



Slide 1

Slide notes: In this tutorial we look at Stock Item Templates.

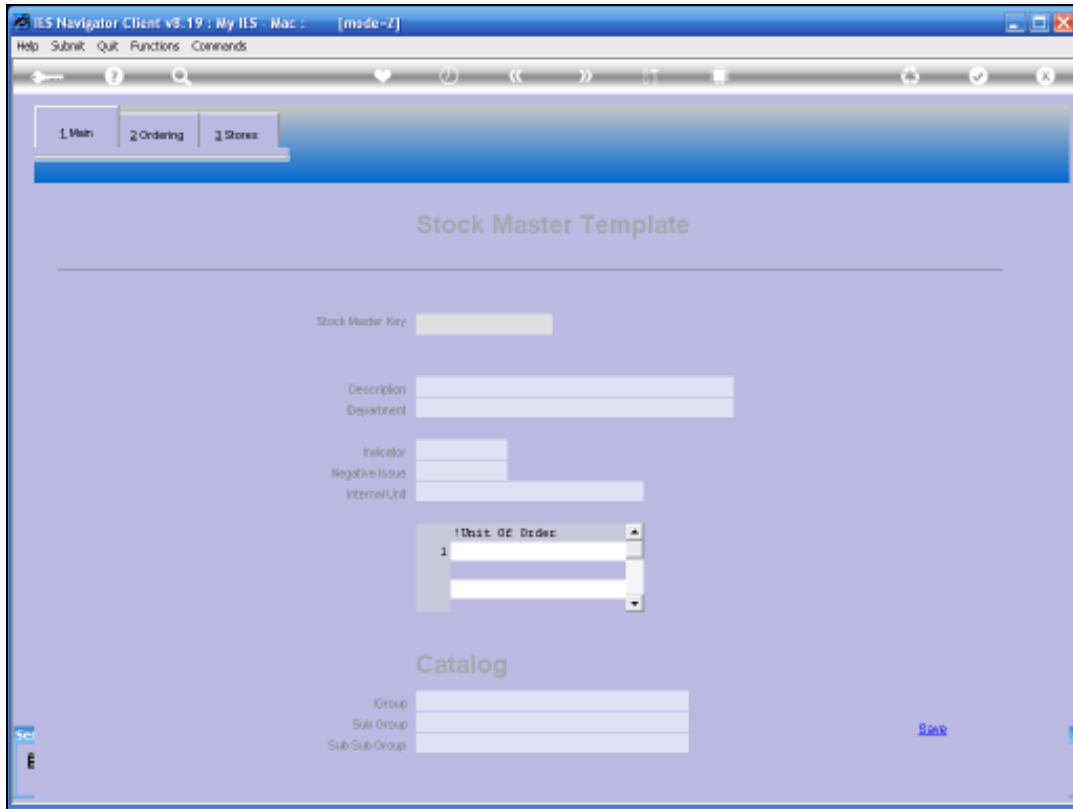


Slide 2
Slide notes:

