Update the Stock Item MIN/MAX

Overview

The Warehouse Management module Stock Item MIN/MAX process provides the ability to calculate, edit, approve, or deny the Minimum and Maximum Stock Item levels within an individual Warehouse, Site, Region, or Logistics Program.
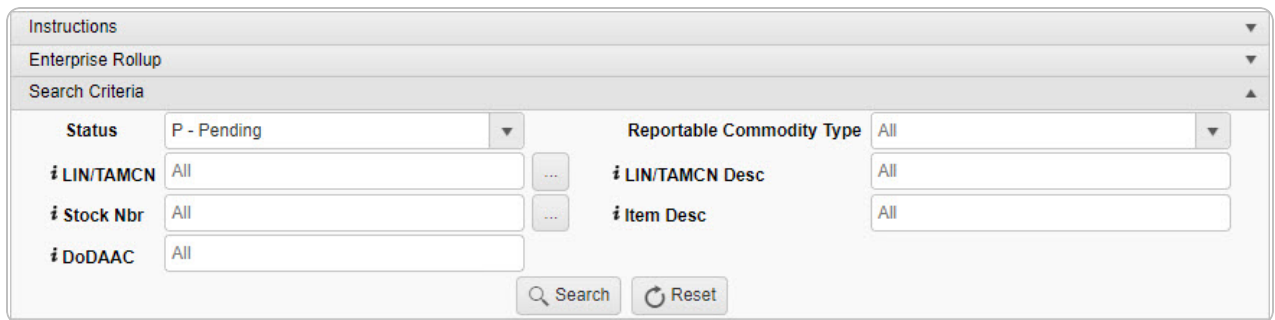
Navigation

CATALOG MGMT > Stock Item MIN/MAX > Stock Item MIN/MAX Update page
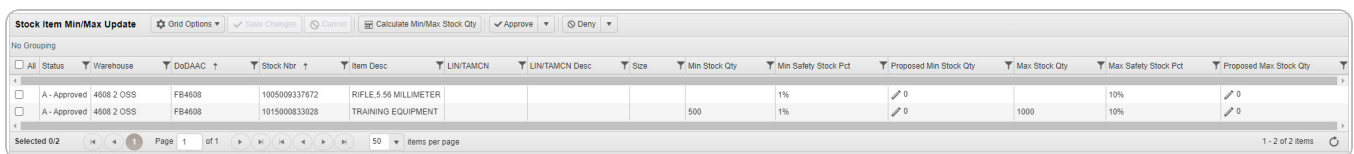
Procedures

Search For a Stock Item

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting [⟳ Reset] *at any point of this procedure returns all fields to the default "All" setting.*

