

How-To Guide Configuring Inventory Management

Document Type: External

Document Version: 1.0

Date: 11 Dec 2020

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Introduction

The purpose of this guide is to show how to configure the Enactor Estate Manager and POS to enable the Inventory Management capabilities of the solution. While very little configuration is needed to activate the functionality itself, there are numerous options within various master data components that will impact the overall capabilities and experience.

The Enactor Inventory Management application is not only responsible for tracking store level inventory as it is impacted by retail transactions, but it also provides the necessary functionality to track and manage inventory as it traverses the retailer's supply chain. The associated Inventory Management operations are largely managed Business Processes.

Overview

The following areas will be reviewed as part of establishing Inventory Management:

- Inventory Management Preferences
- Products
- Locations
- Suppliers
- Inventory Types
- Reason Codes

Prerequisites

Resources

Before starting, you should have the following resources in place:

- Enactor Estate Manager
- Enactor POS, connected to the Estate Manager
- Standard Configuration, including:
 - Base Configuration
 - Products

Prior Training/Experience

You should be familiar with the following:

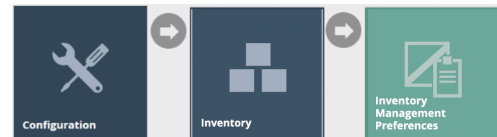
- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products etc.
- Data broadcasting
- Inventory Management operations
- Inventory Levels and Inventory Types

Configuration Steps

Inventory Management Preferences

The Inventory Management Preferences are set by default. No changes are required to enable Inventory Management functionality. Changes may be required to ensure the tracking and valuation of inventory meets your retailer's requirements.

The Inventory Management Preferences Maintenance application can be accessed through: *Configuration-Inventory-Inventory Management Preferences*.



Select Preference Set ID 1 for editing.

A screenshot of the 'Inventory Management Preferences Maintenance' application. It features a header bar with a green background and white text. Below the header, there is a search bar with a 'Preference Set ID' label and a 'Starts With' dropdown. To the right of the search bar is a 'Hide' button. Below the search bar are two buttons: 'Apply Filters' and 'Reset Filters'. A table below these buttons lists preference sets. The table has a single row with the 'Preference Set ID' 1. To the left of the table is a toggle switch and a pencil icon.

On the General tab, the first setting to consider will be “Distribution Responsibility”. The choices for this setting are “Source” or “Destination”. Quite simply, this setting defines which location “owns” the inventory while in transit. This setting should be made based on the retailer’s accounting practices.

A screenshot of the 'Inventory Management Preferences Maintenance' application, showing the 'General' tab. The header bar is green with white text. Below the header, there are 'Save' and 'Cancel' buttons. A message states 'You are editing Preference Set ID: '1''. The main content area has two tabs: 'General' and 'Printing'. Under the 'General' tab, there are several settings: 'Distribution Responsibility*' with a dropdown menu showing 'Source'; 'Cost Price Management Method*' with a dropdown menu showing 'None'; 'Maximum Stock Take Recounts Allowed' with a text input field showing '2'; 'Maximum Stock Take Count Duration Hours' with a text input field showing '12' and a note '(Zero means unlimited)'; 'Take Stock Snapshot X Minutes Before Count' with a text input field showing '180' and a note '(Zero means unlimited)'; 'Take Stock Snapshot At Time' with a time picker showing ': ' and a note '(Blank means undefined)'; and 'Document ID Pattern' with a text input field showing 'ttssssss' and a note 'e.g. bbbb-tt-ssssss (b = base, t = type, s = sequence)'. There is also a 'Save' button at the top left of the settings area.

The next setting on the General tab is “Cost Price Management Method”. The choices for this setting are “None”, “FIFO”, “LIFO”, “Cost” or “Average Cost”. As above, this setting should be made based on the retailer’s accounting practices.

