



Cyncly

FeneVision® Best Practice

Build to Stock Setup Guide (BP0104)

Introduction

Stock Functionality allows customers to use already-built Stock products instead of manufacturing new ones. This allows manufacturers to build common product ahead of time and expedite processing and shipping for these common products.

In addition to the ability to configure and manufacture stock products, FeneVision has the ability to compare Width, Height, Thickness, and Options when determining if the line item they ordered matches a window that's already in Stock. There are two places in the system will attempt to automatically swap a manufactured item with stock: Order Entry and Scheduler.

To understand Stock functionality in FeneVision, familiarize yourself with Substitute Parts.

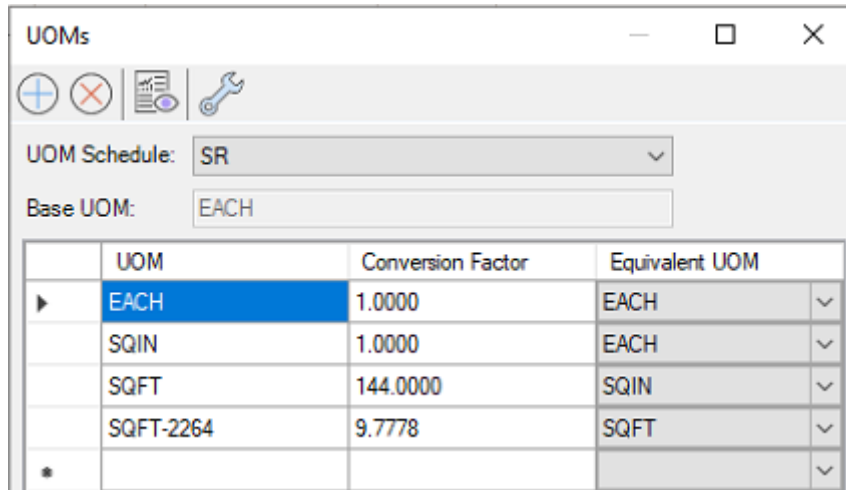
- Substitute parts allow an orderable part to use the Bill of Material of another orderable part. This is used by our customers to speed up configuration. If two or more parts share the same BOM, it's easier for them to set up the BOM on one part, and then tell other parts to use its BOM.
- When using substitute parts, you can either let the people using Order Entry select the options (using the options wizard) or the person doing configuration can pre-select the options.
- You can also set up different attributes and part types on the orderable part using the other parts' BOM.
- In the past, people would have flagged the part that uses the other part's BOM as *Manufactured*. It would have made little sense to mark it non-manufactured because you wouldn't have been able to schedule it, and therefore not been able to take advantage of the other part's BOM.

With the introduction of Stock functionality, Substitute Parts will be used according to these rules:

- New orderable products will be set up to use a manufactured part's BOM. However, these will be marked *non-manufactured*. On the *Options* tab in Bill of Material Part Setup, you will uncheck *Enable Wizard* (This disables Options Wizard for this part). Then you will pre-select the options for the Stock product. It would make no sense for the user to pick the options using Options Wizard, because the product has already been produced.
- The width, height and thickness attributes on the stock orderable part will be hardcoded to certain numbers. Use the numeric attribute type. Once again, the W/H/T have already been pre-determined.

Producing Products For Stock

1. Create substitute parts with pre-determined options and numeric W/H/T attributes, make sure the substitute parts are configured as Inventoried.
 - You will need to add these parts to a category, create a pricebook for the category (if one doesn't exist), configure pricing for the part, and assign the category to the stock customer.
 - Pricing can use an "Each" price for the stock item (a stock item has fixed dimension and options, therefore a fixed price). If for some reason dimensions should factor into pricing (for example, pre-configured options are priced by width and height, and sales on the option code should be tracked), then set the stock item's W/H/T values in Inventory Setup as well. Pricing will fall back on these values when it sees that the ordered dimensions are 0.
 1. If W/H/T values in Inventory Setup do need setup, make sure to create a UOM Schedule for the stock sizes, otherwise inventory quantities and costing will be inaccurate in Inventory Requirements. The UOM schedule should have Base UOM of EACH or EA. Add SQIN, SQFT, and an entry for each stock size.



