Inventory Management Workbook User Guide

This workbook is designed to help you with basic inventory management tasks including recording stock value, physical inventory counts, sales, and purchase records. It also lets you prepare a purchase order form, generate low stock reports, and inventory movement within specific date ranges. Sample data is included.

To use these templates yourself, click above on File>Make a Copy. This will let you copy this template to your Google Drive and you can edit or use any way you wish.

Get Started:
Step 1: Prefill the inventory list tab with your products' basic information
Step 2: Create your supplier contact list
Step 3: Update your purchase and sales records
Step 4: Start your physical inventory count to complete the inventory list records

*Note that all shaded columns are automatically computed

Inventory List Tab

Enter product details including supplier name, product size and color

Add your product code or SKU.

Assign a reorder point, cost price and markup

Record physical inventory on display and in your stock room to arrive at your initial stock level.

Supplier Contact List

Enter your supplier name and contact details

Purchase Record Tab

Enter your purchase order number

Choose your product name from the drop down list

Indicate the quantity received in cases and singles

Add the date of your purchase order and record the arrival date *only* when the stock arrives

Use the floating tab to filter purchase records based on your chosen date range

Sales Record Tab

Enter your sales order number

Choose the product name from the dropdown list and indicate the quantity of items sold

Indicate your customer's name and the date of sale

Add the ship date *only* when the items have already been sent out for delivery

Use the floating tab to filter sales records based on your chosen date range

Low Stock Report Tab

All the data in this tab is autogenerated

Click on the funnel icon in F3 (Stock Level Status) to filter only products with "Reorder" status

Click on the funnel icon in A3 (Supplier Name) to sort the list alphabetically

Refresh the list by repeating steps 2 and 3 before running a report

Links to helpful FSB articles

How to Price a Product – The Ultimate Product Pricing Strategy Guide for Small Businesses
SKU Numbers: What They Are & How to Set Them Up
Gross Margin & Markup Calculator: How to Price Retail Items
How to Do Bar & Liquor Inventory in 4 Steps

Free Purchase Order Template & Instructions: How to Create a Purchase Order

What Is Order Fulfillment? Processes & Strategies
Order Fulfillment Costs: Fulfillment Services & 3PL Costs Explained
FIFO vs LIFO: Differences & Which Is Right for Your Business?
Ecommerce Shipping & Handling in 6 Steps + Free Checklist

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Purchase Order Template

Choose your supplier's name from the drop down list and the contact information will be automatically populated based on your list of suppliers

Choose the product to be ordered from the drop down list, add your supplier's item reference number and the cost price will be automatically populated based on your inventory list

Note that all the products you sell will be shown in the dropdown to allow you to order these items from a different supplier in case of a better unit cost

Specify any agreed upon wholesale discounts (usually in %), or total special discounts on one or more items (usually in $)

Shrinkage and Turnover Calculator Tab

Use this tab to calculate for inventory shrinkage rate and inventory turnover ratio

Shrinkage calculator: Key in the value of your inventory in books and the calculator will pick up

the value of your physical inventory based on the physical count from your inventory list tab.

Turnover calculator: You will need to key in all the figures from your accounting records

