

We are currently updating our site; thank you for your patience.

INVENTORY

PARTS – STOCK CONTROL – MIN/MAX REORDER METHOD

Stock control determines how you will replenish your stock. For example, which **reorder method** will be used to trigger the process to bring stock into the warehouse ready for sale.

In Nucleus Service you have the ability to set a **reorder point method** and to set a **minimum and maximum level reorder method**.

The **Min-Max** process set out below is considered the simplest method of inventory control.

The **minimum level** of inventory for a part is generally defined as the quantity of that part which is required to be kept available in stock at all times. This figure is based on factors including **lead time**¹ and expected sales of the part in a particular time period, for example, over a week or month.

It is important to make sure there is enough stock on hand to ensure that business operations are not impacted and that customer demand can be met.

The **maximum level** of inventory for a part is defined as the quantity of that part which must not be exceeded in stock. This figure is based on factors such as the cost of storage and insurance, inventory turnover and the nature of the part, e.g., is rapid **obsolescence**² a consideration?

¹The lead time is the amount of time between when an order is placed with a supplier and the time that order is delivered and received by the company.

²This is the process of becoming obsolete or outdated and no longer used.

Ribbon Select Inventory > Parts

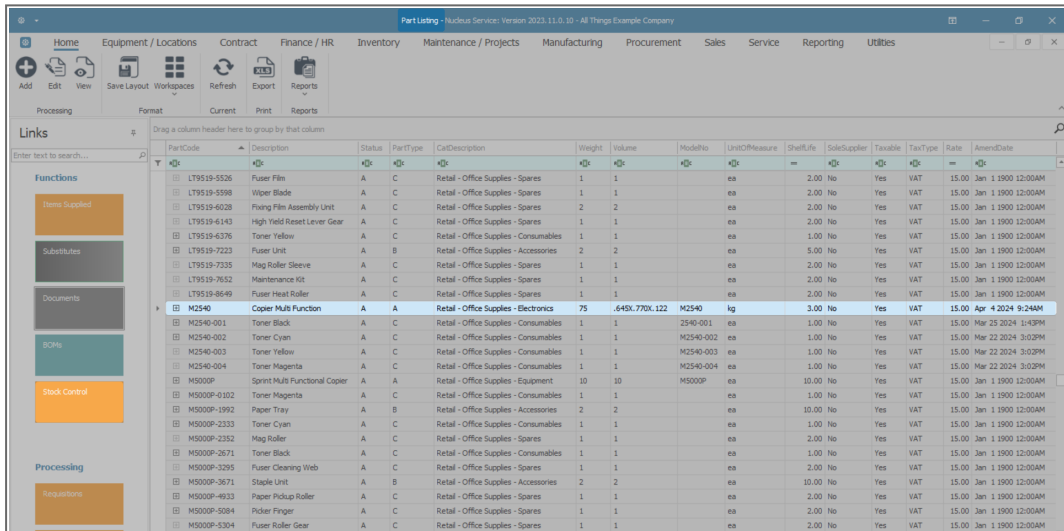


- The **Part Listing** screen will be displayed.

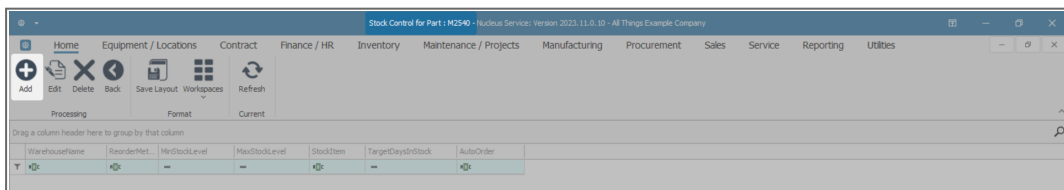
ADD A MIN/MAX REORDER METHOD

SELECT THE PART DEFINITION

- Select the **row** of the part definition where you wish to add a reorder **Min / Max** level.
- Click on the **Stock Control** tile.

