventory Status field as well as an Inventory section is now available. Notice that the Inventory Status field displays "Out of Stock." This is because the status is dependent upon the information that is entered in on the Inventory section, which has not been done yet in this case.

To enter inventory information:

- Step 1:** Click the **Inventory** heading. The Inventory window opens.
- Step 2:** In the Quantity field, enter the quantity on-hand.
- Step 3:** In the Maximum Quantity field, enter the maximum quantity on-hand – this is used to help determine how much to re-order.
- Step 4:** In the Reorder Quantity field, enter the reorder quantity or the threshold for once quantity is below that amount triggers an alert for reorder.
- Step 5:** Enter how many are in a unit and how it is sold as (i.e. 100 in a Pack).
- Step 6:** Once done, click the **Save** button.

This will take you back to the General profile page. Notice that the Inventory Status field now displays "Available" due to the available quantities entered in the Inventory section. As the item is issued out with the INVENTORY APP, the quantity shown in SalamanderLive will decrement. Once the quantity of the item goes below the reorder quantity, SalamanderLive will auto-generate a reorder alert that will show up in the Alerts List tile on the Home dashboard. This serves as a reminder to the user that an order needs to be placed for the item. To ensure inventory accuracy, once the reorder is received, the item record should be updated with the new inventory values.

5.2 Creating and Editing an Inventory Alert

An alert is a reminder to perform a task or action on a specific day or at specific intervals. Users can create alerts to reorder, receive, dispose, expected return, relocate, expiration, inspection, repair, maintenance, or "other" for miscellaneous reminders that don't fit into the available categories. Alerts can also be set to reoccur. If desired, this can be set to daily, weekly, monthly, or an annual reminder.

An inventory alert goes through a 5-stage life cycle:

1. Create the Alert
2. Alert Appears in the Alert List Tile
3. Subscribers are Emailed
4. Mark Alert Complete
5. Completion is Logged

5.2.1 Lifecycle of an Inventory Alert

An inventory alert goes through a 5-stage life cycle:

Stage 1: Create the Alert

An alert can be created manually by a user or automatically by SalamanderLive. There is only one circumstance in which SalamanderLive will auto-create an alert, and that is for consumables. If the quantity of an item goes below the reorder quantity set for the item, SalamanderLive will auto-generate a reorder alert for that item.

Stage 2: Alert Appears in the List Tile

Once an alert meets the expiring in 30 days timeframe, the alert will appear in the Alert List. Any SalamanderLive auto-generated alerts will also appear here.

Stage 3: Subscribers are Emailed

When an alert expires, an email notification will be sent to users who are subscribed to receiving inventory email alerts.

Stage 4: Mark Alert Complete

Users can log into SalamanderLive and mark the alert(s) complete either from the Alert List tile or from within the item record.

Stage 5: Completion is Logged

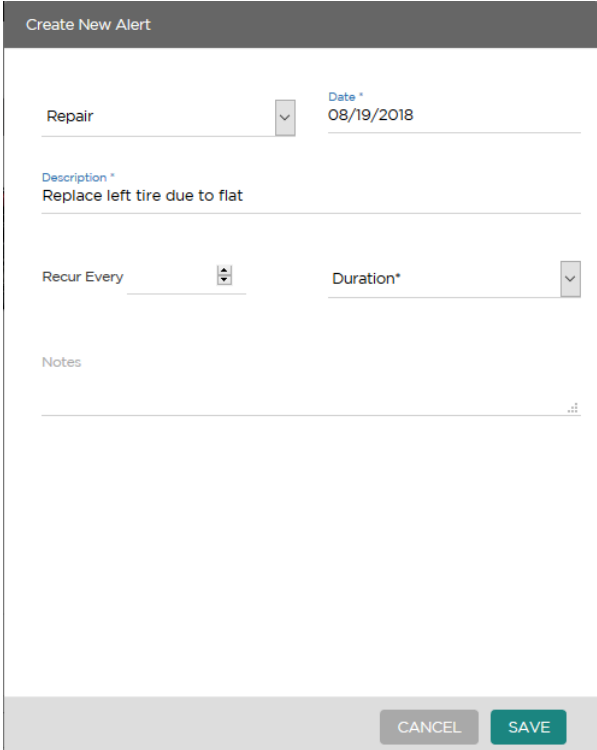
Once an alert is marked complete, the alert will be removed from the Alert List tile and be logged into the item's history.