Inventory Shrinkage: Definition, Causes & How to Prevent It

Inventory Aging Report and How to Calculate: The Ultimate Guide

What is Cost of Goods Sold (COGS) & How To Calculate It

Product Name	SKU or Product Code	Size	Color	QOH Shelves	# Cases	Qty/Case	# Singles	Total	Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
Magazine X, Q1	MagX-0000Q1			12	2	20	0	40	52	10	1	0	0	42	$ 5.00	$ 2.00	$ 7.00	Supplier D
Magazine X, Q4	MagX-0000Q4			8	1	20	6	26	34	10	1	0	0	32	$ 5.00	$ 2.00	$ 7.00	Supplier D
Magazine X, Q2	MagX-0000Q2			15	4	20	12	92	107	10	2	0	0	93	$ 5.00	$ 2.00	$ 7.00	Supplier D
Magazine Y, Q1	MagY-0000Q1			5	2	20	0	40	45	10	1	1	0	45	$ 3.00	$ 1.50	$ 4.50	Supplier D
Magazine Y, Q4	MagY-0000Q4			5	3	20	0	60	65	10	6	1	0	30	$ 3.00	$ 1.50	$ 4.50	Supplier D
Magazine Y, Q2	MagY-0000Q2			16	0	20	9	9	25	10	1	0	0	20	$ 3.00	$ 1.50	$ 4.50	Supplier D
ABC Pen, Black 0.5 Point	PenABC-Blk05	0.5	Black	26	1	50	0	50	76	100	1	0	0	151	$ 0.90	$ 0.90	$ 1.80	Supplier A
ABC Pen, Blue 0.5 Point	PenABC-Blu05	0.5	Blue	29	2	50	0	100	129	100	6	0	0	45	$ 0.50	$ 0.50	$ 1.00	Supplier A
ABC Pen, Red 0.5 Point	PenABC-Red05	0.5	Red	33	4	50	10	210	243	100	3	0	0	231	$ 0.90	$ 0.90	$ 1.80	Supplier A
ABC Pen, Black 0.3 Point	PenABC-Blk03	0.3	Black	18	2	50	16	116	134	100	1	0	0	104	$ 0.90	$ 0.90	$ 1.80	Supplier A
ABC Pen, Blue 0.3 Point	PenABC-Blu03	0.3	Blue	11	1	50	5	55	66	100	3	0	0	101	$ 0.50	$ 0.50	$ 1.00	Supplier A
ABC Pen, Red 0.3 Point	PenABC-Red03	0.3	Red	39	1	50	0	50	89	100	1	0	0	137	$ 0.90	$ 0.90	$ 1.80	Supplier A
XYZ Pen, Black 0.5 Point	PenXYZ-Blk05	0.5	Black	12	2	50	0	100	112	100	3	1	0	104	$ 0.75	$ 0.75	$ 1.50	Supplier A
XYZ Pen, Red 0.5 Point	PenXYZ-Red05	0.5	Red	18	1	50	2	52	70	100	0	0	0	70	$ 0.80	$ 0.80	$ 1.60	Supplier A
XYZ Pen, Black 0.3 Point	PenXYZ-Blk03	0.3	Black	9	2	50	0	100	109	100	0	0	0	109	$ 0.75	$ 0.75	$ 1.50	Supplier A
XYZ Pen, Red 0.3 Point	PenXYZ-Red03	0.3	Red	13	1	50	6	56	69	100	1	0	0	63	$ 0.80	$ 0.80	$ 1.60	Supplier A
ABC Co. Beach Shirt, Green, Large	ABC1-BShirt-GL	L	Green	12	1	20	0	20	32	50	3	2	0	51	$ 9.00	$ 4.00	$ 13.00	Supplier B
ABC Co. Beach Shirt, Green, Small	ABC1-BShirt-GS	S	Green	16	3	20	2	62	78	50	1	0	0	72	$ 5.00	$ 2.50	$ 7.50	Supplier B
ABC Co. Beach Shirt, Green, Medium	ABC1-BShirt-GM	M	Green	8	2	20	6	46	54	50	1	1	0	54	$ 7.00	$ 3.50	$ 10.50	Supplier B
ABC Co. Beach Shirt, Green, XL	ABC1-BShirt-GXL	XL	Green	5	5	20	0	100	105	50	1	0	0	101	$ 10.00	$ 5.00	$ 15.00	Supplier B
ABC Co. Beach Shirt, Multi color, Large	ABC1-BShirt-McL	L	Multi	7	1	20	0	20	27	50	1	0	0	22	$ 8.00	$ 4.00	$ 12.00	Supplier B
ABC Co. Beach Shirt, Multi color, Small	ABC1-BShirt-McS	S	Multi	19	0	20	1	1	20	50	0	0	0	40	$ 8.00	$ 4.00	$ 12.00	Supplier B
ABC Co. Beach Shirt, Multi color, Medium	ABC1-BShirt-McM	M	Multi	6	3	20	2	62	68	50	2	1	0	85	$ 8.00	$ 4.00	$ 12.00	Supplier B
ABC Co. Beach Shirt, Multi color, XL	ABC1-BShirt-McXL	XL	Multi	11	6	20	0	120	131	50	1	0	0	131	$ 8.00	$ 4.00	$ 12.00	Supplier B
Brand A School Backpack, Black, Medium	A001-BKPCK-BlkM	M	Black	14	0	12	0	0	14	15	0	0	24	14	$ 8.00	$ 4.00	$ 12.00	Supplier C
