

Maintaining Inventory with SDScribe™

Stock tab (Stock activity, Substance data entry)

This view allows you to set an initial stock on hand (in your warehouse) for a Substance, along with the units of measure. You can also perform this task for multiple Substance records, by selecting **Quick inventory [show-hide]** from the drop-down menu next to the **[P]rint button**, on the Substance browse list. [Quick inventory](#) is discussed below.

To adjust the stock and/or units here for the current Substance, click on the **Stock** button, and select **Stock level and units** (Fig. 1 and Fig. 2).

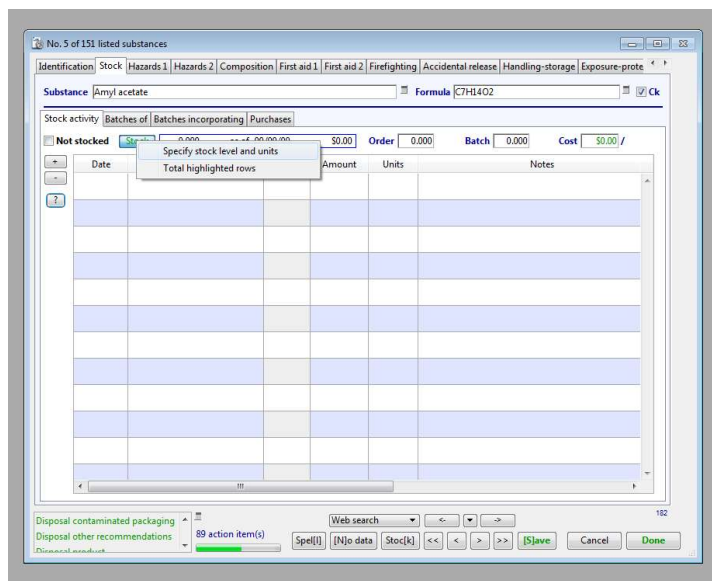


Fig. 1. Specifying stock level.

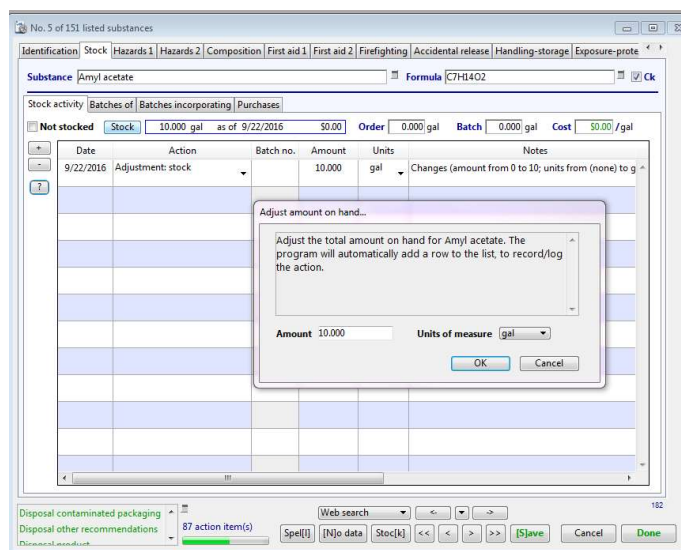


Fig. 2. Adjusting on hand amount records stock adjustment to the table

The program will present a dialog containing the current stock level and units of measure for the Substance. You can change either or both values. It's important to note that **changing the units of measure** also affects the reorder level (**Order**), the new batch level (**Batch**), and the unit cost (**Cost**) fields, which are based upon these same units of measure. The program does not automatically adjust these values, so you should ensure that the values are still appropriate after changing units of measure.

Each time you change the stock level, the program will **add a row to the stock activity table**, which logs stock actions. You can make further edits to the row by changing the action type (**Action** column), the quantity (**Amount** column), or the units of measure (**Units** column).

Some entries in the table **cannot be changed**, because they represent **allocations associated with a batch**. (You can, however, still edit the **Notes** column for any entry.)

During batch preparation (Fig. 3), when you are ready to remove batch ingredients from stock, and click on the **Allocate** button on the batch entry form, the program will withdraw the appropriate amount from stock, and make an entry into the stock activity table for each allocated ingredient.