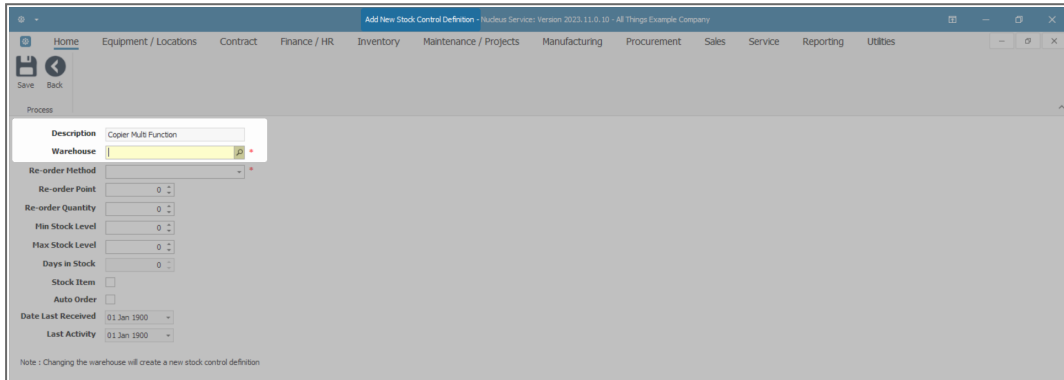


- The **Stock Control for Part: []** screen will open.
- Click on **Add**.

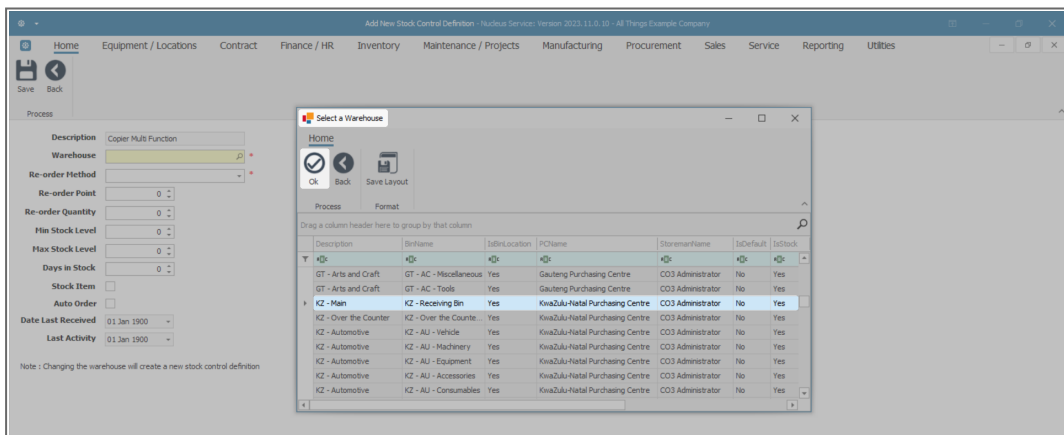


ADD MIN/MAX DETAILS

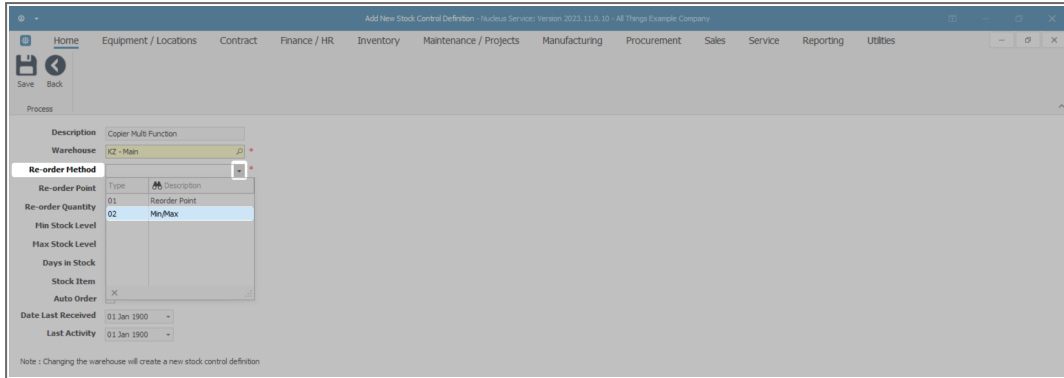
- The **Add New Stock Control Definition** screen will be displayed.
- **Description:** This will auto populate with the description of the part definition selected in the previous step.
- **Warehouse:** Click on the **search** button in this field.



- The **Select a Warehouse** screen will pop up.
- Select the **row** of the warehouse where you wish to **add** a reorder **Min / Max** method.
- Click on **Ok**.



