



## *Inventory Management*

*Stock Level Management, Special Orders, Purchasing, Scanning,  
Serialized Item Specs, Sales Classifications, Advanced Stock Levels*

**Engage 2019**  
EBMS User Conference

# Melvin Lambright

**Solutions Consultant**

Expert in Eagle Solutions Services:

EBMS Training, Consulting, Setup, & Customization Services



# I. Stock Level Management

- On Hand
- On Time
- Visibility

Products\Lumber\2X4-12 SPF

Product: 2412 Warehouse: MAIN Category: Lumber

General Purchasing Pricing **Count** Components Accessories Advanced Messages Shipping Product Applications Product Attributes Automotive Parts Calculate Website Lost Sale/Return Sales Activity Documents 2019 2018

Processed: 281.00 Purchase Method: Stocked (standard)

In	Ordered	Received
Purchase Orders	324.00	30.00
Manufacturing	5.00	
Warehouse Transfer		
<b>Total In</b>	<b>329.00</b>	<b>30.00</b>

Out	Ordered	Shipped
Sales Orders	1,316.00	311.00
Manufacturing Consumed	10.00	
Warehouse Transfer	500.00	
Job Transfer		
<b>Total Out</b>	<b>1,826.00</b>	<b>311.00</b>

Summary  
 Net Ordered: -1,216.00 On Hand:   
 Quantity to Order: Available: -1,515.00

Stock Levels  
 Maximum: 965.00  
 Minimum: 483.00  
 Reorder Increment: 200.00

Main Unit: EA Default Selling: EA All Units Require Integer Quantities

Sell	Unit	Formula
✓	EA	Main Unit
✓	UNIT	Multiplies by 200.0000

Warehouse	Count	Net Ordered	On Hand	Sales Shipped	Mfg - To Use	Mfg - Used	Mfg - To Make	Mfg - Made	Ware - To Transfer Out	Ware - Transferred Out	Ware - To
All	281.00	-716.00		311.00	10.00		5.00		500.00		500.00
MAIN	281.00	-1,216.00		311.00	10.00		5.00		500.00		
SECOND		500.00									500.00

Options

Automotive Formulas  
 General Price Levels Sales Level Manufacturing Vendor Ca  
 Method to markup prices:  Margin  Markup  
 COGS Adjustment  Allow propagation  
 Inventory Method:  Perpetual  Periodic  
**Available Quantity Calculation**  
 Processed Count + Incoming Received - Outgoing Ordered  
 Processed Count + Incoming Ordered - Outgoing Ordered

OK Cancel New Delete Print



# Setting up Stock Levels

- Manually
- By Utility
- In Purchasing Dialog

Purchasing - MAIN

Purchasing Special Orders

Vendor:  Search for primary vendor: DAISUP  
Dairyman's Supply, Inc.  
Mayfield, KY 42066

Folder: Lumber  
 Include Subfolders  Include Inactive  
 Manufacturer  
 Show items with order quantities  
 Show only track count items  
 Only show stock inventory (minimum > 0)  
 Only show product that needs to be ordered  
Rental Equipment: Include Rental Equipment

Sales For Previous 13 Months

Counts in other warehouses

Warehouse	Net Count	Net Ordered	Sales History
All other Warehouses (total)			
SECOND			

Order Quantity	Product	Description 1	Total In (Ordered)	Total In (Received)	Total Out (Ordered)	Total Out (Shipped)	On Hand	Minimum	Maximum	Reorder Increment
2408		2x4-8 SPF	301.00	7.00	588.00		150.00	294.00		294.00
2410		2x4-10 SPF	160.00	50.00	819.00	275.00	875.00	500.00	1,000.00	100.00
241021		2x4-10 MCA						588.00		294.00
2410458		2x4-104-5/8 SPF						588.00		294.00
2411658		2x4-116-5/8 SPF						588.00		294.00
2412		2x4-12 SPF	324.00	25.00	1,310.00	300.00	989.00	500.00	1,000.00	200.00
241221		2x4-12 MCA						588.00		294.00
2414		2x4-14 SPF			5.00			294.00		294.00
2416		2x4-16 SPF						588.00	882.00	294.00
24162		2x4-16 YP						588.00		294.00
241621		2x4-16 MCA						588.00		294.00
2418		2x4-18 SPF						294.00		294.00
2420		2x4-20 SPF						588.00		294.00
24202		2x4-20 YP						588.00		294.00
249258		2x4-92-5/8 SPF						588.00		294.00

