

# **Stock Set Up**

Aptean Ltd  
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# 1 Stock Set Up

## 1.1 INTRODUCTION

This section describes the required screens to be used in setting up the information concerned with the stock to be stored in the warehouse. Other guides describe the set up of company, user, warehouse, owners etc.

This is a generic guide based on the version of the *CALIDUS* WMS system at the time of writing.

It can also be used by clients to specify their specific data values to aid initial system set up as well as for future reference.

Note that fields marked '\*\*\*' are mandatory and are needed to ensure correct set up of the system.

## 1.2 OVERVIEW

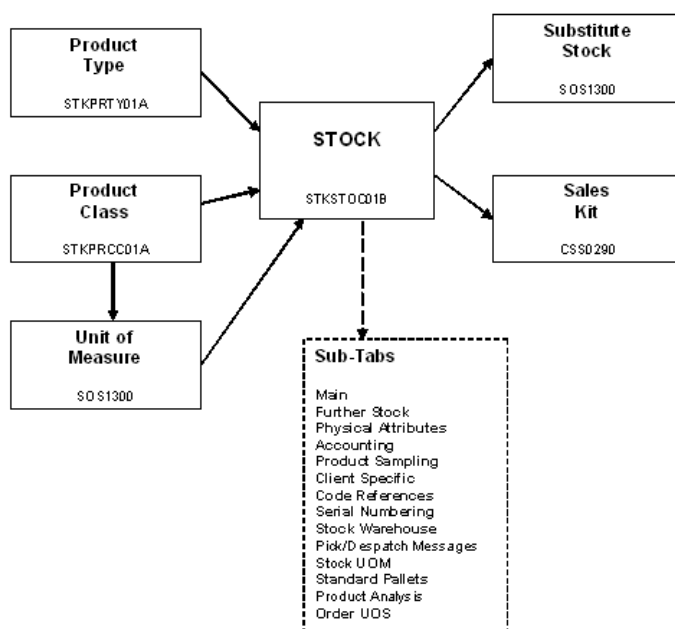
The configuration dependency diagram below illustrates which configuration levels are contingent upon preceding configuration. The pre-requisites for setting up stock information are:

1. Product type
2. Product class
3. Unit of measure

The main stock information is input in a number of tab screens within the main screen. Note that it is necessary to input all mandatory fields on all tabs before a product can be used within the system.

Once stock information is available it is possible to define:

1. Substitute stock
2. Sales kit configuration




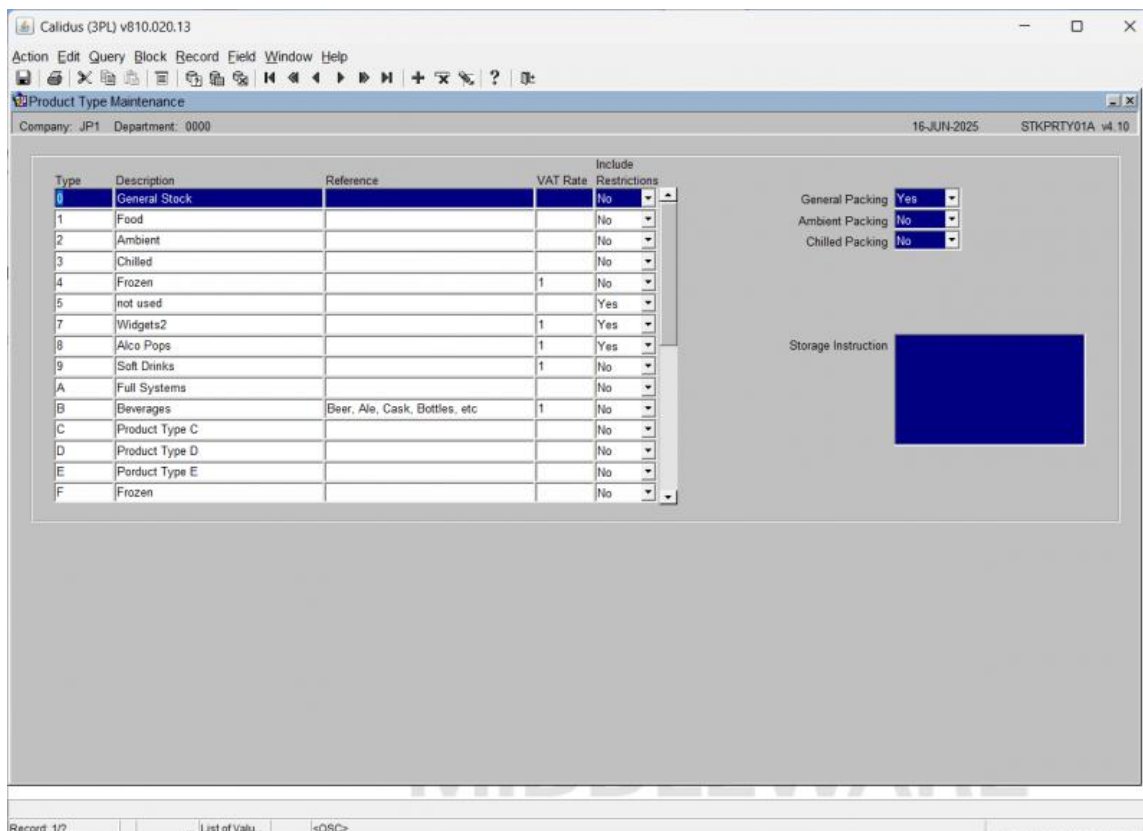
## 1.3 PRODUCT TYPE MAINTENANCE (STKPRTY01A)

Product type configuration is a pre-requisite to the configuration of products, given that product type is a mandatory field in the product configuration. Product types enable the grouping of stock, usually by physical classification. For example,



frozen, chilled or ambient products may each be assigned a distinct product type, this will have an impact on how orders are processed and displayed in the system.