- The selected **warehouse** will populate the field.
- **Re-order Method:** Click on the drop-down arrow and select **Min/Max** from the list.



The screenshot shows a web-based form titled 'Add New Stock Control Definition - Nucleus Server: Version 2023.11.0.31 - All Things Example Company'. The form is for defining a stock control method. Key fields include:

- Description:** Copier Multi Function
- Warehouse:** KZ - Main
- Re-order Method:** Min/Max (selected from a dropdown)
- Re-order Point:** 01 (Type: Reorder Point)
- Re-order Quantity:** 02 (Type: Min/Max)
- Min Stock Level:** (empty)
- Max Stock Level:** (empty)
- Days in Stock:** (empty)
- Stock Item:** (checkbox, unchecked)
- Auto Order:** (checkbox, checked)
- Date Last Received:** 01 Jan 1900
- Last Activity:** 01 Jan 1900

Note: Changing the warehouse will create a new stock control definition.

- Continue adding the stock control definition details, as required:
- **Re-order Point:** This field will be uneditable as it is only applicable if you are setting a [Re-order Point method](#).
- **Re-order Quantity:** This field will be uneditable as it is only applicable if you are setting a [Re-order Point method](#).
- **Min Stock Level:** Type in the minimum quantity to be kept in stock.
- **Max Stock Level:** Type in the maximum quantity to be kept in stock.
- **Days in Stock:** Type in the average number of days that this part is stored in the warehouse before being sold.
- **Stock Item:** Select this check box if the part is kept in stock.
- **Auto Order:** Select this check box if you want the system to auto order according to the stock control set up.
- **Date Last Received:** This field is uneditable for the re-order method.
- **Last Activity:** This field is uneditable for the re-order method.
- When you have finished adding your reorder point stock control definition, click on **Save**.

- You will return to the **Stock Control for Part: []** screen.
- The added **Min/Max method** details will be listed in the data grid.
- Click on **Back** or **Close** the screen to return to the **Part Listing** screen.

WarehouseName	ReorderMethodDesc	MinStockLevel	MaxStockLevel	StockItem	TargetDaysInStock	AutoOrder
KZ - Main	Min/Max	15	45	Yes	3	Yes

EDIT A MIN/MAX REORDER METHOD

SELECT THE PART DEFINITION

- In the **Part Listing** screen -
- Select the **row** of the part definition where you wish to **edit** the reorder **Min/Max** method.
- Click on the **Stock Control** tile.

PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	SoleSupplier	Taxable	TaxType	Rate	AmendDate
LT9519-5526	Fuser Film	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-5598	Wiper Blade	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-6028	Fixing Film Assembly Unit	A	C	Retail - Office Supplies - Spares	2	2		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-6143	High Yield Reset Lever Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-6376	Toner Yellow	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-7223	Fuser Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	5.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-7333	Mag Roller Sleeve	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-7652	Maintenance Kit	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
LT9519-8649	Fuser Heat Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M2540	Copier MJB Function	A	A	Retail - Office Supplies - Electronics	75	.645X.770X.122	M2540	kg	3.00	No	Yes	VAT	15.00	Apr 4 2024 9:24AM
M2540-001	Toner Black	A	C	Retail - Office Supplies - Consumables	1	1	2540-001	ea	1.00	No	Yes	VAT	15.00	Mar 25 2024 1:43PM
M2540-002	Toner Cyan	A	C	Retail - Office Supplies - Consumables	1	1	M2540-002	ea	1.00	No	Yes	VAT	15.00	Mar 22 2024 3:02PM
M2540-003	Toner Yellow	A	C	Retail - Office Supplies - Consumables	1	1	M2540-003	ea	1.00	No	Yes	VAT	15.00	Mar 22 2024 3:02PM
M2540-004	Toner Magenta	A	C	Retail - Office Supplies - Consumables	1	1	M2540-004	ea	1.00	No	Yes	VAT	15.00	Mar 22 2024 3:02PM
M5000P	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	M5000P	ea	10.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-0302	Toner Magenta	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-1992	Paper Tray	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-2333	Toner Cyan	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-2352	Mag Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-2671	Toner Black	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-3295	Fuser Cleaning Web	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-3671	Staple Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-4933	Paper Pickup Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-5084	Picker Finger	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM
M5000P-5304	Fuser Roller Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00	Jan 1 1900 12:00AM