Quantity: Cost: Weight: Net Count: 2,014.00

Find (F5) Close View Item... Create Print

EBMS - Lambright Enterprises, Melvin

File Edit Sales Inventory Expenses Labor Financials Horticulture Job Costing Rental Window Help

Product Catalog...  
Purchasing  
Serialized...  
Lots...  
Manufacturing...  
Warehouse Transfer...  
Journal Entry...  
Display Unposted Transactions  
Post Transactions  
Adjust Counts...  
Manufacturing Schedule  
Utilities  
Options...

Inactivate Products...  
Calculate Stock Level Settings...  
Determine Sales Level...  
Update From Vendor Catalogs...  
Import Images...  
Populate Application Guide Folders  
Update Keystone Inventory  
Manage Keystone Flyers  
Change/Merge ID's...

Calculate Stock Level Settings

Select a folder or range of products you want to calculate.

Folder

- Products
  - 1. Lumber
  - 2. Metal
  - 3. Building Materials
  - 4. Hardware
  - 5. Fasteners
  - 6. Windows & Doors
  - 7. Miscellaneous
  - 8. Milwaukee

Include Subfolders

All Products

Range: To:

Calculate minimum and maximum ordering quantities for inventory items in folder 1. Lumber, including subfolders.

Number of months supply: 3.0

Based on an average Sales volume for 24 months ending March 2019

Calculate Minimum: Add 0 % with a minimum of 1

Calculate Maximum: (None)

< Back Next > Cancel

< Back Calculate > Cancel



# Stock Level Visibility

- Color
- Visual

Id	Description	Price	Location	On Hand	Ordered(Out)	Shipped(Out)
2408	2x4-8 SPF	4.16	A	150.00	297.00	
2410	2x4-10 SPF	5.63	A	875.00	824.00	275.00
241021	2x4-10 MCA	6.25	C		80.00	
2410458	2x4-104-5/8 SPF	3.75	A			
2411658	2x4-116-5/8 SPF	4.19	A			
2412	2x4-12 SPF	6.25	A	989.00	1,810.00	300.00
241221	2x4-12 MCA	6.50	C	588.00	1.00	
2414	2x4-14 SPF	6.25	A		5.00	
2416	2x4-16 SPF	6.88	A			
24162	2x4-16 YP	5.94	B			
241621	2x4-16 MCA	7.19	C			
2418	2x4-18 SPF	7.50	A			
2420	2x4-20 SPF	8.13	A			
24202	2x4-20 YP	7.50	B			
249258	2x4-92-5/8 SPF	3.60	A			
2608	2x6-8 SPF	5.63	A			
2610	2x6-10 SPF	6.25	A			
2610458	2x6-104-5/8 SPF	5.00	A			
2611658	2x6-116-5/8 SPF	5.44	A			
2612	2x6-12 SPF	7.25	A			
2614	2x6-14 SPF	7.50	A			
2616	2x6-16 SPF	6.88	A			
26162	2x6-16 YP	6.25	B			
2618	2x6-18 SPF	8.75	A			
2620	2x6-20 SPF	9.38	A			
26202	2x6-20 YP	8.44	B			

Id	Description	Price	Location	On Hand
2408	2x4-8 SPF	4.16	A	150.00
2410	2x4-10 SPF	5.63	A	875.00
241021	2x4-10 MCA	6.25	C	

Up To %	Color
99.00	Red
110.00	Pink
500.00	Green

Filter Down

Inventory Stock Level Coloring has been enabled.  
Restart EBMS for the changes to take effect

OK



# II. Special Orders

- Easy
- Sell Now
- Order Later

Sales Invoice Entry - Jane Doe

File Edit Materials Process View Tasks Documents Customer Documents Action

Custc Find Ctrl+F Find Next Ctrl+N Process and Print Ctrl+P Process \ No Print Ctrl+R

Change Customer... Ctrl+H Allow All Payment Methods Ctrl+F5 Unprocess Ctrl+U

J. Scan Entries F8 Process 'Made To Order' Batches Unprocess 'Made To Order' Batches

5 Ship All Items Recalculate All Prices Insert Retainage

Price Calculation... Combine Lines Create Purchase Order(s) Ctrl+G

Purchase Method... Convert to Proposal

G Insert Serial Number... F11 Keystone Part Selector Ctrl+W Import detail from file...