5.2.2 Creating an Alert

To create an alert:

- Step 1:** Once logged into SalamanderLive, navigate to the Equipment list view.
- Step 2:** Select the piece of equipment you would like to set an alert for. This will bring you to the equipment's general summary page.
- Step 3:** Scroll down and click the "Alerts" section heading.
- Step 4:** Click the "Add Alert" button. The Create New Alert window will appear.
- Step 5:** Enter in the desired information – all required fields are marked with an asterisk.
- Step 6:** Once the form is completed, click the "SAVE" button. The Alert will appear in the Alerts section for that piece of equipment.

NOTE: A single piece of equipment can have multiple alerts as there is no limit on the number of alerts you can set for one piece of equipment.



The screenshot shows a 'Create New Alert' form. At the top, there's a title bar 'Create New Alert'. Below it, there are several input fields: 'Repair' with a dropdown arrow, 'Date*' with the value '08/19/2018', 'Description*' with the text 'Replace left tire due to flat', 'Recur Every' with a dropdown arrow, and 'Duration*' with a dropdown arrow. Below these is a 'Notes' section with a text area and a 'Notes' label. At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

Figure 5.2.2.1

5.2.3 Editing an Alert

To edit an alert:

Step 1: Access the equipment record by either clicking on an alert from the Alert List tile or clicking on a piece of equipment with the alert you want to edit from your Equipment list view.

IMPORTANT NOTE: Add the Alerts, Alert Date, and Alert Message columns to help filter your Equipment list views.

Step 2: On the equipment's General summary page, click the alert you want to edit. The Edit Alert window will open.

Step 3: Edit the alert information as needed.

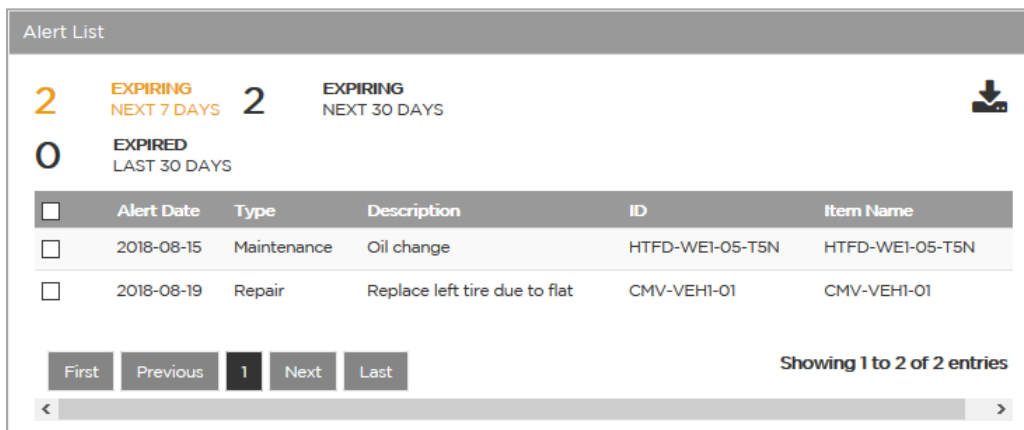
Step 4: Click the "SAVE" button.

5.3 Managing Inventory Alerts

5.3.1 The Alerts List Tile

On the Home dashboard, there is a new Alert List tile that will be available for those with access to the INVENTORY MANAGEMENT feature in SalamanderLive. By default, the Alert List tile will be hidden on your Home dashboard. To add it, simply click the "Tile Menu" icon and select "Alert List" from your list of available options.