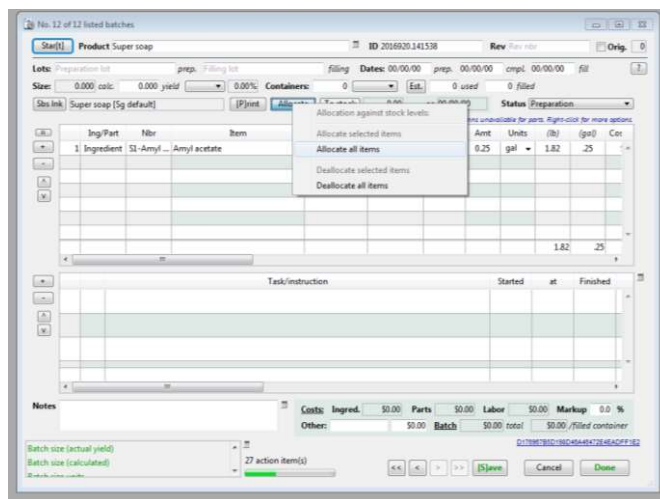


Fig. 3. Allocating an ingredient against stock, batch data entry form.

Allocation-type rows will display a **batch number** in the third column (**Batch no.**) of the stock activity table (Fig. 2).

You can add or remove non-allocation table entries using the **[+]** and **[-]** buttons to the left of the table. Entries which will add to the stock level are positive; entries which will withdraw from stock are negative.

Making a manual entry in the stock activity table does **not** in itself change the current total stock level of the Substance. Instead, you must highlight one or more rows in the table, and select **Total highlighted rows** from the **Stock** button.

Not stocked (check box)

Click on this button to indicate that the Substance is not to be maintained as inventory. The program will set the current stock level to zero after confirming the change with you.

Order (field)

Specify the level at or below which the program will identify the Substance for the **Reorder report**. This level applies for a Substance which is **purchased from a supplier**, rather than a Substance produced in your facility.

The screenshot shows a software window titled "No. 1 of 1 listed substances". The "Substance" field is "Amyl acetate" and the "Formula" is "C7H14O2". The "Stock activity" tab is active, showing a summary table with the following data:

Not stocked	Stock	as of	Order	Batch	Cost
	9,750 gal	9/22/2016	10,000 gal	0,000 gal	\$50.00 /gal

The "Order" and "Cost" fields are circled in red. Below the summary table is a detailed table with columns: Date, Action, Batch no., Amount, Unit, and Notes. The detailed table contains the following rows:

Date	Action	Batch no.	Amount	Unit	Notes
9/22/2016	Adjustment: stock		10,000	gal	Changes (amount from 0 to 10; units from (none) to g
9/22/2016	Allocation: remove batch i...	2016920...	-0.250	gal	Batch allocation against stock
9/22/2016	Deallocation: add to stock	2016920...	0.250	gal	Batch ingredient deallocation (add to stock)
9/22/2016	Allocation: remove batch i...	2016920...	-0.250	gal	Batch allocation against stock

At the bottom of the window, there are buttons for "Web search", "Spell", "[No data]", "Stoc[k]", "[Save]", "Cancel", and "Done".

Fig. 4. Setting the reorder level (10 gallons) and a purchase price (\$50/gal)

Batch (field)

Specify the level at or below which the program will identify the Substance for the **Production needs report**. This level applies to a Substance which is **produced at your facility**, rather than a Substance which is purchased from a supplier.

Batches of (table view)

This non-editable table lists all batches of the Substance that you have **produced**. Applies to a Substance which is **produced at your facility**, rather than a Substance which is purchased from a supplier.

You can double-click on a row to display the relevant batch record.

Batches incorporating (table view)

This non-editable table lists all batches that you have **produced** which incorporate the Substance as an ingredient.

You can double-click on a row to display the relevant batch record.

Purchases (table view)

This non-editable table lists all purchases of the Substance. Applies to a Substance which is **purchased from a supplier**, rather than a Substance which is produced at your facility.

You can double-click on a row to display the associated purchase record.

Quick inventory (Substance browse list)

The quick inventory mode replaces the normal Substances browse list with an **enterable list** for the same Substance records. Access **Quick inventory [show-hide]** from the drop-down menu next to the **[P]rint button**, on the Substance browse list. This mode facilitates rapid entry of stock (on-hand) levels, units of measure, reorder and new batch levels, and unit cost for each listed Substance. You can also designate Substance records as **Not stocked**, meaning that you won't maintain warehouse stock levels for the Substances.