Sales Person: MELVIN P.O./Job: Ship Date: Ship Via: Pickup Price Level: Retail Warehouse: MAIN Job ID: 010 Department: 010

	Ordered	Shipped	Product	On Hand	Description	Price	Amount	Taxed	G/L Account	Purchase Method	Vendor	V
1	500.00		2412	989.00	Zx4-12 SPF	6.25			51000-010	Stocked (standard)	BLUCOR	
2	2.00		CAN24072		Filter	73.50			51000-010	Drop ship	BLUCOR	
3	5.00		2410	875.00	Zx4-10 SPF	5.63			51000-010	Sync Quantities	BLUCOR	ABCDEF
▶	3.00		2408	150.00	Zx4-8 SPF	4.16			51000-010	Associated	BLUCOR	
*												

Purchasing Special Orders

Vendor: [ ] Folder: Products Ship Dates: 5 days before 03/05/2018 Fri

Include subfolders  Include primary vendor lead times

Manufacturer: [ ] Purchase Method: Associated

Selected	Vendor	Method	Ordered	Product	ID	Document	Ship Date	Total In (Ordered)	Total In (Received)	Total Out (Ordered)	Total
<input checked="" type="checkbox"/>	BLUCOR	Associated	3.00	2408	DOE.JAN	1027		301.00	7.00	293.00	
<input checked="" type="checkbox"/>	BLUCOR	Sync Quantities	5.00	2410	DOE.JAN	1027		160.00	50.00	799.00	250.00
<input checked="" type="checkbox"/>	BLUCOR	Associated	2.00	CAN24072	DOE.JAN	1024				4.00	
<input checked="" type="checkbox"/>	BLUCOR	Drop ship	2.00	CAN24072	DOE.JAN	1027				4.00	
▶	ESD/CWO	Drop ship	1.00	241221	DOE.JAN	1026				1.00	

Select All Unselect All

Find [F5] Close View Item... Create P.O. Print

Summary:

Show Cost

Costs:	\$0.00	S.O. Subtotal:	\$3,312.63	Subtotal:	\$0.00	Shipped / Invoice Total	
Total Markup:	\$0.00	S.O. Total:	\$3,312.63	Paid:	\$0.00		0.00
Percent Markup:	0.0%	S.O.:	\$3,312.63	Balance:	\$0.00		
Shipped Products:	0.000000						

Entry Date: 04/05/2019 Fri Sales Order



# Managing Special Orders

The screenshot displays the EBMS interface with several windows open to manage a query. Red boxes and numbers 1 through 4 highlight specific actions:

- 1:** The 'Queries...' button in the top right of the main window.
- 2:** The 'Properties' button in the 'Queries' dialog box.
- 3:** The 'S.O. Detail Query' button in the 'Query Properties' dialog box.
- 4:** The 'Set Query' dialog box, which contains a table for defining query filters.

Process	Sales Order	Id	Name	Description	Date	Total	Sales Person	P.O. Number	Ship Date	Price Level
	1024	DOEJAN	Jane Doe	Filter	04/05/201		MELVIN			Retail
	1026	DOEJAN	Jane Doe	2x4-12 MCA	04/05/201		MELVIN			Retail
	1027	DOEJAN	Jane Doe	2x4-12 SPF	04/05/201		MELVIN		05/08/2019	Retail
	1028	DOEJOH	John Doe	2x4-10 MCA	04/05/201		MELVIN			Retail

Query Id	Description
ALL	All Sales Orders
SPECIAL ORDERS	Special Order Sales

Database Field	Operator	Value	And/Or
PURC_METH	is not equal to	0	and

Selected Sales Orders:  Total Sales Orders: 4

Buttons: Select All, Unselect All, View Sales Order, Process, Print



# III. Purchasing

- Replenish Stock
- Flexible Options

Purchasing - MAIN

Purchasing Special Orders

Vendor  
 Search for primary vendor

Folder Lumber  
 Include Subfolders  Include Inactive  
 Manufacturer CAN  
 Show items with order quantities  
 Show only track count items  
 Only show stock inventory (minimum > 0)  
 Only show product that needs to be ordered  
 Rental Equipment: Include Rental Equipment

Show sales history: Apr, 2018 - Mar, 2019 Query...