- In Inventory Setup, assign this UOM Schedule and then set the Stock UOM, Cost UOM, and selling UOM to the appropriate size and the rest of the UOM values to EACH or SQIN.

Weight UOM	Cost UOM	Stock UOM	Selling UOM	BOM Primary UOM	BOM Secondary UOM
EACH	SQFT-3476	SQFT-3476	SQFT-3476	SQIN	SQIN

- Because the width and height are not entered in order entry, verify the WR attribute on the part references the W and H attributes, instead of OrderedWidth and OrderedHeight.
 - The stock item must belong to the same pricing category and price book as the manufactured item. Default option values must be defined statically, and cannot use script expressions.
- Create a new customer in FeneVision, marking the customer as stock using the GSP InventoryStockCustomer, whose value will be the aforementioned customer's CustomerID.
 - Place an order in the system using the above customer. The manufactured order type will already be selected.
 - The line items will be the Substitute parts you just created. Even though they are non-manufactured, they will show up in scheduler.
 - Schedule the line items and release the schedule.
 - Allocate the schedule.
 - Relieve the schedule
 - The schedule's inventory transaction increases the 'Qty On Hand' of these substitute parts. The last and average costs are recalculated for these items.

Prior to version 11.4: After creating the products, our customer is responsible for receiving these into the accounting system. Since we don't send over information for finished goods inventory on Manufactured orders, these newly-created stock products would get lost in the shuffle unless the customer makes an effort to increment these products manually. To mimic this, we will increase 'Qty On Hand' of these substitute parts in inventory setup after "creating" these products (after step 7).

Using Products From Stock

- The stock customer above can only create products – all other customers can order these products
- You can add a stock product to the order using one of the following methods:
 - Select the stock product in OE.
 - Select a manufactured part in OE (one that has substitute parts). If the W/H/T and options match one of the substitute parts, and it has sufficient quantity, it will prompt you to replace the manufactured product with Stock.
 - "Sufficient Quantity" means the quantity on the line item is less than or equal to ('Qty on Hand' - 'Qty Scheduled' - 'Qty on Sales Order')
 - For instance, if they order 5 products on a line item, and we have 10 in stock, but 3 are on sales order and 3 are scheduled (this means they are allocated on other schedules), then we don't have enough to fulfill the quantity on this line item.
 - If you swap the mfg part with a stock product, the stock product's 'Qty on Sales Order' will increase by the quantity on the line item.

- iii. The line item's dimensions are set to 0.
 - iv. If you don't see the pop happening to replace your unit, debug `usp_orderdetailSelectStockWindow`, this is what pulls the units in. Most likely an option value is off.
- 3. Add the orders to a schedule
 - i. If scheduler determines the quantity of stock available ('Qty on Hand'-'Qty Scheduled'-'Qty on Sales Order') is enough to partially or fully replace a manufactured part in scheduler, it will automatically perform a swap.
 - ii. This will increase 'Qty on Sales Order' of the stock part.
 - a. There is a new row in the schedule totals grid (at the bottom of scheduler) that tells the user how many products are stock products. They can use this information to help schedule the number of people they need on the production floor to produce products.
 - b. If you don't see the stock populating a value, debug `usp_scheduledetailSelectStockWindow`, this is what pulls the units in. Most likely an option value is off.
- 4. Release the schedule. If any stock products exist, a new 'stock batch' will be created automatically. It will be the last batch in a schedule.
 - a. A new label template can be set up in 'Report Setup' specifically for stock products. The orderable *manufactured* part can be assigned to this template (this would be done if you don't want the stock product part number to be shown on the label), or the *stock* part can be assigned to this template.
- 5. Allocate the schedule
 - a. This will drive 'Qty on Sales Order' of stock down, and 'Qty Scheduled' of stock up
- 6. Relieve the schedule
 - a. This will drive 'Qty Scheduled' of stock down (if previously allocated) and 'Qty on Hand' of stock down
- 7. Add the orders to a route
- 8. Invoice the order
- 9. Ship the route in trucking.