When an alert is expired or about to expire, it will appear on the Alert List tile (see Figure 5.3.1.1). This tile will display item records with alerts that are expiring in the next 7 days, expiring in the next 30 days, and expired in the last 30 days. Each of the headings are clickable, allowing you to zone in on the group of expiring or expired alerts. From there, you can click on a specific alert which will bring you to the equipment record associated with that alert. Here, you can see the alert information assigned to a piece of equipment.



Alert List					
2	EXPIRING NEXT 7 DAYS	2	EXPIRING NEXT 30 DAYS		
0	EXPIRED LAST 30 DAYS				
<input type="checkbox"/>	Alert Date	Type	Description	ID	Item Name
<input type="checkbox"/>	2018-08-15	Maintenance	Oil change	HTFD-WEI-05-T5N	HTFD-WEI-05-T5N
<input type="checkbox"/>	2018-08-19	Repair	Replace left tire due to flat	CMV-VEHI-01	CMV-VEHI-01
First Previous 1 Next Last					Showing 1 to 2 of 2 entries

Figure 5.3.1.1

5.3.2 Downloading Expiring or Expired Alert Reports

From the Alert List tile, you can download a .csv report for all expiring or expired alerts, if desired. To do so, click the "CSV Export" icon in the upper right corner of the Alert list tile (see Figure 5.2.1.1). The download will occur immediately and once complete, select to save the file or open the file using Excel.

5.3.3 Marking an Alert Complete

There are two ways to mark an alert complete:

1. From the Alert List tile
2. From within the equipment record

From Alert List Tile

To mark an alert complete from the Alert List tile:

Step 1: Click the checkbox to the left of the alert (see Figure 5.3.1.1).

NOTE: Multiple alerts can be checked by individually clicking the checkboxes, or you can click the checkbox at the top of the column to select all alerts listed.

Step 2: Once a checkbox is clicked, a COMPLETE button will appear in the tile. Click the **COMPLETE** button once all desired checkboxes are clicked. A confirmation message will appear.

Step 3: Click **OK** to mark the selected alert(s) complete or **Cancel** to cancel the action. Once "OK" has been selected, all alerts will be marked as complete and removed from the Alert List tile. At this time, it will also be logged in the equipment record's history report.

From Equipment Record

To mark an alert complete from within the Equipment Record:

Step 1: Access the desired equipment record by either clicking on an alert from the Alert List tile or by clicking on a piece of equipment with an alert from your Equipment list view.

NOTE: Add columns Alerts, Alert Date, and Alert Message to help filter your Equipment list view.

Step 2: On the equipment's General summary page, click the alert you want to mark complete. The Edit Alert window will open (see Figure 5.2.3.1).

Step 3: Add any notes as needed and then click the **MARK COMPLETE** button. A confirmation window will appear.

Step 4: Click **OK** to mark the alert complete or click **Cancel** to cancel the action. Once "OK" is selected, the alert will be marked as complete and be logged in the equipment record's history report. If the alert was listed on the Alert List tile, it will be removed at this time.