Sales For Previous 13 Months

Counts in other warehouses

Warehouse	Net Count	Net Ordered	Sales History
All other Warehouses (total)		4.00	
SECOND		4.00	

Order Quantity	Product	Description 1	Cost	Total In (Ordered)	Total In (Received)	Total Out (Ordered)	Total Out (Shipped)	On Hand	Net Ordered	Minimum
294.00	2408	2X4-8 SPF	3.33	304.00	10.00	347.00	50.00	103.00	100.00	151.00
600.00	2410	2X4-10 SPF	4.50	165.00	55.00	904.00	360.00	795.00	361.00	500.00
588.00	241021	2X4-10 MCA	5.00	80.00		80.00				588.00
588.00	2410458	2X4-104-5/8 SPF	3.00							588.00
882.00	2411658	2X4-116-5/8 SPF	3.35			1.00			-1.00	588.00
2,000.00	2412	2X4-12 SPF	5.00	329.00	30.00	1,826.00	311.00		-1,216.00	483.00
588.00	241221	2X4-12 MCA	5.20			489.00	489.00			588.00
588.00	2414	2X4-14 SPF	5.00			5.00			-5.00	294.00
882.00	2416	2X4-16 SPF	5.50							588.00
588.00	24162	2X4-16 YP	4.75							588.00

Quantity: 7,598.00 Cost: \$34,979.32 Weight: 10,000.00 Net Count: 898.00

Calculate stock levels

Clear Orders Default Orders Find (F5) Close View Item... Create Print





# Managing Purchases

Expense Invoice Entry - Rhodes Supply, Inc. Vendor: RHOSUP

Order Information: Ordered Date: 04/05/2019, Order ETA: 04/13/2019 Sat, Vendor Lead Days: 5, Lead Time: 5 days

Ordered	Received	Warehouse	Product	Measure	Description	Unit Cost	Amount (Invoice)	G/L Account	ETA Date
1	294.00	MAIN	2408	EA	2x4-8 SPF	3.33		60000-010	04/13/2019 Sat
2	500.00	MAIN	2410	EA	2x4-10 SPF	4.50		60000-010	04/10/2019 Wed
3	588.00	MAIN	241021	EA	2x4-10 MCA	5.00		60000-010	04/10/2019 Wed
4	588.00	MAIN	2410458	EA	2x4-104-5/8 SPF	3.00		60000-010	04/10/2019 Wed
5	588.00	MAIN	2411658	EA	2x4-116-5/8 SPF	3.35		60000-010	04/10/2019 Wed
6	600.00	MAIN	2412	EA	2x4-12 SPF	5.00		60000-010	04/10/2019 Wed
7						5.20		60000-010	04/10/2019 Wed
8						5.00		60000-010	04/10/2019 Wed
9						5.50		60000-010	04/10/2019 Wed
10						4.75		60000-010	04/10/2019 Wed
11						5.75		60000-010	04/10/2019 Wed
12						6.00		60000-010	04/10/2019 Wed
13						6.50		60000-010	04/10/2019 Wed
14						6.00		60000-010	04/10/2019 Wed
15						2.88		60000-010	04/10/2019 Wed
16						4.50		60000-010	04/10/2019 Wed
17	294.00	MAIN	2610	EA	2x6-10 SPF	5.00		60000-010	04/10/2019 Wed
18	588.00	MAIN	2610458	EA	2x6-104-5/8 SPF	4.00		60000-010	04/10/2019 Wed
19	588.00	MAIN	2611658	EA	2x6-116-5/8 SPF	4.35		60000-010	04/10/2019 Wed

P.O. Total: \$116,734.80 Subtotal: \$0.00  
Weight: 0.00 Total: \$0.00  
Balance: \$0.00

Entry Date: 04/05/2019 Fri Purchase Order

Reports

- Expenses
- Financials
- Horticulture
- Job Costing
- Labor
- Management
- Miscellaneous
- Products**
  - Costs/Prices
  - Counts/Values
  - G/L Transactions
  - Labels
  - Lists
  - Lot Tracking
  - Manufacturing
  - Serialized Items
  - Warehouse
  - Web
  - Sales
  - System Folders

Report Name: Inventory Purchasing Detail

Print - Inventory Purchasing Details

Choose Printer: HP48C6B4 (HP Officejet Pro 8610)

