



Stock Item Minimum/Maximum Stock – User Notes

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Introduction

This feature uses the 'Below Minimum Quantity Report' to report on stock items that have fallen below the minimum quantity and to create consolidated purchase orders by supplier and by location to reorder stock back to the required maximum stock levels.

Suggested minimum and maximum stock levels when used in conjunction with the 'Below Minimum Quantity Report' allow stock levels and stock reordering to be managed.

Purpose of this document

This document informs the user how to set suggested minimum and maximum stock quantities and to use stock reporting options to help them to effectively maintain stock levels.

Stock Items - Setting Minimum/Maximum Stock

Minimum and maximum stock levels can be set on all stock items to record the suggested minimum and maximum stock quantities for each stock location:

Editing Stock Item

Item Type: Stock Item

General Suppliers Suggested Min/Max

Location	Suggested Min.	Suggested Max.	Default Location
Location1	25.0	100.0	<input checked="" type="radio"/>
Location2	50	250	<input type="radio"/>

[Add](#)

This feature allows stock levels to be maintained using the 'Below Minimum Quantity Report' to report for stock items that have fallen below the minimum quantity and to create consolidated purchase orders to reorder stock back to a required maximum stock level:

Stock Below Minimum Report

Stock Items: Example stock item Supplier: Stock Locations: STORES 1 selected Change selection

Group by location

[SEARCH](#)

Stock Item/Location	Prod. Supplier	Unit Price	Qty.	Suggested Min.	Suggested Max.	List Price	Unit	Lead Time
<input checked="" type="checkbox"/> Example stock item / undefined	SupplierA	50.00 GBP	0	25	100	75	each	

[CREATE CONSOLIDATED PURCHASE ORDER](#)

Notes:

For users upgrading to BCE v1.6.0 who have minimum stock item quantities set:

- The new maximum stock item quantity fields will be set to the same value as the existing minimum stock quantity
- To implement the effective reorder of stock to a maximum quantity will require stock items to be reviewed and an appropriate minimum and maximum quantity to be set
- The maximum stock quantity cannot be less than the minimum stock quantity

Stock Enquiry

The 'Stock Enquiry' pop up screen displays the Min and Max stock quantities by location:

Stock Enquiry ✕

Stock Details: Stock 1

 Show all locations

Location	Min./Max.	Current Stock	- Demand	- Picked	= Free Stock	+ Supply	= Forecast
Location1	20/100	18	0	0	18	0	18
Location2	10/50	8	0	0	8	0	8
Total	30/150	26	0	0	26	0	26

CANCEL

Stock Below Minimum Report

Running the 'Stock Below Minimum Report' displays the actual, suggested minimum and suggested maximum stock item levels by preferred supplier.

The report can be filtered further to list stock by individual stock items or suppliers and to group stock by location:

Stock Below Minimum Report

Stock Item: Supplier: Stock Locations: [Change selection](#)

Group by location

SEARCH

Stock Item/Location	Pref. Supplier	Unit Price	Qty.	Suggested Min.	Suggested Max.	List Price	UoM	Lead Time
<input type="checkbox"/> Stock 1	SupplierA					50	each	
<input type="checkbox"/> Location1			18	20	100			
<input type="checkbox"/> Location2			8	10	50			
Total			26					
<input type="checkbox"/> Stock 2 / Location2	SupplierA		30	35	125	100	each	

CREATE CONSOLIDATED PURCHASE ORDER

The 'Stock Below Minimum Report' supports hyperlinks from the 'Stock item/Location', 'Pref. Supplier' and 'Qty' columns to allow the user to quickly look up the stock item and inspect the stock enquiry pop up to view stock supply and demand by locations.

Clicking on these values will open the enquiry in a new tab to preserve the stock below minimum report position.

From the 'Stock Below Minimum Report' an option to create consolidated purchase orders allows users to reorder stock items back to their maximum stock levels.

The reorder quantity is calculated from the maximum stock quantity less the current in stock quantity and the quantity does not include the current demand and supply values:

Stock Below Minimum Report

Stock Items: Supplier: Stock Locations: Location1 and Location2 selected [Change selection](#)

Group by location

Location/Stock Item	Prod. Supplier	Unit Price	Qty.	Suggested Min.	Suggested Max.	List Price	UoM	Lead Time
<input type="checkbox"/> Location1 / Stock 1	SupplierA	30.00 GBP	18	20	100		50 each	
<input checked="" type="checkbox"/> Location2								
<input checked="" type="checkbox"/> Stock 1	SupplierA	30.00 GBP	8	10	50		50 each	
<input checked="" type="checkbox"/> Stock 2	SupplierA	45.00 GBP	30	35	125		100 each	

From the consolidated purchase order screen it is possible to amend order due dates, reset the due dates and change delivery addresses as required:

Consolidated Stocks Below Minimum Orders

Supplier	Updated Due Date	Order Value	Currency Code	Actions
<input type="checkbox"/> SupplierA		5,335.00	GBP	<input type="button" value="Amend Due Date"/> <input type="button" value="Reset Due Date"/> <input type="button" value="Delivery address"/>

Amend Due Date

Update PO Due Date ✕

⚠ Selected date will become due date for all items in this PO. You should carefully check individual PO due date before proceeding.