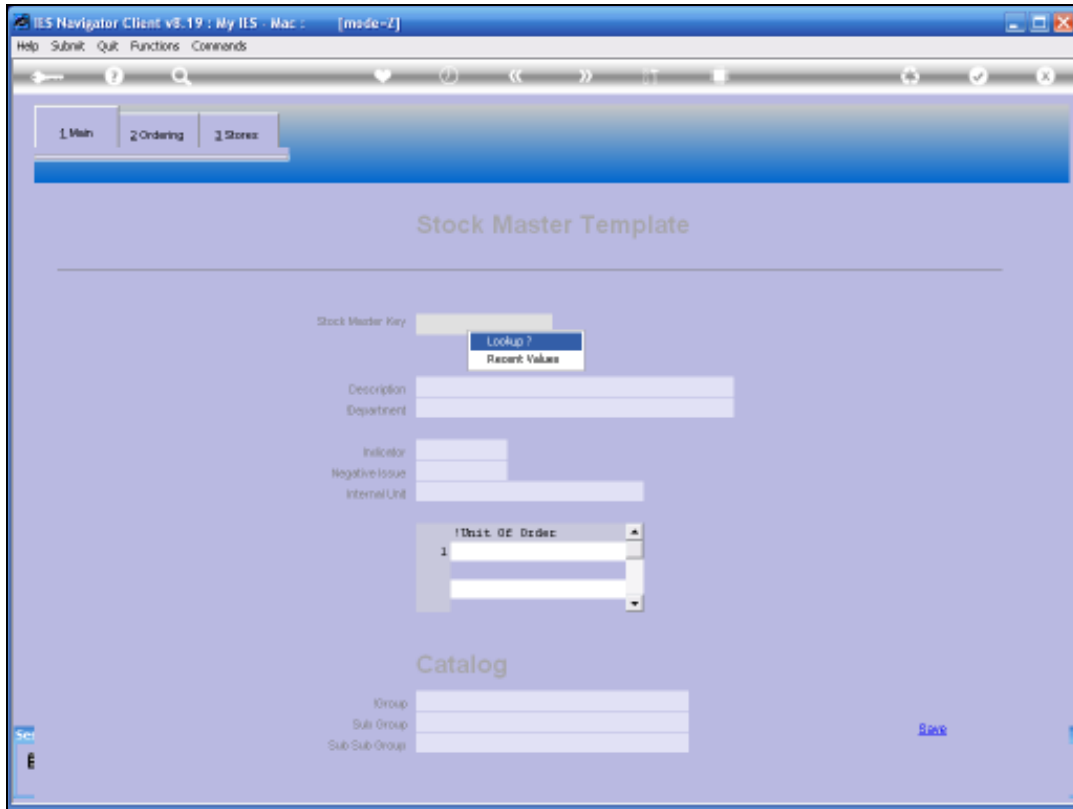


Slide 3

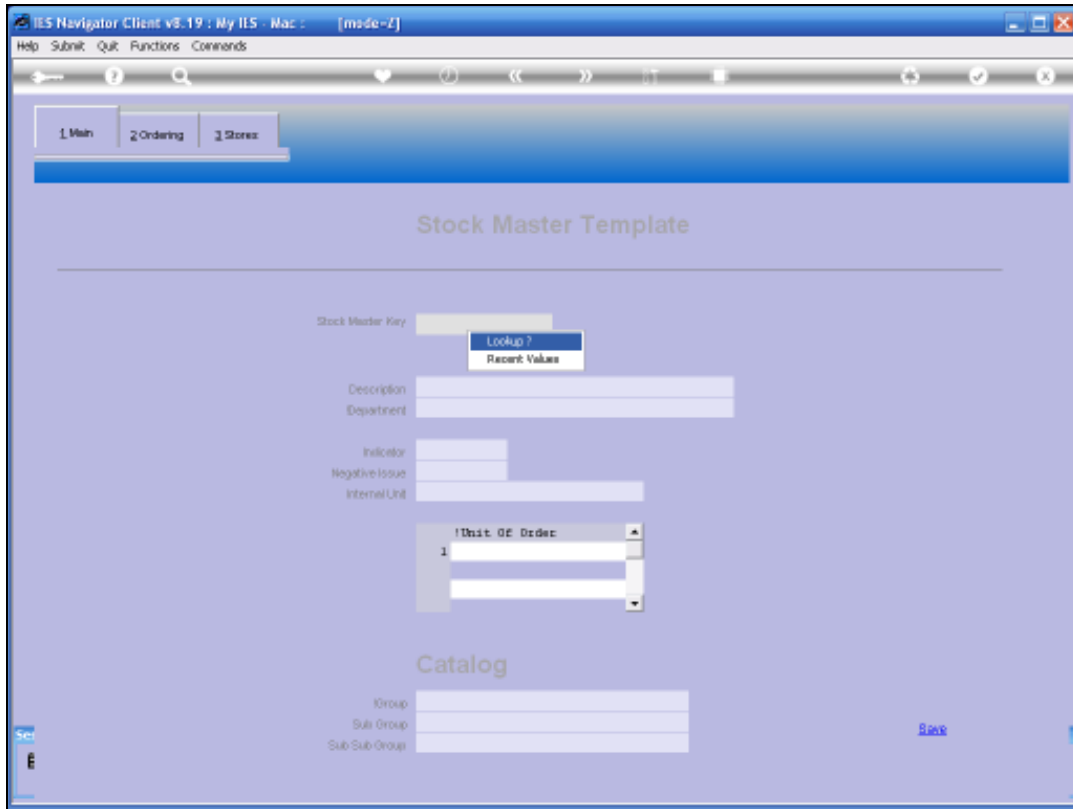
Slide notes: The maintenance option for Stock Item Templates is found at the File Maintenance menu in Inventory Management.



