



# Manage Inventory in Aegis CRM

Aegis Premier Solutions is committed to maintaining the highest standards and providing exceptional service to our nonprofit clients. We are a leading provider of nonprofit services such as caging, donor management, merchant services ,and acquisition funding.

Our suite of products offers an end-to-end solution from acquisition funding to donation processing and the management of donor and campaign data. We help you work smarter and make it simple. Let Aegis Premier Solutions help you focus your time on fulfilling your non-profit's mission!

The Aegis brand includes three unique companies – Aegis Premier Solutions, Aegis Processing Solutions and Aegis Premier Technologies – that have joined forces to provide our clients with an A to Z suite of services to help navigate through the various aspects of fundraising.

Security is at the forefront of our business mission. Your organization and your donors can rest easily knowing information is secure in state-of-the art data centers, monitored 24/7/365. Our experts ensure your system is always up-to-date, correctly configured, and is PCI DSS compliant.

**Table of Contents**

<b>Inventory .....</b>	<b>4</b>
<b>Warehouses .....</b>	<b>5</b>
<b>Inventory Categories .....</b>	<b>6</b>
<b>Locate an Inventory Record .....</b>	<b>7</b>
<b>Navigate an Inventory Record .....</b>	<b>8</b>
<b>Add a New Inventory Item .....</b>	<b>10</b>
<b>Add Item Attributes .....</b>	<b>11</b>
<b>Record a Purchase Order .....</b>	<b>13</b>
<b>Add Item Assets .....</b>	<b>14</b>
<b>Upload Media .....</b>	<b>15</b>
<b>Create an Inventory Kit .....</b>	<b>16</b>
<b>Add Kit Components .....</b>	<b>17</b>
<b>Analytics .....</b>	<b>19</b>

## Inventory

With the inventory module in **Aegis CRM**, you can manage and track your inventory including the warehouses that store the physical, tangible assets and intangible services you give or provide to donors. These items can be sold on an individual basis, such as at an event or on a web site, or included in your solicitation efforts as part of an appeal or response to a donation.

The assets and services you have can be used to create pre-packaged kits for improving the efficiency and effectiveness of your campaigns. Keeping all your inventory items including warehouses, assets, and services in **Aegis CRM** gives you everything you need to:

- **Track Assets**

- Monitor your current and backordered inventory levels.
- Manage the vendors and suppliers who provide the assets and services to your organization.
- Identify items that are for sale and those that provide services.

- **Increase Revenue**

- Offer gifts to donors who give a certain amount of money to generate more income.
- Provide benefits to members who join at a higher level.
- Give incentives to major donors for building relationships and securing a large gift.

- **Manage Costs**

- Track the per unit cost of your assets.
- Analyze the cost versus value of assets.
- Generate reports for managing inventory items.

- **Increase Efficiency**

- Establish policies and procedures for maintaining inventory levels.
- Pre-package products using kits.
- Incorporate warehouse and category best practices.

## Warehouses

When managing your inventory products, you can use warehouses to store the physical assets such as books and compact discs as well as the services including audio or video files you sell or provide to donors. The following table identifies recommended warehouses and includes a description for each one.

Warehouse Name	Description
Main Warehouse	A physical building or location where you store assets such as books, mugs, t-shirts, and compact discs.
Major Event Warehouse	Usually a virtual location where you track service products such as sponsorships and tickets as well as any asset products including auction items.
Materials Warehouse	A physical building or location where you store assets including shipping envelopes, letterhead, and return envelopes.

Warehouses display in alphabetical order and a standard setup usually includes Main as the primary warehouse. Because **Rapid Entry** defaults to the first warehouse value, it is a best practice to place your physical assets in the Main warehouse.

## Inventory Categories

Think of categories like folders that store certain products to increase efficiency. Categories follow a parent/child structure, are assigned to each product, and created in the Administration module of **Aegis CRM**.



In this example, the CD's Pastor Sermons folder represents the parent category with children categories for each year that includes recorded sermons.

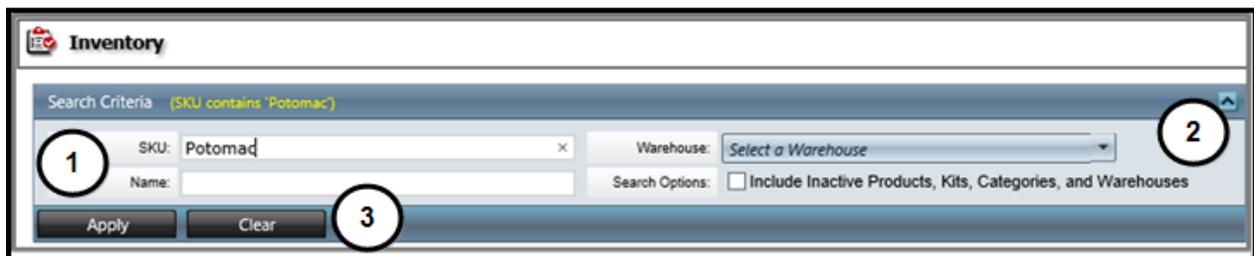
In the example below, Major Events is the parent category with two children categories that reflect each year of the annual event. From there multiple categories are created for each activity during the event as well as the products available for the activity.