Data Source: Live EBMS Database

Product Category: Products
 

- Automotive
- Cores
- Lumber
- Metal
- Miscellaneous

Vendor Folder: Vendors
 

- Auto Parts Suppliers
- Lumber
- Misc
- Taxes

Date Selection: ETA Date  
Status: Purchase Orders  
Group by: Product Category



# Receiving

- In PO
- In Receiving Dialog

Receiving

Vendor Id: DAISUP P.O.: 108  
Dairyman's Supply, Inc. Received Date: 04/13/2019 Sat  
Mayfield KY 42066

Show only items that have not been received

	Ordered	Received	Receiving	Warehouse	Product	Measure	Description	Vendor Part Number	Linked	Purchase Method
▶	294.00	294.00		MAIN	2408	EA	2x4-8 SPF			Stocked (standard)
	100.00			MAIN	2410	EA	2x4-10 SPF			Stocked (standard)
	294.00			MAIN	2412	EA	2x4-12 SPF			Stocked (standard)
	294.00			MAIN	2420	EA	2x4-20 SPF			Stocked (standard)
	588.00	588.00		MAIN	2416	EA	2x4-16 SPF			Stocked (standard)

**Unfulfilled Orders**

Invoice	Customer	Invoice Date	Description	Warehouse	Price
102	(\$)/WHTRAN	04/04/2019 Thu	2x4-8 SPF	MAIN	
1023	DOEJAN	04/04/2019 Thu	2x4-8 SPF	MAIN	
1027	DOEJAN	04/05/2019 Fri	2x4-8 SPF	MAIN	

Total Ordered: 297.00 Total Shipped:

Close Source...

Receive All Process Close Print



# IV. Scanning

- Quick
- Easy
- Accurate

The screenshot shows the EBMS software interface. On the left, a tree view under 'Reports' has 'Specialty Printer Labels' selected. The main window displays 'Print - Product and Bin Labels (2 x 1)'. The 'Print Bar Code' checkbox is checked and highlighted with a red box. Below the dialog, three sample labels are shown for 'EAGLE' products: '2X4-8 SPF' priced at \$4.16 EA, '2X4-12 SPF' priced at \$6.25 EA, and another '2X4-12 SPF' priced at \$6.25 EA. Each label includes a barcode and the product code '2412'.

The screenshot shows the 'Print - Packing List' dialog box. The 'Show Bar Code' checkbox is checked and highlighted with a red box. Other options like 'Show Logo', 'Show Company Info', and 'Show Note on Printed Document' are also visible. The 'Print' button is highlighted.

The sample packing list is for 'Lambricht Enterprises' at '12456 Anywhere Street, Gap, PA 17527'. It includes contact information: 'Phone: (123) 123-1234', 'Fax: (123) 123-1234', and 'port@eaglebusinesssoftware.com'. The list is titled 'Packing List' and shows 'Order Number 1027', 'Date 4/5/2019', and 'Page 1 of 1'. A barcode is present and highlighted with a red box. The 'Ship To:' field is empty.

The screenshot shows the 'Print - Product Labels from Invoice (2 x 1)' dialog box. The 'Print Bar Code' checkbox is checked and highlighted with a red box. Other options include 'Print Description', 'Print Logo', 'Print Location', and 'Print Price'. The 'Print' button is highlighted.



# Scan Settings



The image shows two overlapping software windows. The top window is titled "Options" and has several tabs: "Customer Categories", "S.O. To Proposal", "Recurring Billing", "Shipping Manager", "Contacts", and "CW2 & AVS Rules". The "Invoices and S.O.s" tab is selected and highlighted with a red box. Under "User Preferences", there are several checkboxes and dropdown menus. A dropdown menu is open, showing options: "Set ordered quantity", "Set shipped quantity", "Set ordered quantity", and "Set ordered and shipped quantity". The "Set ordered quantity" option is highlighted with a blue selection bar. The bottom window is titled "Sales Invoice Entry - John Doe" and has a menu open with "Scan Entries" selected. The menu items include: Find (Ctrl+F), Find Next (F3), Change Customer... (Ctrl+H), Allow All Payment Methods (Ctrl+F5), Scan Entries (F8), Ship All Items, Recalculate All Prices, Price Calculation..., Combine Lines, Purchase Method..., Insert Serial Number... (F11), and Keystone Part Selector (Ctrl+W). The background of the bottom window shows a sales invoice form with fields for "Ship To: DOEJOH", "Date: 04/05/2019 Fri", and a table with columns "Product", "On Hand", and "Des".