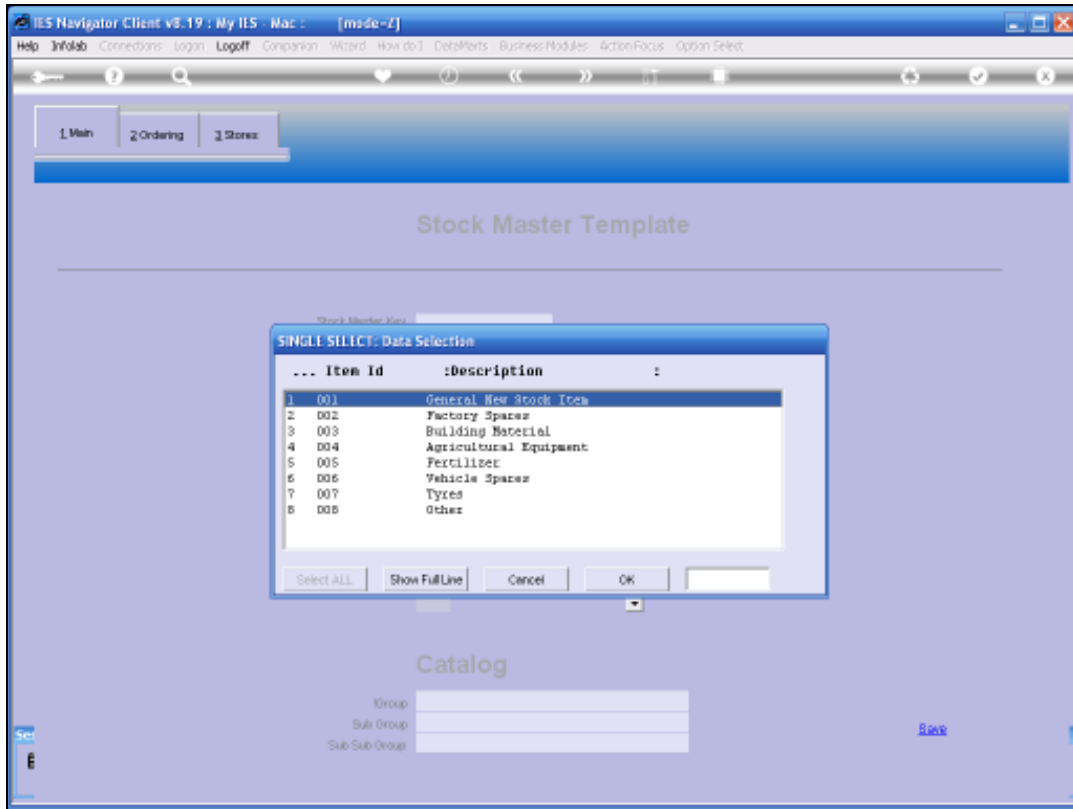
Slide 4
Slide notes:



Slide 5
Slide notes:



Slide 6
Slide notes:



Slide 7

Slide notes: Let's look at the example template for Agricultural Equipment.

The screenshot displays the IES Navigator Client v8.19 interface. The window title is "IES Navigator Client v8.19 : My IIS - Mac - [made-1]". The menu bar includes "Help", "Submit", "Quit", "Functions", and "Commands". The navigation bar shows "1 Main", "2 Ordering", and "3 Stores". The main content area is titled "Stock Master Template".

Fields in the form include:

- Stock Master Key: 104
- Description: Agricultural Equipment
- Department: 100 PRIVATE LEDGERS
- Indicator: f
- Negative Issue: N
- Internal Unit: ea EACH
- Unit Of Order: 1 ea EACH