## Locate an Inventory Record

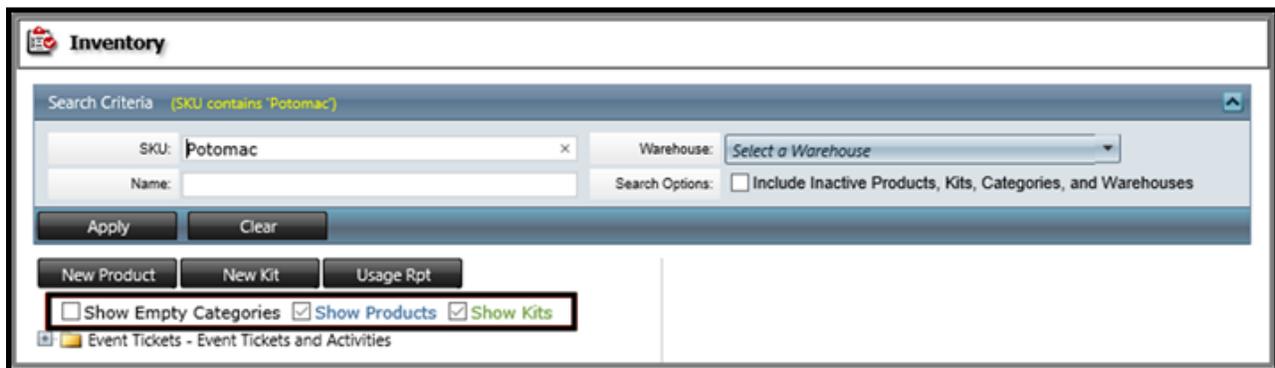
The inventory record contains information to track and manage the goods and materials your organization uses to further its mission. To view these records, you can locate and open an inventory record in **Aegis CRM**.

To locate an inventory record click **Inventory** on the Navigation menu and then follow these steps:



1. Enter the **SKU** or **Name** of the product.
2. Select the **Warehouse** to limit your search to a specific storage location. Mark the **Include Inactive Products, Kits, Categories, and Warehouse** checkboxes to limit your search to these records.
3. Click **Apply**. To perform another search, click **Clear** and repeat the above steps.

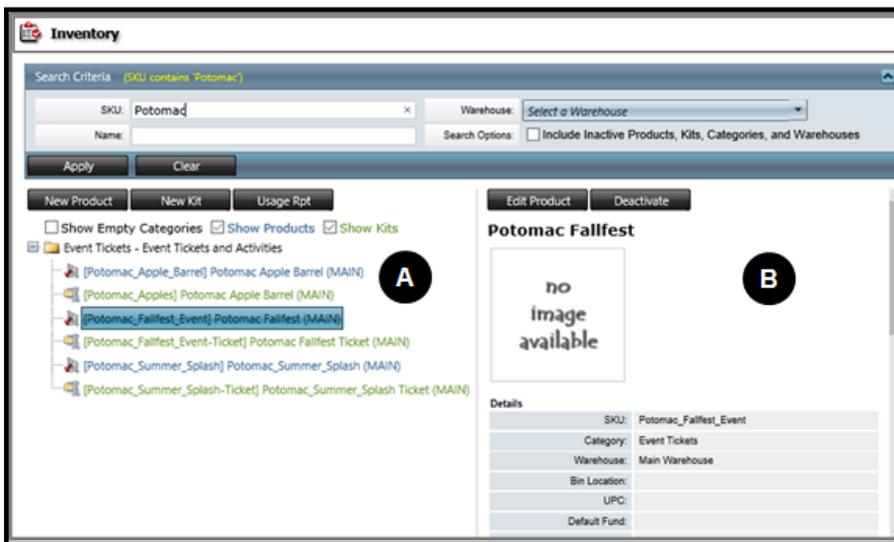
When multiple records are found, you can further filter the results by marking the **Show Empty Categories**, **Show Products**, or **Show Kits** to only display those records.



Click the + icon to the left of the category name to display the products and kits available in your inventory.

## Navigate an Inventory Record

The inventory record allows you to view specific information about the goods or materials you use at your organization.