Brand A School Backpack, Black, Large	A001-BKPCK-BlkL	L	Black	8	2	12	2	26	34	15	0	0	36	34	$ 9.00	$ 4.00	$ 13.00	Supplier C
Brand A School Backpack, Blue, Medium	A001-BKPCK-BluM	M	Blue	10	1	12	0	12	22	15	0	0	0	22	$ 9.00	$ 4.00	$ 13.00	Supplier C
Brand A School Backpack, Blue, Large	A001-BKPCK-BluL	L	Blue	5	3	12	0	36	41	15	1	1	0	41	$ 10.00	$ 5.00	$ 15.00	Supplier C
Brand B School Backpack, Design 1, Medium	B001-BKPCK-D1M	M		12	1	12	1	13	25	15	3	0	0	8	$ 10.00	$ 5.00	$ 15.00	Supplier E
Brand B School Backpack, Design 2, Medium	B001-BKPCK-D2M	M		4	4	12	3	51	55	15	3	0	24	40	$ 10.00	$ 5.00	$ 15.00	Supplier E
Brand B School Backpack, Design 3, Medium	B001-BKPCK-D3M	M		8	0	12	1	1	9	15	5	0	24	-15	$ 10.00	$ 5.00	$ 15.00	Supplier E
Brand B School Backpack, Design 1, Large	B001-BKPCK-D1L	L		5	2	12	0	24	29	15	0	0	0	29	$ 12.00	$ 6.00	$ 18.00	Supplier E
Brand B School Backpack, Design 2, Large	B001-BKPCK-D2L	L		9	3	12	0	36	45	15	0	0	0	45	$ 12.00	$ 6.00	$ 18.00	Supplier E
Brand B School Backpack, Design 3, Large	B001-BKPCK-D3L	L		12	0	12	0	0	12	15	0	0	0	12	$ 12.00	$ 6.00	$ 18.00	Supplier E
Brand C Water Jug, Design 1, Small	C001-WTRJG-D1S	S		11	3	24	1	73	84	30	4	1	0	61	$ 2.00	$ 1.00	$ 3.00	Supplier E
Brand C Water Jug, Design 1, Medium	C001-WTRJG-D1M	M		8	2	24	2	50	58	30	1	0	0	80	$ 3.00	$ 1.50	$ 4.50	Supplier E
Brand C Water Jug, Design 1, Large	C001-WTRJG-D1L	L		6	1	24	0	24	30	30	0	0	0	30	$ 4.00	$ 2.00	$ 6.00	Supplier E
Brand C Water Jug, Design 2, Small	C001-WTRJG-D2S	S		5	1	24	0	24	29	30	2	0	0	26	$ 2.00	$ 1.00	$ 3.00	Supplier E
Brand C Water Jug, Design 2, Medium	C001-WTRJG-D2M	M		9	2	24	0	48	57	30	0	0	0	57	$ 3.00	$ 1.50	$ 4.50	Supplier E
Brand C Water Jug, Design 2, Large	C001-WTRJG-D2L	L		15	2	24	3	51	66	30	0	0	0	90	$ 4.00	$ 2.00	$ 6.00	Supplier E
Brand A Water Jug, Red, Small	A002-WTRJG-RedS	S	Red	16	0	24	0	0	16	30	0	0	0	16	$ 3.00	$ 1.50	$ 4.50	Supplier C
Brand A Water Jug, Red, Medium	A002-WTRJG-RedM	M	Red	12	1	24	0	24	36	30	0	0	0	84	$ 4.00	$ 2.00	$ 6.00	Supplier C
Brand A Water Jug, Red, Large	A002-WTRJG-RedL	L	Red	13	1	24	0	24	37	30	1	1	0	37	$ 5.00	$ 2.50	$ 7.50	Supplier C
Brand A Water Jug, Orange, Small	A002-WTRJG-OraS	S	Orange	18	2	24	1	49	67	30	0	0	0	67	$ 3.00	$ 1.50	$ 4.50	Supplier C
Brand A Water Jug, Orange, Medium	A002-WTRJG-OraM	M	Orange	15	1	24	0	24	39	30	5	1	0	9	$ 4.00	$ 2.00	$ 6.00	Supplier C
Brand A Water Jug, Orange, Large	A002-WTRJG-OraL	L	Orange	10	0	24	0	0	10	30	1	0	0	54	$ 5.00	$ 2.50	$ 7.50	Supplier C
ABC Co. Socks, Black, Small	ABC2-SOCKS-BlkS	S	Black	8	2	25	0	50	58	50	0	0	0	58	$ 2.00	$ 2.00	$ 4.00	Supplier B
ABC Co. Socks, Black, Medium	ABC2-SOCKS-BlkM	M	Black	12	0	25	0	0	12	50	0	0	0	12	$ 3.00	$ 3.00	$ 6.00	Supplier B
ABC Co. Socks, Black, Large	ABC2-SOCKS-BlkL	L	Black	9	1	25	0	25	34	50	0	0	0	34	$ 4.00	$ 4.00	$ 8.00	Supplier B
ABC Co. Socks, White, Small	ABC2-SOCKS-WhtS	S	White	10	3	25	0	75	85	50	1	0	0	107	$ 2.00	$ 2.00	$ 4.00	Supplier B
ABC Co. Socks, White, Medium	ABC2-SOCKS-WhtM	M	White	8	2	25	0	50	58	50	2	1	0	53	$ 3.00	$ 3.00	$ 6.00	Supplier B
ABC Co. Socks, White, Large	ABC2-SOCKS-WhtL	L	White	5	1	25	0	25	30	50	1	1	0	55	$ 4.00	$ 4.00	$ 8.00	Supplier B

