

How to Use Inventory Maintenance & Expiry Dashboard

This guide explains how to use **Inventory Maintenance** and the **Expiry Dashboard** within Phoenix to manage stock details and expiry dates.

Links:

- **Inventory Maintenance:**
http://phoenix.svs.co.nz:9080/erp/ic/d_items/d_items.php?from=menu
- **Expiry Dashboard:**
http://phoenix.svs.co.nz:9080/erp/ic/od_expdates/od_expdates.php?from=menu

Note: The **Expiry Dashboard** can also be accessed directly from the **Inventory Maintenance** screen.

IMPORTANT NOTE: You won't have editing access of inventory information (e.g. Price, Desc, Notes etc. which is okay as its not in the supervisor scope. You will only need access to viewing this information and editing on the Expiry Dashboard.

◆ When to Use Each Dashboard

Dashboard	Purpose
Inventory Maintenance	To view or edit stock information , including product descriptions, warehouse stock levels, locations, expiry details, and DG (Dangerous Goods) info.
Expiry Dashboard	To view and adjust expiry dates for specific stock batches within the warehouse. Best for handling stock rotation, prioritising short-dated stock, and ensuring correct expiry batch picking.

◆ Inventory Maintenance Layout Overview

The **Inventory Maintenance** screen is split into **three main sections**:

Section	Location	Purpose
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Section 1	Left side	Used for searching products. You can search by Item Code, Description, or other fields to quickly locate stock.
Section 2	Middle	Displays Item Information . Shows product description, DG information, pricing, and other general details about the item.
Section 3	Right side	Displays Warehouse Information , including stock levels per warehouse, locations, expiry batches, and other warehouse-specific data.

Tip: Clicking an item in **Section 1** will load its detailed information in **Section 2** and the related warehouse data in **Section 3**.

◆ Section 1 – Search Options in Inventory Maintenance

In **Section 1 (Search Section)**, you can use a variety of filters to search for products.

☆ Commonly Used Search Options (Most Important):

Search Option **Purpose**

Item Code Search by internal SVS item code (most used).

Desc (Description) Search by product description.

Primary Location Search by primary location.

Tip: These are the quickest ways to search when verifying stock or troubleshooting issues.

🔍 Less Commonly Used Search Options:

The screenshot shows a 'Search' interface with a grid of filter options. Each option has a dropdown menu with 'No Filter' selected. A tooltip 'CTRL + click to select multiple values' is visible above the 'Warehouse' dropdown. The 'Warehouse' dropdown menu lists 'All', 'CHRISTCHURCH', 'EQUIPMENT', 'HAMILTON', and 'PALMERSTON NORTH'. At the bottom right are 'Search' and 'Download' buttons.

Filter	Value
Item Code	No Filter
Desc	No Filter
Size	No Filter
Status	No Filter
Non-stock Item	No Filter
Brand	No Filter
Size	No Filter
Type	No Filter
Strength	No Filter
DG Goods	No Filter
DG Class	No Filter
Controlled	No Filter
Refrigerated	No Filter
Frozen	No Filter
Stock Category	No Filter
Classification	No Filter
Product Category	No Filter
Season	No Filter
Current SOH	No Filter
Primary Location	No Filter
Supplier Code	No Filter
Supplier Alpha	No Filter
Supplier SKU	No Filter
Warehouse	All CHRISTCHURCH EQUIPMENT HAMILTON PALMERSTON NORTH
Notes	No Filter
Sales Notes	No Filter
Purchase Notes	No Filter
VetChannel Notes	No Filter
Vet2Pet Listed	No Filter
Vetcare/Animates Listed	No Filter
Drop Ship Products	No Filter
Product Class	All
Item Grouping	All

Search Option

Purpose

Size, Status, Non-stock Item, Brand, Type, Strength

Filter by product characteristics.

DG Goods, DG Class, Controlled, Refrigerated, Frozen	Filter based on storage and DG requirements.
Stock Category, Classification, Product Category, Season	Filter by category or classification tags.
Current SOH, Supplier Code, Supplier Alpha, Supplier SKU	Filter by supplier details or current stock holdings.
Warehouse, Notes (various), VetChannel Notes, Vetcare/Animates List	Various internal reference fields for specialised use.
Drop Ship Products, Product Class, Item Grouping	Special filters for drop-ship or grouped products.

Search and Download Buttons

At the **bottom of Section 1**, there are two main buttons:

- **Search Button:**
 - Runs the search based on the filters selected.
 - The search result will show the **Item Code** and **Description**.
 - The **Item Code** appears as a **blue hyperlink** — clicking it will load the detailed product information in **Section 2** (Item Info) and **Section 3** (Warehouse Info).
 - **Download Button:**
 - Downloads the **search results** into an **Excel file**.
 - **Note:** This feature is **not commonly used in the supervisor role** but can be helpful if you need to export product data for reference or reporting purposes.
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Section 2 – Item Information Tabs Overview

In **Section 2 (Middle Section)**, you will see multiple tabs that provide detailed information about the selected product. These tabs include:

Commonly Used Tabs (Supervisors Focus On These):

