

Inventory Manager 500

Integrates Into Sage 500



Bar Coding Solutions For Sage Software



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Inventory Management Business Processes

Inventory Manager 500 is a system that uses barcode scanning handheld terminals to manage inventory anywhere in the warehouse. The handheld terminals fully integrate with Sage 500/1000 and use a wireless network to ensure that all information, on both the handheld terminal and the core Sage system, is updated immediately. This means that accurate stock and stock location information is available to the entire business at all times.

There are four key Inventory and Warehouse management processes within any business:

- Goods Receipt
- Put-Away & Transfers
- Stocktake
- Sales Order Picking & Despatch.

Within each of these four key processes there are a number of more detailed sub-processes used to manage inventory (such as batch tracking), which depend on the type of business and how it operates.

Inventory Manager 500 has a core set of functions that significantly enhance the operational management and information accuracy of each of these inventory processes. Furthermore, the system can also be enhanced with the addition of Upgrade modules, which enable users to independently upgrade selected parts of *Inventory Manager 500* to suit their particular operational needs or budgets. These modules provide extended functions which are detailed below. Detailed functional specifications for each module are available separately.

Goods Receipt

Inbound goods can be receipted in a number of ways, the standard options for *Inventory Manager 500* are either GRN receipts for ad-hoc receipts or Purchase Order receipts. Receiving goods against Production Works Order receipts is also available, but requires the relevant upgrade module.

The standard functions available to the Stores person on the handheld terminal are:

- **GRN Receipt**

When the GRN receipt option is selected, *Inventory Manager 500* acquires the next Sage GRN number and books receipts to that reference. The handheld terminal will then prompt the operator for the product code which can be scanned from a barcode or keyed in.

From a validated product code, the product details and the product short description are displayed on the handheld screen, enabling visual verification that the correct product is being received.

The handheld will then prompt the user to enter the quantity of the product received.

At this stage other information may be entered depending on the business process:

- Batch Number
- Use By Date
- Serial Number

In each case, the operator will be prompted for the relevant information by the system. These prompts are product-specific – for example, if the product requires batch tracking, then *Inventory Manager 500* will request the batch number. The operator does not need to know the booking-in requirements for each specific product as the system requests the information required and will not proceed to the next stage of the Goods Receipt process unless it is entered. This ensures that all goods received are booked in correctly.

The relevant information is written in real time into Sage 500, ensuring that the central Sage system is immediately updated.

- **Purchase Order Receipts**

Purchase Order receipts enable received product to be received against a specific Sage purchase order by reviewing a list of all outstanding Purchase Orders on the handheld and selecting the relevant one. Alternatively, users can directly enter the specific Purchase Order number. In either case, the details of the Purchase Order are displayed on the handheld prior to carrying out the actual receipt.

Once the Purchase Order number has been selected or entered, the handheld will acquire the next "Q" transaction number from Sage to carry out the receipt. At this point the user is requested to enter the product code, either by scanning the relevant barcode or manually keying it in.

If a valid part number is entered and the selected purchase order has that part number as an outstanding line, then the handheld will display the product details, the quantity of product due to be received and the unit of measure that it was ordered in. The user then enters the quantity of product actually being received.



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As with the GRN receipting process, the product file configuration will dictate what other information, such as batch and serial numbers, is requested and collected.

Depending on requirements, the final step of receipt can be the creation of product or pallet barcodes. These barcodes enable tracking of subsequent movements of the stock through the warehouse or production process. Barcode labels are available in a range of formats and sizes enabling custom labelling for products, containers or pallets, selectable from a library of different options. These can be automatically printed by *Inventory Manager 500* as part of the receipting process.

Goods Receipt - Extended Functions

- *Works Orders* - Receipt of finished goods and sub-assemblies against a Works Order
- *Production Receipts* – Sage 500 production receipt functions can be run by the handhelds, enabling data capture directly from the shop floor.
- *Batch Tracking* – Track all product deliveries by batch number
- *Serial Number* – Track multiple serial numbers under one product code

Put Away and Transfers

Once a product has been received into a warehouse using *Inventory Manager 500* the next step would normally be to place the product into a bin location.

To carry out a “Put Away” the process would be as follows.