Also, on the General tab, there are several settings related to the Stock Take function. When a Stock-Take is initiated, the system will suggest a deadline for Stock-Take completion and a time at which the inventory snapshot will be taken. Changes to these settings will be drive the default values as Stock-Take requests are submitted. These values should be changed to match the retailer's preferred business process.

On the Printing tab, you are able to specify if any of the documents associated with the standard Inventory Management transactions should automatically be generated as a PDF or printed as part of the standard business processes.

Inventory Management Preferences Maintenance

Save

Cancel

You are editing Preference Set ID: '1'

General

Printing

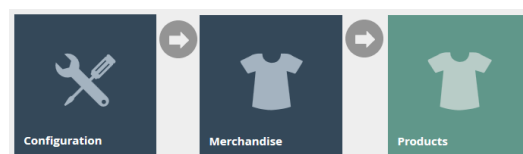
Document Type	Generate PDF	Print PDF
Dispatch Note	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Order	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Receipt	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order Cancellation	<input type="checkbox"/>	<input type="checkbox"/>
Stock Adjustment	<input type="checkbox"/>	<input type="checkbox"/>
Stock Take	<input type="checkbox"/>	<input type="checkbox"/>
Supplier Return	<input type="checkbox"/>	<input type="checkbox"/>

Products

A separate guide has been published on setting up base product data (see: 'How to configure example Product Data'). This guide will only deal with the aspects of product setup that support or impact Inventory Management.

While all product data will likely be provided by an integration to the retailer's ERP system, the following section will demonstrate how these changes can also be made directly within Estate Manager.

The Product Maintenance function can be accessed through: *Configuration-Merchandise-Products*. Use the filters provided to locate and select the desired product.



Product Maintenance

Product ID

Starts With

Product Type

Merchandise Product

Brand

-

Fascia

-

Supplier

-

Selling Code

Starts With

Description

Starts With

Product Group

-

MM Group

-

Range

-

Supplier Product ID

Starts With

Apply Filters

Reset Filters

Product ID

Product Description

AMI-0000C1

Product Amount By Item 0000C1

AMI-00B100

Product Amount By Item 00B100

AMI-00B2C3

Product Amount By Item 00B2C3

AMI-A10000

Product Amount By Item A10000

AMI-A2B300

Product Amount By Item A2B300

AMI-A300C2

Product Amount By Item A300C2

AMI-A4B4C4

Product Amount By Item A4B4C4

Once the product has been selected, click on the “Merchandise” tab.

The screenshot displays the 'Product Maintenance' window for a product named 'QUARTZ FRACTAL COPPER FD42283'. The 'Merchandise' tab is selected, and the 'General' sub-tab is active. The form contains the following fields and values:

Field	Value
MM Group	050102 - Wallpaper
Brand	-
Range	-
Season	-
Measure System	Case Pack
Sales Units	One
Standard Cost Price	£5.00
Standard Margin	0%
Allow For Loan	<input checked="" type="checkbox"/>
Allow Customer Order	<input checked="" type="checkbox"/>

Some settings within Product Maintenance will not impact user functionality but may provide meaningful data to other processes. On the Merchandise-General tab, it is possible to define a “Standard Cost Price” and a “Standard Margin” amount. These entries may be used by your retailer to arrive at an inventory valuation as discussed in the section on Inventory Management Preferences.

Also, on the General tab, it is possible to designate if an item is allowed to be loaned out or if it can be sold as a customer order instead of from stock.

The Inventory tab contains several settings that directly impact the ordering of a product.

The screenshot shows the 'Product Maintenance' window for 'QUARTZ FRACTAL COPPER FD42283'. The 'Inventory' tab is selected, showing various settings:

- Is Stocked:** ☐
- Inventory Management Type:**
- Allow Purchase Order:** ☒
- Customer Order Only:** ☐
- Direct To Store Delivery:** ☐
- Purchase Order Start Date:**
- Purchase Order End Date:**
- Inventory Units:**
- Warehouse Unit Of Measure:**

The “Is Stocked” option only applies to constituent products and is used in relation to the inventory management of Composite Products. The “Inventory Management Type” option is available in the event that the product inventory needs to be tracked and managed at the serial number level which is often the case for high-value goods.