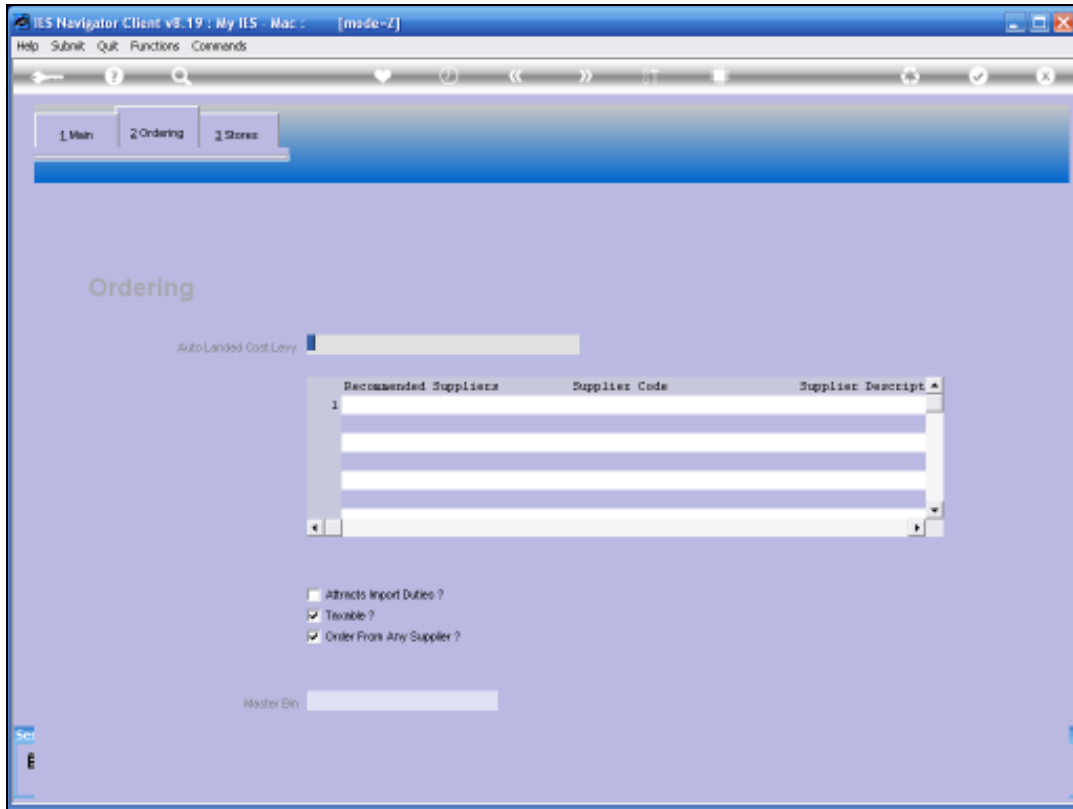
Below the form is a "Catalog" section with the following hierarchy:

- Group: AAP AGRICULTURAL EQUIPMENT
- Sub Group: AAP02 Harvesting
- Sub-Sub Group: AAP0201 General

A "Save" button is located at the bottom right of the form area.