 **Note:** If an order is made up of multiple product types, the system will allow individual allocation and picking by product type, in effect splitting the pick list.



Calidus (3PL) v810.020.13

Product Type Maintenance


Company: JP1 Department: 0000 16-JUN-2025 STKPRTY01A v4.10

Type	Description	Reference	VAT Rate	Include Restrictions
0	General Stock			No
1	Food			No
2	Ambient			No
3	Chilled			No
4	Frozen		1	No
5	not used			Yes
7	Widgets2		1	Yes
8	Alco Pops		1	Yes
9	Soft Drinks		1	No
A	Full Systems			No
B	Beverages	Beer, Ale, Cask, Bottles, etc	1	No
C	Product Type C			No
D	Product Type D			No
E	Product Type E			No
F	Frozen			No

General Packing: Yes  
Ambient Packing: No  
Chilled Packing: No

Storage Instruction: [Blue Box]

Record: 1/7 List of Valu... -OSC>

 **Note:** If RF is enabled there will be the option to send the entire table to the WCS (**Send RF Data**). All amended or newly created records are automatically sent to the WCS on update of the record.

Field Name	Description	Options	Generic Values
Type	Specifies a particular product type. Product type differentiation enables separation of sales order processing via pick wave building.	1 character free text field	Defined by the client
Description	Describes the product type as above	30 character free text field or left blank	Defined by the client
Reference	Used with Owner Charging and Invoicing	30 character free text field or left blank	Defined by the client
VAT Rate	Used with Owner Charging and Invoicing	30 character free text field or left blank	Defined by the client
Include Restrictions		Yes, No	Defined by the client
General Packing	Defines the General Packing process. Selecting this will disable Ambient and Chilled Packing.	Yes, No	
Ambient Packing	Defines the Ambient Packing process. Selecting this will disable General and Chilled Packing. This will also enable Temp Controlled Yes/No and Def Amb Temp Monitor.	Yes, No	
Chilled Packing	Defines the Chilled Packing process. Selecting this will disable General and Ambient Packing.	Yes, No	



Field Name	Description	Options	Generic Values
<i>Storage Instructions</i>	Free text storage instructions	Free Text	
<i>Temp Controlled Yes/No</i>	Enabled when Ambient Packing is enabled.	Yes, No	
<i>Def Amb Temp Monitor</i>	Enabled when Ambient Packing is enabled.	List of Values	
<i>Def Chill Temp Monitor</i>	Enabled when Chilled Packing is enabled.	List of Values	

## 1.4 PRODUCT CLASS MAINTENANCE (STKPRCC01A)

Product Range, Class, Category and Group combinations are created in order to segregate stock within the warehouse. They can also be used to distinguish one type of product from another. You can use these combinations to specify putaway routines and for stocktaking purposes. Note, although you see all four here, when you set them up you have to create the range first, go through the rest of the fields and save the record. When you come to create the class field, you have to enter the range you just created and then go through the same process. In this way, you can have multiple combinations of all four criteria.

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Product Class Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKPRCC01A v4.5

Prod Range: Product Range 1

Prod Class: 01 Product Class 1

Prod Category: 01 Product Category

Prod Group: BX Box

Back Order: ☐ Yes ☒ No

Box Required: Yes

Temp Monitor Required: No

Include In PO: No

Bonded Unbonded

Preferred - Location 1: Location 2: Location 3:

Record: 5/6 ... List of Valu... <OSC>

Field Name	Description	Options	Generic Values
<i>Prod Range **</i>	Used to denote a specific range for multiple products in conjunction with class, category and group	1 character free text field	Defined by the client
<i>Prod Class **</i>	Used to denote a specific class for multiple products in conjunction with range, category and group	2 character free text field	Defined by the client
<i>Prod Category **</i>	Used to denote a specific category for multiple products in conjunction with range, class and group	2 character free text field	Defined by the client
<i>Prod Group **</i>	Used to denote a specific group for multiple products	2 character free text field	Defined by the client
<i>Back Order **</i>	Used in union with other flags throughout the system to determine whether back ordering will be utilised Y or N	Defaults to No	N - Functionality not yet migrated



Field Name	Description	Options	Generic Values
<i>Preferred Location Bonded/Unbonded</i>	Specifies putaway anchor points for the range,class,category,group combination	Must be valid locations or left blank - LOV available	Defined by the client
<i>Box Required</i>		Yes, No	
<i>Temp Monitor Required</i>		Yes, No	
<i>Include in PO</i>		Yes, No	

## 1.5 UNIT OF MEASURE MAINTENANCE (SOS1300)

Unit of measure maintenance, enables the configuration of warehouse storage medium for specific product groups, this level of configuration is a pre-requisite for the configuration of individual products, in that the UOMs configured against a product group will be applied to the stock codes that are assigned that product grouping.

Field Name	Description	Options	Generic Values
<i>Range, Class, Category **</i>	No entry allowed, the screen comes in as query mode and you find the combination of range, class, category you wish to assign valid unit of measures to.	Must already have been created in product class maintenance - LOV available	Defined by the client
<i>Unit of Measure **</i>	Used to define what media the products will be packaged in/stored on. This will be used later in processing to determine how goods will be received into/ despatched from the warehouse.	6 character free text field	Defined by the client
<i>Unit of Measure 1/2/3</i>		6 character free text field	Defined by the client
<i>Stocking Unit of Measure</i>		6 character free text field	Defined by the client

## 1.6 STOCK MAINTENANCE (STKSTOC01B)

This form and all the tabbed sub screens carry all the product level configuration settings.



## 1.6.1 Stock Maintenance - Main Tab

First group of general product details.

