

Kalahari Inventory.

These notes describe the various settings in Kalahari for Inventory. Different labs have different processes so the settings need to be matched with the lab operations.

Allow Issue when zero stock.

If the stock level is zero then this will give the option to Order Semi-finished. An order can only be completed if the Order Semi-finished is ticked or there is sufficient inventory. If Order Semi-finished is ticked then naturally there is no issue of the inventory recorded. The setting is probably misnamed as it is in effect Create Purchase when zero stock.

Update when calculate.

This determines where stock is downdated in inventory. If it is set then stock is downdated by the calculation. If it is not set then stock is downdated in the "Pick Stock". There can be confusion if Update when calculate is set and "Pick Stock" are both used as it will not be clear in the process.

Reordering Method.

There are two methods – by trigger level or replace as used. If by trigger level then when the level of items falls below the trigger level then items are reordered. The quantity to reorder is to bring up to a stated multiple of the trigger level. If the multiple is 1 then the quantity reordered will take back up to the trigger level.

There are special rules if a trigger level is set to 1 piece. In this case, it is taken that one piece is kept in stock as a safety and only one item is reordered. For 2 and 3 pieces as a trigger level there are transitory arrangements as a mixture of the rule for one piece (effective multiple is 1) to the stated trigger multiple value.

If replace as used then the number issued for calculation or reject since the last run are counted and this is ordered. This is based on the assumption that the correct levels are in stock and works well if there is daily ordering.

Replace as used needs the levels to go minus so the Allow Issue when Zero Stock needs to be turned off.

Rejects.

If there is a reject then for the eye that is rejected then there will be another issue of the stock recorded against the order. If the reject indicates that the lens is recoverable then there is not an issue.

If the processing of the reject requires a different lens to be supplied then the replacement is issued by making a recalculation.

If the reject is down to the wrong item being picked then this needs to be recorded by manual adjustment to the inventory.

Purchase Orders.

There are two types of purchase orders created. One for orders that are waiting for items so the lenses can be made and another for lenses to be added to the inventory. The appropriate actions to do on receipt of these depend on the configuration.

The simplest is for lenses to be added to the inventory. This purchase order is processed and the items recorded as delivered are added to the inventory. If there are items to follow then the purchase order is left open. If there are not items to follow then the purchase order is closed.

For the missing items that will not be delivered; If reordering is by trigger level then the missing items will be reordered on the next purchase order run. If reordering is replace as used then there needs to be a manual order raised to reorder these items.

For the purchase orders that are for specific items then the action depends on how stock is being issued.

If stock is being issued by "Pick Stock" then the items can be booked into inventory and then the stock is issued from Pick Stock. So the level is zero as the item is zero. Processing the purchase orders puts items into stock and then Pick Stock will take the items out so the level returns to zero.

If stock is being issued at calculation then there is a choice.

a) The items on the purchase order can simply be placed into the waiting jobs and the line closed on the purchased order without booking the stock into inventory. In this case, the inventory is not touched for these orders.

b) The items on the purchase order can be booked in. This will increase the inventory level so the inventory is then reduced by recalculation. As there are no items in stock the "Order Semi-finish" is not ticked and the inventory is reduced back to zero.

If a purchase order contains a mixture of replacement inventory and items for jobs then some care needs to be taken when processing the purchase order. In practice, it is best to handle the items being ordered for jobs as described above and then the replacement.

Conclusion.

These notes should allow the lab and software operations to be matched.