1. In the Search Criteria box, narrow the results by entering one or more of the following optional fields.

2. Select [🔍 Search] . *The Search Results are displayed in the Stock Item Min / Max Update grid.*

Update the MIN/MAX for a Stock Item

1. Click ☐ to select the entry. *The Stock Item record is highlighted.*

    ### Enter a Proposed MIN STOCK QTY

    A. Click ✏. *The cell becomes an editable field.*

    B. Enter the Proposed MIN STOCK QTY for that Stock Item. *The* ✓ Save Changes *and* ⊘ Cancel *become available.*

    C. Select ✓ Save Changes. *The revised amount is saved and the field becomes read-only.*

    ### Enter a Proposed MAX STOCK QTY

    A. Click ✏. *The cell becomes an editable field.*

    B. Enter the Proposed MAX STOCK QTY for that Stock Item. *The* ✓ Save Changes *and* ⊘ Cancel *become available.*

    C. Select ✓ Save Changes. *The revised amount is saved and the field becomes read-only.*

Approve the MIN/MAX Quantity for a single Stock Item

1. Click ☐ to select the entry. *The Stock Item record is highlighted.*

2. Select ✓ Approve ▼. *The Approve menu appears.*

3. Select ✓ Approve. *The **Approve MIN/MAX Records** pop-up window appears.*

Approve Min/Max Records   ✕

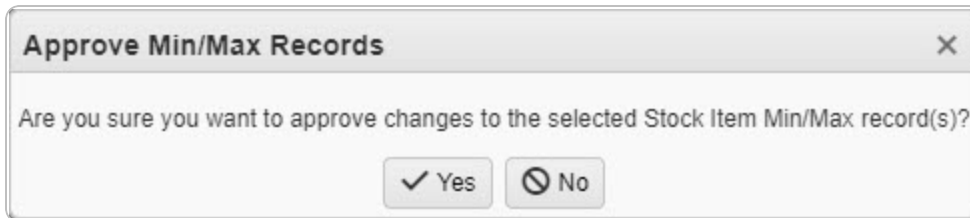Are you sure you want to approve changes to the selected Stock Item Min/Max record(s)?

✓ Yes   ⊘ No

Select [✔ Yes]. [⊘ Records successfully approved. ×] *appears while the record is moved from Pending to Approved.*

4.

OR

Select [⊘ No]. *The **Approve MIN/MAX Records** pop-up window closes and the record remains in Pending.*

Approve the MIN/MAX Quantity for all Pending Stock Items

1.   Select [✔ Approve ▼]. *The Approve menu appears.*

2.   Select [☑ Approve All]. *The **Approve MIN/MAX Records** pop-up window appears.*

Approve Min/Max Records	×
Are you sure you want to approve changes to the selected Stock Item Min/Max record(s)?	
✔ Yes ⊘ No	

Select [✔ Yes]. [⊘ Records successfully approved. ×] *appears while all of the Stock Item records are moved from Pending to Approved.*

3.

OR

Select [⊘ No]. *The **Approve MIN/MAX Records** pop-up window closes and all of the Stock Item records remain in Pending.*
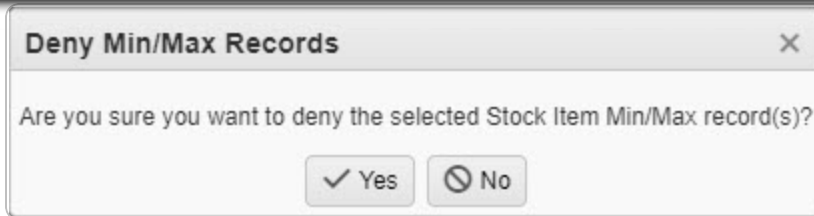
Deny the MIN/MAX Quantity for a single Stock Item

1.   Click ☐ to select the entry. *The Stock Item record is highlighted.*

2.   Select [⊘ Deny ▼]. *The Deny menu appears.*

3.   Select [⊘ Deny]. *The **Deny MIN/MAX Records** pop-up window appears.*

Select ☑ Yes . appears while the record is moved from Pending to Denied.
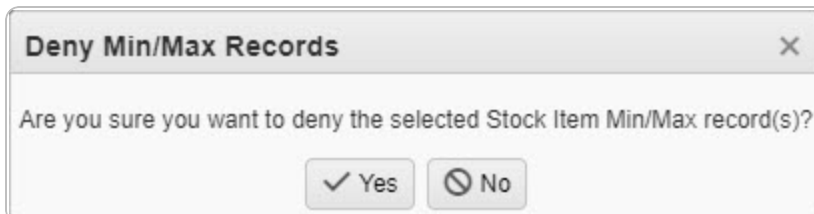
4.

OR

Select ⊘ No . The **Deny MIN/MAX Records** pop-up window closes and the record remains in Pending.

Deny the MIN/MAX Quantity for all Pending Stock Items

1. Select ⊘ Deny ▼ . *The Deny menu appears.*

2. Select 🗑 Deny All . *The* **Deny MIN/MAX Records** *pop-up window appears.*

Select ☑ Yes . appears while all of the Stock Item records are moved from Pending to Denied.