- A. View the results from your search and select the record to open in the right column.
- B. View specific information about the record selected in the left column. The information available depends on the inventory type you select in the left column.

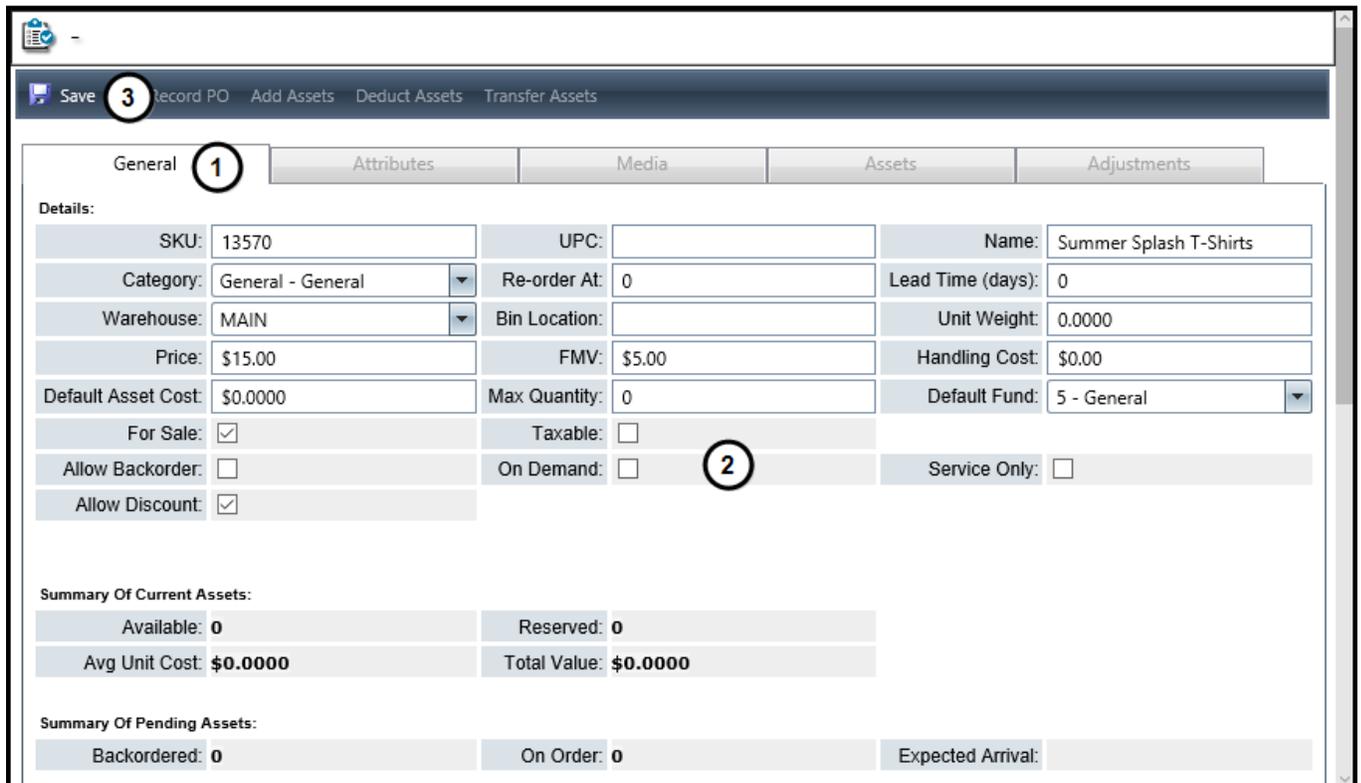
The table below identifies the sections that may be available with a description of the information you can view on the inventory record.

Section	Description
Details	View information including the sku, category, warehouse, and bin location. Other details such as default fund and unit weight are also available.
Cost / Price / Value	View the average cost per unit, price, total value, and cost for the item.

Section	Description
Stock	View the number of items available or backordered, level for reordering, how many are on order, and when to expect the order.

## Add a New Inventory Item

To create an inventory item click **Inventory** on the Navigation menu, click **New Product** and then follow these steps:



Save **3** Record PO Add Assets Deduct Assets Transfer Assets

General **1** Attributes Media Assets Adjustments

Details:

SKU:	13570	UPC:		Name:	Summer Splash T-Shirts
Category:	General - General	Re-order At:	0	Lead Time (days):	0
Warehouse:	MAIN	Bin Location:		Unit Weight:	0.0000
Price:	\$15.00	FMV:	\$5.00	Handling Cost:	\$0.00
Default Asset Cost:	\$0.0000	Max Quantity:	0	Default Fund:	5 - General
For Sale:	<input checked="" type="checkbox"/>	Taxable:	<input type="checkbox"/>		
Allow Backorder:	<input type="checkbox"/>	On Demand:	<input type="checkbox"/> <b>2</b>	Service Only:	<input type="checkbox"/>
Allow Discount:	<input checked="" type="checkbox"/>				

Summary Of Current Assets:

Available:	0	Reserved:	0
Avg Unit Cost:	\$0.0000	Total Value:	\$0.0000

Summary Of Pending Assets:

Backordered:	0	On Order:	0	Expected Arrival:	
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### 1. Enter the details for the item.