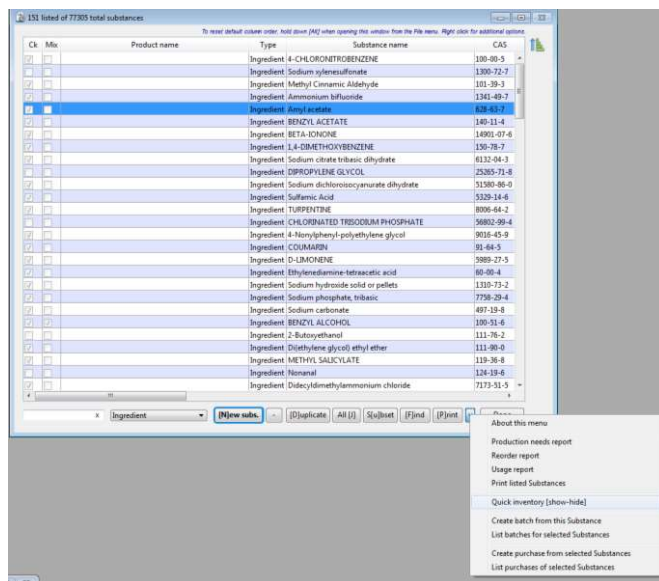


Fig. 5. Accessing Quick inventory from the Substance browse list

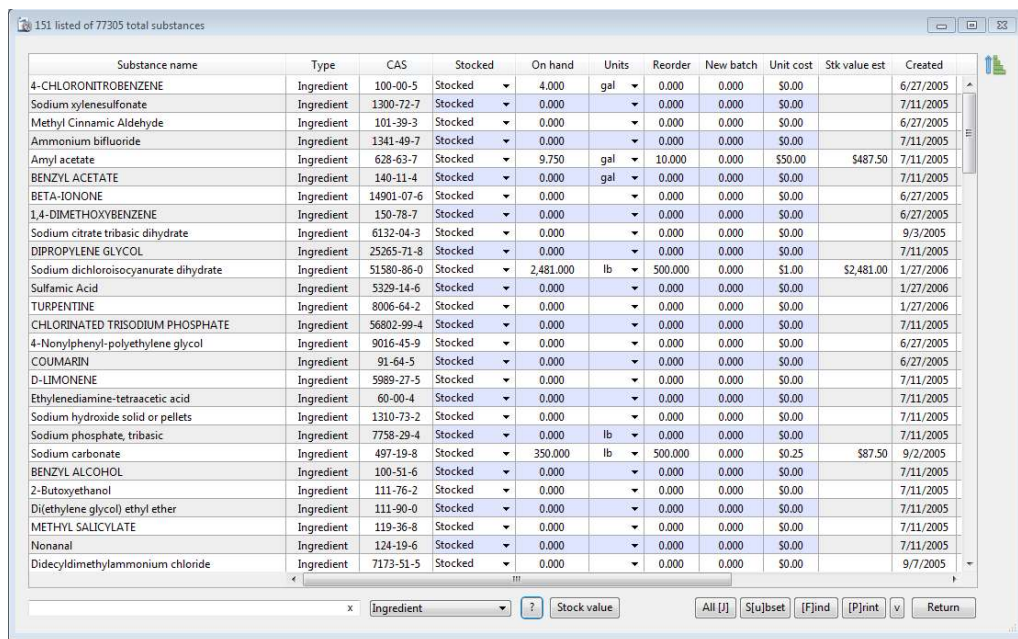
The screenshot displays the 'Quick inventory view' of the Substance browse list. It shows a table with the following columns: Substance name, Type, CAS, Stocked, On hand, Units, Reorder, New batch, Unit cost, Stk value est, and Created. The table lists various substances such as 4-CHLORONITROBENZENE, Sodium xylenesulfonate, Methyl Cinnamic Aldehyde, Ammonium bifluoride, Amyl acetate, BENZYL ACETATE, BETA-IONONE, 1,4-DIMETHOXYBENZENE, Sodium citrate tribasic dihydrate, DIPROPYLENE GLYCOL, Sodium dichloroisocyanurate dihydrate, Sulfamic Acid, TURPENTINE, CHLORINATED TRISODIUM PHOSPHATE, 4-Nonylphenyl-polyethylene glycol, COUMARIN, D-LIMONENE, Ethylenediamine-tetraacetic acid, Sodium hydroxide solid or pellets, Sodium phosphate, tribasic, Sodium carbonate, BENZYL ALCOHOL, 2-Butoxyethanol, Di(ethylene glycol) ethyl ether, METHYL SALICYLATE, Nonanal, and Didecylmethylammonium chloride. At the bottom, there is a search box containing 'Ingredient', a 'Stock value' field, and buttons for 'All [I]', 'S[u]bset', '[F]ind', '[P]rint', and 'Return'.

Fig. 6. Quick inventory view, Substance browse list.

The searching tools that are normally available on the Substance browse list are also available during quick inventory. You can search for specific Substances using the **quick search box** at lower left, or use the full **query editor** by clicking on the **[F]ind** button.

The drop-down menu adjacent to the quick search box allows you to locate Substances having positive reorder levels (**With min reorder levels**); Substances with positive new batch levels (**With min batch levels**); Substances for which there are existing batches; Substances having existing stock; and so on.

When you change the contents of the **On hand** (stock level) or the **Units** (stock level units of measure) columns, the program logs an entry into the **Stock activity** list, on the **Stock** tab of the Substance record.

To return to the standard Substance browse list display, click on the **Return** button. You can also select **Quick inventory [show-hide]** again from this pop-up menu.