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Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.187

Owner: **ROC** [001] RM

Stock Code: 000000020 Description: **Bonne Marche Apricot Jam** Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp... Code Refe... Serial Nu... Stock War... Bond Pick/Disp... Supplier Stock UOMS Standard Product A...

Product Range **1** Product Class **01** Product Category **01** Product Group **01** Prod Sub Group

Product Range 1 Product Class 1 Product Category Product Group 1

Unit Of Measure 1 **UNIT** Factor **UNIT** To **CASE** **8** Sales Kit **No**

Unit Of Measure 2 **CASE** Factor **CASE** To **PALLET** **12** Convert Units **No**

Unit Of Measure 3 **PALLET** Factor **UNIT** To **PALLET** **96** Product Status **Active**

Stocking Unit of Measure **UNIT** Factor **UNIT** To Transit **0** Net Weight **0.500** KGM

Gross Weight **0.550** KGM

Pallet Type **STD** Standard

ABC Code **N**

EAN Code

Auditing ☒ Yes ☐ No

Product Type **1** Food

Tax Code **0** V.A.T. exempt

Normal Supplier **SUPP\_CODE** **001** Test Supplier

Country of Origin **FR** FRANCE

Bonded ☐ Yes ☒ No

Copy Item Notes

Record: 1/9 <OSC>

Field Name	Description	Options	Generic Value
Owner **	Owner code the product is to be created against (the description will default to that setup in owner maintenance)	Must have been created in owner maintenance and be assigned to the current login id (will default to common) - LOV available	Defined by the client
Stock code **	The product code you will be creating	20 character free text field	Defined by the client
Description **	The description of the product you are creating. This description will appear on pick lists and receipt notes etc	30 character free text field	Defined by the client
Description 2	An additional description for the product	30 character free text field or left blank	Blank
Description 3	An additional description for the product	30 character free text field or left blank	Blank
Size	The size if required of the product	10 character free text field or left blank	Blank
Product Range **	The product range this product is grouped under	Must have been created in product class maintenance - LOV available	Defined by the client
Product Class **	The product class this product is grouped under	Must have been created in product class maintenance - LOV available	Defined by the client
Product Category **	The product category this product is grouped under	Must have been created in product class maintenance - LOV available	Defined by the client
Product Group **	The product group this product is grouped under	Must have been created in product class maintenance - LOV available	Defined by the client
Product Sub-Group	The product sub-group this product is grouped under		Defined by the client
Unit of Measure 1 **	The first (smallest) packaging type the product can be stored in	Must already be setup in unit of measure maintenance - LOV available	Defined by the client
Unit of Measure 2 **	The second (main) packaging type the product can be stored in	Must already be setup in unit of measure maintenance - LOV available	Defined by the client
Unit of Measure 3 **	The last (pallet) packaging type the product can be stored in	Must already be setup in unit of measure maintenance - LOV available	Defined by the client





Field Name	Description	Options	Generic Value
<i>Factor (uom1 to uom2) **</i>	The quantity of uom1 within uom2	0-99999999	Defined by the client
<i>Factor (uom2 to uom3) **</i>	The quantity of uom2 within uom3	0-99999999 - NB - the two factors together cannot exceed 99999999	Defined by the client
<i>Stocking Unit of Measure **</i>	The default warehouse storage unit of measure - this will determine what quantities of goods are stored at receipt	Must already be set up in unit of measure maintenance and must be one of the three units of measure setup for this product - will default to UOM2 - LOV available	Defined by the client
<i>Sales Kit</i>	Determines whether the product will be a kit master, a component or not part of a kit	Both, No, Yes or Blank - will default to No	No
<i>Convert Units</i>	If goods are to be broken up in cases and units, determines whether a product will be 'exploded' from units into cases at order entry	Enter, Grams, Kilograms, Yes, No or Blank - will default to No	Defined by client
<i>Product Status **</i>	Determines whether the product is available for processing or not	A - Active (can be used for IB and OB) I - Inactive (cannot be used for processing) R - Redundant (can only be used for orders until all stock is cleared down) N - New (can only be used for receipts)	Defined by client
<i>Product Type **</i>	Specifies a product type against the current stock code	Must have been previously setup in product types maintenance - LOV available	Defined by client
<i>To Transit</i>	Allows an additional unit of measure to be assigned to a product to allow receipts of more than 9,999,999 - based on unit of sale 'I' for impressions	0 - 99999999 - note, cannot exceed the combination with factor 3 (not yet migrated)	NA
<i>Net Weight</i>	Net weight of the product	0 - 999999.99 or left blank	Defined by client
<i>Net Weight UOM **</i>	Default weight format. Defined in the base_uom table	Left blank or LOV to select a valid value	Defined by client
<i>Tax Code **</i>	Defines the default VAT rate for the product	Must have been set up in vat rates maintenance - LOV available	Defined by the client
<i>Gross Weight</i>	Gross weight of the product	0 - 999999.99 or left blank. If entered, must be greater than net weight	Defined by the client
<i>Gross Weight UOM **</i>	Default weight format. Defined in the base_uom table	Defined by the client or left blank	Defined by the client
<i>Normal Supplier **</i>	Default supplier this stock code will be received from	Must have been created in partners maintenance for this owner - LOV available	Defined by the client
<i>Pallet Type **</i>	The default pallet type this product will be stored on - note this will work in conjunction with the factors of stock to work out how many pallets a quantity of cases equal to	Must have been created in pallet types maintenance - LOV available	Defined by client
<i>ABC Code</i>	Denotes whether a product is fast moving or not. Can be used for stocktaking purposes	1 character free text field or left blank	Defined by the client
<i>Country of Origin **</i>	Country code from where the stock was received from	Must have been created in countries maintenance - LOV available	Defined by the client
<i>EAN Code</i>	Specifies an EAN number for the product code	30 character free text field or left blank	Blank
<i>Bonded **</i>	Denotes whether a product is bonded or not	Y or N	N
<i>Auditing **</i>	Determines whether a history of any changes to the product is required	Y or N	N
<b>Button</b>		<b>Description</b>	
<b>Copy Item</b>		Will copy the stock code	
<b>Notes</b>		Allow view and entry of notes	

### 1.6.2 Stock Maintenance - Further Stock Tab

Second group of general product details.