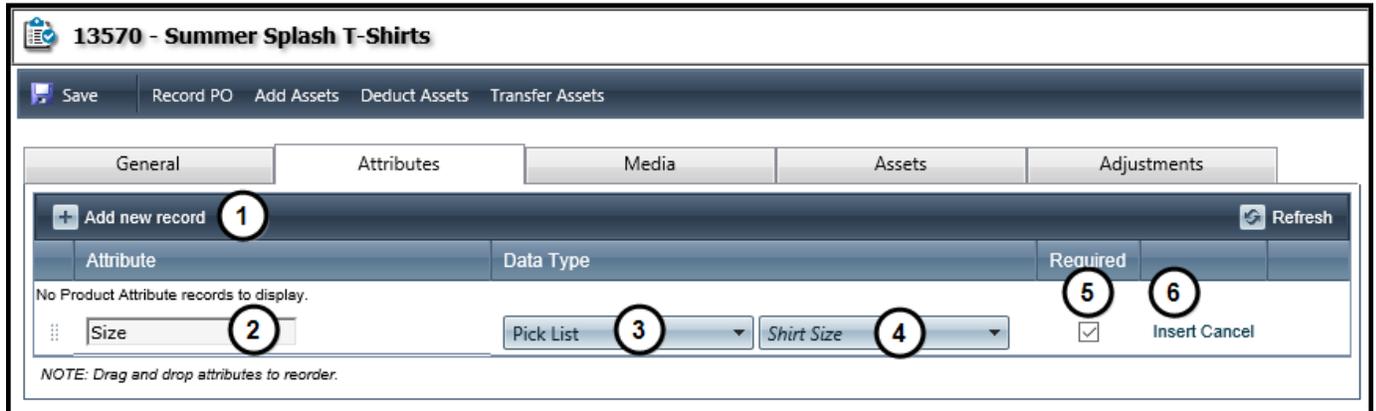
- Enter the item **SKU**.
- Enter an optional **UPC** code.
- Enter the **Name** to identify a description.
- Select a **Category**.
- Enter the **Re-order At** number to identify when to re-order an item based on the current assets in stock.
- Enter the **Lead Time (days)** number to establish a time frame for how long it will take to receive the re-ordered item.
- Enter the **Bin Location** where the product is stored at the warehouse.

- Enter the **Unit Weight** per item to help determine shipping costs.
  - Enter the **Price** that you will charge for the item.
  - Enter the **FMV** Fair Market Value for the cost or value of the item.
  - Enter the **Handling Cost** associated with the item.
  - Enter the **Default Asset Cost** to identify the cost for the item.
  - Enter the **Max Quantity** to keep in stock.
  - Select the **Default Fund** to associate the price with a fund when entering transactions in Rapid Entry.
2. Mark the checkboxes to establish additional details for the item.
- Mark the **For Sale** checkbox to identify the item as available for sale in Rapid Entry or in the Estore.
  - Mark the **Allow Backorder** checkbox to allow the item to be ordered when the item is not in stock.
  - Mark the **Allow Discount** checkbox to offer the product at a discounted price.
  - Mark the **Taxable** checkbox to add sales tax to the price of the item.
  - Mark the **On Demand** checkbox to produce the item when an order is placed for the item. Examples include MP3 recordings or CDs and DVDs.
  - Mark the **Service Only** checkbox to identify the item as an intangible product and not a physical asset.
3. Click **Save**.

### Add Item Attributes

Attributes allow you to add details for the item such as size and color of t-shirts or food choices for an event.

