

Destock Diversion

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Summary

This sheet provides information on how to setup single stock management location for 2 sites. This functionality is used to allow multiple practices to destock from one single location.

Details

In the instructions below 'Site B' will not manage its own stock at the end of this process, 'Site A' will manage the stock for both PMS sites.

Step 1: Prepare Sites

Before removing a site's responsibility for controlling their own stock, you may want to transfer stock or remove the stock levels.

Option 1: Transfer Stock

- a) Open the Stock Transfer screen (Inventory > Stock Control > Stock Transfer)
- b) Set the Source site as 'Site B' and Destination site as 'Site A'
- c) Transfer all stock as required.

Option 2: Zero Stock Levels

- a) Open the Stock Adjustment screen (Inventory > Stock Control > Stock Adjustment)
- b) Ensure 'Site B' is selected in the site filter.
- c) Select 'All' Treatment type (Left hand menu at the bottom)
- d) Select 'Select All/None' at the bottom of the screen.
- e) Select 'Zero Stock on Selected Codes' button to remove stock levels for that site.

Step 2: Setup the Destock Diversion

- a) Open the Sites Library (Administration > System > Sites > Sites)
- b) Find the site in the list (scroll or search)
- c) Select 'Site B'
- d) Scroll right to the column 'Destock Site'
- e) For the selected site, click the drop down to select 'Site A' (Our site which will have responsibility of stock)

for Site A and Site B).

f) Select 'Save' to commit.

Once saved, any stock level changes that occur at Site B will be destocked and restocked under site A.
