Product Batch Stock Options Transcript

The fields on the Branch Stock Options tab allow you to customize a product's settings based on the actual branch location. In this course, we begin with an overview of this tab. Then we will take a look at the settings commonly used for generating suggested orders and a couple associated pricing and cost controls. We'll wrap up with a review of several other miscellaneous options.

A table style input form is used to enter the Branch Stock Options. Let's select a product and then open the Branch Stock Options tab. The Branches are listed down the left column and the field names are column headings across the top.

The first entry line is designated for the Default Company settings. The entries from the Default will used when a Branch setting is null. When adding a new product some fields including Stocked, Include in Suggested Order, and Stock Class are automatically assigned values for the Default and all Branches.

The entries for Stocked and Stock Class come from a System Option setting. Use the scroll bar at the bottom of the window to view fields across the table. You can rearrange the order of the column headings and put those you use most often closer to the Branch name. To do so, drag and drop the column-heading from the current location to a new one. Column-widths can also be adjusted.

Some columns contain data that is not available for entry and is automatically updated by specific processes such as Last Counted and Last Count Source. Those are shown with a gray background. Checking the box to Show full stock turn, age, GMROI changes the display to include this information within the grid. These fields are not accessible for change. Unchecking the box removes them from view.

Several Branch Stock Options are used with BisTrack's Suggested Order functionality. When a new product is added, the default is Stocked in all branches. Uncheck the box for any branch where the product is not carried. You can also set the date a product is First Stocked. Either key it in or select it from the Date Picker.

The product is flagged to be included in suggested orders at all branches. Stock classes are updated nightly according to the System Option settings. Leave this field set to U-Unranked to allow the ranking to occur once there is adequate sales history for the product.

The Stock Class can be used as a filter for suggested orders, reports and smart views. For example, you can generate a suggested order of all A ranked products below their minimum stock level. Two Stock Classes set manually include O - Obsolete to discontinue further purchases, and N – No Sales to prevent the product being added to sales orders.

The How Sourced field determines how the product can be obtained at each branch. This may be through purchasing, transfer or manufacturing. The drop-down lists the methods in various combinations for you to choose from. In this example, let’s assume purchasing is centralized at the Stockton branch with the product also being received there and then transferred to the other locations.

You would set the How Sourced to Purchase, Transfer for Stockton and then set all other Branches to Transfer. It will not be possible to create a purchase order for this product at any branch but Stockton. The method used to generate a Suggested Order takes this setting into consideration. The Suggested Order program can create purchase orders, works orders and transfers by location based on the Source Branch or Manufacture Branch settings.

For example, you have a product that is always transferred from a particular branch, set the How Sourced to Transfer, and the Source Branch to the one that supplies the product. Or, a product that is manufactured at just one branch, set the How Sourced to Manufacture and the Manufacture Branch to the location that produces it. The works order is automatically assigned to the Manufacture Branch.

Other key fields that can be used to calculate suggested order requirements include Lead Time, Cover, Shelf Life and the Minimum Level and Maximum Level. Cover refers to the number of weeks needed to maintain adequate stock levels.

Within Suggested Order there is an option to generate the Min and Max Levels. When using that method, these fields will be updated automatically.

There are a couple Branch Stock Option settings related to Pricing and Costing. Products can have a Price Sensitivity code assigned. These codes are used with the Pricing Planner module to calculate the potential impact of price changes. These can be set by Branch to accommodate the pricing needs at each location.

The drop-down list shows the codes that were have been set in System Manager, Products view. The Batch Type column is used to indicate if the product is controlled by Cost, Lot or Serial Number by Branch. This information is used with Product Batches to track inventory quantities and optionally costs separate for a product based on a batch reference.

A Product Batch allows you to keep a special buy separate from regular stocked inventory, prevent job specific buys from affecting inventory average cost and lets you track inventory lots. For more information, refer to the document Product Batches found in the course materials section. This field will only appear if Product Batches have been enabled on your system.

Free form fields are available for you to enter a Count Group, Picking Zone and Bin Location by Branch. These can then be used to organize stock counting or with advanced picking procedures. You can assign Product Managers for the Company or by Branch and then filter certain reports, message rules and processes like suggested orders using this setting. To add or change the field, click the ellipsis button and then select a manager from the Find a User window.

When you select to print a label for this product, you can have the system auto-select the template by pre-setting the default. This is only necessary when there are multiple label formats in use. Click the drop-down list to choose the template from those available. A checkbox entry is used to flag products to Use Memo Input for entering quantities on documents and to indicate when it is a Vendor Managed Inventory item.

Both require additional setup and are for use with specific applications.   Contact your BisTrack Consultant for further information. Finally, you can set a product to

Skip Stock Warnings. When selected, the low stock message is not shown when there is not enough inventory on hand to satisfy a sales order. Finally, you can set a product to Skip Stock Warnings. When selected, the low stock message is not shown when there is not enough inventory on hand to satisfy a sales order.

The Branch Stock Options ensure that each location can adapt a product's settings to their specific needs. You should now be able to use the table style input form to set the fields by Branch and customize its view. You should also be able recognize the options associated with suggested orders and those used for price planning and cost controls.

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