To add attributes to an item locate and open the Inventory record, click the **Attributes** tab, and then follow these steps:



13570 - Summer Splash T-Shirts

Save Record PO Add Assets Deduct Assets Transfer Assets

General Attributes Media Assets Adjustments

+ Add new record 1 Refresh

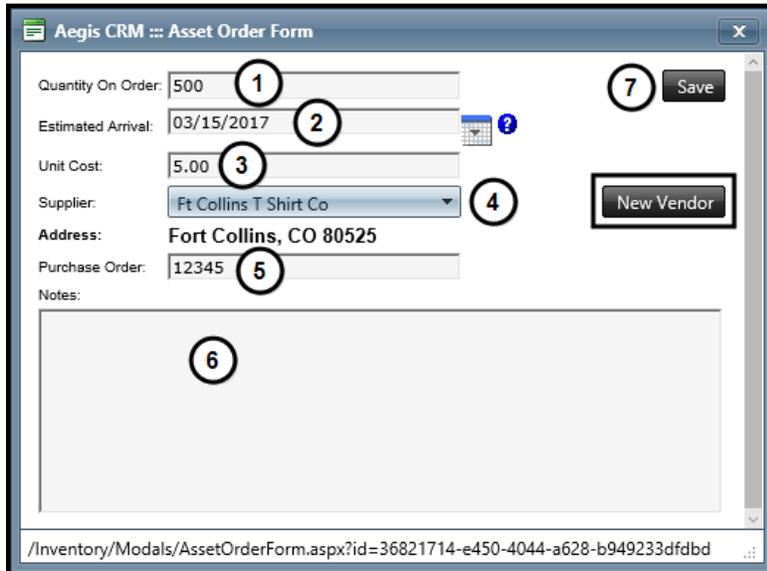
Attribute	Data Type	Required
No Product Attribute records to display.		
Size 2	Pick List 3	Shirt Size 4
		5 <input checked="" type="checkbox"/> 6 Insert

NOTE: Drag and drop attributes to reorder.

1. Click **Add new record**.
2. Enter a name for the attribute.
3. Select the **Data Type** for the attribute.
  - a. Options include:
    - Currency
    - Date
    - Decimal
    - Memo
    - Number
    - Pick List
    - Text
    - Yes / No
    - Yes / No / Unknown
4. Select the list to use if you choose **Pick List** as the data type.
5. Mark the checkbox to require this information when someone orders the item.
6. Click **Insert**.

## Record a Purchase Order

When your order inventory items, you can record the details of the purchase on the Inventory record in **Aegis CRM**. To record a PO locate and open the Inventory record, click **Record PO**, and then follow these steps:



The screenshot shows the 'Aegis CRM :: Asset Order Form' window. It includes the following fields and controls:

- Quantity On Order: 500 (1)
- Estimated Arrival: 03/15/2017 (2)
- Unit Cost: 5.00 (3)
- Supplier: Ft Collins T Shirt Co (4)
- Address: Fort Collins, CO 80525
- Purchase Order: 12345 (5)
- Notes: (6)
- Buttons: Save (7), New Vendor

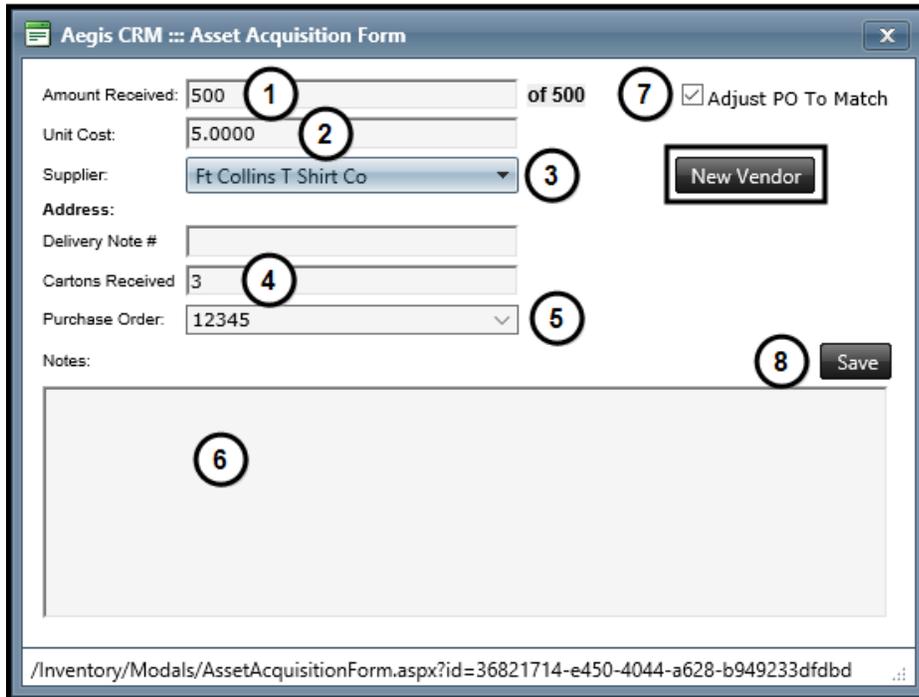
The URL at the bottom of the window is: /Inventory/Modals/AssetOrderForm.aspx?id=36821714-e450-4044-a628-b949233dfdbd

1. Enter the quantity ordered for the item.
2. Enter or select the **Estimated Arrival** date.
3. Enter the **Unit Cost** of each item.
4. Select the **Supplier** of the item. If a supplier is not available from the list, click **New Vendor** to add the supplier.
5. Enter the **Purchase Order** number.
6. Enter any **Notes** about the order.
7. Click **Save**.