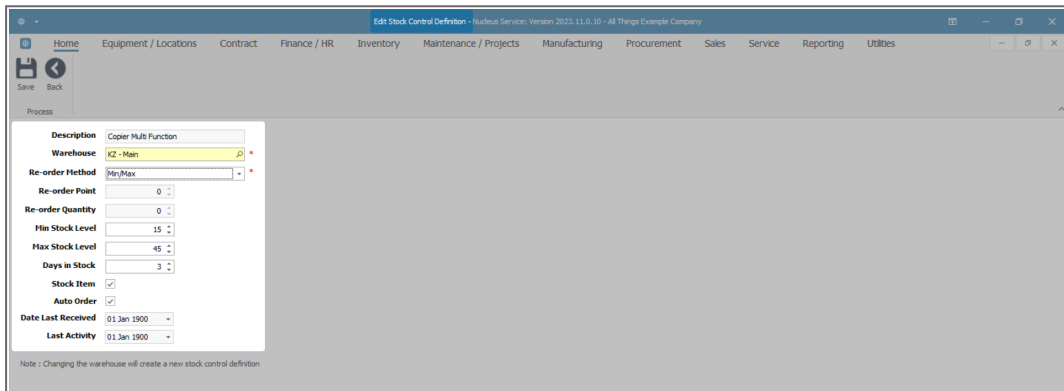
- The **Stock Control for Part: []** screen will open.
- If there is more than one stock control method in the data grid, ensure you select the **row** that contains the reorder **Min/Max** method where you wish to make changes.
- Click on **Edit**.

WarehouseName	ReorderMethodDesc	MinStockLevel	MaxStockLevel	StockItem	TargetDaysInStock	AutoOrder
K2 - Main	Min/Max	15	45	Yes	3	Yes

EDIT THE MIN/MAX DETAILS

- The **Edit Stock Control Definition** screen will open.
- The following fields can be edited:
 - **Warehouse:** Click on the **search** button and choose from the **Select a Warehouse** pop up screen, the warehouse you wish to link to this reorder point method. (See **Add a Reorder Min/Max Method** above, for a more in-depth explanation.)
 - **Min Stock Level:** Edit the minimum quantity to be kept in stock.

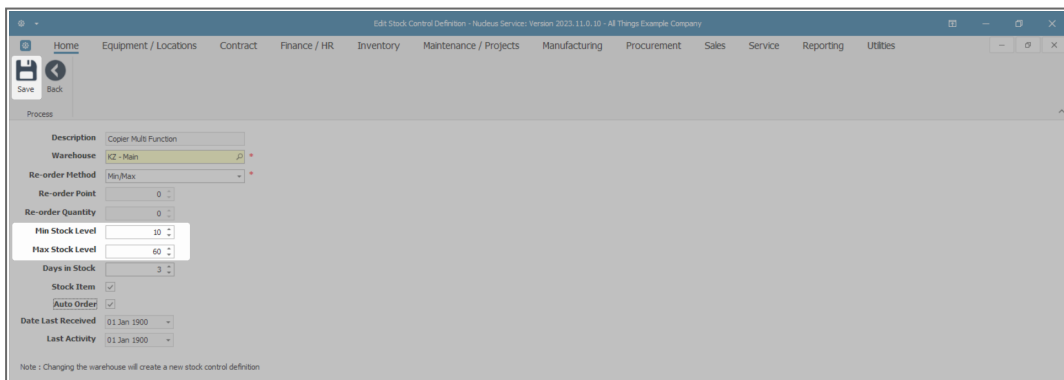
- **Max Stock Level:** Edit the maximum quantity to be kept in stock.
- **Days in Stock:** Edit the average number of days that this part is stored in the warehouse before being sold.
- **Stock Item:** Edit this check box as required. Select it if the part is to be kept in stock, otherwise leave blank.
- **Auto Order:** Edit this check box as required. Select it if you wish the system to auto order this part according to the stock control set up, otherwise leave blank.