All shaded cells are autopopulated

Product Name	SKU or Product Code	Size	Color	QOH Shelves	QOH - Stockroom				Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
					# Cases	Qty/Case	# Singles	Total										

All shaded cells are autopopulated

Product Name	SKU or Product Code	Size	Color	QOH Shelves	# Cases	Qty/Case	# Singles	Total	Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name

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QOH - Stockroom

Product Name	SKU or Product Code	Size	Color	QOH Shelves	QOH - Stockroom			Total	Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
					# Cases	Qty/Case	# Singles											

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Product Name	SKU or Product Code	Size	Color	QOH Shelves	# Cases	Qty/Case	# Singles	Total	Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
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All shaded cells are autopopulated				QOH - Stockroom														

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QOH - Stockroom			

Product Name	SKU or Product Code	Size	Color	QOH Shelves	QOH - Stockroom				Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
					# Cases	Qty/Case	# Singles	Total										

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Product Name	SKU or Product Code	Size	Color	QOH Shelves	# Cases	Qty/Case	# Singles	Total	Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
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Product Name	SKU or Product Code	Size	Color	QOH Shelves	QOH - Stockroom				Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
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Product Name	SKU or Product Code	Size	Color	QOH Shelves	QOH - Stockroom				Original Stock Level	Reorder Point	Total # of Sales	Sales waiting to be fulfilled	Stock waiting to be received	Total Stock on hand	Cost Price	Markup	Retail Price	Supplier Name
					# Cases	Qty/Case	# Singles	Total										

All shaded cells are autopopulated

Supplier Contact List						
Supplier Name	**Supplier Contact Person**	**Supplier Street Address**	**Supplier City. ST, ZIP Code**	**Supplier Phone**	**Supplier Email**	**Supplier Website**
Supplier A	Contact A	Address A	City A	Phone A1	Email a@1mail.com	a.com
Supplier B	Contact B	Address B	City B	Phone B2	Email b@2mail.com	b.com
Supplier C	Contact C	Address C	City C	Phone C3	Email c@3mail.com	c.com
Supplier D	Contact D	Address D	City D	Phone D4	Email c@4mail.com	d.com
Supplier E	Contact E	Address E	City E	Phone E5	Email e@5mail.com	e.com

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Supplier Contact List						
Supplier Name	Supplier Contact Person	Supplier Street Address	Supplier City. ST, ZIP Code	Supplier Phone	Supplier Email	Supplier Website