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Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB 001 RM  
Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp Code Refs Serial Nu Stock War Bond Pick/Disp Supplier Stock UOMS Standard Product A

Lot Traceability: Customer Batch Hazard: No  
Allocation Sequence: Allocate by Age UN Number:   
Double Deep Strategy: 0 - Multi pallet not suggested Stock Hazard Details  
Putaway Algorithm: A - Pick Face, Replen Loc, Part-filled Bk Loc  
Reorder Algorithm:   
Pick and Box:   
Catch Weight: G - Goods Rcpt Only - Optional  
Unit of Sale:

Duty Paid Rotation Seq: Under Age: 0 Minimum Intake Life: 10 Product Strength: 3 Auto Quarantine: Yes No Review Period (Hrs): 0  
Bonded Rotation Seq: Over Age: 0 Maximum Intake Life: 99,999 Issue Life: -9 Reason Code:   
Product Issue Life:

Case Label: Yes No Internal/External Reorder: External Internal Break Case: Yes No  
Pallet Label: Yes No Under Warehouse Control: Yes No Promotion: Yes No  
Back Order: Yes No FIFO Stock Control: Yes No Temp Controlled: Yes No Record Temp:   
EAN: Yes No Non Stock: Yes No Aka Code: Cust Stock Aka  
Multi Order UOS: Yes No Freezing Details Required: Yes No Max Order Quantity:

Copy Item Notes

Record: 1/7 -OSC>

Field Name	Description	Options	Generic Value
<i>Lot Traceability</i> **	Determines what kind of rotation traceability you want for this product. This setting will prompt for this information at receipt	D - Customer Batch  F - No Customer Batch G - System Generated M - Manually Generated S - Sell by Date O - Manual Override P - Production Date T - Tea Garden Invoice N - No Rotation <b>Note:</b> lot traceability cannot be changed where there is on hand stock for the product	
<i>Allocation Sequence</i> **	Allows the user to specify in what priority order allocation will take place for this product	A - Allocate by Age  C - Customer Batch S - System Batch R - Sys Batch in location and pallet sequence B A - Sell By Date <b>Note:</b> allocation sequence cannot be changed where there is on hand stock for the product	
<i>Double Deep Strategy</i>	Dictates whether multi-deep functionality will be utilised and if so, in what priority	0 - Multi pallet not suggested  1 - Multi pallet prior to std. 2 - Multi pallet after std. 3 - Linked D.Deep prior to std or left blank	0
<i>Putaway Algorithm</i> **	If auto putaway is to be utilised, determines which anchor point this product will use to start the putaway process. Note, there are 5 places to action autoputaway:-  Owner Bulk Locations Warehouse Bulk Locations Product Class Bulk Locations Location Class Bulk Locations Product Bulk Locations	See AutoPutaway Section for details	A
<i>Reorder Algorithm</i>	Used for purchase order suggestion (not migrated)	1 - Suppliers review days  2 - Daily replenishment Minm. 3 - Daily replenishment Maxm. 4 - As 1 + On Hand	Blank



Field Name	Description	Options	Generic Value
		Qty of SW 5 - Required & available diff. Or left blank	
Pick and Box	Client specific packing functionality (not migrated)	C - One Case to a Box N - None (Default) T - Cases to a Box  N	
Catch Weight	Determines whether an 'adhoc' weight is to be captured at receipt or outbound - will override stock weight if set - also used for specific functionality	C - Carton Wt. @ Rec/Pick D - Carton Wt. @ Pick only F - Catch Wt. @ Pick Conf. N - No Catch Wt. recording P - Catch Wt. @ Order Entry For settings 'C' and 'D' carton weights are subtotaled to pallet level.	N
Unit of Sale	Denotes an additional unit of measure for the product other than the standard UOM's created in stock maintenance (Main Tab.) Used mainly for reporting purposes (see 'To transit' for factorisation of unit to Impressions)	A -Area I - Impressions L - Length P - Pack Q - Quantity V - Volume W - Weight Or left blank	Blank
Hazard **	Dictates whether a product is hazardous or not. Setting this flag to anything other than 'N' will take you into an additional hazardous details screen	N - No S - In Storage W - In Warehouse Y - Yes	No
UN Number	Hazardous required UN number. Only allowed entry if hazardous flag is other than 'N'	4 character plus single character UN variant - must be already created in hazard maintenance or left blank	Blank
Auto Quarantine **	Determines whether a product will be automatically put on hold at receipt. If Y is selected, the user will be prompted for a reason code and a review period	Y or N	N
Reason Code	The reason code used for stock to be automatically put on hold	Must have been created in reason codes maintenance - LOV available	Defined by the client
Review Period (Hrs)	The number of hours before the hold is released	0 -9999	Defined by the client
Duty Paid Rotation seq	Taken from ware_last_numbers of type ROT - no setup required		
Bonded Rotation Seq	Taken from ware_last_number of type ROT - no setup required		
Under Age **	The number of days the stock is in the warehouse before it is under age (not migrated) Used in allocation - the system determines if it is under age based on the age of the stock + under age days and if this is greater than current date	0 - 999999999 (displays only 8 digits) will default to zero	Defined by the client
Over Age **	The number of days the stock is in the warehouse before it is over age (not migrated) Used in allocation - the system determines if it is under age based on the age of the stock + over age days and if this is less than current date	0 - 999999999 (displays only 8 digits) will default to zero	Defined by the client
Minimum Intake Life **	If sell by dates are required, determines the minimum number of days the product must be in the warehouse. Allocation will use this flag in conjunction with max intake life and issue life to establish if it the product is outside the sell by date allowance	0 - 99999 will default to zero	Defined by the client
Maximum Intake Life **	If sell by dates are required, determines the maximum number of days the product can be in	0 - 99999 will default to zero. This must be greater than or equal to the minimum intake	Defined by the