The information entered displays in the **Summary of Pending Assets** section on the General tab of the Inventory record.

## Add Item Assets

When an inventory shipment is received, you can add the assets to the Inventory record in **Aegis CRM**. To add assets locate and open the Inventory record, click **Add Assets**, and then follow these steps:



The screenshot shows the 'Aegis CRM :: Asset Acquisition Form' window. It contains several input fields and buttons. Numbered callouts are placed as follows: 1 is over the 'Amount Received' field (value 500); 2 is over the 'Unit Cost' field (value 5.0000); 3 is over the 'Supplier' dropdown menu (value Ft Collins T Shirt Co); 4 is over the 'Cartons Received' field (value 3); 5 is over the 'Purchase Order' dropdown menu (value 12345); 6 is over a large empty text area at the bottom; 7 is over the 'Adjust PO To Match' checkbox (checked); and 8 is over the 'Save' button. A 'New Vendor' button is also visible next to the supplier dropdown.

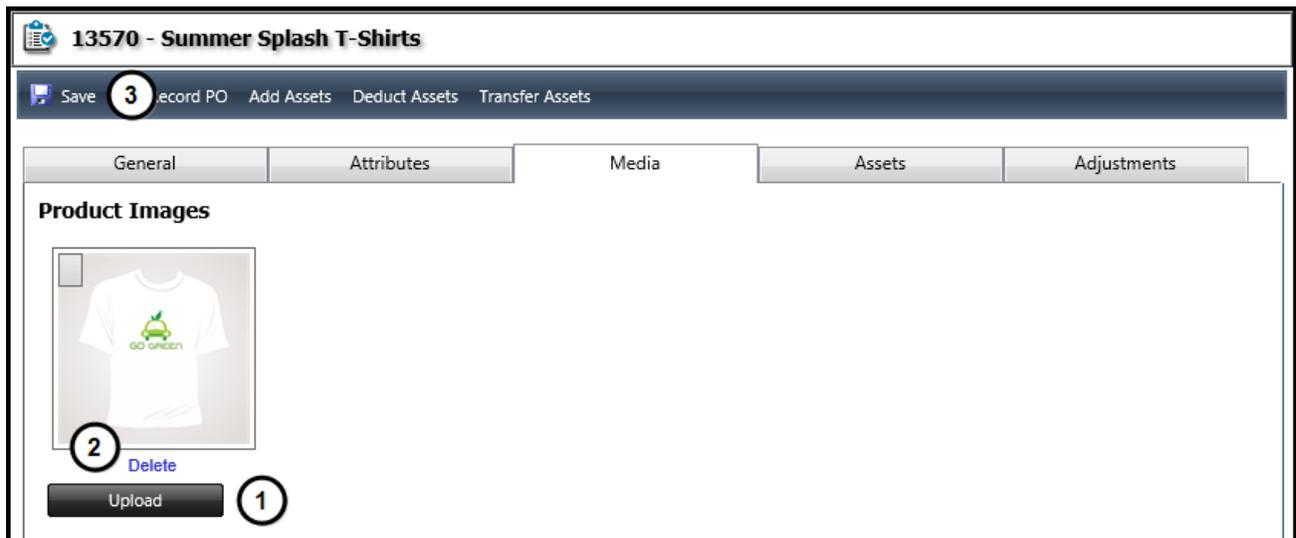
1. Enter the amount received in the shipment.
2. Enter the **Unit Cost** of each item.
  - a. If a purchase order has been recorded for the item, the unit cost automatically displays in the field.
3. Select the **Supplier** of the item. If a supplier is not available from the list, click **New Vendor** to add the supplier.
  - a. If a purchase order has been recorded for the item, the supplier automatically displays in the field.
4. Enter the number of **Cartons Received** in the shipment.
5. Select the **Purchase Order** associated with the shipment.
  - a. If a purchase order has been recorded for the item, the number automatically displays in the field.

6. Enter any **Notes** about the shipment.
7. Mark the **Adjust PO to Match** checkbox if there are differences between the assets received and the purchase order.
8. Click **Save**.

The information entered displays in the **Summary of Current Assets** section on the General tab of the Inventory record.