Selecting the “Allow Purchase Order” option permits a purchase order to be raised against the item. Additionally, if the “Direct To Store Delivery” option is selected the product may be shipped directly from the supplier to the store without passing through the retailer’s own distribution channel. The “Purchase Order Start and End Dates” make it possible to specify a date range as to when Purchase Orders can be raised.

The “Customer Order Only” option will prevent the product from being sold from store stock. The product can only be sold through a customer order.

Options for “Inventory Units” and “Warehouse Unit of Measure” are derived from the values selected for “Measure System” and “Sales Unit” as part of the standard product setup.

The Dimensions tab allows the recording of product dimensions, weight and general size statement. This information could be used by other applications to provide things like slotting assignments or boxing recommendations for orders.

The screenshot shows the 'Product Maintenance' window for 'QUARTZ FRACTAL COPPER FD42283'. The 'Dimensions' tab is selected, showing input fields for Height (8), Length (6), Width (12), Weight (3), and Size Description (Medium).

General	Selling Options	Alternative	Tenders	Tax	Merchandise	Prices	Location	Supplier	Attributes	Product Media
General	Inventory	Dimensions	Warranty	Movements						
Height	8									
Length	6									
Width	12									
Weight	3									
Size Description	Medium									

The Location tab captures properties relating to the product at the selected location. After clicking on the Location tab, select a location from the left-hand column.

The screenshot shows the 'Product Maintenance' window for 'QUARTZ FRACTAL COPPER FD42283'. The 'Location' tab is selected, and 'Regent St' is chosen from the location list. The 'Inventory' sub-tab is active, showing various stock management settings.

General	Selling Options	Alternative	Tenders	Tax	Merchandise	Prices	Location	Supplier	Attributes	Product Media
<div> Location <ul style="list-style-type: none"> Bologna Bristol Canterbury Enactor (PDP) Mobile POS Ser Newcastle Regent St Supplier Tottenham Court Road UK Distribution Web Shop </div> <div> Inventory <ul style="list-style-type: none"> Minimum Stock Quantities Costs Current Stock </div>										
Is Ranged	<input checked="" type="checkbox"/>									
Include In Planning	<input checked="" type="checkbox"/>									
Allow Purchase Order	<input checked="" type="checkbox"/>									
Supplying Warehouse	UK Distribution									
Minimum Stock Level	4									
Maximum Stock Level	18									
Ideal Stock Level	10									
Replenishment Lead Time (days)	7									
Delivery Lead Time (days)	2									

The “Is Ranged” option indicates that the product is part of the selected location’s normal stock range. If “Include in Planning” is selected, the store will be included in any planning for that product.

When “Allow Purchase Order” is enabled, the store will be allowed to raise a purchase order for the item. Those purchase orders would be created as direct delivery. The “Supplying Warehouse” permits the selection of which warehouse is assigned to fulfil the selected product to the selected store.

Additional fields are provided on the Location-Inventory tab to specify Minimum, Maximum and Ideal stock levels. Standard Replenishment and Delivery Lead Times can also be added.

The Minimum Stock Quantities Sub-Tab captures required minimum stock levels to be applied by the Inventory Management System. Levels may be specified with a period dependency at a level of granularity required by the business for the individual Product and Location. Minimum stock level may be specified for a specific period (or number of periods) of the year and varied from year to year.

The screenshot shows the 'Product Maintenance' window for product 'QUARTZ FRACTAL COPPER FD42283'. The 'Location' dropdown is open, showing options like Bologna, Bristol, Canterbury, etc. The 'Inventory' sub-tab is active, and the 'Minimum Stock Quantities' sub-sub-tab is selected. A table shows defined minimum stock quantities with columns for Year, Month, Week, Day, and Quantity. An 'Add' button is visible at the bottom left of the table.

