

Stock Order Functions Explained

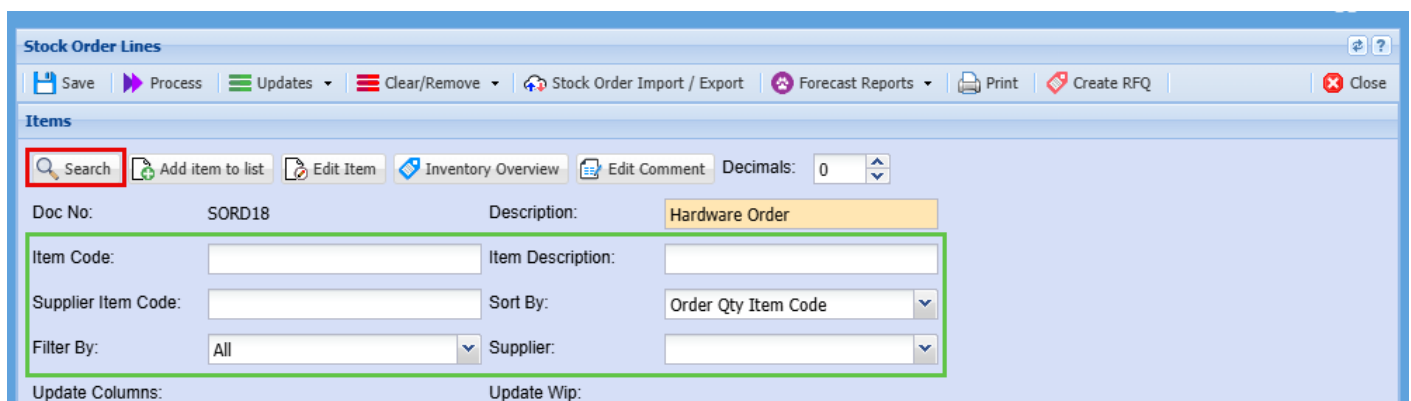
Buttons Explained

Items

Work out your quantities to order and send them to Purchase Orders

Search Button

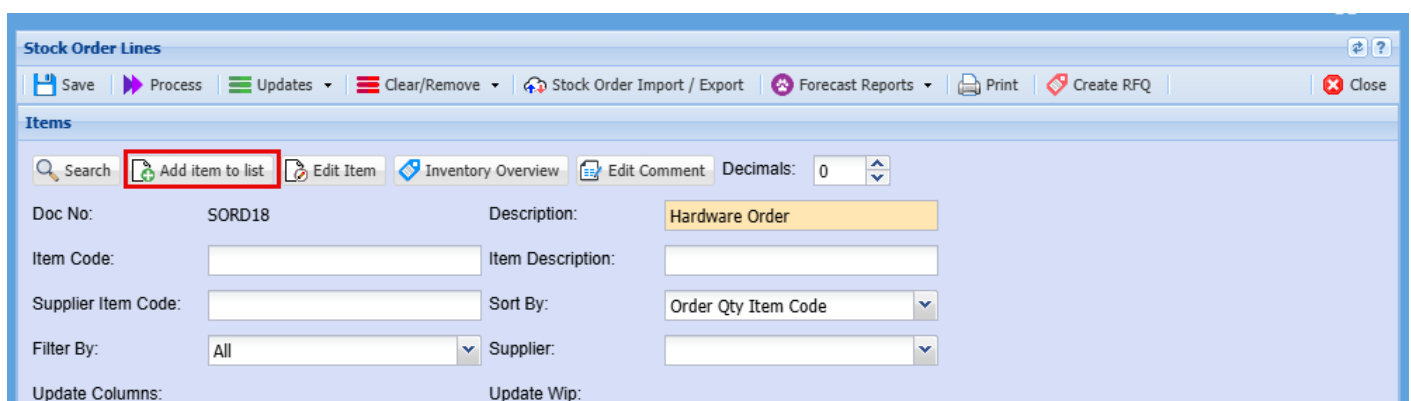
The search button will filter for any of the criteria completed in the green square below. Eg: if you add an Item Code and click Search it will filter your Stock items by Item Code. You can choose more than one filter to refine your search.