### Upload Media

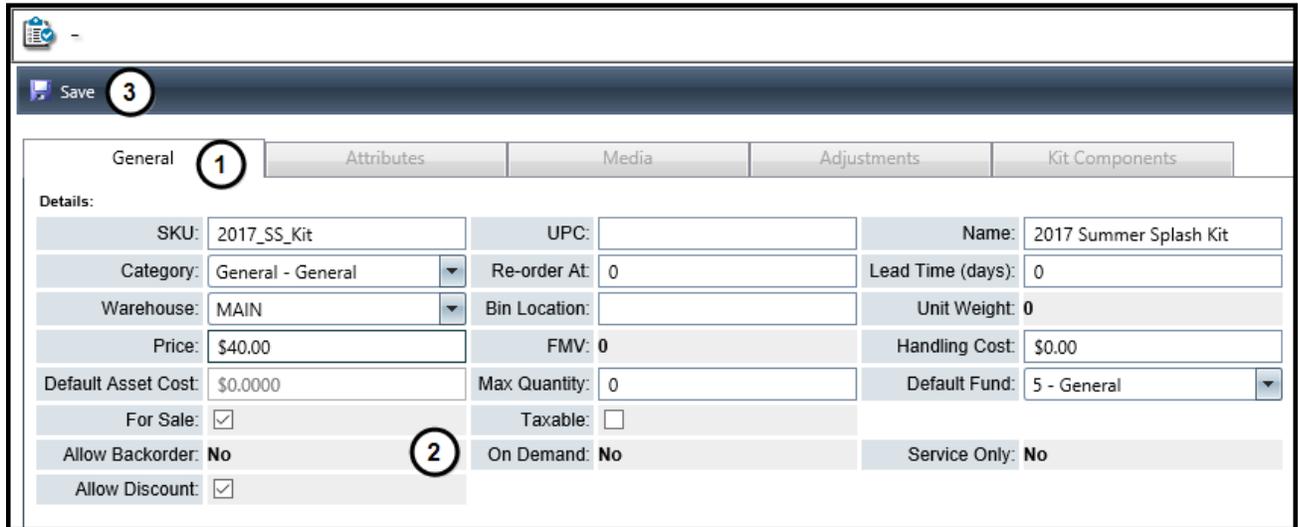
You can upload an image for an inventory item or kit to easily identify them in **Aegis CRM** or in the Estore. To upload media locate and open the inventory item, click the **Media** tab, and then follow these steps:



1. Click **Upload** to search for and select the image to upload.
2. Click **Delete** to remove an uploaded image.
3. Click **Save**.

## Create an Inventory Kit

Kits contain multiple items packaged and shipped together. You can pre-package kits to improve the efficiency and effectiveness of your campaigns. To create an inventory kit click **Inventory** on the Navigation menu, click **New Kit** and then follow these steps:



General <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">1</span>				Attributes	Media	Adjustments	Kit Components
<b>Details:</b>							
SKU:	2017_SS_Kit	UPC:		Name:	2017 Summer Splash Kit		
Category:	General - General	Re-order At:	0	Lead Time (days):	0		
Warehouse:	MAIN	Bin Location:		Unit Weight:	0		
Price:	\$40.00	FMV:	0	Handling Cost:	\$0.00		
Default Asset Cost:	\$0.0000	Max Quantity:	0	Default Fund:	5 - General		
For Sale:	<input checked="" type="checkbox"/>	Taxable:	<input type="checkbox"/>				
Allow Backorder:	No	On Demand:	No	Service Only:	No		
Allow Discount:	<input checked="" type="checkbox"/>						

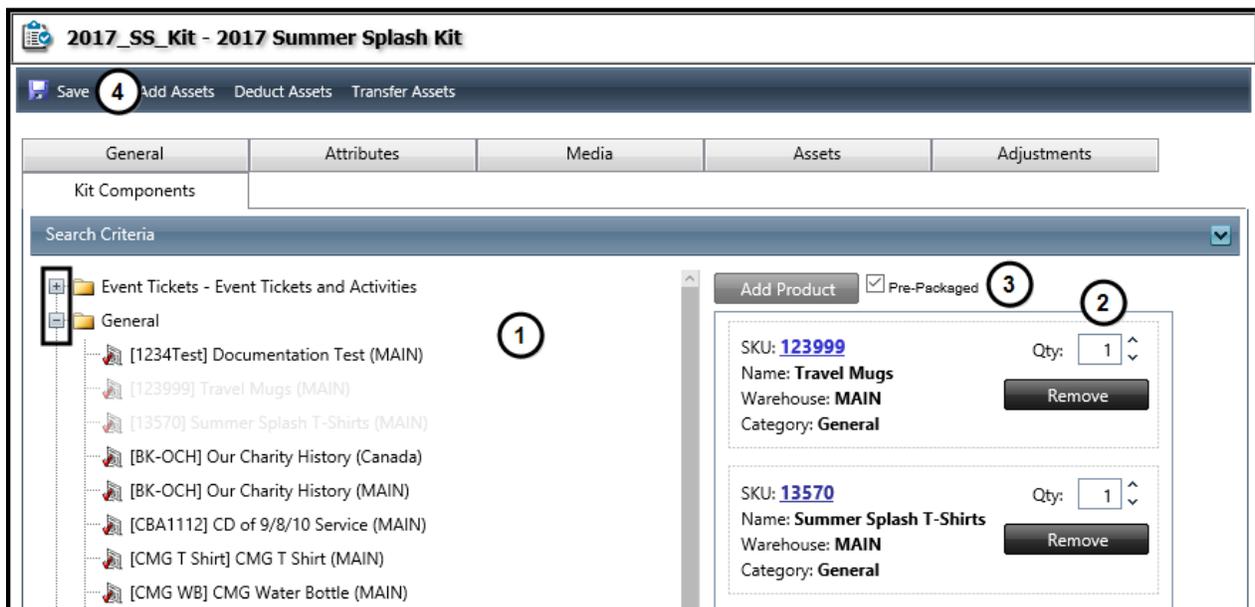
### 1. Enter the details for the kit.

