Using the New Inventory Sheet

By: Jessica Hernandez

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New Inventory Tracking Sheet

• Updated format to easily track orders and distributed program materials
• Excel spreadsheet
• Blank printable form

Welcome Baby Inventory Sheet

<table>
<thead>
<tr>
<th>ITEM</th>
<th>SHEET NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>This Emotional Life DVD</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ORDERED</th>
<th>RECEIVED</th>
<th>DISTRIBUTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATE</td>
<td>ORDER NO.</td>
<td>VENDOR</td>
</tr>
<tr>
<td>2/2/2015</td>
<td>100</td>
<td>LURES</td>
</tr>
</tbody>
</table>

CARRIED TO SHEET 2
Blank Inventory Sheet

- Print out blank sheet to keep hard copy of inventory
Using the Excel Inventory Sheet

- For the inventory tracking to work correctly, starting balances **MUST** be filled in the **received** and **distributed** sections under quantity.

- Tabs located on the bottom separate each program material.
Using the Excel Inventory Sheet

- Orders should be tracked under the “ORDERED” column.
- Once an order is received, it should be entered into your “RECEIVED” column.
Using the Excel Inventory Sheet

- Items being distributed **MUST** be accounted for
- Include Name/Title, Date, Quantity and Comments
- Balance is **automatically** updated when an item is checked out
- Comment should indicate how the item was distributed
  - Ex) Visit Type
Saving the Excel Inventory Sheet

- Sheets should be saved for each month
- **DO NOT** record multiple months in one sheet
- Use **Save As** to create a new document for the new month
- Excel inventory sheets will be due with inventory form.
Thank You!