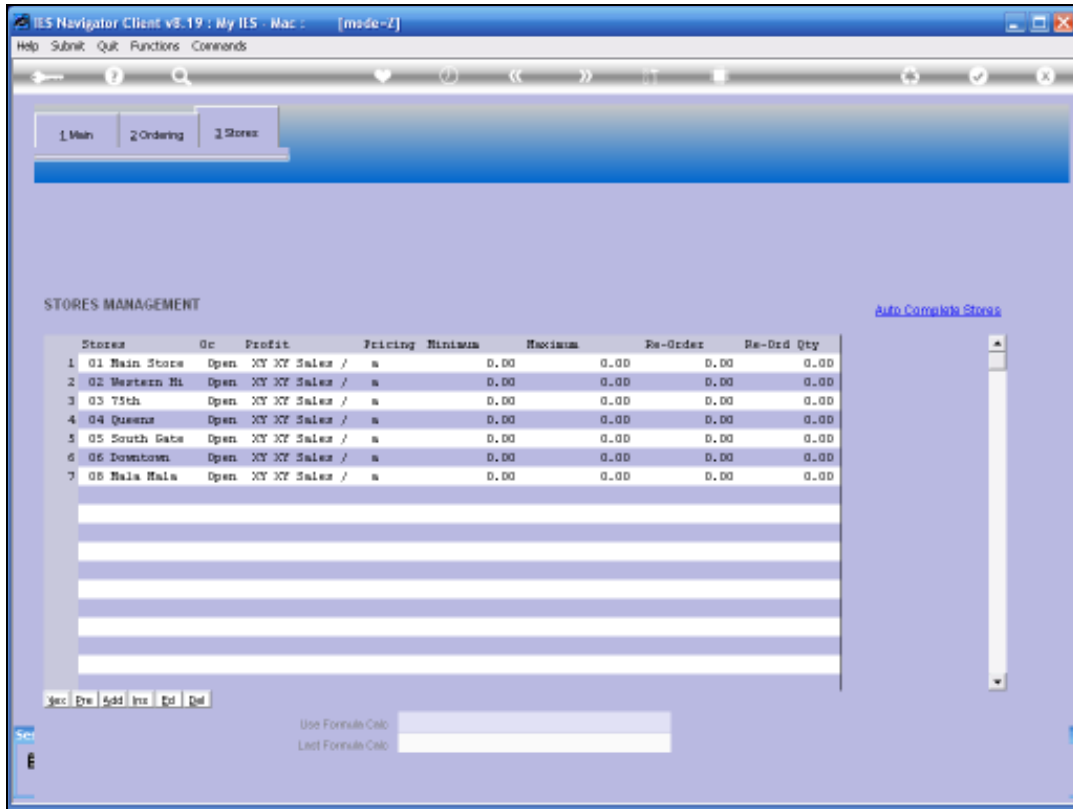
Slide 8

Slide notes: A Stock Item Template is actually just a default template for opening new Stock Items, and we can have as many of these Templates as we deem fit. We populate the Template with the fields that we want to default when this Template is selected at the opening of a new Stock Item.



Slide 9

Slide notes: On the Stock Template, the fields are not mandatory, so we can decide which fields are realistic to provide defaults for.



Slide 10

Slide notes:



Slide 11

Slide notes: Now we will open a new Stock Item, and see how useful the Stock Template is.



Slide 12

Slide notes:



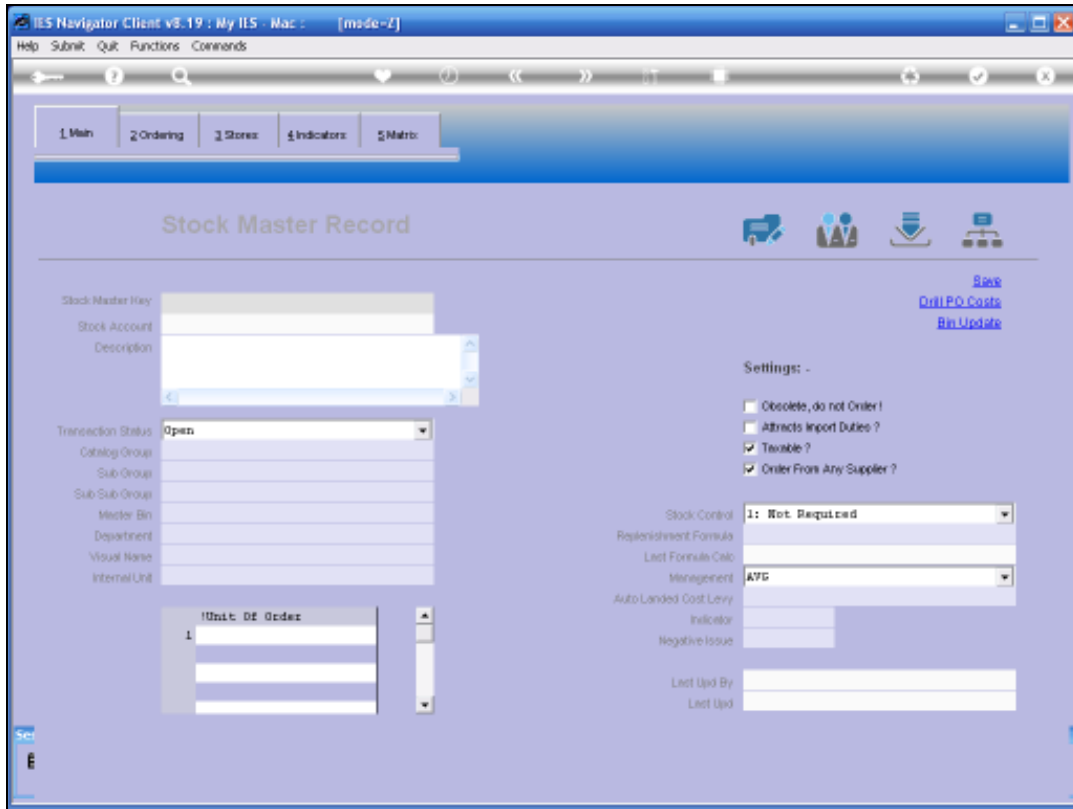
Slide 13

Slide notes:



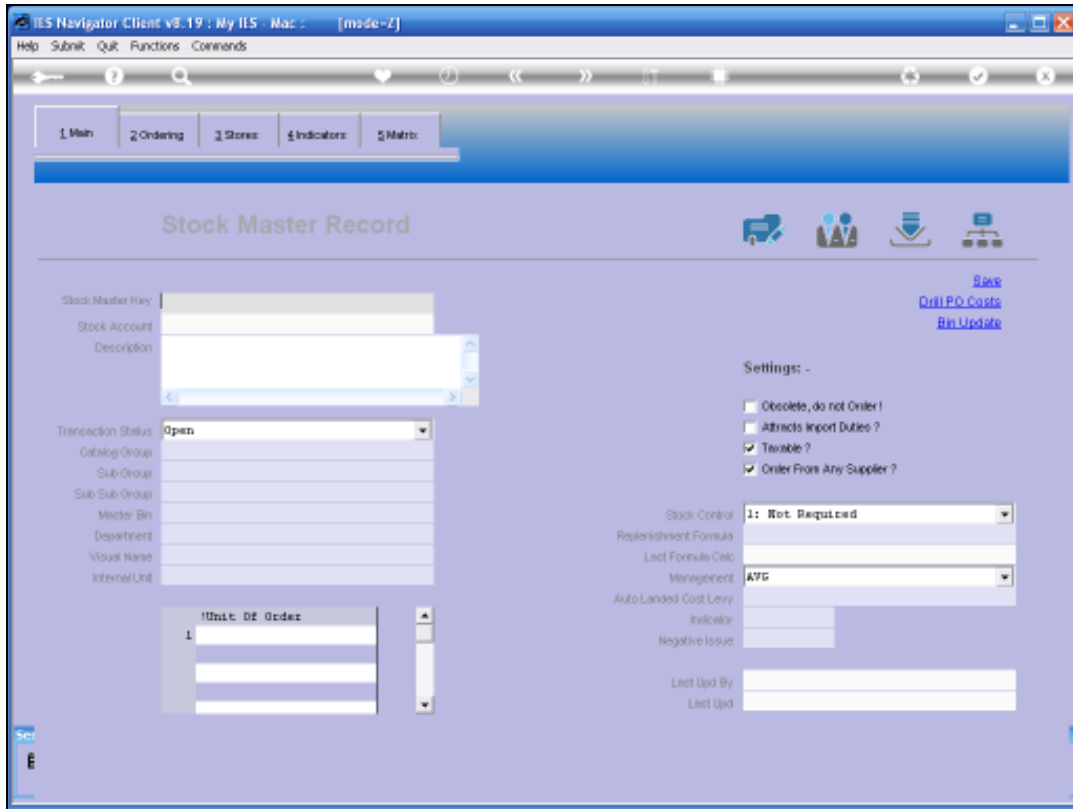
Slide 14

Slide notes:



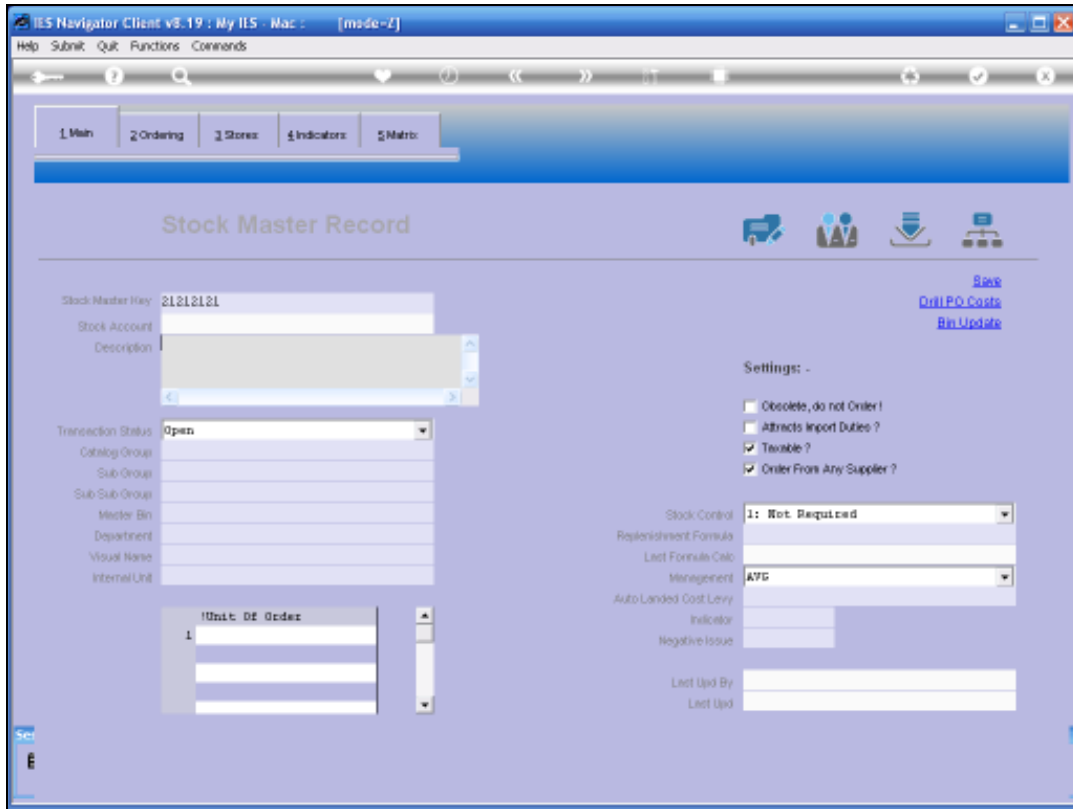
Slide 15

Slide notes:



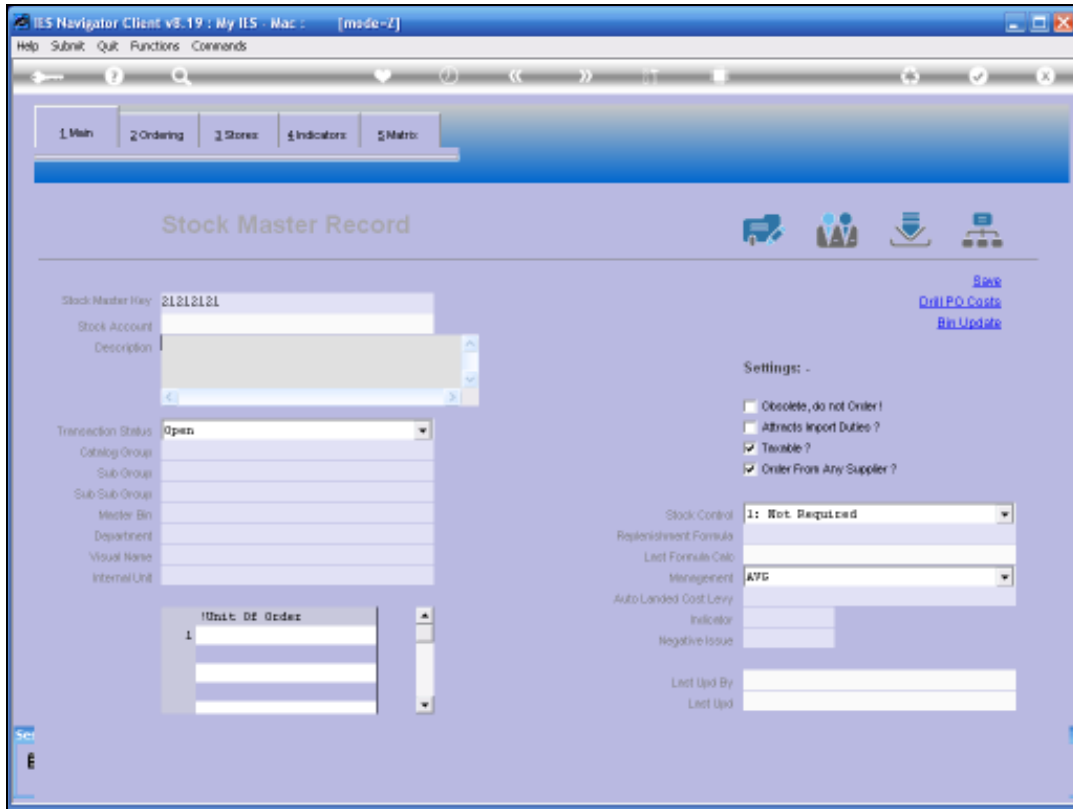
Slide 16

Slide notes: When we type a Stock Code number that does not yet exist, then the system senses that we may want to open a new Stock Item. Therefore, it looks for Stock Item Templates, and if any are found, it offers a selection.