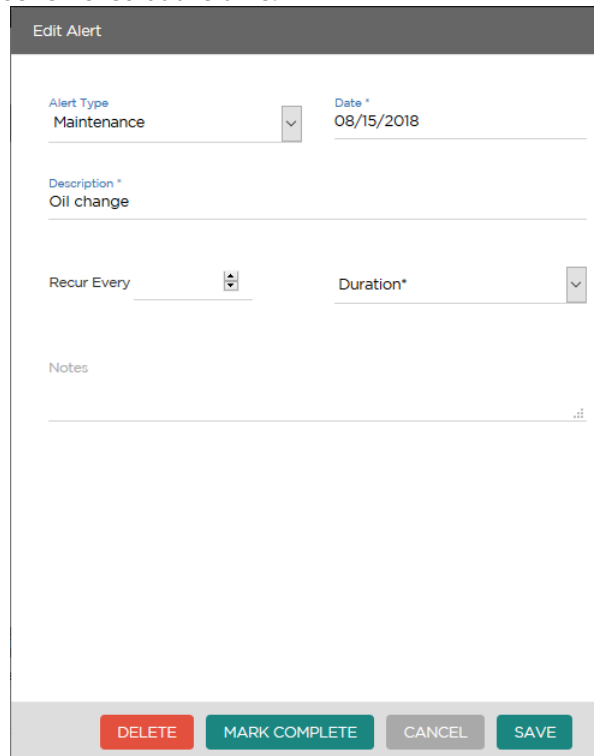


Figure 5.3.3.1

5.4 Subscribing Users to Receive Inventory Alert Emails

Once an inventory alert expires, an email notification will be sent out to users on the account who have been subscribed to receive alert emails. Only users assigned to the INVENTORY MANAGEMENT feature can elect to receive alert emails. To subscribe a user:

Step 1: Click **Security Users** from the navigational menu.

Step 2: Select the user to access their profile.

Step 3: Click the **Update Subscriptions** link. This will open the Subscriptions window.

Step 4: Click the **Notify me by email when alerts expire** dropdown. There are three options to select from:

- i. Unsubscribed – by default, this will be selected. This means the user will not receive any inventory alert emails.
- ii. My primary organization only – this will allow the user to receive alert emails only for the organization in which he/she is set to per their security user profile.
- iii. All Alerts – this will allow the user to receive all inventory alert emails for the entire account, regardless of their set organization.

Step 5: Select the desired option for the user.

Step 6: Click the **Save Changes** button. The changes are now applied to this user.

For a user to assign themselves to receive alert emails:

Step 1: Click **Welcome** at the top left of the page.

Step 2: The user's profile will open. Click the **Pencil icon** next to Active Subscriptions.

Step 3: This will open the Subscriptions window.

Step 4: Click the **Notify me by email when alerts expire** dropdown. There are three options to select from:

- i. Unsubscribed – by default, this will be selected. This means the user will not receive any inventory alert emails.
- ii. My primary organization only – this will allow the user to receive alert emails only for the organization in which he/she is set to per their security user profile.
- iii. All Alerts – this will allow the user to receive all inventory alert emails for the entire account, regardless of their set organization.

Step 5: Select the desired option.

Step 6: Click the **Save Changes** button. The changes are now applied to the user.

Here is an example alert email:

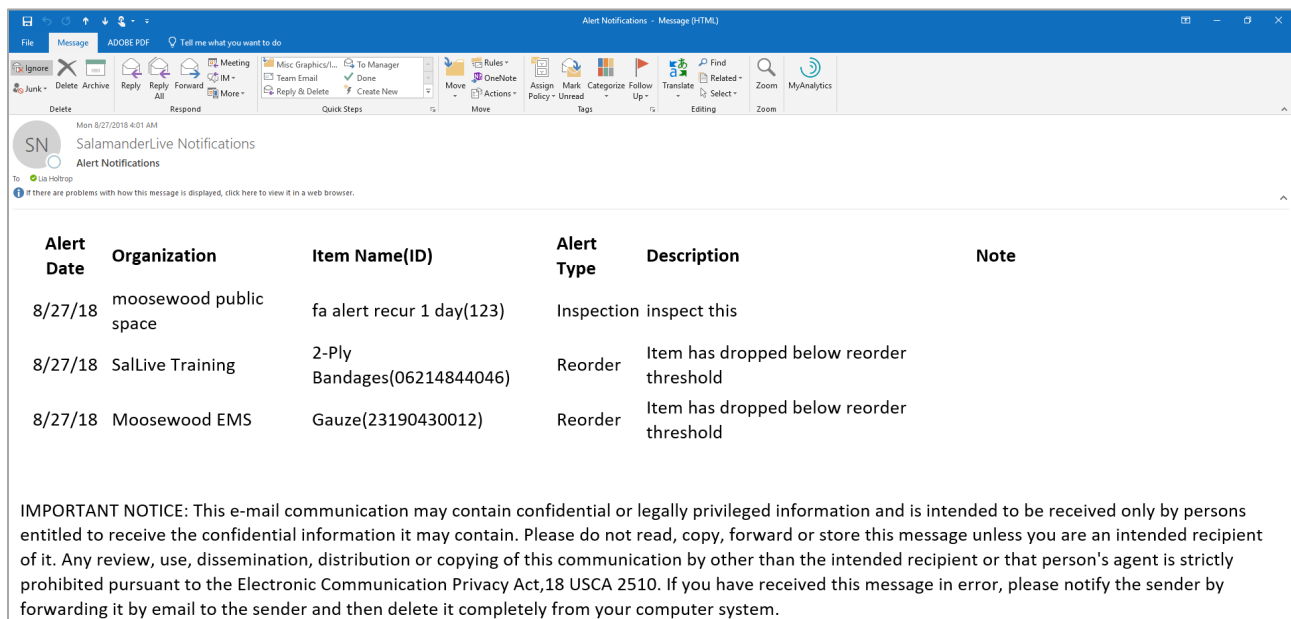


Figure 5.4.1

NOTE: The email only acts as a notification. This means that the user will not be able to take any action on the items listed on the email. The user must log in to SalamanderLive and either mark the alert complete from the Alert List tile on the Home dashboard or update the alert information within the item record.

5.5 INVENTORY MANAGEMENT Reports

There are seven different reports available with INVENTORY MANAGEMENT:

- Alert Report
- Full Inventory Report
- Issued Inventory Report
- Missing Inventory Report
- Out of Service Report
- Parent-Child Report
- Reorder Report

5.5.1 Downloading Reports

To find the available inventory reporting options:

Step 1: Select **Equipment** from the left menu.

Step 2: Click the **Report** icon. The list of reports available will display in a dropdown.

IMPORTANT NOTE: The reports take into account your active list filter, so whatever your filters are set to, the report will only include items from that filtered list. If you want to view items from all organizations, remove the filter and click the **Report** icon again.

Step 3: Select the desired report option.

Alert Report

If selected, the Alert Report window will appear. Input the necessary information and click "RUN REPORT". This will generate a .csv report to download. This report shows alert type, description, date, duration, and more information associated with any equipment with an alert set.

Full Inventory Report

If selected, a .csv report will automatically download. This is a full report of all inventory entered and all details associated with each piece of inventory.

Issued Inventory Report

If selected, the Issued Report window will appear. Input the necessary information and click "RUN REPORT." This will generate a .csv report to download. This report shows all equipment associated with the selected personnel or, if the "All" option was selected, all assigned equipment and its associated personnel.

Missing Inventory Report

If selected, a .csv report will automatically download. This is a report of all inventory marked as missing and its associated information, including the last date it was marked and to whom it was last issued.

Out of Service Report

If selected, a .csv report will automatically download. This is a report of all inventory marked out of service and its associated information, including the date it was marked out of service.

Parent-Child Report

If selected, a .csv report will automatically download. This is a report of all inventory labeled Parent and its associated information.

Reorder Report

If selected, the Reorder Report window will appear. Select the desired radial button option and click "RUN REPORT." This will generate a .csv report to download. This is a report of all items marked for reorder and its associated information, including reorder quantity and other pertinent reordering information.

Event Inventory History Report

Aside from the seven reports available under the Equipment List, there is one additional inventory related report available, the Event Inventory History Report.

The Event Inventory History Report tracks the levels of inventory usage during an event(s). The report will provide a history of activity on the issuance and return for both consumables and fixed assets as well as calculate rate reimbursement.

To access the Event Inventory History Report:

Step 1: Click **Events** from the left menu.

Step 2: From the Events list, click the event you would like to view an inventory history report for.

Step 3: Click the **Report** icon.

Step 4: A list of event related reports will display under three types of reports. Click the **Inventory History** report under the CSV section and open the report.

6 CONTACT US

877.430.5171

training@salamanderlive.com

www.salamanderlive.com