The screenshot shows the 'Stock Order Lines' window. The 'Items' section has a toolbar with buttons: Search (highlighted with a red box), Add item to list, Edit Item, Inventory Overview, and Edit Comment. Below the toolbar, there are input fields for Doc No (SORD18), Description (Hardware Order), Item Code, Item Description, Supplier Item Code, Sort By (Order Qty Item Code), Filter By (All), and Supplier. A green box highlights the Item Code, Item Description, Supplier Item Code, Sort By, Filter By, and Supplier fields.

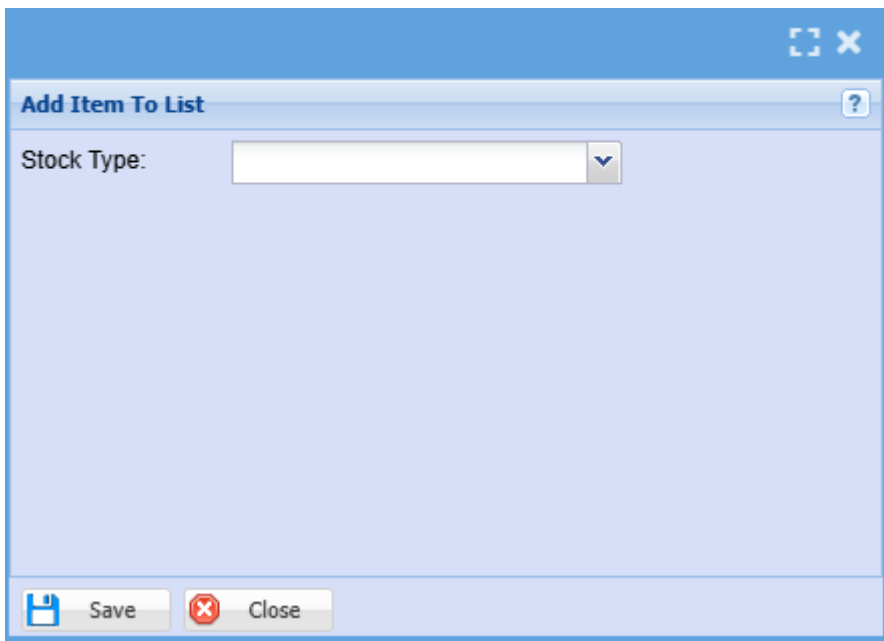
Add Item To List Button

You may find that an item is not on the Stock Order list, you can search for this item and add it to the order



The screenshot shows the 'Stock Order Lines' window. The 'Items' section has a toolbar with buttons: Search, Add item to list (highlighted with a red box), Edit Item, Inventory Overview, and Edit Comment. Below the toolbar, there are input fields for Doc No (SORD18), Description (Hardware Order), Item Code, Item Description, Supplier Item Code, Sort By (Order Qty Item Code), Filter By (All), and Supplier.

