Multi-Store Levels

Introduction

The **Levels** feature allows you to view and manage inventory stock quantities by vendor and vendor style in an interactive form. This form contains pertinent statistics about each styles' performance with the option to break down by store. It also includes the ability to transfer items between stores.

Designed to be used in concert with the **Reorder Form/Report** and **Purchase Order** features, it helps you maintain optimal stock levels. To this end, it also lets you define minimum and maximum levels for each style either by company (all stores) or per store. Each style contains a button that allows you to toggle between managing it by company or store.

Viewing Levels

To view inventory **Levels**:

1. Click **Inventory > Items > Levels**. The **Item Levels** filter will appear. Note this strongly resembles, and functions like, the **Item Find** filter.

2. Leave blank to see all styles or enter criteria to filter (e.g. entering a vendor will only display styles for that specific vendor), then click **OK**.

Interactive form includes:

Vendor	The vendor for this style.
Style #	The vendor's style number.
Store	When style expanded via drop-down, it shows stock breakdown by store #.

	When style condensed to one line, it will display summary of all stores combined. If this summary line states **Totals**, this style is being managed by store. If this line states **All**, this style is being managed by company (all stores).
Min	The minimum quantity to keep in stock. Use in conjunction with Reorder Form/Report to automate maintaining stock levels.
Max	The maximum quantity to keep in stock. Use in conjunction with Reorder Form/Report to automate maintaining stock levels.
# In Stock	Quantity currently in stock.
On Order	Quantity currently on a PO that has not been received or canceled.
Avg Days On Hand	For **# Instock**, the average number of days these items have been in stock.
MR Received	The date of the last time an item of this style was added to inventory.
# Sold	Total number of this style ever sold.
Avg Days To Sale	For **# Sold**, the average number of days these items were in stock before being sold.
MR Sold	The date of the last time an item of this style was sold.
# SPO	Of **# Sold**, the quantity that were sold on special order. This only includes sold (i.e. picked up) special orders.
Retail	The retail price for this style.
Cost	The cost for this style.
# Other	The total quantity for this style that are not in stock or sold (excluding special order), i.e. layaway, memo out, returned to vendor, missing, assembled/disassembled, donations, giveaways, scrapped, etc.
Do Not Reorder	Mark this style to never be reordered. This will prevent it from ever appearing on the Reorder Form/Report. However, the style will still be available in the vendor style drop-down when adding inventory for this vendor.
Discontinued	Mark this style discontinued. This will prevent it from ever appearing on the Reorder Form/Report and will also prevent it from showing in the vendor style drop-down when adding inventory for this vendor.
Description	The item description for this style.

3. The form will display each style condensed into one summary line. Use the drop-down button at the beginning of the line to expand the breakdown by store.

	Vendor	Style #	Store	Min	Max	# In Stock	On Order	Avg Days On Hand
⌃	AB	ABC-101A	Totals	6	10	4	0	39
			HQ	0	0	0	0	
Transfer			1	2	4	1	0	103
Transfer			2	4	6	3	0	18
			3	0	0	0	0	

4. The **Transfer** button will only appear on lines where the store has in stock items. You can use it to transfer these items to any of the other stores.
5. The **Show Images** checkbox at the bottom can be used to enable and disable images.
6. The **See Items** button at the bottom will bring up all matching items for the selected style regardless of current status.

7. The **Store** drop-down at the top allows you to filter styles by store.

> **NOTE:** Only styles that are being managed per store will display when you filter by store. Any styles being managed by company will NOT display.

Setting Levels

Minimum and maximum stock quantities can be set for each style. When the **Reorder Form/Report** is run, it will suggest ordering items to maintain the stock levels you set. Style levels can be managed at the company level (all stores) or individually by store.

To set levels:

1. Click **Inventory > Items > Levels**. Enter any desired criteria and click **OK**.
2. Click the drop-down on the style you want to set so that it expands the store breakdown.
3. Click the **Edit Levels** button in the top right. The **Min** and **Max** fields will unlock. Use the button below the style's image to toggle between managing by store (**Set Individually**) or by company (**Set Company**).

4. Notice when managing **By Company**, the first line displays **All** for store. This indicates all stores are being managed together. The first line for **By Store** displays **Totals** indicating styles are being managed by store and these are the totals of all stores combined.
5. Enter desired **Min** and **Max** quantities. In this example, we are setting by store.

6. Click the **Save Levels** button in the top right.

7. When the **Reorder Form/Report** is run to include **Styles Below Reorder Point** any styles below the **Max** quantity will display with a suggested order quantity to replenish to **Max** quantity.

8. From here you can use **Queue Items for Order** to queue the items for placement on a purchase order. These items can either be queued together to an HQ location or queued for specific stores; the checkbox at the start of the line indicates where to queue. It is possible to select multiple stores, i.e. you can queue items for store 01, 02, etc.

Next Steps

For more information on the next steps in the ordering processing see:

- ➢ **Multi-Store Reorder Form/Report**
- ➢ **Multi-Store Purchase Orders**