Adding Inventory Item Master Records

Adding Inventory Items

Prior to adding new item master records for a vendor, a vendor code master record must be set up. From the Inventory Menu, select **Item Master**. With the "Main Inventory" screen displaying, press [**F12**] and **V** for Vendor scrn. Follow instructions in the document "Adding Inventory Vendor Code Master."

Next, with the "Main Inventory" screen displaying, press the function key F8=TAB SETTING. Set tabs for field stops. Refer to the document "Inventory Tab Set Procedure" for more information.

The screen below is a sample. Modify the tab stops as needed.

```
MM/DD/YYYY               TAB SET FOR MAIN INVENTORY
Item No:                          Vendor Code:      Sort:
UPC Num:                          Description: Y
Product Group:     Sub Group:    Stock: Y  Display:Y   Serial #:    Kit Flag:
Related:  Y                       Y    Qty: Y     Chrg: Y  Room: Y  Note:

Prices:    RETAIL      OUR $       BUILDER     SPECIAL     MSC       Base/Costs
------                                                      Y          Y

LBR
Promo:          THRU          Level:   Pr/ADJ:             Avg Cost:
Round:     Mfg:                                            Last Rec:
Room:      Pop:    LBR :    Free:     Supplier: Y    Archive: Y  Net:    Tax:
Ext. Sales:    Loc:          Div:  Y   Alt:                              /

Quantities:  On Hand:           On Order:          Reorder Level:Y
----------   Reserved:          Backorder:         Minimum ROL:  Y
             Available:         Special:           Pkg: Y  Y          Y
             CBO:               Weight:  _         Date Last Purch: _
                                                   Date Last Rec:   _
                                                   Date New Item:   _

ENTER 'Y' TO STOP / 'N' OR ' ' TO NOT STOP.  MUST RETURN THROUGH ALL FIELDS .
 ARE ALL ENTRIES CORRECT Y OR N ?
```

A brief explanation of typical "tab stop" fields is given below.

Item No: Enter Item number.

Vendor Code: Enter vendor code. A vendor code master must exist for the vendor code.

Sort: Typically [Enter] is pressed to leave this field blank. A user defined code can be entered in the Sort field to group similar items together within a vendor line for inquiries, reports, and when using Pg Up and Pg Down to scroll through inventory. Refer to manual for more information or contact Mylee Customer Support. (Not widely used because it is high maintenance.)

Description: Enter the item's description (not a required field).

Stock: Enter "S" if this is a stock item. "F" is for stock items that should automatically "F"orce sell when the quantity is not available. "X" is for Discontinued items. Leave the stock field Blank for special order items.

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Display: Optional. Valid entries are D=On Display; N=New (hang tag needed); Blank=Not on display. 0-9 Customer defined. Some users update the display flag based on "point of sale display tickets."

Serial#: Press [Enter] to accept the default value of N. The cursor stops at Serial# because the system requires a value of Y or N; it cannot be blank. Typical lighting showroom items do not require a serial #. (For Lighting Showrooms that carry appliances requiring serial numbers, separate documentation is available on serial number tracking.)

Kit: Press [Enter] to accept the default value of N. The cursor stops at Kit because it is a required field. Separate documentation is available describing how to set up catalog kits.

The next line in the item master is for entry of **related item information**. Typically, a related item is the bulb for the item you are adding. (Some users set up fan blades as related items.) An example is shown below:

```
Related:  15A15CL                    BLB  Qty:    1  Chrg: Y  Room: I  Note:
```

The default values for the related item fields Chrg, Room and Note are set up in table options. To view the default values set up in table options: From Main Menu, select System Administrator, Options Menu, Table Options, Inventory Options.

Related: Enter related item number, followed by the related item number's vendor code.

> **Qty**: Enter the quantity of the related item needed (e.g. the number of bulbs the fixture requires).
>
> **Chrg**: "Y" if you charge for the related item (bulb) separately. "N" if the price of the bulb is included in the fixture price.
>
> **Room**: "I" to keep the related item grouped in the same room as the fixture on a point of sale order.
>
> **Note**: Blank in this example. (Users who choose to group the bulbs in a "Miscellaneous Room" on a point of sale ticket may want to print a "bulb note line" on a picking ticket or job label. These would require note flags of P for picking ticket and/or L for job label.)

Cost E: The cost E field is typically the "published book cost." The heading for the Cost E field is defined in Main Options. The example above uses the heading "-PrSht-" for Cost E meaning "Price Sheet" cost. Some use their company initials for the heading. To view or change the headings for the price and cost fields: From Main Menu, select System Administrator, Options Menu, Main Options. The labels are shown on the first screen of Main Options.

Base/Cost F: This is the item's actual cost. Cost F will often be the same as Cost E. When an item has a "Quoted" cost or "Tab" cost, it should be entered in this field. Cost F is typically (though not always) used as the for purchasing and as the Cost-of-Goods Sold for sales analysis and accounting purposes. Some users leave Cost F blank (zero) during the initial load and then use a batch process to copy cost E to F unless F contains a Quoted or Tab cost.

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Supplier: Enter a Q in the first position of this field if Cost F is a quoted cost. Enter T if Cost F is a Tab Cost. Placing a Q or T protects the quoted cost during the batch process that copies cost E to F. Also, placing a "Q" or "T" in Supplier allows you to print a list of quoted and/or tab cost items for a vendor.

Archive: Blank to print a job label for the item; L to not print a job label for the item. O (the letter O) to print "O"ne job label regardless of order quantity. Refer to "Inventory Archive Flag" documentation for more information.

> Note: If all items for a specific "division" (group of items) should not have a job label printed (such as for light bulbs or replacement glass), the archive flag of "L" can be "plugged" in the archive field for that division using query rather than entering it on each item individually when loading new items.

Ext. Sales: Press [Enter] to accept the default value of Y to keep extended unit sales (15 months) for this item. The cursor stops at Ext Sales because it is a required field. It is recommended that "Y" be used for all items.

Div: Enter division code. Division codes are user defined and refer to a "product group" of inventory items. Refer to the list of division codes used by your company. (Examples: FX=Fixture; DA=Decorative Accessories.) Batch pricing can be done by Division Code (e.g. all decorative accessories can be priced with the same markups using a batch process). Sales Analysis reports also may be printed by "division."

> NOTE: If the division code is the same for all items within a vendor line, a default division code can be entered in the vendor code master. This will cause the division code to pre-fill as new items are added for that vendor.

Reorder Level: Stock level quantity to maintain. The ROL can be used in purchasing to suggest an order quantity. Refer to the "Purchasing Reference ROL & Min ROL" document for more information.

Minimum ROL: Qualify quantity point to trigger ordering. This field is used in conjunction with Reorder Level. Refer to the "Purchasing Reference ROL & Min ROL" document for more information.

Pkg: Package Qty and Description. Can be used in purchasing to round order quantities to package quantity. Package Qty codes can be set up in main options to speed up data entry. Refer to the "Item Package Qty Setup" document for more information.

OK TO ADD RECORD? (Y OR N) Respond **Y** to add the item to inventory. (If [F10] is pressed at any point while filling out the item master, the "OK to Add" prompt will display.)