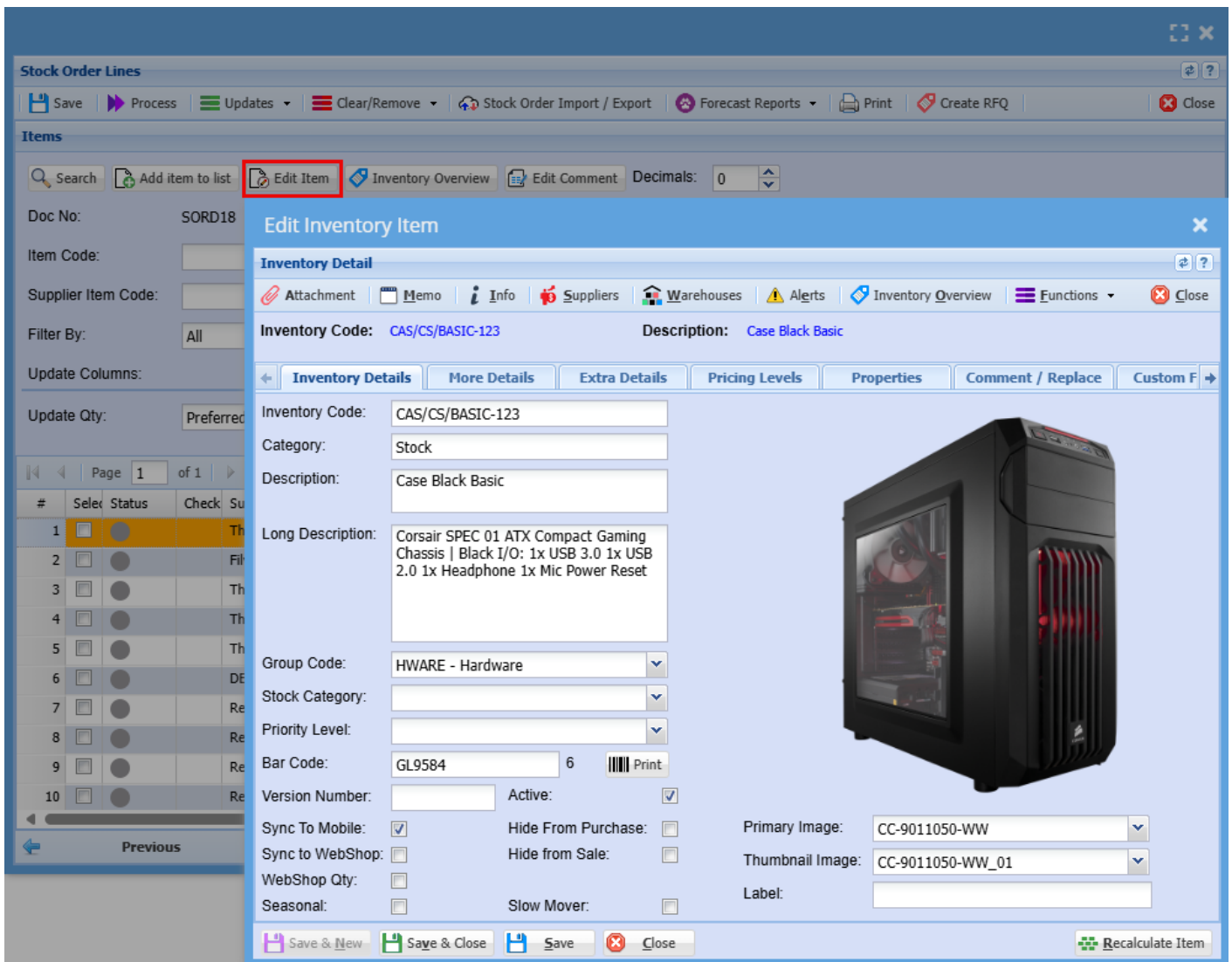
Select or search for an item in the drop-down menu and click "Save"



The image shows a software dialog box titled "Add Item To List". It has a blue header bar with standard window controls (maximize, close) and a help icon. Below the title bar, there is a label "Stock Type:" followed by a text input field and a small downward-pointing arrow, indicating a dropdown menu. The main area of the dialog is a large, empty light blue rectangle. At the bottom, there is a footer bar containing two buttons: "Save" with a floppy disk icon and "Close" with a red 'X' icon.

Edit Item Button

You can highlight a row and click the Edit Item button which will take you to the item to make any changes you require to the main system. Changes will not show in your Stock Order as this is like a snapshot of the data at the time if "Save" being clicked. You will need to double click on the line item and make changes to your Stock Order lines.



Inventory Overview Button

The inventory overview window allows a quick access to view information on an item.