- Enter the item **SKU**.
- Enter an optional **UPC** code.
- Enter a **Name** to identify the description.
- Select a **Category**.
- Enter the **Re-order At** number to identify when to re-order an item based on the current assets in stock.
- Enter the **Lead Time (days)** number to establish a time frame for how long it will take to receive the re-ordered item.
- Enter the **Bin Location** where the product is stored at the warehouse.
- Enter the **Unit Weight** per kit to help determine shipping costs.
- Enter the **Price** that you will charge for the kit.
- Enter the **Handling Cost** associated with the item.
- Enter the **Max Quantity** to keep in stock.

- Select the **Default Fund** to associate the price with a fund when recording transactions in Rapid Entry.
2. Mark the checkboxes to establish additional details about the kit.
    - Mark the **For Sale** checkbox to identify the kit as available for sale in Rapid Entry or in the Estore.
    - Mark the **Allow Discount** checkbox to offer the kit at a discounted price.
    - Mark the **Taxable** checkbox to add sales tax to the price of the kit.
  3. Click **Save**.

## Add Kit Components

Components are the inventory items you include in a kit. Before you can add kit components, you should ensure that the items you include are available for you to use. To add components to a kit locate and open the record, click the **Kit Components** tab, and then follow these steps:



1. Select the first item to add to the kit, drag it from the left, and then drop it on the right.

- a. Repeat this step to include additional items in the kit.
  - b. Click the plus to expand the category to display the items available in that category.
2. Edit the quantity of the item to include in the kit.
3. Mark the **Pre-Packaged** checkbox to include all items in the kit before it is shipped.
4. Click **Save**.

## Analytics

There are different reports in **Aegis CRM** you can generate to track and manage your inventory. To access these reports, click **Analytics** on the Navigation menu and then click **Inventory** to display the reports. The following table identifies the reports and includes a description for each report.

Report Name	Description
Inventory List (I1001)	Displays each product by SKU and can be filtered to include those in a specific warehouse.
Inventory SKU Status (I1018)	Shows the number of products that have been received, removed, shipped, and ordered.
Product Usage – Aging (I1013)	Lists all SKUs by specified aging group.
Item Order by Partner with Shipping Date (I1014)	Includes all items ordered during a specified time frame sorted by partner last name.
Inventory Assets (I1008)	Displays financial information about assets based on first-in-first inventory accounting.
Instock vs. Reorder Levels (I1012)	Lists SKU with on-hand quantities lower than the defined reorder level.
Inventory Stock Evaluation and Status (I1004)	Maintains inventory dollar value at the end of the month for General Ledger.
Inventory on Back Order (I1010)	Shows all items with an open back order.
Shipments Pending (I1011)	Includes inventory items with orders pending.
Item Order by Partner (I1007)	Lists those items ordered by a partner during a specified time frame.
Product Status by Appeal (I1009)	Shows metrics by appeal on the number of orders for SKUs included in the criteria.
Product Status by SKU by Appeal (I1015)	Includes the number of orders, quantity, and revenue for selected SKUs.

Report Name	Description
Product Sold by Appeal by Date (A1004)	Lists products sold by appeal for a specified time frame.
Product and Gift Revenue by Appeal (A1049)	Analyzes revenue and costs by product versus gift.
Product and Gift Revenue by Appeal Segment (A1050)	Includes an analysis of revenue and costs grouped by appeal and segment ID.
Product Sold by Appeal (A1046)	Shows the quantity and dollar value of sold products.
Product and Gift Revenue by Appeal Group (A1051)	Analyzes revenue and costs by appeal grouping.



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