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## Mobile Scanner

- Wi-Fi Enabled
- Print Labels
- Set a Quantity to Order
- Ship
- Receive
- Warehouse Transfers



- Job Transfers
- Tasks
- Adjust Counts
- Check Counts
- Set Storage Locations
- Check Price



# V. Serialized Item Specs

- Details
- Specs
- Service Only Units



**Lambright Enterprises**  
 12456 Anywhere Street  
 Gap, PA 17527  
 Phone: (123) 123-1234  
 Fax: (123) 123-1234  
 support@eaglebusinesssoftware.com

## Sales Order

Order Number	Date	Page
1050	4/13/2019	1 of 1



**Bill To:**  
 Nancy Doe  
 24 Down Town Street  
 Gap, PA 17527

**Ship To:**  
 Pickup

Customer ID	Sales Person	P.O. Number	Ship Date	Ship Via	Terms
DOENAN	MELVIN			Pickup	Cash/Check/Credit Card

Ordered	UOM	Description	Unit Price	Extended
1.00	LABOR	Labor/Services	100.00	100.00

**VIN:** A25B1993AUT - 2014, Ford, F150, White, V6  
**Mileage:** 151,346.0

Products\Miscellaneous\Customer Unit

Product: CUSTUNIT Warehouse: MAIN Category: Miscellaneous

Serial No. Specs Defaults

Description	Serial No. Specs
Year	
Make	
Model	
Color	
Engine	
Cab	

Sales Invoice Entry - Nancy Doe

Customer ID: DOENAN Invoice: 1050 Ship To: DOENAN Date: 04/13/2019 Sat

Bill To: Nancy Doe, 24 Down Town Street, Gap, PA 17527, USA

Payment: Cash, Check, Credit / Debit Card, Gift Card, Charge

Serial No. A25B1993AUT Miles/Hrs 151346

Description	Info
Year	2014
Make	Ford
Model	F150
Color	White

Serialized Item - A25B1993AUT

Serial No.: A25B1993AUT Description: 2014, Ford, F150, White, V6

Product: CUSTUNIT

Import Serial No. Specs Defaults

Description	Info
Year	2014
Make	Ford
Model	F150
Color	White
Engine	V6
Cab	Regular

Options

Unit of Measure: Serial No. Specs

Default Serialized Item: CUSTUNIT

Update serialized item description with first 5 details



# Specs in Serialized for Resale

Expense Invoice Entry - Keystone Automotive

File Process View Documents Vendor Documents Action

Vendor:  Ship To:  Pay To:

Vendor Id: KEYAUT

Keystone Automotive  
44 Tunkhannock Ave  
USA  
Exeter PA 18643

Invoice:  PO#126 Date: 04/13/2019 Sat

Payment:  Manual  Charge  Urgent

Bank Account: 01100-000 - Che

Ordered Date: 04/13/2019

Control Number:

Ordered Date: 04/13/2019 Sat

Order ETA:

Defaulted from invoice entry date, m

Calculated as Latest ETA, may be n

Enter Serial Numbers

Enter the serial numbers purchased for item PDW.

Count	Shipped	Serial Number	Description
1	✓	Z165F916E5FA581	Dewalt, Drill, 18V, 3 YR Warranty.

P.O. #:  Ship via:  Description:

126 Acct Default

Ordered	Received	Warehouse	PO
1.00	1.00	MAIN	PO

Serialized Item - Z165F916E5FA581

Serial No.: Z165F916E5FA581 Description: Dewalt, Drill, 18V, 3 YR Warranty.

Product: PDW Change...