It is accessed in most windows where stock items are present

Stock Order Lines

Save Process Updates Clear/Remove Stock Order Import / Export Forecast Reports Print Create RFQ Close

Items

Search Add item to list Edit Item **Inventory Overview** Edit Comment Decimals: 0

Doc No:

Item Code:

Supplier Item:

Filter By:

Update Col:

Update Qty:

Select

1 ☐

2 ☐

3 ☐

4 ☐

5 ☐

6 ☐

7 ☐

8 ☐

9 ☐

10 ☐

Inventory Overview

Inventory Overview - CAS/CS/BASIC-123 - Case Black Basic

Load Totals Print Attachments Edit Item Recalculate Close

Main Detail Info Stock Available WIP Movement Sales Pricing Levels

Inventory Code: CAS/CS/BASIC-123

Description: Case Black Basic

Long Description: Corsair SPEC 01 ATX Compact Gaming Chassis | Black I/O: 1x USB 3.0 1x USB 2.0 1x Headphone 1x Mic Power Reset

Last Date Invoiced:

Last Date Received:

Movement Period for the last: 180 Calculate

All Stock Movement Out: 0

All Stock Movement In: 0

Quantity On Delivery Note: 0 Detail

Total Quantity In WIP: 0

Total Inventory On Hand: 0

Quantity On Quotes: (-) 0 Detail

Quantity On Sales Orders: (-) 0 Detail

Quantity On SO Confirm / WHS: (-) 0 Detail

Quantity On Part Invoices: (-) 0 Detail

Quantity On Invoices: (-) 0 Detail

Quantity On Invoice Dispatch Stock: (-) 0 Detail

Quantity On Credit Notes: (+) 0 Detail

Sub Total: 0

Quantity On Purchase Order: (+) 0 Detail

Qty O/S Stock Orders & Receiving: (+) 0 Detail

Quantity On GRV: (+) 0 Detail

Quantity On Return To Supplier (RTS): (-) 0 Detail

Sub Total Balance: 0

Stock Request Expected WIP: 0 Detail

BOM Manufacture Expected WIP: 0 Detail

Update Exis

Supplier Item C Comm

KEY110

350LP

MON24

8067715...