	Year	Month	Week	Day	Quantity
-	-	-	-	-	-
+ Add					

To add a Period-Minimum Stock Level specification to the list, enter the properties defining the period and the required Minimum Stock level then select the **Add** option. To remove entries, select the Rubbish Bin Icon option:

Property	Description
Year	Numeric value; minimum value 2000. The Year in which the Minimum Stock Level (MSL) applies.
Month	Numeric value; maximum value 13. If specified, the Month in which the MSL applies.
Week	Numeric value; maximum value 53. If specified, the Week in which the MSL applies.
Day	Numeric value; maximum value 366. If specified, the Day on which the MSL applies.
Quantity	Numeric value; maximum value 99999. The required Minimum Stock Level for the period.

Quantity Numeric value; maximum value 99999. The required Minimum Stock Level for the period.

The Location Costs Sub-Tab, as illustrated below, captures manual entries of Cost details for the Product at the selected Location. Details for the selected Inventory type are added to a list when the User selects **Add**. The List is normally populated automatically if Inventory Preference **Cost Price Management Method** is not set to NONE in the Estate Manager Configuration>Inventory>Inventory Management Preferences. The Cost Details are captured in properties described in the following table:

You are editing Merchandise Product 05000401 : QUARTZ FRACTAL COPPER FD42283.

General Selling Options Alternative Tenders Tax Merchandise Prices Location Supplier Attributes Product Media

Location

Bologna
Bristol
Canterbury
Enactor (PDP) Mobile POS Ser
Newcastle
Regent St
Supplier
Tottenham Court Road
UK Distribution
Web Shop

Inventory Minimum Stock Quantities Costs Current Stock

The following costs have been defined.

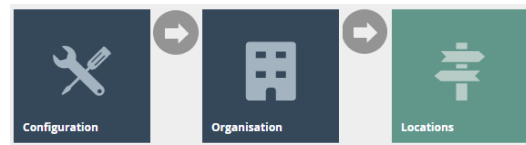
	Inventory Type	Date Received	Quantity	Cost
-	-	-	-	-
+ Add	Available	11 December 2020		£0.00

Property	Description
Inventory Type	Dropdown list selection from a list of all configured Inventory Types.
Date Received	The date on which the delivery was received into stock. Each delivery received into stock is separately costed.
Quantity	Numeric value; quantity of the item received in this delivery into stock.
Cost	Numeric value; cost of the items received in this delivery into stock.

Locations

The core configuration for Locations is covered in the 'How to configure a New Store' guide. This guide will cover the specific location settings that impact Inventory Management from. This guide will also show how to create a Warehouse Location.

Locations are accessed using the Locations option, obtained via the selection sequence shown at right starting from the Main Menu:



Location Maintenance ? || x

Region Hide

Location Type

Location ID

Name

	Location ID	Location Type	Name
	0001	Store	Regent St
	0003	Store	Newcastle
	0004	Store	Supplier
	0005	Store	Canterbury
	0006	Store	Bologna

To create a Warehouse Location, click on “Create a New Location”. Select a Location Type of “Warehouse”, assign a Location ID and click “Create”.

Location Maintenance ? || x

You are adding a new location, please select the type, template and enter the ID:

Location Type

Template

Location ID

Generally, the information needed to setup a warehouse is the same as what is required for a store setup. On the General-General tab, a warehouse “Name” and “Region” selection are required. As with stores, a default “Locale” should be assigned as well as the appropriate MMG Group.

Location Maintenance

Save

Cancel

You are editing warehouse ID: WH001

General

Address

Purging

Email

MM Groups

MM Group Price

Attributes

General

Ordering

Currency

Is Live

☐

Name*

Main Warehouse

Company ID

Region*

United Kingdom

Locale

English (UK)

Document Code

VAT Number

MM Group Hierarchy

Fashion

Start Date

14

December

2020

...