Description: Copier Multi Function
 Warehouse: KZ - Main
 Re-order Method: Min/Max
 Re-order Point: 0
 Re-order Quantity: 0
 Min Stock Level: 15
 Max Stock Level: 45
 Days in Stock: 3
 Stock Item:
 Auto Order:
 Date Last Received: 01 Jan 1900
 Last Activity: 01 Jan 1900

Note: Changing the warehouse will create a new stock control definition

- In this example, the **Min Stock Level** has been changed to **10** and the **Max Stock Level** has been changed to **60**.
- When you have finished editing the details in this screen, click on **Save**.



Description: Copier Multi Function
 Warehouse: KZ - Main
 Re-order Method: Min/Max
 Re-order Point: 0
 Re-order Quantity: 0
 Min Stock Level: 10
 Max Stock Level: 60
 Days in Stock: 3
 Stock Item:
 Auto Order:
 Date Last Received: 01 Jan 1900
 Last Activity: 01 Jan 1900

Note: Changing the warehouse will create a new stock control definition

- You will return to the **Stock Control for Part: []** screen.
- The edited details can be viewed in the data grid.
 - In this example, the **Min Stock Level** and **Max Stock Level** were edited to **10** and **60**.
- Click on **Back** or **Close** the screen to return to the **Part Listing** screen.

WarehouseName	ReorderMethodDesc	MinStockLevel	MaxStockLevel	StockItem	TargetDays/Stock	AutoOrder
K2-Main	Min/Max	10	60	Yes	3	Yes

DELETE A MIN/MAX REORDER METHOD

SELECT THE PART DEFINITION

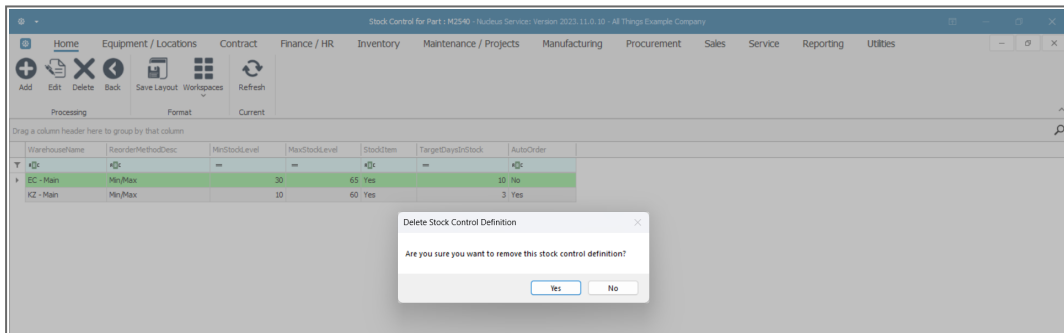
- In the **Part Listing** screen -
- Select the **row** of the **part** where you wish to **delete** the reorder **Min/Max** method.
- Click on the **Stock Control** tile.

PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	SoleSupplier	Taxable	TaxType	Rate	AmendDate
M2540	Copier Multi Function	A	A	Retail - Office Supplies - Electronics	75	.645x.770x.122	M2540	kg	3.00	No	Yes	VAT	15.00	Apr 4 2024 9:24AM

- The **Stock Control for Part: []** screen will open.
- If there is more than one stock control method in the data grid, ensure you select the **row** that contains the reorder **Min/Max** method that you wish to **unlink** from the part definition.
- Click on **Delete**.

WarehouseName	ReorderMethodDesc	MinStockLevel	MaxStockLevel	StockItem	TargetDaysInStock	AutoOrder
EC - Main	Min/Max	30	65	Yes	10	No
KZ - Main	Min/Max	10	60	Yes	3	Yes

- A **Delete Stock Control Definition** message box will pop up with the following prompt:
 - **Are You sure you want to remove this stock control definition?**
- Click on **Yes**.



- The reorder **Min/Max** reorder method will be **removed** from the data grid.
- Click on **Back** or **Close** the screen to return to the **Part Listing** screen.

The screenshot shows a software window titled "Stock Control for Part: M2540 - Nucleus Service: Version 2023.11.0.10 - All Things Example Company". The interface includes a navigation menu with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Workspaces, and Refresh. A processing bar is visible with "Processing" and "Current" buttons. The main area contains a table with the following data:

WarehouseName	ReorderMethodDesc	MinStockLevel	MaxStockLevel	StockItem	TargetDaysInStock	AutoOrder
KZ - Man	Min/Max	10	60	Yes	3	Yes

MNU.026.002