Differences between replacing stock in OE vs Scheduler

- 1. OE
 - a. The part will never be scheduled and released.
 - b. Companies would want to perform this for walk-up customers. This way they can quickly place an order and create an invoice for stock without having to wait for schedule release. They will not show up in RB or Trucking because they would invoice and close the order immediately.
- 2. Scheduler
 - a. The part will be scheduled and released to production.
 - b. Paperwork and labels will be printed for these, they will show up in RB and Trucking. They will flow through the production floor just like manufactured products.

Creating inventoried stock using build to stock functionality

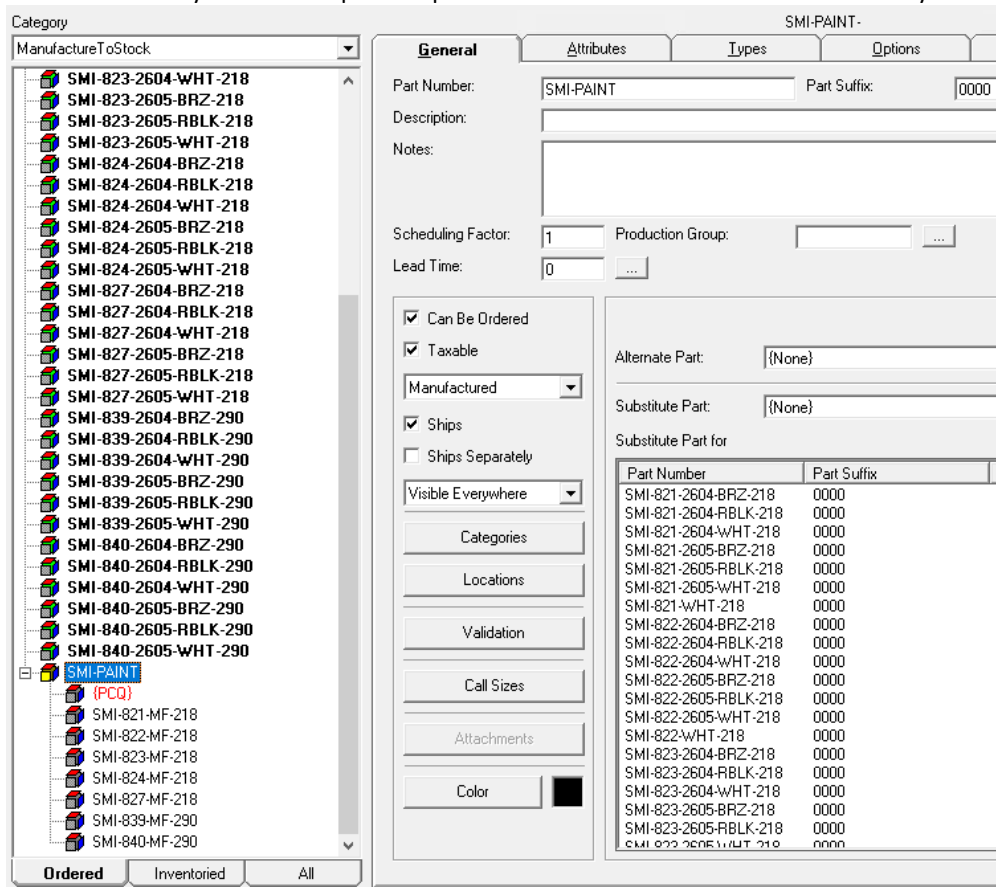
The purpose of this functionality is for the customer to take their stock pieces of material, and they want to paint a large quantity of that material ahead of time and treat that new material as if it is inventoried instead of manufactured.

For example, if white is a very common color for material, then before any orders are placed, they want to manufacture/build to stock their base stock parts into white stock parts that will be used by future BOM's.