Menu Group

Default

Default Menu Group

Default

Price Group

-

Privacy policy URL

Template

Change Template

* Denotes Mandatory

The General-Ordering tab is also very similar to that of a store location. This allows additional control over how the warehouse will interact with customer orders. Direct settings are provided on the General-Ordering tab to specify if the location can “Accept Collection Orders” or Accept Reservation Orders”. Additionally, it is possible to specify if the location is authorised to “Fulfil Collection Orders” or “Fulfil Delivery Orders”. A location can also be restricted from using stock on hand to fulfil collection Orders.

Location Maintenance

?

||

x

Save

Cancel

You are editing warehouse ID: WH001

General

Address

Purging

Email

MM Groups

MM Group Price

Attributes

General

Ordering

Currency

Volumetric Weight Factor

0

Customer Forwarder Surcharge

\$0.00

Default Delivery Zone

-

Accept Collection Orders

☐

Accept Reservation Orders

☐

Fulfil Collection Orders

☐

Fulfil Delivery Orders

☐

Prevent Local Collections using Own Stock

☐

All other location settings very closely mirror the default location setup steps.

To configure store specific Inventory Management settings, return to the Location Maintenance screen and choose a store location. After selecting a store, navigate to the General-Ordering tab.

Location Maintenance

Save

Cancel

You are editing store ID: 0001

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

General

Ordering

Tax

Currency

Security

Manager

Volumetric Weight Factor

Customer Forwarder Surcharge

Default Warehouse

Default Delivery Zone

Accept Collection Orders

Accept Reservation Orders

Fulfil Collection Orders

Fulfil Delivery Orders

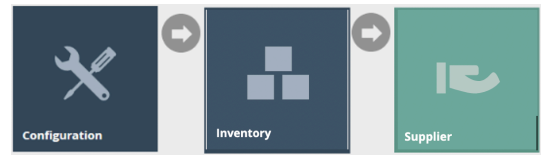
Prevent Local Collections using Own Stock

On the Ordering tab, the “Default Warehouse” is selected for a location. This represents the location where stock should be drawn from to fulfil orders. On the Ordering tab, it is also possible to specify if the location can “Accept Collection Orders” or Accept Reservation Orders”. Additionally, it is possible to specify if the location is authorised to “Fulfil Collection Orders” or “Fulfil Delivery Orders”. A location can also be restricted from using stock on hand to fulfil collection Orders.

Suppliers

If Enactor will be used to order product from external sources, it will require the setup of Suppliers. Based on the Product and Product-Location settings discussed previously in this document, purchase orders may be raised to suppliers from stores, warehouses or both.

Suppliers are accessed using the Supplier option, obtained via the selection sequence shown at right starting from the Main Menu:



Supplier Maintenance
? || ×

Supplier ID

Starts With

Name

Starts With

Status

-

Apply Filters

Reset Filters

Hide

	Supplier ID	Name	Status
	0002	Acme Clothing	Approved
	ALT_SUPPLIER-CA	Alternate supplier (CA)	Approved
	ALT_SUPPLIER-US	Alternate supplier (US)	Approved
	0001	ClothesRUs	Approved
	FINED	Fine Decor	Approved

⏮

Page 1 of 3

⏭

⏪

⏩

Page Size

5

🔄

+

Create a new Supplier

To add a Supplier, click on “Create a new Supplier”. After entering the Supplier ID, the Supplier Configuration will be presented.

Supplier Maintenance

Save

Cancel

You are editing Supplier ID: '0002'

General

Factories

MM Groups

Contacts

Contacts Directory

User Attributes

General

Orders

Billing

Name*

Acme Clothing

Status

Approved

Currency*

Pounds Sterling

Default Cost Method

Inventory Units

Barcode Type

-

Auto Replenishment

☐

Communication Method*

Fax

Cancellation Communication Method*

Fax

Default Terms and Conditions

Allow Back Orders

☒

Allow Receipt of Unexpected Items

☐

On the General-General tab, the Supplier “Name” and “Currency” are required. Additionally, “Communication Method” and “Cancellation Communication Method” are also required as they drive specific activities within various business processes. These settings determine how order and cancellation information will be shared with a supplier. Current choices include: Post, Fax, File, Email, Email (CSV), Email (PDF) and None.