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
	All shaded cells are autopopulated	The product names you have added in your Inventory list tab will show up in the drop down list								
					# Cases	Qty/Case	# Singles	Total		
1001	ABC Pen, Blue 0.3 Point	4/25/2020	5/11/2020	Supplier A	1	50	0	50	$ 0.50	$ 25.00
1001	ABC Pen, Black 0.5 Point	4/25/2020	5/11/2020	Supplier A	2	50	0	100	$ 0.90	$ 90.00
1001	ABC Pen, Red 0.3 Point	4/25/2020	5/11/2020	Supplier A	1	50	0	50	$ 0.90	$ 45.00
1004	ABC Co. Beach Shirt, Green, Large	7/25/2020	8/5/2020	Supplier B	1	20	0	20	$ 9.00	$ 180.00
1005	ABC Co. Beach Shirt, Multi color, Small	7/25/2020	8/5/2020	Supplier B	1	20	0	20	$ 8.00	$ 160.00
1006	ABC Co. Beach Shirt, Multi color, Medium	7/25/2020	8/5/2020	Supplier B	1	20	0	20	$ 8.00	$ 160.00
1007	Brand A School Backpack, Black, Medium	7/25/2020		Supplier C	2	12	0	24	$ 8.00	$ 192.00
1008	Brand A School Backpack, Black, Large	7/25/2020		Supplier C	3	12	0	36	$ 9.00	$ 324.00
1009	Brand B School Backpack, Design 3, Medium	7/25/2020		Supplier E	2	12	0	24	$ 10.00	$ 240.00
1010	Brand B School Backpack, Design 2, Medium	7/25/2020		Supplier E	2	12	0	24	$ 10.00	$ 240.00
1011	Brand C Water Jug, Design 1, Medium	4/25/2020	5/16/2020	Supplier E	1	24	0	24	$ 3.00	$ 72.00
1012	Brand A Water Jug, Red, Medium	4/25/2020	5/16/2020	Supplier C	2	24	0	48	$ 4.00	$ 192.00
1013	Brand A Water Jug, Orange, Large	4/25/2020	5/16/2020	Supplier C	2	24	0	48	$ 5.00	$ 240.00
1014	Brand C Water Jug, Design 2, Large	4/25/2020	5/16/2020	Supplier E	1	24	0	24	$ 4.00	$ 96.00
1015	ABC Co. Socks, White, Large	7/25/2020	8/5/2020	Supplier B	1	25	0	25	$ 4.00	$ 100.00
1016	ABC Co. Socks, White, Small	7/25/2020	8/5/2020	Supplier B	1	25	0	25	$ 2.00	$ 50.00

Click the funnel to update your data by range and condition

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
All shaded cells are autopopulated		The product names you have added in your Inventory list tab will show up in the drop down list								
					# Cases	Qty/Case	# Singles	Total		

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
All shaded cells are autopopulated		The product names you have added in your Inventory list tab will show up in the drop down list								
					# Cases	Qty/Case	# Singles	Total		

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
All shaded cells are autopopulated		The product names you have added in your Inventory list tab will show up in the drop down list								
					# Cases	Qty/Case	# Singles	Total		

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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All shaded cells are autopopulated		The product names you have added in your Inventory list tab will show up in the drop down list			Quantity					
Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	# Cases	Qty/Case	# Singles	Total	Cost Price	Total Cost

Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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Purchase Order #	Product Name	Purchase Date	Arrival Date	Supplier Name	Quantity				Cost Price	Total Cost
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All shaded cells are autopopulated			The product names you have added in your Inventory list tab will show up in the drop down list				
Sales Order #	**Product Name**	**Order Date**	**Ship Date**	**Customer Name**	**Quantity**	**Retail Price**	**Total Cost**
20001	Magazine X, Q2	6/6/2020	6/6/2020	Customer AA	5	$ 7.00	$ 35.00
20002	Magazine Y, Q4	6/6/2020	6/6/2020	Customer AB	10	$ 4.50	$ 45.00
20003	Magazine X, Q1	6/6/2020	6/6/2020	Customer AC	10	$ 7.00	$ 70.00
20004	ABC Pen, Black 0.5 Point	6/6/2020	6/6/2020				
20005	ABC Pen, Blue 0.5 Point	6/6/2020	6/6/2020				
20006	ABC Pen, Black 0.3 Point	6/6/2020	6/6/2020	Customer AD	30	$ 1.80	$ 54.00
20007	ABC Pen, Blue 0.3 Point	6/6/2020	6/6/2020	Customer BA	12	$ 1.00	$ 12.00
20008	XYZ Pen, Black 0.5 Point	6/8/2020		Customer CD	8	$ 1.50	$ 12.00
20009	XYZ Pen, Red 0.3 Point	6/21/2020	6/21/2020	Customer AA	6	$ 1.60	$ 9.60
20010	ABC Co. Beach Shirt, Green, Large	6/21/2020	6/21/2020	Customer BA	1	$ 13.00	$ 13.00
20011	ABC Co. Beach Shirt, Green, XL	6/21/2020	6/21/2020	Customer DB	4	$ 15.00	$ 60.00
20012	XYZ Pen, Black 0.5 Point	6/21/2020	6/21/2020	Customer DC	2	$ 1.50	$ 3.00
20013	ABC Co. Beach Shirt, Green, Large	6/21/2020		Customer BB	9	$ 13.00	$ 117.00
20014	Brand B School Backpack, Design 3, Medium	6/22/2020	6/22/2020	Customer AE	1	$ 15.00	$ 15.00
20015	Brand C Water Jug, Design 1, Medium	6/27/2020	6/27/2020	Customer CC	2	$ 4.50	$ 9.00
20016	Brand A Water Jug, Orange, Medium	6/27/2020		Customer CC	3	$ 6.00	$ 18.00
20017	Magazine Y, Q4	6/27/2020	6/27/2020	Customer CC	1	$ 4.50	$ 4.50
20018	Brand C Water Jug, Design 2, Small	6/27/2020	6/27/2020	Customer CC	1	$ 3.00	$ 3.00
20019	Brand A Water Jug, Red, Large	6/27/2020		Customer AA	12	$ 7.50	$ 90.00
20020	ABC Co. Socks, White, Medium	6/27/2020		Customer AB	10	$ 6.00	$ 60.00
20021	ABC Co. Socks, White, Large	6/27/2020		Customer AC	22	$ 8.00	$ 176.00
20022	ABC Co. Socks, White, Small	7/7/2020	7/7/2020	Customer CA	3	$ 4.00	$ 12.00
20023	Magazine X, Q2	7/7/2020	7/7/2020	Customer DA	9	$ 7.00	$ 63.00
20024	ABC Co. Beach Shirt, Green, Small	7/7/2020	7/7/2020	Customer AD	6	$ 7.50	$ 45.00
20025	Brand B School Backpack, Design 1, Medium	7/7/2020	7/7/2020	Customer BA	2	$ 15.00	$ 30.00
20026	ABC Co. Beach Shirt, Multi color, Large	7/7/2020	7/7/2020	Customer AA	5	$ 12.00	$ 60.00
20027	Magazine Y, Q2	7/7/2020	7/7/2020	Customer BA	5	$ 4.50	$ 22.50
20028	ABC Pen, Blue 0.5 Point	7/9/2020	7/9/2020	Customer DB	12	$ 1.00	$ 12.00
20029	Magazine Y, Q1	7/9/2020		Customer DC	8	$ 4.50	$ 36.00
20030	ABC Pen, Red 0.5 Point	7/9/2020	7/9/2020	Customer BB	7	$ 1.80	$ 12.60
20031	Brand B School Backpack, Design 3, Medium	7/13/2020	7/13/2020	Customer AE	2	$ 15.00	$ 30.00
20032	Brand B School Backpack, Design 2, Medium	7/13/2020	7/13/2020	Customer AA	1	$ 15.00	$ 15.00
20033	Brand C Water Jug, Design 1, Small	7/13/2020	7/13/2020	Customer BA	5	$ 3.00	$ 15.00
20034	Brand A Water Jug, Orange, Medium	7/13/2020	7/13/2020	Customer DB	1	$ 6.00	$ 6.00
20035	Brand B School Backpack, Design 1, Medium	7/14/2020	7/14/2020	Customer DC	9	$ 15.00	$ 135.00
20036	ABC Co. Socks, White, Medium	7/14/2020	7/14/2020	Customer BB	5	$ 6.00	$ 30.00
20037	Brand A School Backpack, Blue, Large	7/14/2020		Customer AE	7	$ 15.00	$ 105.00
20038	ABC Pen, Red 0.3 Point	7/14/2020	7/14/2020	Customer AA	2	$ 1.80	$ 3.60