- The user selects the “Put Away” option from the menu. This will acquire the next “B” transaction type from the Sage system, which will be used for reference to record the transaction into both Sage and *Inventory Manager 500*.
- The user scans the bar code of the product that is to be put-away. This can be the Sage part number, a product code which is set up in the cross reference table or a “pallet number” as produced during the goods receipt process.
- *Inventory Manager 500* will suggest a location to the user and the goods are then physically transferred to it.
- Once the goods have been put away, the relevant bin number is scanned to confirm the location and the quantity moved to that location is entered.

At some stage it is likely that the product will be moved again, from one location to another. If this is within the warehouse then the “Bin to Bin”

functionality is used, if it is between warehouses then the “Warehouse to Warehouse” functionality is used. These operate as follows:

• Bin to Bin Transfer

The user activates the bin to bin transfer option from the handheld menu, and selects a transfer reason code from a list, which is customer configurable. Once selected, the handheld will prompt the user to scan or enter the “Source Bin”. The handheld will then prompt the user to scan the product code of the item(s) being moved. The system will validate that the product scanned is actually expected to be in that location and alert the user if there is a discrepancy. If the product code is valid and it is in the correct location, the product details are displayed and the user requested to confirm the transfer. Next, the user is requested to scan the “Target Bin” location. On entry of a valid bin number the user is asked to enter the quantity of product being transferred. Once confirmed, the database will be immediately updated.

• Warehouse to Warehouse transfer

Moving product between warehouses is similar in operation to the bin to bin transfer except that, in the final step, both the target warehouse and the target bin details are requested via the handheld.

Transfers - Extended Functions

- *Allocation* - Real-time allocation of product for transfers
- *Batch Tracking* – Track all product movements by batch number
- *Serial Number* – Track multiple serial numbers under one product code

Stocktaking

The stocktaking function within Sage is used to generate stocktake ‘cards’. These are then available for use on the relevant handhelds, ready for entry of the physical stocktake details.



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There are two different methods of creating stocktake cards within *Inventory Manager 500*:

- *Product Guided* – where the user is guided by the card to specific bin locations to stocktake specific products.
- *Location Guided* – where the user has to check all the bins in a defined location or area.

Product Guided Process

This process is to stocktake specific products:

- The handheld user selects the “Std Stock Take” option, which will display a list of valid stocktake cards available.
- The handheld user selects the stocktake card they wish to use, which will display the first bin location to stocktake
- The bin number is scanned and the handheld displays the product to be counted within that bin. The product code and, if relevant, the batch number are scanned in and verified and then the physical product count is entered.

This sequence will be repeated for each item on the stocktake card until all products have been identified and counted. Each time a line is completed on the stocktake card the count value is entered into the Sage stocktake card. Only information related to those products listed on the stocktake card can be updated.

Location Guided Process

In the user guided stocktake, the aim is to count all the products that are found in a set of defined bins. The stocktake card controls which bins are to be checked but will allow any valid product to be in the locations. This means that stock found in any location listed on the card may be counted and its quantity and location adjusted accordingly. The process is:

- The user selects the option “*Det Stock Take*” which displays all the valid stocktake cards. The user selects the card that they wish to work with and is prompted to scan one of the bin numbers listed.
- The user is then prompted to scan a product code. This has to be a valid product code within Sage, but not necessarily on the stocktake card. If a product not on the stocktake card is found then it is added to the stocktake card within Sage
- The user is then prompted to enter the physical product count.

This information is transferred online to the selected stocktake card within Sage, which is then used to review and post the amendments in the normal way.

Stocktake - Extended Functions

- *Batch & Use By* – Stocktake batch numbered or *Use By* dated goods
- *Serial Numbered Goods* – Stocktake individually numbered items

Sales Order Picking & Despatch

Once a Sales Order has been raised and released by Sage, it immediately becomes available on the handheld for the user to pick. This process is as follows:

- Select the “*Sales Order Pick*” option on the handheld and choose the relevant Sales Order by means of either the Sales Order number or the pick list. Alternatively, the Sales Orders can be listed and selected by age of order.
- Prior to selecting the specific order to pick, the user may view the detail of the orders and review individual lines within the order, showing the size and type of goods to be picked. This enables users to understand if there are any special handling instructions or other requirements related to that order.
- Once the order is selected for picking, the handheld will present the details of the order in bin sequence to the operator, showing the product details and bin location to be picked.
- The handheld will then wait for the bin number to be scanned before prompting the user to scan the product code.
- Finally, the quantity of product being picked is entered.