Field Name	Description	Options	Generic Value
	the warehouse. Allocation will use this flag in conjunction with min intake life and issue life to establish if it the product is outside the sell by date allowance	life	client
<i>Product Strength</i>	The strength of the product if applicable (will print on the pick list when migrated)	2 character free text field	Defined by the client
<i>Issue Life **</i>	If sell by dates are required, determines the actual shelf life of the product. Allocation will use this flag in conjunction with max intake life and min intake life to establish if it the product is outside the sell by date allowance	0 - 99999 will default to zero	Defined by the client
<i>Case Label</i>	Determines whether case labels are required for the product. Currently only generic case labels are available	Y or N - will default to N	N
<i>Pallet Label</i>	Determines whether pallet labels are required for the product. Currently only generic and Schenker specific pallet labels are available	Y or N - will default to N	N
<i>Back Order</i>	Used in conjunction with product class and other flags, indicates whether this product can be back ordered	Y or N - will default to N	N
<i>EAN</i>	Indicates whether an EAN number is required	Y or N - will default to N	N
<i>Multi Order UOS</i>	Allows the user to enter an additional unit of sale at order entry if required	Y or N - will default to N	N
<i>Internal/External Reorder</i>	Used for automatic purchase ordering (not migrated)	E or I - will default to E	E
<i>Under Warehouse Control **</i>	Specifies whether the product is under full warehouse control (not migrated)	Y or N	Y
<i>FIFO Stock Control **</i>	Will determine at autoputaway whether FIFO will be considered	Y or N	Defined by the client
<i>Non Stock **</i>	Specifies whether the product will actually be stored and monitored as a normal stock item or classed as a 'not in stock' i.e. not to be processed product	Y or N	N
<i>Freezing Details Required **</i>	Determines, if product is to be frozen whether an additional box for freeze details will appear at receipt to capture date/ place frozen.	Y or N	N
<i>Break Case **</i>	If a product is to be processed in both cases and units, specifies whether cases can be broken into units for this product in order to fulfil ordered unit qtys where no units are available at time of allocation.	Y or N	N
<i>Promotion **</i>	Is this a promotional material?	Y or N	N
<i>Temp Controlled **</i>	Specifies whether the product is temperature controlled. This will determine whether special processing throughout the system will be required	Y or N	N
<i>Record Temp</i>	If this flag is checked, the temperature recorded at receipt will be held on the system	Checked or left blank	Blank
<i>Aka Code</i>	An additional 'also known as' field to allow an alternative product code to be used	20 character free text field or left blank	Blank
<i>Max Order Qty</i>	Maximum order quantity	0-9999999	
<b>Buttons</b>			
<b>Stock Hazard Details</b>	Allows the user to enter specific hazardous information for the product		



### 1.6.3 Stock Maintenance - Physical Attributes Tab

Field Name	Description	Options	Generic Value
<i>Minimum Tolerance</i>	This determines the lowest catch weight value that can be entered at any point throughout the system. This percentage figure may be taken off the exact catch weight entry without error. Subtracting more than this percentage will trip an error condition. Consider a receipt of 10 cases of a product with a weight of 1Kg per case. The exact catch weight is 10Kg, but a Minimum Catch weight tolerance of 10.00% will allow 9Kg to be input.	Any lesser values than this will trip an error condition forcing re-input until the value is within the 10% tolerance range. (not migrated) 0 - 99999 - will default to zero	0
<i>Case Length</i>	The length of the case in the set UOM. The next field will allow you to set the value i.e. CM, IN	0 - 99999999 - will default to zero - UOM will default to base UOM	0
<i>Maximum Tolerance</i>	This determines the highest catch weight value that can be entered at any point throughout the system. This percentage figure may be added onto the exact catch weight entry without error. Adding more than this percentage will trip an error condition. Consider a receipt of 10 cases of a product with a weight of 1Kg per case. The exact catch weight is 10Kg, but a Maximum Catch weight tolerance of 10.00% will allow 11Kg to be input. Any greater values than this will trip an error.	0 - 99999 - will default to zero	0
<i>Case Width</i>	The width of the case in the set UOM. The UOM will be taken from the previous entry	0 - 99999999 - will default to zero - UOM will default to base UOM	0
<i>Low Tolerance</i>	This determines the value at which a warning condition is tripped during catch weight entry. This percentage figure may be taken off the exact catch weight entry without warning. Subtracting more than this percentage will trip a warning condition. Any lesser values than this, up to and including the Minimum catch weight tolerance, will trip a warning condition.	0 - 99999 - will default to zero	0
<i>Case Depth</i>	The depth of the case in the set UOM. The UOM will be taken from the previous entry	0 - 99999999 - will default to zero - UOM will default to base UOM - note however, the combination of the length, width and depth	0