It is important to note that it will not be possible to raise a purchase order for unless the “Status” is set to “Approved”. Settings to “Allow Back Orders” and to “Allow Receipt of Unexpected Items” are also provided. If “Allow Back Orders” is selected, orders can remain open after initial receipt to receive any items that were back ordered. The “Allow Receipt of Unexpected Items” will allow the receiver to add items to the receipt that were not ordered but were delivered.

Supplier Maintenance

Save

Cancel

You are editing Supplier ID: '0002'

General

Factories

MM Groups

Contacts

Contacts Directory

User Attributes

General

Orders

Billing

Supports Electronic ASN

☐

Auto Authorise Purchase Orders

☐

Multiple MMG Orders Allowed

☒

Default Shipping Method

Default Lead Time (days)

0

Cancellation Notice (days)

0

Minimum Order Packs

0

Minimum Order Quantity

0

Minimum Order Value

£0.00

Maximum Order Value

£0.00

The General-Orders tab allows the configuration of several key order handling attributes. The “Supports Electronic ASN” is selected if electronic ASN’s from this Supplier will be interfaced to Enactor. If the Supplier does not Support Electronic ASN’s the system will automatically generate a receiving document to be used when the shipment arrives.

In the default business processes, Purchase Orders go through an authorization task. The option to “Auto Authorise Purchase Orders” will skip that step if the person creating the Purchase Order also has the authority to approve the Purchase Order.

Other common settings found on the General-Orders tab include the ability to track a “Default Lead Time” as well as the necessary “Cancellation Notice” requirement. Minimum and Maximum Order variables can also be specified.

If a Supplier is associated with different MM Groups, the MM Groups tab can be used to establish different order rules based on MM Group.

Supplier Maintenance ? || x

Save Cancel

You are editing Supplier ID: '0002'

General Factories **MM Groups** Contacts Contacts Directory User Attributes

MM Group Hierarchies

- All
- Cosmetics
- Fashion
- Grocery
- Made to Measure
- MOBILE
- Stationary
- Value

Default Cost Method Order Units

Default Shipping Method

Default Terms and Conditions

Minimum Order Packs 10

Minimum Order Quantity 0

Minimum Order Value £0.00

Maximum Order Value £0.00

Save Remove

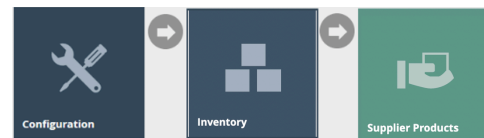
After an MM Group is selected in the left panel, MM Group specific Order settings can be selected in the right panel. These settings will be enacted based on the MM Group specified on the Purchase Order.

The additional settings found on the General-Billing, Factories, Contacts, Contacts Directory and User Attributes do not impact the core Inventory Management functionality and are provided for general Supplier information.

Supplier Products

Once a Supplier has been created, product must be associated to the supplier to permit ordering. While this can be completed within Product Maintenance, adding this information one product at a time is too inefficient when working with a number of items. The Supplier Products application provides a format to handle large data sets including direct copy-paste from a spreadsheet.

Supplier Products are accessed using the Supplier Products option, obtained via the selection sequence shown at right starting from the Main Menu:



Supplier Products

Cancel Save

Product ID Starts With 321 Supplier ID Starts With Supplier Product ID Starts With Supplier Reference Starts With Working Status All Items

Supplier Name Starts With Supplier Status -

Apply Filters Reset Filters

	Product ID	Supplier ID	Supplier Product ID	Supplier Ref.	Order Units	Cost Price
<input type="checkbox"/>	321101	0002	321101	Women's Belt BRN	1	£ 2.50
<input type="checkbox"/>						£ 0.00

Page 1 of 1 Page Size 25 Apply Delete Copy Rows Cancel Rows Defaults Paste Apply

The Supplier information for any Product can be added or updated simply by adding values for the headers displayed on the form.