Once all the lines on the order have been picked there is the option to confirm the packing and dispatch method. When this information is entered, the order is marked as picked and Sage is updated, ready to complete the invoicing process.



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Optional Upgrade Modules

With these modules *Inventory Manager 500* can be selectively upgraded, providing extended functions and enabling progressive customisation of the system in a highly cost-effective and controlled manner.

These Upgrade modules are derived from our market-leading *Warehouse Manager 500* system, which is widely recognised as the most flexible and comprehensive warehouse management system available for *Sage 500/1000*. The modules automate specific business process areas and can be activated at any time.

Each module can be activated independently of the other and, as well as adding specific new functions, they also enhance the core functionality of *Inventory Manager 500*. Details of these modules are available separately, but to fully appreciate their potential benefit to your business, contact us to discuss your objectives and requirements.

More detailed information on each of the modules is available but a brief description of each and some of the additional functions are given below.

Auto Dispatch Confirm

This module automatically updates Sage as soon as the handheld operator has confirmed the Sales Order as picked and shipped.

Enhanced Serial Number Handling

This module manages the tracking of large numbers of serial numbered products. A range of functions exist, including specifying when to capture serial numbers for Receipt or Sales Dispatch transactions.

Goods Transfers

Provides the ability to actively manage allocation of product for Transfers.

Enhanced Stocktaking

This module enhances the standard Sage stocktake functionality by providing a more flexible set of stocktaking functions.

Sales Order Advanced Functions

This module provides significant additional flexibility for Sales Order allocation, Stock Allocation and Marshalling of orders by load or Courier.



Works Orders

This module enables the issue of raw material stock to, and the receipt of finished goods and sub-assemblies against, the relevant Works Order within Sage. It also provides specific item Backflushing where appropriate.

Production Issues & Receipts

This module enables the Sage 500 'Production Issue' and 'Production Receipt' functions to be run from the wireless handhelds, enabling the relevant details to be captured directly from the shop floor.



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Enquires

Within *Inventory Manager 500* there are a number of user enquires that provide real-time stock and location information. These can be viewed on a PC or on a handheld in the warehouse. They provide a more detailed view of the inventory position than may be available in standard Sage.

Barcode Labels

Inventory Manager has a portfolio of labels which may be used to label products, cases, pallets, bins and locations.

Batch, Use By and Serial Number Tracking

The ability to track goods is becoming increasingly important in all industries, and remains vital in others. Inventory Manager 500 can track the receipt, transfer, stocktake and despatch of individual *Batches, Use By* and *Serial Numbers*. This is done by configuring the Product files. For example, the system can be configured so that, at Goods Receipt, the Batch number information has to be entered or the receipt cannot be completed. This enables managers to implement a disciplined approach to the collection of key information.

Serial Numbers can be scanned or entered. Electronic import of serial numbers against a Purchase Order is also available, but requires the relevant Upgrade module.

During Stocktake, Batch Information can be requested by product code.

Product Code Cross References

Within *Inventory Manager 500* there is a cross reference table that enables external product numbers to be linked to internal Sage product codes. This means that a supplier's product codes and barcode labels can be used to receipt and track stock, avoiding the need to re-label products or manually look up the relevant internal product code. This is especially useful in Retail businesses, where EAN codes are almost universally used within the supply chain.

Data Verification

All the processes are verified in real-time, preventing incorrect products, locations or batch numbers being used.

The following key fields are all verified in **real-time**:

- Product Codes
- Batch Numbers
- Serial Numbers
- Pallet Numbers
- Bin Locations
- Purchase Orders
- Works Orders
- GRN numbers

Business Benefits

Inventory Manager 500 ensures that the accuracy of all inventory data is high, creating significant business benefits. Typical proven benefits are:

- Goods Receipting - 20% Faster
- Stocktaking - 50% Faster
- Sales Order Picking - 20% Faster
- Sales Order Picking - 100% Accurate

The Payback on our systems is typically 18 months, usually far sooner.

For more details on business benefits, go to our website: www.datalinx.co.uk

Datalinx reserve the right to amend specifications and functionality as part of our commitment to continuous improvement.