General Costs History Tasks Images Website Serial No. Specs Invoices Documents

Import Serial No. Specs Defaults

Description	Info
Brand	Dewalt
Tool(s)	Drill
Volt	18V
Warranty	3 YR Warranty
Kit	
*	



# VI. Sales Classifications

- Cool
- Nifty

EBMS - Lambright Enterprises, Melvin

File Edit Sales **Inventory** Expenses Labor Financials Horticulture

**Options**

Automotive Automotive Formulas  
General Price Levels **Sales Level** Manufacturing

Cost Pool Maximums

Cost Level	Rank by Cost
▶ 2.00	
4.00	✓
8.00	✓
16.00	✓
32.00	✓
64.00	✓
128.00	✓
256.00	✓
999,999,999.99	
*	

Sales Level Classification

Classification	Percent
▶ A	5.0
B	15.0
C	40.0
D	70.0
E	100.0
*	

- Lambright Enterprises, Melvin

Sales **Inventory** Expenses Labor Financials Horticulture Job Costing Rental Window Help

- Product Catalog...
- Purchasing >
- Serialized...
- Lots...
- Manufacturing...
- Warehouse Transfer...
- Journal Entry...
- Display Unposted Transactions >
- Post Transactions
- Adjust Counts...
- Manufacturing Schedule
- Utilities** >
- Options...

Customers  
New Customer  
Proposals  
Invoices & SO's  
Customer Payments  
Deposits  
▶ Demo

- Inactivate Products...
- Calculate Stock Level Settings...
- Determine Sales Level...**
- Update From Vendor Catalogs...
- Import Images...
- Populate Application Guide Folders
- Update Keystone Inventory
- Manage Keystone Flyers
- Change/Merge ID's...

Determine Sales Level

Start Date: 04/10/2018 Tue

End Date: 04/05/2019 Fri

Products\Lumber\2X4-10 SPF

Product: 2410 Warehouse: MAIN Category: Lumber

General **Purchasing** Pricing Count Components Accessories Advanced Messages Shipping Product Applications Product Attri

Primary Vendor: BLUCOR  Update information from purchases Sales Classification: C

Vendor	Part Number	Message	Cost	Invoice	Date	Stock Q





# VII. Advanced Stock Levels

- Sales Predictions
- Automate Stock Levels

The screenshot displays the EBMS software interface with several key components:

- Calculate Stock Level Settings Dialog:**
  - Beginning Fiscal Period: January, 2016
  - Ending Fiscal Period: March, 2019
  - Predict inventory for this month and all following months till the end of open fiscal months: April, 2019
  - Buttons: < Back, Calculate, Cancel
- Automated Ordering Settings:**
  - Prediction Type: Best Fit
  - Maximum Formula: No Prediction
  - Minimum Formula: Average
  - Months Supply: 3.0
  - Start doing automatic calculations: 6 months after first purchase.
  - Options:  Include this item's sales history by default when superseding,  Exclude drop-ships from predictions,  Restrict history and predictions to Months Supply.
- Monthly Sales Prediction Table:**

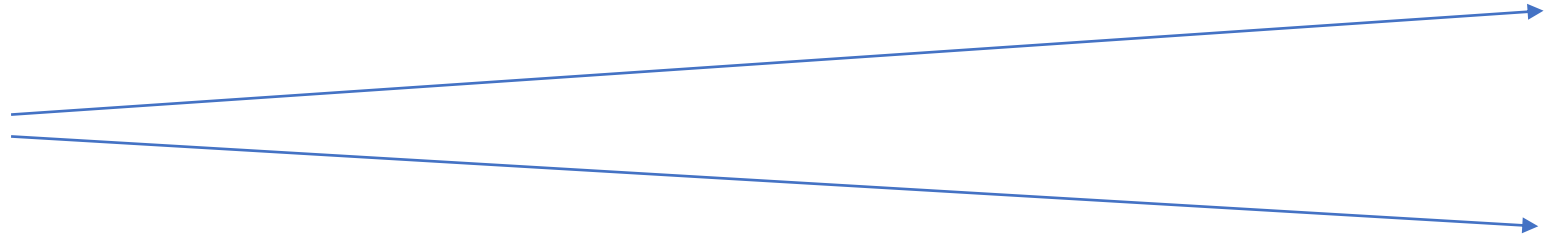
Month	On Hand	Sales Shipped	M
May	279.00	1,395.00	
Jun	279.00	1,395.00	
Jul	279.00	1,395.00	
Aug	279.00	1,395.00	
Sep	279.00	1,395.00	
Oct	279.00	1,395.00	
Nov	279.00	1,395.00	
Dec	279.00	1,395.00	
<b>Total</b>	<b>1,000.00</b>	<b>5,000.00</b>	<b>30.00</b>