Large quantities of updates can be made by copying and pasting data from a spreadsheet. To use this functionality, copy the data range from a spreadsheet without header row information. Click the "Paste" button in the bottom right corner of the page. At that time, a window will be presented to accept the copied data:

Supplier Products

Cancel Save

Product ID Starts With 321 Supplier ID Starts With Supplier Product ID Starts With Supplier Reference Starts With Working Status All Items

Supplier Name Starts With Supplier Status -

Apply Filters Reset Filters

	Product ID	Supplier ID	Supplier Product ID	Supplier Ref.
<input type="checkbox"/>	321101	0002	321101	Women's Belt BRN
<input type="checkbox"/>				

Page 1 of 1 Page Size 25 Apply Delete Copy Rows Cancel Rows Defaults Paste Apply

Paste Here

Once the data has been pasted, a mapping utility will be presented to associate the data column with the appropriate field. Default values can also be specified at this point if needed.

Supplier Products

Cancel Save

Product ID Starts With 321 Supplier ID Starts With Supplier Product ID Starts With Supplier Reference Starts With Working Status All Items

Supplier Name Starts With Supplier Status -

Apply Filters Reset Filters

	Product ID	Supplier ID
<input type="checkbox"/>	321101	0002
<input type="checkbox"/>		

Page 1 of 1 Page Size 25 Apply Delete Copy Rows Cancel Rows Defaults Paste Apply

Please map the data you have pasted to the columns in the table. The first row of data is shown below:

Mapping Set Copy Of DefaultSet

Column	Map To	Default Value
Product ID	Column 1: 321102	
Supplier ID	Column 2: 0002	
Supplier Product ID	Column 3: 321102	
Supplier Ref.	-- Not Mapped --	
Order Units	Column 5: 1	
Supplier Cost	Column 6: 3	
Price Start Date	-- Not Mapped --	
Currency	-- Not Mapped --	Pounds Sterling
Delete Flag	-- Not Mapped --	

OK Cancel

	Order Units	Cost Price
<input type="checkbox"/>	1	£ 2.50
<input type="checkbox"/>		£ 0.00

Page 1 of 1 Page Size 25 Apply Delete Copy Rows Cancel Rows Defaults Paste Apply

When the mapping is complete, click on “OK”. The copied data will now be mapped onto the form in Estate Manager.

Supplier Products ? II X

Cancel Save

Product ID Starts With 321 Supplier ID Starts With Supplier Product ID Starts With Supplier Reference Starts With Working Status All Items

Apply Filters Reset Filters

	Product ID	Supplier ID	Supplier Product ID	Supplier Ref.	Order Units	Cost Price
<input checked="" type="checkbox"/>	321102	0002	321102		1	£ 0.03
<input checked="" type="checkbox"/>	321101	0002	321101	Women's Belt BRN	1	£ 2.50

Page 1 of 1 Page Size 25 Apply Delete Copy Rows Cancel Rows Defaults Paste Apply

Clicking on “Save” will now commit these entries.

Inventory Types









































By default, a number of Inventory Types are created to account for various Inventory Type labels that are needed to track inventory as it flows through the supply chain.

Inventory Types are accessed using the Inventory Types option, obtained via the selection sequence shown at right starting from the Main Menu:

Inventory Type Maintenance ? II X

Inventory Type Starts With Hide

Apply Filters Reset Filters

	Inventory Type	Description
   	AFL	Available for Loan
   	ALO	Allocated for Store
   	AVA	Available
   	AWD	Awaiting Dispatch
   	COL	Customer Collection
   	DAM	Damaged
   	DMG	Damaged
   	IBTAD	Inter Branch Transfer - Out Awaiting Dispatch
   	IBTI	Inter Branch Transfer - Incoming
   	IBTO	Inter Branch Transfer - Outgoing

Inventory Types are essentially labels to be used by various Business Processes and, therefore, carry no configuration details. To create an additional Inventory Type, simply click on “Create a new Inventory Type” followed by the “Inventory Type ID” and associated “Description”.