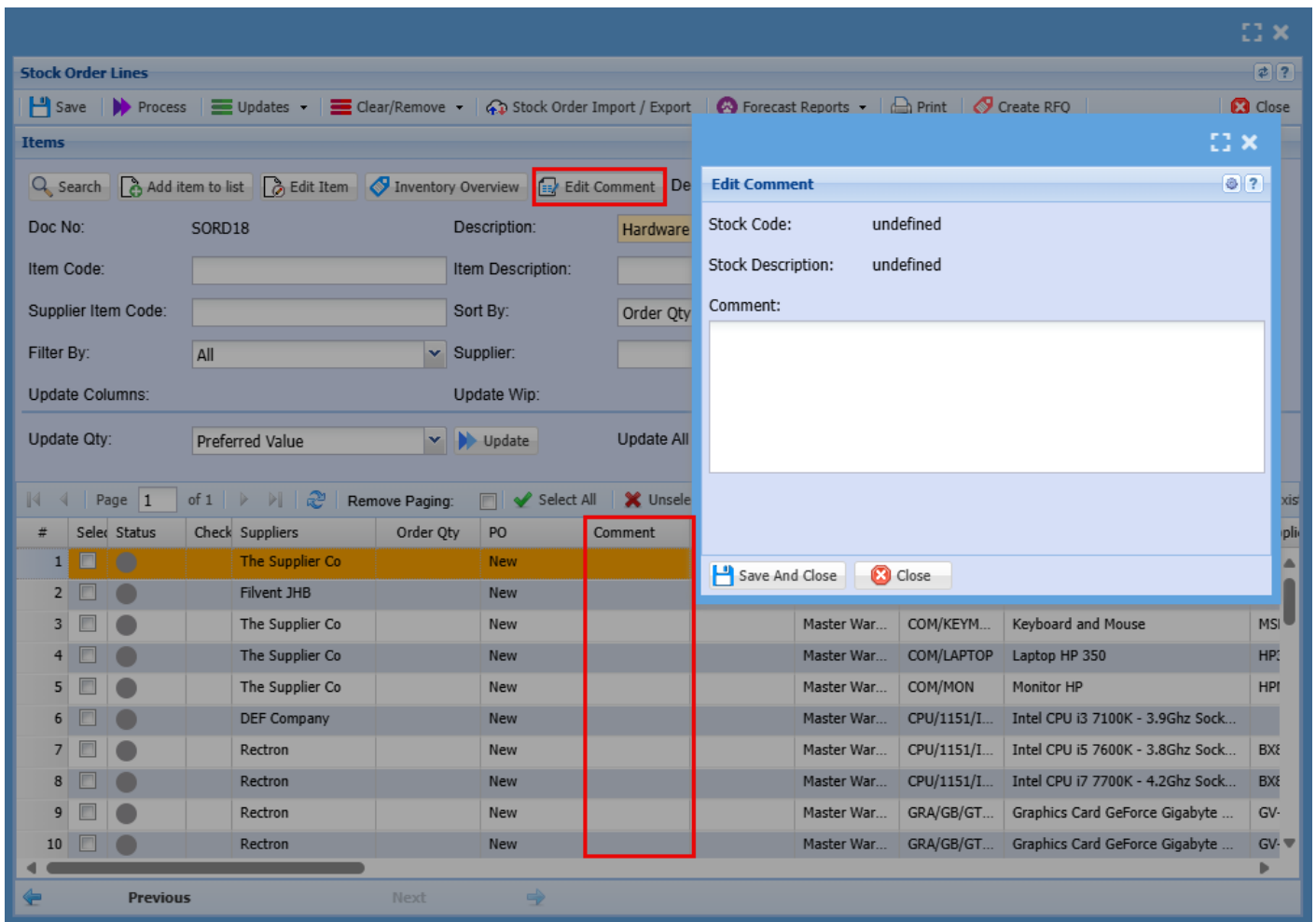
8067717...

-N710D3...

-N730D3...

Edit Comment Button

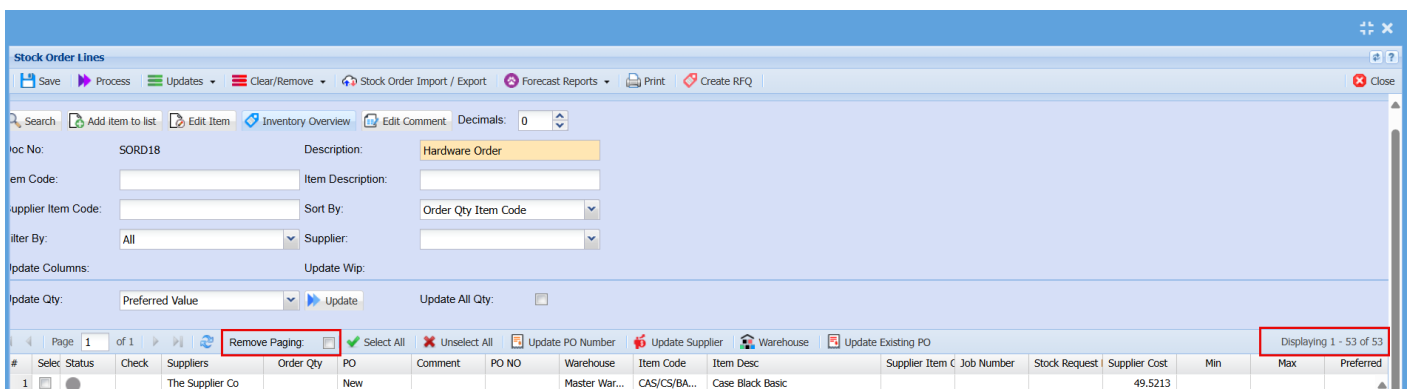
Here you can edit comments made for each item



Grid Buttons Explained

Remove Paging

Put this tick on to displays all Stock Order items on a single page If the Order list exceeds the default 100 lines. If this box is not ticked and you have more than 100 items, you will need to click through the pages with the arrows



Select All / Unselect All

The Stock Order Lines can be all selected and unselected by clicking on the Select All or Unselect All button. Or you can tick the boxes individually.