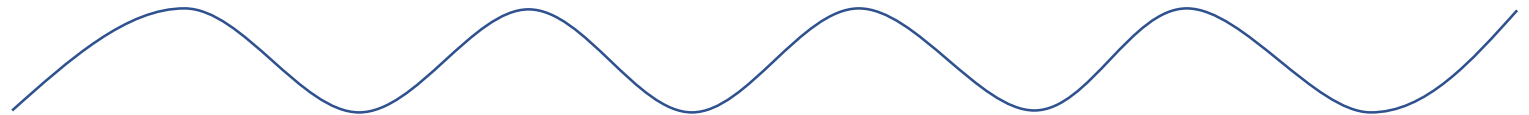
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# Sales Prediction Types

- Linear Increasing
- Linear Decreasing



- Visualizing Seasonal Prediction Type



Last Calculation of Sales Predictions:

Warehouse "MAIN"  
 Date: 04/08/2019  
 Time: 08:26 AM  
 User: MELVIN

Sales History Configuration:  
 Date Range: 1/2018 to 12/2018

Start doing automatic calculations 1 months after first purchase  
 (extended to 3 month required minimum for Best Fit)  
 Drop shipments not excluded  
 Including item 2412

Configured prediction method: Best Fit  
 Trying Seasonal method  
 $S(x) = 139.374404 \sin(\pi \cdot x / 6) + 102.437179 \cos(\pi \cdot x / 6) + 39.835910x + -107.862896$   
 Curve-fitting error = 262.118343  
 Trying Linear method  
 $S(x) = 58.151818x + 4.778324$   
 Curve-fitting error = 203.891620  
 Trying Average method  
 $S(x) = 95.720514$   
 Curve-fitting error = 222.882056  
 Selected prediction method: Linear

First Purchase Month: 2/2018  
 Predictions do not start before: 5/2018  
 (extended to 3 month required minimum for Best Fit)

Sales predictions:

Month 4/2019	153.32
Month 5/2019	160.91
Month 6/2019	168.50
Month 7/2019	176.09
Month 8/2019	183.68
Month 9/2019	191.27
Month 10/2019	198.86
Month 11/2019	206.45
Month 12/2019	214.05
Total =	1653.13

Resulting min/max stock levels based on 3.0 months supply:  
 (always starting with current month)

Month 4/2019	153.32
Month 5/2019	160.91
Month 6/2019	168.50
Total =	482.73

Result of applying Maximum formula "Add 100 %" to 482.73 = 965.00  
 Result of applying Minimum formula "Equal to" to 482.73 = 483.00

# Advanced Min's & Max's

The screenshot shows the SAP 'Automated Ordering' configuration for product 2412. The 'Prediction Type' is set to 'Best Fit' with a 'Maximum Formula' of 'Add 100 %' and a 'Minimum Formula' of 'Equal to'. The 'Months Supply' is set to 3.0. The 'Last Calculation of Sales Predictions' window is open, displaying the warehouse 'MAIN', date '04/08/2019', and the same prediction method and formula as shown in the text on the left. The background window shows a table with columns for Warehouse, Count, Net Ordered, On Hand, and Sales Shipped.

Warehouse	Count	Net Ordered	On Hand	Sales Shipped
All	279.00	-705.00	6.00	300.00
MAIN	279.00	-1,205.00	6.00	300.00
SECOND		500.00		



# Final Q & A

EBMS - Lambright Enterprises, Melvin

File Edit Sales Inventory Expenses Labor Financials Horticulture Job Costing Rental Window Help

Sales	Inventory	Expenses	Labor	Financials
Customers New Customer Proposals Invoices & SO's Customer Payments Deposits	Product Catalog New Product Purchasing Serialized Items Manufacturing Transfer to Job	Vendors New Vendor Invoices & PO's Vendor Payments Bank Accounts Job Costing	Workers New Worker Pay Periods Timecard Entry Worker Payments Tasks & Work Orders	Chart of Accounts Account Reconciliation Journal Entry Post All Transactions Depreciable Assets Reporting
▶ Demo	▶ Demo	▶ Demo	▶ Demo	▶ Demo

Lambright Enterprises, 12456 Anywhere Street, Gap, PA 17527

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**EBMS 8.2**

Ready NUM



# The End

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Your Inventory Management is often only as good as your understanding of your software tools.

***Thank you for attending the Inventory Management class!***