Click the funnel icon to update the order date filter

					Quantity	Retail Price	Total Cost
All shaded cells are autopopulated			The product names you have added in your Inventory list tab will show up in the drop down list				
Sales Order #	**Product Name**	**Order Date**	**Ship Date**	**Customer Name**	**Quantity**	**Retail Price**	**Total Cost**
20039	ABC Co. Beach Shirt, Green, Large	7/14/2020		Customer BA	3	$ 13.00	$ 39.00
20040	ABC Co. Beach Shirt, Green, Medium	7/14/2020		Customer DB	8	$ 10.50	$ 84.00
20041	XYZ Pen, Black 0.5 Point	7/18/2020	7/18/2020	Customer DC	6	$ 1.50	$ 9.00
20042	Magazine X, Q4	7/18/2020	7/18/2020	Customer BB	2	$ 7.00	$ 14.00
20043	ABC Pen, Blue 0.3 Point	7/18/2020	7/18/2020	Customer AE	1	$ 1.00	$ 1.00
20044	ABC Pen, Red 0.5 Point	7/22/2020	7/22/2020	Customer AD	2	$ 1.80	$ 3.60
20045	Brand B School Backpack, Design 3, Medium	7/23/2020	7/23/2020	Customer BA	3	$ 15.00	$ 45.00
20046	Brand B School Backpack, Design 2, Medium	7/24/2020	7/24/2020	Customer AD	8	$ 15.00	$ 120.00
20047	Brand C Water Jug, Design 1, Small	8/7/2020	8/7/2020	Customer BA	6	$ 3.00	$ 18.00
20048	Brand A Water Jug, Orange, Medium	8/7/2020	8/7/2020	Customer AC	2	$ 6.00	$ 12.00
20049	ABC Pen, Blue 0.5 Point	8/7/2020	8/7/2020	Customer CA	1	$ 1.00	$ 1.00
20050	ABC Pen, Blue 0.5 Point	8/7/2020	8/7/2020	Customer DA	12	$ 1.00	$ 12.00
20051	ABC Pen, Blue 0.5 Point	8/7/2020	8/7/2020	Customer AD	25	$ 1.00	$ 25.00
20052	ABC Pen, Blue 0.5 Point	8/7/2020	8/7/2020	Customer CA	20	$ 1.00	$ 20.00
20053	ABC Pen, Blue 0.3 Point	8/8/2020	8/8/2020	Customer CA	2	$ 1.00	$ 2.00
20054	ABC Pen, Red 0.5 Point	8/8/2020	8/8/2020	Customer DA	3	$ 1.80	$ 5.40
20055	Brand B School Backpack, Design 3, Medium	8/8/2020	8/8/2020	Customer AA	8	$ 15.00	$ 120.00
20056	Brand B School Backpack, Design 2, Medium	8/8/2020	8/8/2020	Customer AB	6	$ 15.00	$ 90.00
20057	Brand C Water Jug, Design 1, Small	8/8/2020	8/8/2020	Customer AC	12	$ 3.00	$ 36.00
20058	Brand A Water Jug, Orange, Medium	8/9/2020	8/9/2020	Customer CA	20	$ 6.00	$ 120.00
20059	Brand C Water Jug, Design 1, Small	8/9/2020		Customer DA	100	$ 3.00	$ 300.00
20060	Brand A Water Jug, Orange, Medium	8/9/2020	8/9/2020	Customer AD	7	$ 6.00	$ 42.00
20061	Magazine Y, Q4	8/10/20	8/10/20	Customer BA	10	$ 4.50	$ 45.00
20062	Magazine Y, Q4	8/10/20	8/10/20	Customer AA	12	$ 4.50	$ 54.00
20063	Magazine Y, Q4	8/10/20	8/10/20	Customer BA	2	$ 4.50	$ 9.00
20064	Magazine Y, Q4	8/10/20		Customer DB	12	$ 4.50	$ 54.00
20065	ABC Co. Beach Shirt, Multi color, Medium	8/10/20		Customer DC	5	$ 12.00	$ 60.00
20066	Brand B School Backpack, Design 3, Medium	8/10/20	8/10/20	Customer BB	10	$ 15.00	$ 150.00
20067	Brand C Water Jug, Design 2, Small	8/10/20	8/10/20	Customer AE	2	$ 3.00	$ 6.00
20068	Brand B School Backpack, Design 1, Medium	8/11/2020	8/11/2020	Customer AC	6	$ 15.00	$ 90.00
20069	Brand A Water Jug, Orange, Large	8/11/2020	8/11/2020	Customer CA	4	$ 7.50	$ 30.00
20070	ABC Co. Beach Shirt, Multi color, Medium	8/11/2020	8/11/2020	Customer DA	3	$ 12.00	$ 36.00

All shaded cells are autopopulated	The product names you have added in your Inventory list tab will show up in the drop down list					
Sales Order #	Product Name	Order Date	Ship Date	Customer Name	Quantity	Retail Price	Total Cost

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Sales Order #	**Product Name**	**Order Date**	**Ship Date**	**Customer Name**	**Quantity**	**Retail Price**	**Total Cost**

All shaded cells are autopopulated		The product names you have added in your Inventory list tab will show up in the drop down list					
Sales Order #	**Product Name**	**Order Date**	**Ship Date**	**Customer Name**	**Quantity**	**Retail Price**	**Total Cost**

