

OFSY™

Extending Your Business Reach

OFSY™

INVENTORY

OFSY provides your Inventory department with:

Unit of Measurement Group

This feature enables inventory to order and receive items in terms of any defined unit of measure .

Unit of measurement group , allows the user to group similar units within one head . Each unit of measurement group has a base unit of measure. All the other units of measurements belonging to this group will be related to the base unit of the UOM group.

Unit of Measurement

This provides functionality of creation of units of measurements within a particular group of unit of measurement . These are the units in which the items will be purchased ,sold ,and ordered .

Conversion Factors

Conversions are numerical factors specified between Units of measurements that enables the user to perform transactions in units other than the primary unit of the item being transacted. Three different types of conversions can be specified.

a)Standard

This specifies the unit of measure conversions common to all items . Here the non base units of UOM Group are related to the base UOM of the same UOM Group. Before a non base unit is assigned to an item there should exist a relation between this non-base unit and the base unit of the UOM Group to which the non base unit belongs

b)Item Specific

This specifies the conversions specific to each item .

This again is of three types -

i)Intra class .

Each item has a primary unit of measurement and this primary unit of measurement belongs to a UOM Group. Intra class conversion allows the user to specify the conversion factors between the non base unit of the UOM Group of the primary unit of the item, to the base unit of the UOM Group .

This conversion is specific to the item .

Eg

1 Carton = 24 Each for item X whereas ,

1 Carton = 12 Each for item Y.

ii) **Inter Class**

This conversion method is to accommodate the situation in which an item is stocked in one unit and is sold in a unit belonging to a different UOM Group. E.g. Item being stocked in Kg and sold in LiterS So this method allows the user to specify the conversion factor relating the base units of different UOM Groups .

c) **Both**

In this case for a given item ,all units whether following standard conversions or item specific conversion methods are shown .Here item specific conversions are given preference over the standard conversions. Item specific conversions are given priority over standard conversions. This means that if more than one conversion exists between X and Y unit then item specific conversion is given priority over standard conversion. Whenever an items quantity is entered the default will be the primary unit of that item

The Primary unit of an item can be different from the base unit of the UOM Group .In the UOM field all the units of measurements for which the user has defined standard and/or Item specific units of measurement has been specified from the primary unit of measurement of the item.

· **Parameter Groups**

Creation of parameter groups allows the user to create customisable groups under which the item information can be entered .Some of the examples of parameter groups might include -

- i) Storage parameters.
- ii) Tax related information.
- iii) Characteristics/properties.

· **Item Template**

Here a provision is provided where in the user can himself enter the parameters that he wants while creating items of a particular category .For this ,the user has to select the parameters that he needs for a particular category of items . At the time of item creation , the moment a particular category is selected the parameters customised by the user for a category of items will be shown so that the user sees only those parameters in the form that he intends to see .

· **Item codification**

This is a very important feature of inventory module wherein an item code for a particular category of items can be customised as per users requirement .Here the user can specify the structure of the item code that he wants to set for all items belonging to a particular category .Item codification standards once set cannot be modified later . This codification structure will be followed for all items falling within that category .

· **Items**

Here the user first has to specify the category to which the item belongs and also the type of item that the user wants to create . If the control level of an item is Master and the field is updateable then that field can be modified at the master level but not at the location level and if the control level is location then that field can be modified at the location level as well the field is updateable .Each item has an item code which is not updateable.

· **Location**

This is to create the entire structure of an organisation irrespective of the fact whether it is an inventory location or not . Each location is related to a department . For each location , the user can or cannot associate an item .If the user associates items to a location then that location can deal only in that item else it can deal in all inventory items. That is if an item is being associated to a location then that location can receive, issue and transfer only those items .

· **Requisition**

This enables the user to place any request to the inventory department .

Various types of requests are

- a)Item Transfer
- b)Item Creation
- c)Item Requisition
- d)Item Reservation .

One request can have multiple items .

· **Request Approval**

Each request has multiple items . Out of these there are many items which require approval and also others which does not require approval . All items needing approval has to be approved necessarily before the issue process . At the time of approval process the user can select the requests and generate a transfer order . One Transfer Order will be related to many requests .For requests containing same items the total item quantity will be summed up .

The requester and the supplier department can be different from the two locations (major/minor) between which the transfer has to take place. The user can modify the total requested quantity for the item in the transfer order. A purchase request can also be generated for multiple requests for the same item .So one purchase request can contain multiple inventory requests . There can be multiple purchase requests in one purchase order and one purchase order can have multiple delivery schedules against which items

· **Stores Issue Note**

Issue are basically of two types -

a) Direct issue

This is direct issue either to the suppliers or from internal departments (that is issue without a request id) .

E.g. when items of inventory are to be issued to outside suppliers for reprocessing .

b) Indirect issue

This issue is always against a request id. This is for all those approved requests and also those requested items which do not need approval .

· **Reserve Material Stock**

For all approved reservation requests ,stocks have to be manually reserved. Reserving the stock reduces the on-hand available stock and increases reserved stock making the total stock unchanged .Unless the total reserved stock for an item is equal to the total approved quantity against a reservation request ,the item cannot be issued from inventory. Once it becomes equal the item then appears in the issue window from where the user can issue the stock. One reservation request can have multiple issue ids.

· **Goods Receipt Note**

Item can be taken into inventory -

a) Against a purchase order

b) Against a transfer order

c) Against a sales return

d) Against an internal return

e) Against an issue

Direct receipt into the system without any of those mentioned above cannot be made.

After the receipt is made by the inventory department the items of a receipt is sent to the temporary location (which is system generated) .Till this point the received items wont contribute to the total available stock .In the received items there will be many items which require inspection to be done and also many which can be taken into inventory without any quality check process .For items not needing inspection ,can be directly assigned inventory locations .whereas the others needs to be sent to the quality department and in case of positive quality report can be assigned main locations .

· **Quality Check**

Quality testing of all the items is done here .

These are of two types -

a)Sample testing

b)Bulk testing

For sample testing ,samples are randomly picked from different bags and sent for testing .

Whatever is the QC report it is applicable to the entire lot received by inventory.

For Bulk testing the user can either test the entire bulk of material or will do part by part testing and will be issuing approved items in parts. This implies that one receipt id can have many Quality check ids and at the time of issue , a combination of receipt id and quality check id needs to be specified .

· **Material Return Note**

Material return note is issued when a defective material is received or excess material is returned. So a material return note is always against an issue id . All direct returns will be direct departmental issues .Indirect return is for acknowledging return of items against a particular receipt or issue id.

· **Material Discrepancy**

This is to accommodate any discrepancy in the physical stock and quantity in the stock register .

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