Implementation Steps

1. Part Setup

- a. Create a dummy part that will be used as a substitute part for all the colored stock material
- b. Set that part to be orderable and manufactured. Insert subparts of every single base version of the stock and any inventoried paint or powder coat material that will need inventory to be consumed.



- c. Next make sure that all of the colored stock material is also set to orderable and inventoried. Setup accurate product, pricing, and inventory categories. Then assign the dummy part (SMI-PAINT in this case) as a substitute part for each one.

- d. Then make sure to transfer any capacity attributes that will apply to these parts and a good system for including only the applicable base stock to create colored stock is using the prefix and suffix attributes with the below include script on the base stock parts. This way you only pull from the exact base stock you need to create the colored stock.

Name	Value	Locale	Location
CP-CS-...-PAINT	...	System	
CP-CS-...-SAW-RULE	...	System	
CP-CS-...-SAW1	...	System	
CP-CS-...-SAW2	...	System	
PREFIX	SMI-824-...	Global	
SUFFIX	218	Global	

```
Dim retval As Variant
```

```
'ENTER YOUR CALCULATION HERE!!
```

```
Include = (Parent.Attributes("PREFIX").Value & Parent.Attributes("SUFFIX").Value) = CurrentPart.partNo
```

```
'DO NOT MODIFY CODE BELOW THIS LINE
```

```
AttributeValue = retval
```

- e. Make sure to assign appropriate length attributes to the base stock subparts found under the dummy part (SMI-PAINT). This should just be set to whatever the stock length is of that extrusion (the SUFFIX attribute in this example). Also assign options/questions to each of the colored stock parts whether that be color, pricing, etc.
2. Order Entry
 - a. From this point you can go to order entry and use your manufacture to stock (manstock) customer to order colored stock material that will be made up of paint and base stock subparts. Check the inventory requirements and make sure only base stock material and paint show up as well in the correct quantities.

Order Number: [Redacted] Order Date: 4/15/2025 PO Number: [Redacted]
 Order Type: [Redacted] Required Date: 4/25/2025 Customer Ref: [Redacted]
 Customer: [Redacted] Adt. Date: [Redacted] Order Contact: [Redacted]
 Site: [Redacted] Ship Date: [Redacted] Salesperson: [Redacted]
 Measurement Type: [Redacted] Invoice Date: [Redacted] Sales Code: [Redacted]
 Ship To: [Redacted] Terms: [Redacted] Discount: [Redacted]

Qty	Category	Part	Call Size	Width	Height	Thickness	Weight	Price	Sel's	Sel's Price	Discount	Total	Comments
3	ManufactureToStock	SMI-821-2605-WHT-218 - POWDER COAT QUALITY(2605-WHT), EXTRUSION(W) PRICING(VWIDPR)		0	0	0	17.51	\$232.74			0.0000%	\$698.22	Options
1	ManufactureToStock	SMI-823-2605-RBLK-218 - POWDER COAT QUALITY(2605-RBLK), EXTRUSION(W) PRICING(VWIDPR)		0	0	0	20.18	\$252.88			0.0000%	\$252.88	Options
1	ManufactureToStock	SMI-840-2604-BRZ-290 - POWDER COAT QUALITY(2604-BRZ), EXTRUSION(W) PRICING(VWIDPR)		0	0	0	26.52	\$313.20			0.0000%	\$313.20	Options

Inventory Requirements

Category: (All) Show: (Order)
 Part: [Redacted] Type: (All)
 Description: [Redacted]

	PO Qty	Part	Description	FENml	UOM	Qty On Order
▶	0.0000	PC-2604-BRZ	[Redacted]		BOX	0.0183
	0.0000	PC-2605-RBLK	[Redacted]		BOX	0.0138
	0.0000	PC-2605-WHT	[Redacted]		BOX	0.0413
	0.0000	SMI-821-MF-218	[Redacted]		STICK	3.0000
	0.0000	SMI-823-MF-218	[Redacted]		STICK	1.0000
	0.0000	SMI-840-MF-290	[Redacted]		STICK	1.0000