The screenshot shows the 'Stock Order Lines' window. At the top, there's a toolbar with buttons like Save, Process, Updates, Clear/Remove, Stock Order Import / Export, Forecast Reports, Print, Create RFQ, and Close. Below this is the 'Items' section with search and filter options. The main area contains a table of stock order lines. A red box highlights the 'Select All' and 'Unselect All' buttons in the toolbar above the table. The table has columns for #, Select, Status, Check, Suppliers, Order Qty, PO, Comment, PO NO, Warehouse, Item Code, and Item Desc. The first 10 rows are visible, showing various hardware items like Case Black Basic, Case Black High End, Keyboard and Mouse, Laptop HP 350, Monitor HP, Intel CPU i3 7100K, Intel CPU i5 7600K, Intel CPU i7 7700K, and Graphics Card GeForce Gigabyte.

#	Select	Status	Check	Suppliers	Order Qty	PO	Comment	PO NO	Warehouse	Item Code	Item Desc
1	☐			The Supplier Co		New			Master War...	CAS/CS/BA...	Case Black Basic
2	☐			Filvent JHB		New			Master War...	CAS/CS/HIGH	Case Black High End
3	☐			The Supplier Co		New			Master War...	COM/KEYM...	Keyboard and Mouse
4	☐			The Supplier Co		New			Master War...	COM/LAPTOP	Laptop HP 350
5	☐			The Supplier Co		New			Master War...	COM/MON	Monitor HP
6	☐			DEF Company		New			Master War...	CPU/1151/I...	Intel CPU i3 7100K - 3.9Ghz Sock...
7	☐			Relectron		New			Master War...	CPU/1151/I...	Intel CPU i5 7600K - 3.8Ghz Sock...
8	☐			Relectron		New			Master War...	CPU/1151/I...	Intel CPU i7 7700K - 4.2Ghz Sock...
9	☐			Relectron		New			Master War...	GRA/GB/GT...	Graphics Card GeForce Gigabyte ...
10	☐			Relectron		New			Master War...	GRA/GB/GT...	Graphics Card GeForce Gigabyte ...

Update PO Number

All purchase orders will appear as new when a Stock Order is created. If a purchase order already exists for a supplier and you want to add an item to that order, tick the select the checkbox for the item and click the 'Update Existing Number' button. This will change the status of the PO from 'New' to 'Existing and add the Existing PO number to the PO NO Column.

Stock Order Lines

Save Process Updates Clear/Remove Stock Order Import / Export Forecast Reports Print Create RFQ Close

Items

Search Add item to list Edit Item Inventory Overview Edit Comment Decimals: 0

Doc No: SORD18 Description: Hardware Order

Item Code: Item Description:

Supplier Item Code: Sort By: Order Qty Item Code

Filter By: All Supplier:

Update Columns: Update Wip:

Update Qty: Preferred Value Update Update All Qty:

Page 1 of 1 Remove Paging: Select All Unselect All Update PO Number Update Supplier Warehouse Update Existing PO

#	Sele	Status	Check	Suppliers	Order Qty	PO	Comment	PO NO	Warehouse	Item Code	Item Desc	Supplier It
1				The Supplier Co		Existing		PO146	Master War...	CAS/CS/BA...	Case Black Basic	

Update Supplier

When a Stock Order is created, the Default Supplier will automatically populate in the order. If you need to change the supplier for a stock item, highlight the relevant line, click the 'Update Supplier' button, select the desired supplier from the drop-down menu, and click 'Save'

Stock Order Lines

Save Process Updates Clear/Remove Stock Order Import / Export Forecast Reports Print Create RFQ Close

