

# Baseplan Enterprise Training - Session Outline



## Session: Inventory Control

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### Description:

This session is designed to give attendees both a general overview of the inventory control module of Baseplan Enterprise as well as more advanced processing and some configuration. This session is designed for heavy inventory control users and will provide participants with the competencies to set up, manage and generally use the inventory control module.

### What you will learn (Objectives):

- Add, lookup, edit and manage stock master records
- Manage stock levels through transfers, parts issues, stock reorder and stock adjustment
- Stocktake procedures
- Customer sales orders and invoicing
- Stock ordering and ordering directly to a job
- Serialised stock and the pre-delivery wizard
- Stock management reporting

### What you need to know (Pre-requisites):

Before attending this session, participants must have completed the Baseplan Enterprise - Orientation session and must be reasonably proficient with MS Windows. This includes confidence with use of the mouse and printing underneath Windows.

### Length of session:

This session will take approximately 4 hours without a lunch break.

### Session Content:

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#### Introduction:

- Your presenter (Experience)
- Session objectives (What you will learn)
- Attendees roles
- Housekeeping items (toilets, breaks, data to be used)

#### Stock Master screen:

- General stock fields
- Tick boxes (Sales Item, Do Not Stock, Not in Use, Has Alternates)
- Product Group (Link to GL)
- Pricing options
- Locations list

#### Stock View Menu:

- Stock transaction history (types, drill downs)
- Alternate part numbers (supercessions, alternates)
- Supplier information

**Basic Configuration:**

- Warehouses (Main warehouses, permissions)
- Product Groups

**BREAK – 10 minutes****Stock Enquiry screen:**

- Finding parts (supplier part no, alternate part no)
- Getting prices
- Available stock (main warehouses only)
- Recording lost sales
- Creating transactions (purchase orders, sales orders)

**Sales Orders:**

- Order header
- Stock availability (alternates, allocated qty, backorders)
- Picking slip
- Creating invoices
- Backorder reporting

**Parts Reordering**

- Velocity codes
- Avg monthly sales
- Min and maximum
- Reorder screen
- Generating purchase orders
- Receipting purchase orders

**Stock management**

- Stock transfers
- Parts issues
- Purchase orders for stock
- Purchase orders directly to a job (does not affect avg cost, NO \$0.00 orders, estimates)
- Stock adjustments
- Stocktake procedures

**Session Review**

- Stock master screen (displays all information and is link to history and supplier configuration)
- Stock enquiry screen (used for normal day-to-day finding and viewing)
- Sales orders and invoice creation
- Purchase orders and receipting process
- Parts issues

**Questions****Thank you and Survey**