

# INVENTORY Checklist

This checklist guides system administrators through common INVENTORY configuration.

## Screens

Community specific fields should be added to the applicable screen.

- Site Screen
- Building Screen
- Unit Configuration Type (UCT) Screen
- Unit Screen
- Bed Screen
- Enable *Display on Inventory Card* for any field that should show on the display cards
- Enable *Include As Inventory Filter* for any field that should be a dashboard filter

## General Configuration

Configure all components of Inventory and complete initial unit assignments.

- Customize the *Offline Reason* picklist values
- Configure all Housing Inventory Sites
- Configure all Buildings
- Configure UCTs
  - Turn on Enable Beds for applicable UCTs
  - Configure beds for the applicable UCTs
- Configure Units
- Assign clients to applicable Units

## System Settings

Enable system level settings.

- Enable the *Bed & Unit Management Toggle*

## Site-Level Settings

Enable the following site-level settings if applicable.

- Enable *Automatic Offline Status*
- Enable *Prohibit Edibility Override*

## Program-Level Settings

Enable the following program-level settings if applicable.

- Enable *Inventory Calculated Records*
- Enable *Manage Units Toggle*
- Ensure *Project Receives CE Referrals* is set to Yes

## Dashboard Settings

Configure the settings below to ensure agencies and users see the applicable Site, Building, UCT, Unit, and Bed information on the INVENTORY dashboard.

- Set *Staff Inventory Access* for all agencies
- Set *Inventory Access* for applicable users

## Access Roles

Access roles need to be updated or created to provide INVENTORY access.

- Map out access role changes
- Configure access roles
- Update user access role assignments

For more information about INVENTORY settings, please visit the Clarity Human Services [Help Center](#).