Items

Search Add item to list Edit Item Inventory Overview Edit Comment Decimals: 0

Doc No: SORD18 Description: Hardware Order

Item Code: Item Description:

Supplier Item Code: Sort By: Order Qty Item Code

Filter By: All Supplier:

Update Columns: Update Wip:

Update Qty: Preferred Value Update Update All Qty:

Page 1 of 1 Remove Paging: Select All Unselect All Update PO Number Update Supplier Warehouse Update Existing PO

#	Sele	Status	Check	Suppliers	Order Qty	PO	Comment	PO NO	Warehouse	Item Code	Item Desc	Supplier It
1				The Supplier Co		Existing		PO146	Master War...	CAS/CS/BA...	Case Black Basic	

Stock Order Update Creditor

Creditors: ▼

Save Close

Warehouse and Minimum and Maximum Quantities

If you are working with multiple Warehouses and are wanting to order for a different warehouse, highlight the line you want to change, click the "Warehouse" button, select your warehouse from the list and click "Save".

Stock Order Lines

Save Process Updates Clear/Remove Stock Order Import / Export Forecast Reports Print Create RFQ Close

Items

Search Add item to list Edit Item Inventory Overview Edit Comment Decimals: 0

Doc No: SORD18 Description: Hardware Order

Item Code: Item Description:

Supplier Item Code: Sort By: Order Qty Item Code

Filter By: All Supplier:

Update Columns: Update Wip:

Update Qty: Preferred Value Update Update All Qty:

Page 1 of 1 Remove Paging: Select All Unselect All Update PO Number Update Supplier **Warehouse** Update Existing PO

#	Sele	Status	Check	Suppliers	Order Qty	PO	Comment	PO NO	Warehouse	Item Code	Item Desc	Supplier It
1	☐	☒		The Supplier Co		Existing		PO146	Master War...	CAS/CS/BA...	Case Black Basic	

While in the Warehouse, you can view the minimum and maximum quantities for a specific item. At this stage, you can update your minimum and maximum quantities, as well as your preferred and reorder quantities to assist with future ordering and forecasting.

Once these quantities are set, you can configure the system to send you daily email updates when stock quantities reaching the minimum level. These notifications will inform you when to reorder and how much to reorder based on your specified quantities.

Warehouse Management

Warehouse Creditor

Stock Desc: CAS/CS/HIGH - Case Black High End
Show Inactive:

Warehouse
Locations
Boxes
Batch Numbers

Add
Remove
Activate Warehouse
Deactivate Warehouse

Page 1 of 1
Displaying 1 - 1 of 1

#	Warehouse Code	Warehouse Name	Bin Location	Total Qty On Hand	Min. Qty.	Max Qty	Preferred Qty.	Reorder Qty.
1	MAST	MAST - Master Wareho...		81	0	0	0	0

Save
Close

Update Existing PO

If you already have an existing PO Number associated with a stock item in your Stock Order and you want to change it, you can click the "Update Existing PO" button and select a different Purchase Order from the list.

Stock Order Lines

Save
Process
Updates
Clear/Remove
Stock Order Import / Export
Forecast Reports
Print
Create RFQ
Close

Items

Search
Add item to list
Edit Item
Inventory Overview
Edit Comment
Decimals: 0

Doc No: SORD18
Description: Hardware Order

Item Code:
Item Description:

Supplier Item Code:
Sort By: Order Qty Item Code

Filter By: All
Supplier:

Update Columns:
Update Wip:

Update Qty: Preferred Value
Update
Update All Qty:

Page 1 of 1
Remove Paging:
Select All
Unselect All
Update PO Number
Update Supplier
Warehouse
Update Existing PO

#	Sele	Status	Check	Suppliers	Order Qty	PO	Comment	PO NO	Warehouse	Item Code	Item Desc	Supplier It
1				The Supplier Co		Existing		PO146	Master War...	CAS/CS/BA...	Case Black Basic	