Field Name	Description	Options	Generic Value
		cannot exceed 999999999	
<i>High Tolerance</i>	This determines the value at which a warning condition is tripped during catch weight entry. This percentage figure may be added onto the exact catch weight entry without warning. Adding more than this percentage will trip a warning condition. Consider a receipt of 10 cases of a product with a weight of 1Kg per case. The exact catch weight is 10Kg, but a High Catch weight tolerance of 5.00% will allow 10.5Kg to be input without warning. Any greater values than this, up to and including the Maximum catch weight tolerance, will trip a warning condition.	0 - 99999 - will default to zero	0
<i>Volume</i>	Calculated field - sums up the length, width and depth of the product	N/A	N/A
<i>No. of Cases/Layer</i>	Normally used for pallet levelling - specifies how many cases per layer	0 - 999999 - will default to std pallet qty, total cases per layer + layers/pallet cannot exceed total cases pallet in main tab	Defined by the client
<i>Layers/Pallet</i>	Normally used for pallet levelling - specifies how many layers per pallet	0 - 999999 - will default to std pallet qty, total layers per pallet + cases/layer cannot exceed total cases per pallet in main tab.	Defined by the client
<i>Capacity Weight</i>	Sets the maximum weight for the pallet for this product. The UOM in the next field will default to the base UOM	0 - 99999.9999 - will default to zero	0
<i>Pallet Equivalent Layer Height</i>			

#### 1.6.4 Stock Maintenance - Accounting Tab

Field Name	Description	Options	Generic Value
<i>Standard Cost</i> **	The standard cost of the product (Purchase Price)	0 - 999999.9999	Defined by the client





Field Name	Description	Options	Generic Value
<i>Adjustment 1</i>	Any change to the standard cost can be added here - this will affect the retail price value (Fee 1)	0 - 999999.99 or left blank	Blank
<i>Adjustment 2</i>	Any change to the standard cost can be added here - this will affect the retail price value	0 - 999999.99 or left blank	Defined by the client
<i>Adjustment 3</i>	Any change to the standard cost can be added here - this will affect the retail price value	0 - 999999.99 or left blank	Blank
<i>Retail Price</i>	A calculated field. This is a sum of the above four fields - NO ENTRY ALLOWED	0 - 9999999.99 - note - the sum of the above 3 fields cannot exceed this quantity	N/A
<i>UOM</i>	The default unit of measure of the product	Must have been created in unit of measure maintenance or left blank - LOV avail	Blank
<i>Factor</i>	The charging factor placed against the default UOM	0 - 99999.9999 - will default to zero	Blank
<i>Tariff Code</i>			
<i>Item Cost Required</i>			

### 1.6.5 Stock Maintenance - Product Sampling Tab

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp Code Refs Serial Nu Stock War Band Pick/Disp Supplier Stock UOMS Standard Product A

No. of Sample Labels: 0

Standard Sample Unit:

Sample Quantity: 0

No. of Pallets To Sample: 0

Copy Item Notes

Record: 1/?

Field Name	Description	Options	Generic Value
<i>No. of Sample Labels **</i>	Enter the number of sample labels to be printed (not migrated)	0 - 999 - will default to zero	0
<i>Standard Sample Unit</i>	Normally entered as the default UOM for the product - however no validation (not migrated)	10 character free text field or left blank	Blank
<i>Sample Quantity **</i>	The qty of UOM to be sent as a sample	0 - 999 - will default to zero	0
<i>No. of Pallets to Sample **</i>	The qty of pallets to be sent as a sample	0 - 999 - will default to zero	0



## 1.6.6 Stock Maintenance - Client Specific Tab

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Spe Code Refs Serial Nu Stock War Band Pick/Disp Supplier Stock UOMS Standard Product A

Instructions: Auto Scrap at GRN ? N Financial Product Group: Restricted Item: CAP Flag: Change Pack Quantity: Pack Quantity Entry: Revision Level: PCB Revision: HDA Revision: Visible on Portal: Yes No

Copy Item Notes

Record: 1/? <OSC>

Field Name	Description	Options	Generic Value
<i>Instructions</i>	The ability to enter instructions for the product to be printed at GRN (not migrated - No entry allowed)	None	Blank
<i>Auto Scrap at GRN?</i>	Denotes whether the product will be automatically scrapped at receipt (not migrated - No entry allowed)	None	Blank
<i>Financial Product Group</i>	Denotes a specific financial grouping criteria for the product (not migrated - No entry allowed)	None	Blank
<i>Restricted Item</i>	Affects later processing in the system - denotes a restricted item (not migrated - No entry allowed)	None	Blank
<i>CAP Flag</i>	Indicates whether or not a product operates under Common Agriculture Policy rules (not migrated - No entry allowed)	None	Blank
<i>Revision Level</i>	Allows extra information to be stored against the product - normally used for hardware type products i.e. v.8.2	10 character free text field or left blank	Blank
<i>PCB Revision</i>	Allows a PCB revision reference to be entered against the product	10 character free text field or left blank	Blank
<i>HAD revision</i>	Allows an HDA revision reference to be entered against the product	10 character free text field or left blank	Blank
<i>Visible on Portal</i>			No
<i>Change Pack Quantity</i>		Yes, No	Blank
<i>Pack Quantity Entry</i>		Automated - 1 UOM, Manual Entry	Blank

## 1.6.7 Stock Maintenance - Code References Tab





Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB 001 RM

Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp Code Refer Serial Nu Stock War Bond Pick/Disp Supplier Stock UOMS Standard Product A

External code: New code: Commodity code: 9930990000

Stock Ref 1: Stock Ref 2:

Copy Item Notes

Record: 1/7

Field Name	Description	Options	Generic Value
<i>External Code</i>	Client specific additional reference to a product - can be used for any client	20 character free text field or left blank	Blank
<i>New Code</i>	Client specific field to allow entry of a new product code	20 character free text field	Blank
<i>Commodity Code</i>	Allows entry of a customs specific commodity code	20 character free text field	Blank
<i>Stock Ref 1</i>			
<i>Stock Ref 2</i>			

### 1.6.8 Stock Maintenance - Serial Numbering Tab

This tab screen enables the configuration of a product to enable the capture of serial number details at a carton level at either the inbound or outbound stages.



