



Stock Options are used to set a product's supply- related requirements.

In this course, we will take a look at setting up the vendors you purchase your products from.

Then we'll review the options for Packaging, using Barcodes, and several Checkbox options.

Finally, we'll review the Pack, Memo Quantity Input, and Talled options.

To simplify purchasing you can preset supplier information on a product.

Open the Stock Options tab for the selected product.

When a Default Supplier has already been added, their name appears in the dialog box.

A default supplier is mandatory when adding a product.

To add or change this, click the Default Supplier button and then select one from the Find a Supplier window.

You can have multiple suppliers assigned to a single product.

Here's a tip! BisTrack tells you just how many by showing the number of suppliers assigned to an item in parenthesis on the Others and Prices button.

Click the button to add another supplier, or to view or set further information for the product suppliers.

You must save the product before proceeding.

BisTrack shows the suppliers that you buy this product from on the left side of the window.

The one shown in bold is the default supplier. The system provides another indicator that this is the default supplier by adding a red dot next to the folder icon.

The right side displays supplier specific prices for this product.

Clicking the next supplier in the list changes the display to their pricing.

Prices can be entered as a Standard Price for all branches or individually by branch.

When a branch uses different pricing, click the Buy Price field to enter that value and then select the UOM.

These prices will be used on purchase orders when the system option for Purchase Order Cost Calculation is set to Standard Product Cost Price.



For those using a different PO cost calculation method, or if you don't want to use supplier specific standard buy prices, you can leave these blank.

The prices can be updated using a Buy Price Change Import or EDI upload.

The Branch Stock Options tab gives you more supplier settings.

Here, you can set the number of Lead Time days between ordering and receipt, indicate the supplier's Cut Off day for placing orders, and enter miscellaneous Purchasing Notes.

Like Prices, you can set these as a company Default or by Branch.

This information is used primarily with Suggested Ordering.

Use the buttons available to Add another supplier to this product, Open the supplier properties, enter supplier specific Product properties, Remove a supplier, or set a new Default.

The Branch Defaults tab allows you to set a different default supplier by Branch location.

Initially all are assigned the Company Default.

Click the Branch's Supplier drop-down to select a different one. The list is limited to those from the Supplier's tab.

You can also select the Supplier's Address that will be used for purchasing transactions when it is different from the supplier's default location.

Finally, the Suppliers Purchased From tab lists who this product has been bought from, the dates, PO numbers, quantities, and cost.

Once a Default Supplier is set, they are selected automatically in Suggested Ordering or when creating a purchase order from the Product Find right-click menu.

A number of fields are available on the Stock Options tab to enter packaging specifications.

Some products may have packaging requirements. For those packed using Inner, Outer, or Pallet measures, you can indicate a Quantity per.

These work in conjunction with two Purchasing system option settings to automatically round to a full Inner, Outer, or Pallet quantity, or warn when a PO entry is not for the full amount.

In this example, the Stock Options for a dimensional lumber product are being set.



The number of pieces has been set for the Inner quantity.

You can attach additional barcodes to products based on the Default, Selling, Inner, Outer, Pallet, or Other unit of measure.

For example, a product that can be sold by the Box or Each can have two different barcodes. When the Box barcode is scanned the box quantity and sell price are used. Likewise, when the Each barcode is scanned the Each quantity and sell price are used.

When the system option Use Inner/Outer/Pallet in sale order entry is set to Yes, you can search for products using those barcodes and the quantity will be set according to the Quantity Per.

Click the Barcodes button.

To add a product using a barcode, enter the code in the Barcode column.

Then click the Type drop-down to select the Type of barcode you're adding.

Here's a tip! It's common practice to set one Default barcode and then any additional barcodes, you assign the type Other.

If you select the Selling UOM type, then you must enter a UOM. You can choose one from those already listed for the product, assuming you want to connect a barcode to a specific UOM

Press Enter to complete the line.

The cursor is ready for another and we will add one for the Linear Foot Selling UOM.

When finished, close the window to save the entry.

The Source and Finished fields are not commonly used, but are available for selection when a product is regularly processed to create an updated or revised product.

For example, assume you regularly send this product for treating. You would set the untreated and treated products up using these fields. When you add the untreated product to the Source Materials tab of a work order, the treated item would be added as the Finished Product when the option is selected to Add finished based on source.

Several Stock Options are controlled by a checkbox setting.

The Product type set on the General tab determines which options are available.



For example, a Generic product like paint or tools would not be Stock controlled by length or have Min/max levels by length. Here we see that those fields are grayed out.

Most products will have the Standard stock, Must be picked, and Keep stock figures check boxes enabled.

Keep stock figures must be enabled for all items in order to reconcile inventory to the General Ledger.

Exceptions to this are base special-order template items and any service-type SKUs used to add AVO's (Added Value Operations) onto orders.

The Stock control by length must be selected for any Child lumber products.

Random length products are optional and depend on whether you want to see the stock quantity for each length or one total for all lengths.

You will be forced to enter a Tally for any random length products set to Stock control by length prior to issuing or receiving stock.

For Tallied lumber products you can also specify where the Min/Max levels are to be set by length.

If you choose to manually set the minimum and maximum stock levels for a product, enable the Min and Max manual check boxes to prevent these values from being recalculated using the Suggested Ordering functionality.

The Product type determines which options will be displayed in the lower section of the Product Properties window.

The Quantity input options are available for Generic, Tallied and Sheet Material product types.

Memo quantities are a way of entering product quantities for goods in units or packages of various sizes, without using packs. This is most often used for sheet goods.

When set to Yes, you use a grid similar to a tally grid.

For more information, refer to the document Memo Quantity Instructions found in the course materials section.

Next, we'll look at the Options for a Tallied lumber parent product.

Here, both Pack and Tallied options can be set.

Packs are units or lifts of lumber.



These options are used to indicate if a tallied lumber product can be bought, sold or counted using tagged or untagged packs.

Contact your BisTrack Consultant for more detailed information on Packs.

The Tallied options are often used with random length parent products.

Starting with Tallied surcharge, the options are None or by Length. This is typically left at None.

Next, you can select the type of Sales order tallied input screen to use.

A Best Practice is to use the Advanced (North America).

To have the tally input screen displayed automatically, set the Prompt for tally on sales order to Yes.

The last option, Cut to length style, is only available when the Sales order tallied input screen is set to Cut to length.

When set, you can select a style from the drop-down list.

Cut to Length processing is typically used for steel and allows tallying to the fraction of an inch.

Using Stock Options allows you to define supply-related specifications for a product.

You should now be able to add a Supplier to a product and set it as the default.

You should also be able to set the Inner, Outer, and Pallet quantities, as applicable, and add barcodes that you can use for selling and receiving goods in various UOMs.

Finally, you should recognize the various checkbox, pack, tallied, and memo input options, and how to apply them based on the product's type.