3.

OR

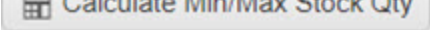Select ⊘ No . The **Deny MIN/MAX Records** pop-up window closes and all of the Stock Item records remain in Pending.

Calculate the MIN/MAX Quantity for a Stock Item

Navigation

CATALOG MGMT > Stock Item MIN/MAX > [⊞ Calculate Min/Max Stock Qty] > Calculate MIN/MAX STOCK QTY pop-up window

Procedures

Calculate the Min/Max Quantities for All Stock Items

Selecting [⊘ Cancel] *at any point of this procedure removes all revisions and closes the page.* **Bold** *numbered steps are required.*

1. Select [⊞ Calculate Min/Max Stock Qty]. *The* **Calculate MIN/MAX STOCK QTY** *pop-up window appears.*
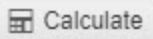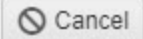
2. Enter the Safety Stock Quantities.

    1. Use ⬍ to choose the MAX Safety Stock PCT.

3. Enter the Calculation Parameters.

    1. Use ▾ to select the Tier Level. *The tier selection appears as a new field.*

        Choose:

        Use ▾ to select the Logistics Program.

        Calculation Parameters
        * Tier Level   * Logistics Program
        [Logistics Program   ▾]   [▾]

    A.

      OR

      Use ▾ to select the Region.

      Calculation Parameters
      * Tier Level   * Region
      [Region   ▾]   [▾]

      OR

      Use ▾ to select the Site.

      Calculation Parameters
      * Tier Level   * Site
      [Site   ▾]   [▾]

      OR

      Use ▾ to select the Warehouse.

      Calculation Parameters
      * Tier Level   * Warehouse
      [Warehouse   ▾]   [▾]

4. Select [▦ Calculate]. *The pop-up window closes. Depending upon the amount of changes, either the new amounts appear in the entry's corresponding columns, or an alert appears.*
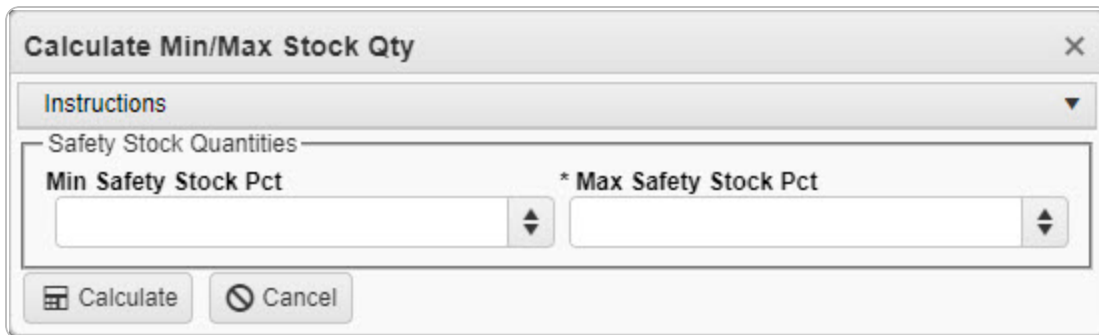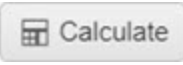
    Alert   ✕

    Due to the large amount of data, the calculations have been sent to a background job. You will be notified by email when the job is complete.

    [✓ OK]

Calculate the MIN/MAX Quantity for a Specific Stock Item

1. Click ☐ to select the entry. *The Stock Item record is highlighted.*

2. Select [⊞ Calculate Min/Max Stock Qty]. *The* **Calculate MIN/MAX STOCK QTY** *pop-up window appears.*

3. **Use** ⬍ to choose the MAX Safety Stock PCT.

4. Select [⊞ Calculate]. *The pop-up window closes, and the new amounts appear in the record's corresponding columns.*