					Quantity	Retail Price	Total Cost

All shaded cells are autopopulated

The product names you have added in your Inventory list tab will show up in the drop down list

Sales Order #	Product Name	Order Date	Ship Date	Customer Name	Quantity	Retail Price	Total Cost

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	All shaded cells are autopopulated	The product names you have added in your Inventory list tab will show up in the drop down list				Quantity	Retail Price	Total Cost
Sales Order #	**Product Name**	**Order Date**	**Ship Date**	**Customer Name**		**Quantity**	**Retail Price**	**Total Cost**

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Sales Order #	Product Name	Order Date	Ship Date	Customer Name			

		All shaded cells are autopopulated	The product names you have added in your Inventory list tab will show up in the drop down list				
Sales Order #	Product Name	Order Date	Ship Date	Customer Name	Quantity	Retail Price	Total Cost

Supplier Name	Product Name	SKU	Reorder Point	Stock On Hand	Stock Level Status
Supplier A	ABC Pen, Blue 0.5 Point	PenABC-Blu05	100	45	Reorder
Supplier A	ABC Pen, Blue 0.3 Point	PenABC-Blu03	100	101	Normal
Supplier A	XYZ Pen, Red 0.5 Point	PenXYZ-Red05	100	70	Reorder
Supplier A	XYZ Pen, Red 0.3 Point	PenXYZ-Red03	100	63	Reorder
Supplier B	ABC Co. Beach Shirt, Multi color, Large	ABC1-BShirt-McL	50	22	Reorder
Supplier B	ABC Co. Beach Shirt, Multi color, Small	ABC1-BShirt-McS	50	40	Reorder
Supplier B	ABC Co. Socks, Black, Medium	ABC2-SOCKS-BlkM	50	12	Reorder
Supplier B	ABC Co. Socks, Black, Large	ABC2-SOCKS-BlkL	50	34	Reorder
Supplier C	Brand A School Backpack, Black, Medium	A001-BKPCK-BlkM	15	14	Reorder
Supplier C	Brand A Water Jug, Red, Small	A002-WTRJG-RedS	30	16	Reorder
Supplier C	Brand A Water Jug, Orange, Medium	A002-WTRJG-OraM	30	9	Reorder
Supplier E	Brand B School Backpack, Design 1, Medium	B001-BKPCK-D1M	15	8	Reorder
Supplier E	Brand B School Backpack, Design 3, Medium	B001-BKPCK-D3M	15	-15	Reorder
Supplier E	Brand B School Backpack, Design 3, Large	B001-BKPCK-D3L	15	12	Reorder
Supplier E	Brand C Water Jug, Design 2, Small	C001-WTRJG-D2S	30	26	Reorder

Purchase Order

[Your Company Name]
[Your Company Slogan Here]

Date: April 12, 2023
Purchase Order #: [100]

To: Contact B
Supplier B
Address B
City B
Phone B2

Ship to: [Your Name]
[Your Company Name]
[Your Street Address]
[Your City, ST ZIP Code]
[Your Phone]

Qty	Item #	Product Name	Unit Price	Unit of Measure	Line Total
100.00	Supplier Ref#255	ABC Co. Beach Shirt, Green, XL	$ 10.00	piece	$ 1,000.00
5.00	Supplier Ref#101	ABC Pen, Red 0.3 Point	$ 0.90	box	$ 4.50

				Subtotal	$ 1,004.50
Wholesale Disc in %	10.00%	Special Disc in $	0.00	Discount	$ 100.45
				Total	$ 904.05

Inventory Management and Performance Calculators

Inventory Shrinkage Rate Calculator	
Value of Inventory in Books:	$ 12,285.00
Value of Inventory from Physical Count:	$ 11,860.85
Inventory Shrinkage Rate:	**3.45%**

Inventory Turnover Ratio Calculator	
Total COGS in your Income Statement:	$ 7,624.85
Beg. Inventory, Month X:	$ 12,285.00
End Inventory, Month X:	$ 9,751.85
Inventory Turnover Ratio:	**0.69**

** Your inventory shrinkage rate tells you just how much inventory you've lost to various reasons (theft, fraud, errors, and damage). The goal is to make sure that this rate is kept low as it indicates the extent of your loss in investment and potential profit.

** Your inventory turnover ratio tells you how efficiently you have been converting inventory into sales for a specific period. Use this ratio in evaluating and coming up with marketing and pricing strategies, as well as purchasing decisions.