Field Name	Description	Options	Generic Value
<i>Serial Numbering **</i>	Determines whether serial numbering is required, and if so, how they are generated	0 - Random 1 - Consecutive 2 - None  2 - None	
<i>Inbound Serial Number Flag **</i>	Determines whether serial number capture is required at inbound	0 - None 1 - Capture at Receipt	0 - None
<i>Outbound Serial Number Flag **</i>	Determines whether serial number capture is required at outbound, and if so, where. If serial numbers have been captured at inbound receipt or a product then on the outbound they can be assigned, otherwise serial numbers will be captured at outbound.	0 - None 1 - Capture/assign at Pick 2 - Capture/assign Latest at Pack 3 - Capture/assign Latest at Despatch 4 - Capture/assign Latest at POD  0 - None	
<i>Capture Extra Details **</i>	If serial numbers are required, is the additional information box required to capture carton level information (i.e. carton level catch weight)	Y or N - will default to N	N
<i>Blind Trial</i>		Y or N	Blank
<i>Serial at Pack Only</i>		Y or N	Blank

### 1.6.9 Stock Maintenance - Stock Warehouse Tab

This tab screen provides configuration control for a product's warehouse level settings. Note that there can be multiple records for a given product in cases where the product is stored in multiple warehouses.



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB 001 RM

Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp Code Refe Serial Nu Stock Ware Bond Pick/Disp Supplier Stock UOMS Standard Product A

Warehouse Id: NFT

Minimum Quantity: 0/0 Maximum Quantity: 0/0 Weight Received: 0.00 Replenish Level Quantity: 0/0

On Hand Bond: 0/0 On Hand Unbonded: 60/0 Weight Despatched: 0.00 Replenish Amount Pallets: 0

Reorder at: 0/0 Reorder Level Days: 0 PO Tolerance (%): Quantity: 1/0

Default Template No: 0 Preferred Location Type's: Pick Mode: Picking Seq: 0

Min Cover Days: 0 Cross Dock: Controller: HTS code: Seals: Yes No

Average Cost Base: 0

Stock Locations

Location Type	Order Type	Sequence	Location Code	Replenish at Quantity	Replenish Pallet	Replenish by Quantity	Putaway Priority

Copy Item Notes

FRM-49350: Query caused no records to be retrieved

Record: 1/1 ... [List of Valu] ... <OSC>

Field Name	Description	Options	Generic Value
Warehouse ID **	Assigns a warehouse ID for the product. Note, this record MUST be created in order for this product to be available for ordering/receipts	Must have been setup in warehouse maintenance - LOV available	Defined by the client
Minimum Quantity	Used for purchase order suggestion, states the minimum qty that can be in the warehouse before a PO is required (not migrated)	0 - 99999999 (plus allows entry of 99999999 units) - will default to zero	0
Maximum Quantity	Used for purchase order suggestion, states the maximum qty that can be in the warehouse (not migrated)	0 - 99999999 (plus allows entry of 99999999 units) - will default to zero	0
On Hand Bond	Calculated field that sums up the total bonded qty in stock for this warehouse - No entry allowed	None	NA
On Hand Unbonded	Calculated field that sums up the total unbonded qty in stock for this warehouse - No entry allowed	None	NA
Weight Received	Calculated field that sums up the total weight of product in receipt	None	N/A
Weight Despatched	Calculated field that sums up the total weight of product sent	None	N/A
Reorder at	Used for purchase order suggestion, states the reorder at qty for a PO to be created (not migrated)	0 - 99999999 (plus allows entry of 99999999 units) - will default to zero	0
Reorder Level days	Used for purchase order suggestion, states the maximum qty that can be in the warehouse (not migrated)	0 - 99999999 (plus allows entry of 99999999 units) - will default to zero	0
Default Template No	Allows information from a template to be passed into the product record (not migrated)	Must have been created in stock templates maintenance - LOV available - will default to 0	0
Preferred Location Type's	Used to be used within the RF pre advice message - no longer used	4 x 1 character fields or left blank	Blank
Min Cover Days	Used for purchase order suggestion, states the minimum number of days stock must be in the warehouse for (not migrated)	0 - 99999999 - will default to zero	0
Pick Mode			Blank



Field Name	Description	Options	Generic Value
	Used at order entry, is related to the pallet levelling functionality. The pick modes set will dictate how pallet levelling occurs	2 digit numerical field - must have been created in pick modes maintenance or left blank - LOV available	
<i>Picking Seq</i>			
<i>Cross Dock</i>	If a product is flagged as cross dock, it is then possible to raise an order without any stock and process it to status 5. When the stock arrives at receipt, you can 'cross dock' it and it will automatically allocate to the outstanding order.	0 - Never 1 - Order Sequence with Warning 2 - Customer Sequence with warning 3 - Order Sequence without Warning 4 - Cust Sequence without warning  0	
<i>Controller</i>	A client specific reference that can be applied to the product	20 character free text field or left blank	Blank
<i>HTS Code</i>	A client specific customs reference that can be applied to the product for reporting purposes.	20 character free text field or left blank	Blank
<i>Seals **</i>	If this settings is checked as 'Y' a warning message will appear at receipt and packing to state seals are required	Y or N	N
<i>Replenish Level Quantity</i>	(greyed out for Bonded as not a bonded warehouse) - not used any more due to the flags being set within the Bonded/Unbonded Stock Locations Button	N/A	0
<i>Replenish Amount Pallets</i>	(greyed out for Bonded as not a bonded warehouse) - not used any more due to the flags being set within the Bonded/Unbonded Stock Locations Button	N/A	0
<i>Replenish Amount Quantity</i>	(greyed out for Bonded as not a bonded warehouse) - not used any more due to the flags being set within the Bonded/Unbonded Stock Locations Button	N/A	0
<i>Average Cost Base</i>			
<b>Stock Locations</b>			
<i>Location Type **</i>	Determines what type of location you are setting	1 - Bulk 2 - Pick 9 - Replenish M - Multi	Defined by the client
<i>Order type **</i>	Specifies for what order type the replenishment settings are for, should always set to 'H' Home Use	There are currently a range of options, non of which are currently supported	H - Home Use
<i>Location Code **</i>	The location code to be used as the default for this product	Must have been created in location codes maintenance and be a valid use type against the /replenish type - LOV available	Defined by the client
<i>Location Code</i>			
<i>Replenish at Quantity</i>	The minimum qty of cases/units to be in the location before a replenishment is triggered	0 - 999999999/999999999 - will default to zero	Defined by the client
<i>Replenish Pallet</i>	The quantity of pallets by which the location will be automatically replenished	0 - 999999999	Defined by the client
<i>Replenish by Quantity</i>	The quantity of cases/units by which the location will be automatically replenished	0 - 999999999/999999999 - will default to zero	Defined by the client
<i>Putaway Priority</i>	Determines in which order the location replenishments will take place	0 - 99	Defined by the client

