

Inventory Management



PowerShift's inventory management programs offer you unsurpassed flexibility for maintaining, tracking, costing and pricing inventory. Enter the more static data in the item's enterprise record, then complement with branch-specific details. Each branch can have a unique cost for an item or the costs from a manufacturing branch can be used to update costs in associated branches. Pricing options include user-definable price levels, customer and item classes, and detailed customer contracts.

Branch Item Maintenance | No connection Host: banana | No connection Host: banana | Workstation: 230 on Host: luci | Workstation: 231 on Host: luci | Workstation: 232 on Host: luci

CA-1 | 4.0 WVI 102511 | RCE | IMB | Branch Item Maintenance | 11/01/2012

Item number: 1 Nut, wire, number 6

Branch: CA-1 CA-1 - WVI (restored 10-25-2011)

Mfg branch: CA-1 CA-1 - WVI (restored 10-25-2011)

Stocking branch:

Item status: 0 Active

Sales UOM: EA Each

Stocking UOM: EA Each

Item type: FT Foot

Product class: GAL Gallon

Product subclass: GR Gross

Price class: IN Inch

Buyer: PKG Package

Planner: PT Pint

Preferred vendor: QT Quart

Consignment?

Drop ship?

Floor stock code: 0 Non-floor stock

Inspection? N Item does not require insp

Receipt trigger: 0

PO receipt tol:

Mfg receipt tol:

Safety stock:

Minimum order qty:

Lot size:

Whse/Bin ctrl? N

Serial/Lot ctrl? N

Make/Buy/Kit B

Pre-assign? N

Item code

Invty acct cd CA-INV

Unq CP RRL? N

Last CP RRL A

Primary whse: 10 Main Warehouse

Primary bin loc: AA010101

Maximum pick qty: 0

Current RRL: A

Current ECL: A

Last ECL created: A

Workorderless?

One-step mfg?

Scrap %: .00

LT update: N Do not update accumulated LT

Mfg LT: .00

Order prep LT: .00

Intransit LT: 5.00

Put-away LT: 30.00

Accumulated LT: 25.00

Auto planning?

Planning period: 001 STANDARD

Max planning period: .00

Exclude from plan?

Shadow Audit

Jump View image Item costs

Drop-downs list valid field values for efficient, error-free field entry

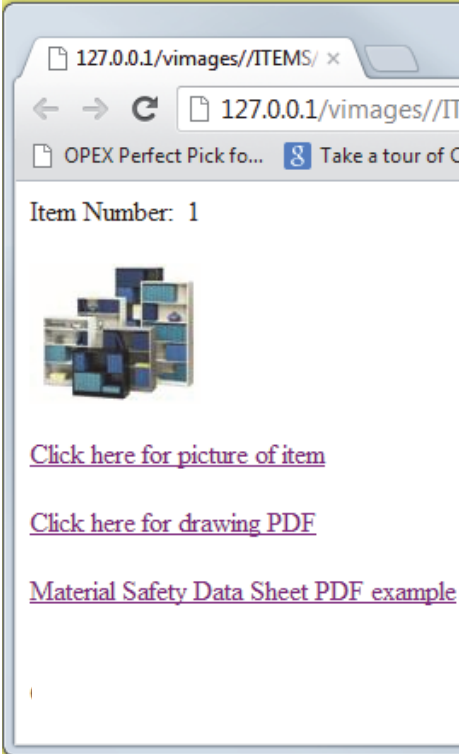
Navigation bar lets you quickly go to the first or last record, display the previous or next record or exit the pro-

"View image" links to intranet page with images and additional details, such as:

- Drawings (e.g., for each ECL)
- Pictures of item
- Work instructions
- Quality instructions
- Link to CNC program
- MSDS (material safety data sheets)
- Purchase specifications
- Anything relevant to your business

You design the page!

- Items can be stocked at multiple branches, warehouses or consignment locations and manufactured, purchased and sold at multiple branches.
- User-defined item statuses allow you to restrict the sale, manufacture, or purchase of item types (for example, obsolete, slow-moving, or seasonal).
- Control items by lot, serial number, and/or warehouse/bin location.
- Supports separate stocking, sales, and purchasing units of measure.
- Vendor-managed consignment inventory can be stocked separately and added to on-hand inventory as needed.
- Substitute items are supported in sales and manufacturing
- Item notes can be transferred to sales and purchase orders, requisitions, manufacturing orders, transfers, and/or sales quotes.



Pricing

- Set up the pricing system to automate your current pricing plan; assign prices by branch to specific item groups, customer groups, items, or customers.
- Base prices on list or cost (actual, average, standard, base, loaded, or user-defined), with mark up or mark down percentages or amounts, volume discounts, and effective dates.
- Customer price contracts can cover a single item, multiple items, or item groups for a date range or order quantity.
- Sales promotions can override standard prices for a date range.
- Price lookup programs provides immediate answers to a customer request for the price of a given quantity of an item.

System-wide Features

- Standardized user interface is easy to learn; accepts point-and-click or keyboard input.
- Lookups speed record or order retrieval; sort the way you want and use the Restart or Find functions to locate the record you need.
- Each user can set and save sort and selection options for reports and inquiries, reducing the need for custom reports and programming.
- Output data to a printer, e-mail, fax, PDF, EDI, or Microsoft Excel.
- Information is accessible with pop-up windows, drill downs, and jumps to related programs, reducing the need to switch screens.
- The Data Dictionary supports ODBC, Report Generator, and QICLOOK™.
- F1 accesses online help for the program you are running.

Item Costing

- Current actual and average costs can be updated when you receive purchased items or close a manufacturing order.
- Preview cost roll-up changes to an item's standard cost before updating; cost roll-up history is retained for reporting.

Material Management

- Display an item's current inventory (on hand, on order, in-transit, committed, and available) by branch, a group of branches, or enterprise-wide.
- Update inventory when you confirm shipment of a sales order or transfer, pick components, and receive purchased, manufactured, transferred, or returned items.
- Inquiries drill to related demand and supply documents.
- Select inventory items for sales orders or components for manufacturing orders by LIFO, FIFO, or lowest serial/control number.
- Track serial and lot control numbers from purchase or manufacturing order to transfer or sales order and customer.
- A system option provides tight control (no negative quantities) of all types of inventory or of selected types (serial, warehouse/bin, or lot controlled).
- Manually adjust inventory, move an item to another warehouse/bin location, pick or scrap components, or reduce the quantity of a consumable item.
- If you activate the general ledger interface, inventory registers perform postings; if not interfaced, registers list transactions for manual posting.
- Track the Restriction of Hazardous Substances (RoHS) compliance level of your raw material and component manufacturers.
- RF applications are available for inventory-related activities. Details are in a separate data sheet.

Requisitions

- The system can automatically create purchase, manufacturing, and transfer requisitions to address shortages and/or you can enter them manually.
- Release requisitions to create purchase orders, manufacturing orders, and/or transfers.

Physical Inventory

- Enter an annual count and/or cycle counts from an inventory book or tags you print or from pre-printed tags.
- Select items for cycle counts based on your criteria (for example, item status, last count date, ABC class, quantity on hand, usage, or whether the item is controlled).
- ABC classes can be assigned by unit cost, usage, or quantity on hand.
- Inventory tags can be sequentially controlled.

Branch Transfers

- Track the movement of transfers from request to shipment to receipt.

Material History

- Display all transactions that affect item quantities and drill to detail.
- Complete audit trails record date, time, user and transaction information.