Adding Inventory Records

New items are always being added to a store's inventory, but they are not always added automatically to your Inventory database.

In order for all of the Eagle applications to work together, we need to create one central record for the item.

By creating an Item Record or SKU, we're able to manage and track all changes to inventory through Point of Sale, Purchasing, Receiving, and Physical Inventory.

Adding new records to your system need not be a tedious task, when using Eagle for Windows Inventory Maintenance.

Let's take a look at how we do this.

Topics

- Inventory Maintenance
- Entering New Items
- Codes Tab

Inventory Maintenance

To access Inventory Maintenance, launch the Eagle Browser, click on the Inventory heading, and then on Inventory Maintenance.

You can also type IMU in the Launch bar and press enter to quickly open Inventory Maintenance.

The Inventory Maintenance screen is divided into a header area and a detail section.

Typically, master data for multi-store users is entered in the header area and store specific data is entered in the detail section, although some master data can appear in the detail area.

Eagle indicates whether the field is master data or store specific data when you place the cursor over the field in question.

When you change Master data, that data is changed for every store within your system.

If the field is store-specific, only the field for that store will be changed.

In the detail section, there are multiple separate and distinct tabs. The tabs are Stocking, Pricing, Codes, History, Notes, Vendor, Load, Misc, Custom Fields, and Analytics.

You'll use the Load and Stocking tab to add new items.

As with all Eagle applications, the icons in the Ribbon menu along the top of the screen control the major processes available in the Inventory module. They are grouped together based on function such as Maintain, Navigate, Lookup, etc.

Each function is also accessible by a specific keyboard key which you will see when you hover over the icon.

For example, pressing F4 is the same as clicking the Add icon.

Entering New Items

To begin the process of entering new items into the Eagle, simply click on the Load tab.

As a best practice, new SKUs created in IMU are entered from this tab.

At a minimum, the system requires the following fields: the SKU or item number, the department, and the description.

If you have a multi-store system, the “In Stores” field must list the stores that will stock this SKU.

Check your stores’ configurations, because Eagle can optionally auto-assign a SKU number if it’s left blank.

Realistically, you’ll want to enter other relevant information in the header area as well, including manufacturer part number, class and/or fineline, and primary vendor.

The more information you enter in the header, the better, because you’ll be able to use that information to group and view items down the road using inventory viewers, reports, or Compass Analytics Queries. Best Practice is to limit the number of employees with the security options to add new items and to require the completion of all key fields as each new SKU is entered.

The quality of your data is dependent on accuracy and consistency.

Let’s walk through the process.

First, enter the SKU and enter a Description.

If you use Manufacturer part numbers, type that here.

Next is the UPC field or Universal Product Code, otherwise known as a barcode. If the SKU has a UPC associated with it, click on the blue hyperlink “UPC” to enter the UPC code. Keep in mind, if you do not enter a UPC code here, the item will not be able to be scanned at POS.

The “Maintain UPC codes” screen displays.

With the cursor in the “New UPC” field, type or scan the UPC.

You can also assign a "Primary UPC" to an item to indicate the UPC that will print on Windows Labels and RF labels, display in Inventory Maintenance and the Inventory Viewer, and print on invoices.

Assigning a Primary UPC is optional. If you don't assign one, the last UPC used at POS will print or display in the above situations.

Press F4 to add it, and then close the Maintain UPC codes window and continue to key in information.

Again, if you have a multi-store system, make sure to add items to the correct store(s).

Remember that Department is a mandatory field.

Click the drop-down arrow and select the correct department for this SKU, then tab to the next field.

Class and fineline are not required fields however they do enable the department to be broken down into sub-categories for better sales and inventory analysis.

Finally, select the primary and manufacturing vendors if you'd like.

The more information you fill out in the header, the easier it will be to track and report on in the future. Remember, accuracy and consistency.

New items can also be added from the Stocking tab.

Typically, lumber or "L" type records are added from this tab. L type records differ from H type records in that they are purchased and sold by units of measure that are not equivalent. For example, they're purchased by the thousand-board-foot and sold by the piece. Therefore, the system has to perform a calculation—a "Purchasing Conversion Factor"—to convert the item from its purchasing unit to its selling unit of measure.

For more information on this topic, view the Training on Demand course "Loading Lumber Items", or see online help.

Although the header area is identical to the Load tab, the detail area has many fields that are unique to the Stocking tab. Many of these track the dates of various activities in the system. Each field has a hyperlink available to provide the detail that created the given date.

Data is normally not entered manually here as we want the Eagle system to populate the fields as each event occurs.

Note that pricing and costing is not available on the Stocking tab. That information would have to be entered on the Load or Pricing tab, after the item was added.

Codes Tab

You may be wondering why we haven't talked much about the other tabs yet.

The main reason is that the fields on the Load tab are actually pulled together from the various other tabs to make it easier to add new items.

As you become more familiar with adding new items, you'll want to explore each of these tabs to determine what additional information you want to maintain for the products you stock, particularly the Codes tab.

There are many different types of codes you can assign to an item—anything from Popularity Codes that show which items are selling fastest; to Seasonal Sales codes to better manage your suggested ordering process.

The value of these various codes is their ability to be used to include or exclude items from a report or analysis. Remember, accuracy and consistency are the key to getting the most use from the data in your inventory file and from these codes.

Before we leave this page, let me point out some codes that are often overlooked. You can find them by clicking the Additional Codes hyperlink.

The first one – Decimal Quantity Allowed – determines whether this item is sold in fractions at Point of Sale.

If you sell ribbon or chain by the foot and want to be able to sell ½ foot, then you would set this flag to Yes. You can also let it be controlled by the defaults you've set up in Options Configuration.

The next flag tells whether this item can be sold at Point of Sale at No Charge.

If you set this to Yes, the item will post at 0.00 and **No Charge** will print on the receipt.

If you have an item which is only available through Special Order, use this flag to mark it as such. Any of your employees who are looking at this record will know it's not normally stocked in your inventory. These Items are Flagged on Purchase Orders and also update the Vendor Special Purchase History.

The next flag, Sellable in this Store, tells whether an item can be sold in a particular store or location. This can be helpful in a multi-store environment because it is a store specific field.

You'll use the next flag if you are setting up a SKU for Gift Cards. Setting this Flag to Yes will activate a Gift Card when it's sold at Point of Sale.

You also have the ability of setting a Fixed Price Indicator on products. If this Code is left blank, the item follows the Customer Pricing Level at Point of Sale.

Otherwise you can set the value to always sell this item at a particular price. If this Flag is set, it will always override the Customer Pricing at POS. The ONLY exception is if the item is on a contract in Category Pricing Plans and the customer has that Category plan.

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The Fee Type code indicates whether an Item has an Environmental Fee or an Excise Tax associated with it.

If you have enabled Enhanced Forms on your system, the total Excise Tax fees can be printed at the bottom of the invoice.

Finally, you can use the Hazardous Code flag to identify a Hazardous item.

You can use one of the many default codes in the drop-down menu, but you can also set up your own.

The code determines whether an item can be shipped via air, ground, rail or ship.

Continuing on in the detail section of the Load tab, enter the correct selling price in the "Retail" field and the correct cost in the "Replacement Cost" field.

If the retail field is left blank and a cost is entered, a new retail will be calculated based on the value in the desired gross profit field. If this field is left blank as well, the desired gross profit associated with the department will be used in the calculation instead.

Click F4 to add the item to the inventory file.

If the item was added correctly, a "Record(s) added" message appears on the bottom of the screen.

If the item was NOT added correctly, you'll see a message at the bottom of the screen notifying you of what needs to be corrected.

About Epicor

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