### 1.6.10 Stock Maintenance - Pick/Despatch Messages

This tab screen enables the configuration of product level message lines that can be configured for individual customers for reporting purposes, namely on despatch notes and pick lists.



Field Name	Description	Options	Generic Value
<i>Customer Code</i> **	The customer code the pick/despatch messages will apply to	Must have been created in partners maintenance/customer wizard - LOV available	Defined by the client
<i>Name</i>	Will default in the customer name from the main settings	None	N/A
<i>Pick Message Code</i> **	The template message text code to apply to this customer	4 character free text field or left blank	Blank
<i>Despatch Message Code</i> **	The template message text code to apply to this customer	4 character free text field or left blank	Blank
<i>Pick/Despatch Text</i>	The text to apply to the message code you have just typed in. At order entry for this customer, you can then enter the message code and this text will automatically appear (not migrated)	70 character free text field or left blank	Blank

### 1.6.11 Stock Maintenance - Stock UOMS Tab



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Stock Maintenance

Company: JP1 Department: 0000 16-JUN-2025 STKSTOC01B v4.107

Owner: ROB 001 RM

Stock Code: 000000020 Description: Bonne Marche Apricot Jam Size:

Main Further Stock Physical Attributes Accounting Product Sa Client Sp Code Refs Serial Nu Stock War Bond Pick/Disp Supplier Stock UOMS Standard Product A

Bar Code	Uom	Description	Factor	Pick Use	Last Changed Date
0045320073500	UNIT				09-AUG-2022
5031123132123	CASE				09-AUG-2022

Copy Item Notes

Record: 1/2 -<OSC>

Field Name	Description	Options	Generic Value
BarCode	The default bar code number used for this product/UOM combination. The user can have various barcodes for the different UOMS to be scanned by the RDT (not migrated)	30 character free text field or left blank	Blank
Uom	The Unit of measure for this barcode	Must have been created in Unit of Measure maintenance - LOV available	Defined by the client
Description	Description of the particular Uom/barcode combination	30 character free text field or left blank	Blank
Factor	Number of smallest Uom within the Uom entered	0 - 99999999	Blank
Pick Use	The factor level of the UOM. N.B. the factor for level 4 must be less that of 3, which must be less than that of 2 etc	-	Blank
Last Changed Date	The last time this information was changed. This is not editable, but is automatically captured for reference whenever changes are made.	-	-

### 1.6.12 Stock Maintenance - Standard Pallets Tab

This screen enables the user to assign different pallet types and quantities per pallet to a product other than its default set in the main tab. This can then be used at receipt to enable multi auto putaway settings for different pallets into different location types.



Field Name	Description	Options	Generic Value
<i>Pallet Type **</i>	The pallet type this product can be received in on	Must be set up in pallet types maintenance - LOV available (note, the first record will always be created from the default already set up)	Defined by the client
<i>Description</i>	The description of the pallet type will be automatically populated from the description set up in pallet types maintenance	None	N/A
<i>Pallet Qty **</i>	The qty of stocking uom of this product to this pallet type	0 - 9999999	Defined by the client
<i>Pallet Merging</i>			
<i>Qty From</i>			
<i>Qty To</i>			
<b>Cubing Parameters</b>			
<i>Cases/Layers</i>			
<i>Layers/Pallet</i>			
<i>Layer Height</i>			
<i>UOM</i>			

This screen is used to assign analysis types to a particular product. Once assigned, this analysis type can be used to group products together and assign values to them.



Field Name	Description	Options	Generic Value
Product Analysis Type	The analysis type to be assigned to the product	Must have been created in product analysis maintenance (not migrated)	Blank
Product Analysis Value	The value assigned to this particular analysis type	3 character free text field	Blank

#### 1.6.14 Stock Maintenance - Order UOS Tab

You are only allowed entry into this tab if you have the 'Multi Order UOS' box checked to Y in the Further Stock Tab. Facilitates ordering in multiple units of measure for conversion into case/unit quantities for allocation and picking.

Field Name	Description	Options	
------------	-------------	---------	--



			<b>Generic Value</b>
<i>Unit of Sale (UOS) **</i>	The Unit of sale to be applied to the product	Must have been setup as one of the three units of measure and any other values set up in owner maintenance under owner UOS	Defined by the client
<i>Default</i>	Is this the default UOS	Y or N	Defined by the client
<b>Buttons</b>			
<b>Make Default</b>	Allows the user to highlight the specific Unit of Sale and make this the default for the product		