Inventory Type Maintenance
? || x

Please enter following details for the new Inventory Type

Inventory Type
RECALL

Back Create

Inventory Type Maintenance
? || x

Save Cancel

You are editing Inventory Type ID: 'RECALL'

General

Description*
Recalled
English (UK)

* Denotes Mandatory

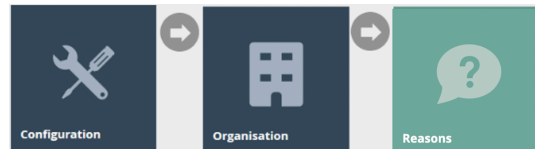
Reasons

There are multiple Reason Types that are related to Inventory Management. These Reason Types have the capability of moving Inventory between Inventory Types. Reason Types with the provision to alter Inventory Types include:

- Inter Store Transfer
- Item/Receipt Exchange
- Item/Receipt Return
- MMG Return
- Stock Adjustment

Using the Inventory Types mentioned in the previous section, these Reason Types allow associated Reasons to define an execute the inventory movement associated with the transaction.

Reasons are accessed using the Reasons option, obtained via the selection sequence shown at right starting from the Main Menu:



Reason Maintenance ? || x

Region: Hide

Reason Type:

Reason ID:

	Reason ID	Reason Type	Region	Reason Start Date	Reason End Date	Description
	IST02	Inter Store Transfer	All Regions			Condensing
	IST01	Inter Store Transfer	All Regions			Overstocked
	IST03	Inter Store Transfer	All Regions			Replenishment

Return and Exchange related Reasons simply allow the specification of the inventory type that the merchandise should be allocated to upon completion of the return.

Reason Maintenance ? || x

You are editing Item Return Reason ID: 'IR-UK3' for region 'United Kingdom'

General **Return** **Applicable Tenders** **Transaction Types**

Effect on Inventory*

Capture Original Tender? ☐

Capture Original Tax Region? ☐

Requires Witness? ☐

Return within Days Limit (Zero means unlimited)

This is accomplished by simply selecting the desired Inventory Type in the “Effect on Inventory” setting.

Reasons associated with an Inter Store Transfer Reason Type allow specification of the Inventory Type that the product is being moved from.

Reason Maintenance
? || x

Save
Cancel

You are editing Inter Store Transfer Reason ID: 'IST02' for region 'All Regions'

General
Transfer
Stock Adjustment

From Inventory Type
-

In the case of an Inter Store Transfer Limited Reason Type, the end Inventory Type can also be specified.

Reason Maintenance
? || x

Save
Cancel

You are editing Inter Store Transfer Limited Reason ID: 'CX_COLLECTION' for region 'All Regions'

General
Transfer
Stock Adjustment

Effect on Inventory*
Customer Collection

Allow Item Amendment
☒

Skip Authorisation
☐

Permitted Destinations

	Destination

Customer Home

+ Add

The Stock Adjustment Reason Type includes both the beginning and resulting Inventory Type.

Reason Maintenance

?

||

x

Save

Cancel

You are editing Stock Adjustment Reason ID: 'CX_ADJ_COLLECTION' for region 'All Regions'

General

Stock Adjustment

From Inventory Type

Available

From Stock Ledger Transaction Type

-

Stock Adjustment Authorisation Code

-

To Inventory Type

Customer Collection

To Stock Ledger Transaction Type

Stock Adjustment

Skip Authorisation

☒

Allow Item Amendment

☐

Allow Picking

☒

Allow Location Area Change

☐

Allow Inventory Container Change

☐

In addition to the Inventory Type, a Stock Ledger Transaction Type can be optionally included.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Version 1.0

Product Version 2.6

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	11 Dec 2020	Michael Tolson	Initial version