Set PO due date

Change Delivery Address

Purchase Order Delivery Address ✕

Contact name

Telephone

Receiving Company

Line 1

Line 2

Line 3

Line 4

Postcode

Clicking on 'Create Purchase Order' creates the consolidated orders for the suppliers.

Works Orders – Material Requirements Planning

For Works Orders the 'Item' quantity uses the max quantity as the basis to calculate the order quantity:

Requirements

Existing orders to include: Date up to 30/07/2020 Sales forecasts View as Weekly Stock Locations Location1 selected Change selection

Sort: Under max quantity Show all Bring to top: Stock: stock Show stock code only

Item		Late	W/E 5 Jul	W/C 6 Jul	W/C 13 Jul	W/C 20 Jul	W/C 27 Jul
Stock 1	+/-						
max 100 in stock 18	Stock	18	18	18	18	18	18
Stock 2	+/-						
max 100 in stock 30	Stock	30	30	30	30	30	30

An amber warning indicates where the build quantity increases stock to a value below the maximum quantity.

A red warning indicates if the build quantity returns a negative stock quantity.

Note: The maximum stock item quantity field was introduced in BCE v1.6.0 and was set to the same value as the original minimum stock quantity.

Clicking on 'Add Order' opens the following screen to allow the new order to be completed for the planned purchases:

New purchase order for Stock 1 ✕

Supplier: Supplier A (preferred supplier)

Supplier stock ref.:

Due date: 01/07/2020

Currency: GBP: Home Currency (GBP)

Exchange Rate: 1

Unit price: 30

UoM: each

Conversion rate: 1

Stock location: Location 1

Quantity: 82

Stock quantity: 82

Stock items below their minimum stock levels are included within the suggestions from the Planned for Creation section:

Planned for creation

➤ Suggestions

Include demand from suggested orders? Inherit Build Item Location? Calculate at:

Filters: Order type: W/O P/O Both Stock location: Location 1 Stock: Supplier:

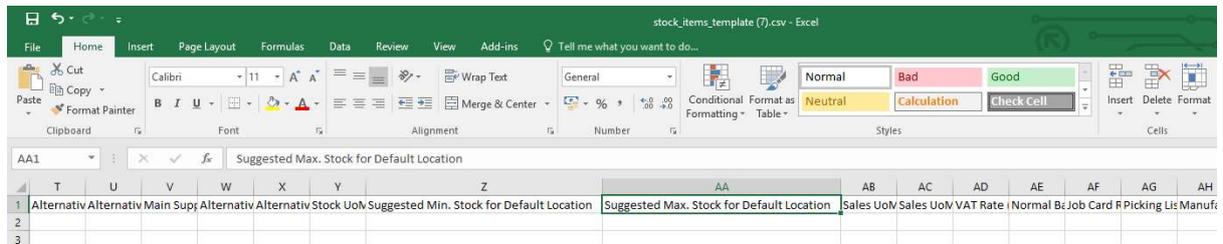
Order type	Qty	Stock location	Stock Name (#Code)	Supplier	Price	Lead	Order By	Due Date
<input type="checkbox"/> P/O	70	Location 1	Stock 2 (#Stk2)	Supplier A	45			2 Jul

Import - Stock

The 'Stock Item Import Template' from stock and order items and from the stock setup wizard includes fields for:

Suggested Min. Stock for Default Location

Suggested Max. Stock for Default Location



	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	Alternativ	Alternativ	Main Supy	Alternativ	Alternativ	Stock UoM	Suggested Min. Stock for Default Location	Suggested Max. Stock for Default Location	Sales UoM	Sales UoM	VAT Rate	Normal B	Job Card	Picking Li	Manuf
2															
3															

From the 'MORE' button, 'Import Suggested Min/Max Stock for Locations' is available to allow the minimum and maximum values to be imported:



Name	Stock Code
<input type="checkbox"/> Example stock item	EXSTK01
<input type="checkbox"/> Stock 1	STK1
<input type="checkbox"/> Stock 2	STK2

- Import Bill(s) of Materials
- Import Items
- Import Suggested Min./Max. Stock for Locations
- Export Stock & Order Items
- Revalue Manufactured Items Cost
- Update Stock Item (Bulk)