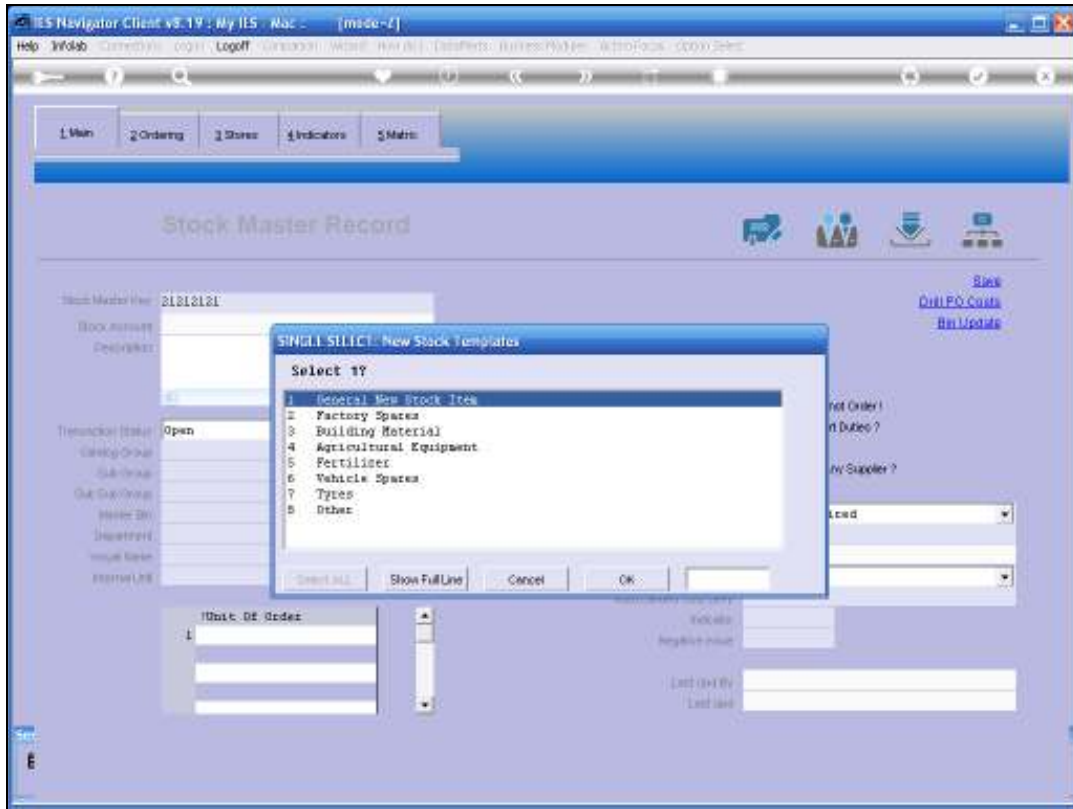
Slide 17

Slide notes:



Slide 18

Slide notes:



Slide 19

Slide notes: If we select one of the Templates offered, then the system will use that Template to populate the fields for the new Stock Item.

ILS Navigator Client v8.19 : My ILS - Mac - [msde-1]

Help Submit Quit Functions Comments

1 Main 2 Ordering 3 Stock 4 Indicators 5 Matrix

Stock Master Record

Stock Master No: 21812121
 Stock Number: 21812128
 Description: Agricultural Equipment
 Transaction Status: OPEN
 Category Group: AAP AGRICULTURAL EQUIPMENT
 Sub Group: AAP02 Harvesting
 Sub Sub Group: AAP001 Benetsal
 Warehouse: 100 PRIVATE LEDGERS
 Department: ea EACH
 Fiscal Year: 1
 Internal Use:

[Back](#)
[Delete PO Costs](#)
[By Update](#)

Settings:

- Obsolete, do not Order?
- Attracts Inport Duties?
- Trackable?
- Order From Any Supplier?

Stock Order: I: Not Required
 Last Fiscal Year: APF
 Unit of Measure: F
 Internal Use: IL

Last Used By:
 Last Used:

Slide 20

Slide notes: And if it is a good template, then the process of opening a new Stock Item is really quick and easy, because now we only need to capture the new Description for the Stock Item, and possibly change a Sub Group or Sub Sub Group as may be appropriate. Then when we choose SAVE then the new Stock Item is opened. So Stock Item Templates are very productive as a tool for the opening of new Stock Items.