- **Item Information**

- Notes
- Dangerous
- Image

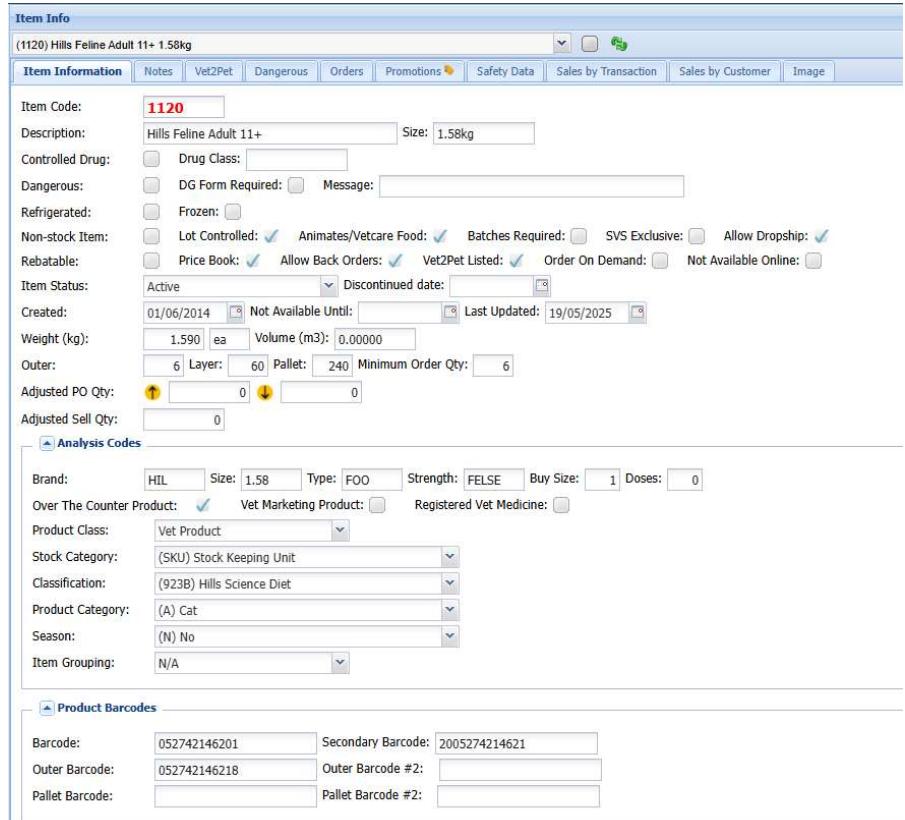
Less Commonly Used Tabs:

- Vet2Pet
- Orders
- Promotions
- Safety Data
- Sales by Transaction
- Sales by Customer

Item Information Tab (Detailed Breakdown):

The **Item Information** tab contains key product details all in one place:

- **Item Code and Description**
- **Controlled Drug and Dangerous Goods** checkboxes with DG Class and required messaging.
- **Storage Information:** Refrigerated, Frozen, Non-stock, Lot Controlled, Animate/Vetcare Food, Batches Required, SVS Exclusive, Allow Dropship.
- **Stock Settings:** Price Book status, Allow Back Orders, Vet2Pet Listed, Order on Demand, Not Available Online, Item Status (Active/Inactive), Discontinued Date.
- **Dates:** Created date, Last Updated date, Not Available Until date.
- **Packaging & Weights:**
 - Weight (kg), Volume (m3), Outer Quantity, Layer, Pallet configuration, Minimum Order Qty, Adjusted PO Qty, Adjusted Sell Qty.
- **Analysis Codes:**
 - Brand, Size, Type, Strength, Buy Size, Doses, OTC Product, Vet Marketing Product, Registered Vet Medicine.
- **Classifications:**



The screenshot shows the 'Item Info' screen with the 'Item Information' tab active. The interface includes a search bar at the top and a navigation bar with tabs: Notes, Vet2Pet, Dangerous, Orders, Promotions, Safety Data, Sales by Transaction, Sales by Customer, and Image. Below the tabs are various input fields and dropdown menus for product details like Item Code (1120), Description (Hills Feline Adult 11+ 1.58kg), and Storage information (Refrigerated, Frozen). There are also sections for Analysis Codes, Product Barcodes, and Stock Settings. The overall layout is clean and organized, typical of a software application for managing product data.

- Product Class, Stock Category, Classification, Product Category, Season, Item Grouping.
 - **Barcodes:**
 - Product barcode, secondary barcode, outer barcode, pallet barcode.
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Notes Tab Overview:

The **Notes** tab contains several sub-sections where you can view or edit key notes associated with the product:

- Notes: General product notes used internally.
 - Sales Notes: Notes that print on the customer invoice (Often delivery instructions or product information).
 - VetChannel Only Notes: Special notes only visible on VetChannel orders.
 - Purchase Notes: Internal purchasing team notes used when recording stock.
 - Generat ETA: Notes about estimated delivery times or expected product availability.
 - Inwards and picking notes: Notes that display during inwards receiving or picking to inform warehouse team about special handling or checks.
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Dangerous Tab Overview:

The **Dangerous** tab contains hazardous goods classification details for products that are classified as DG (Dangerous Goods). This is critical for shipping and handling processes.

- **UN Code:** Internationally recognised UN number for the DG classification.
- **Shipping Name:** Official shipping name of the hazardous product.
- **Additional Info:** Any extra notes relevant to handling or classifying the product.
- **Hazard Class:** Hazard classification based on the DG rating.

Item Information	Notes	Vet2Pet	Dangerous	Orders	Promotions	Safety Data
UN Code:	(UN1263) PAINT					
Shipping Name:	PAINT					
Additional Info:	FLAMMABLE LIQUID					
Hazard Class:	3					
HazChem:	3YE					
Packing Group:	III					
Flashpoint:	1.0					
MSDS:	N					
Licence Type:						
Volume ML:	1000.00					

- **HazChem:** HazChem code used for emergency response guidance.
 - **Packing Group:** Indicates the level of risk (I = highest risk, III = lowest).
 - **Flashpoint:** The minimum temperature at which the product emits vapour that can ignite.
 - **MSDS:** Reference to the Material Safety Data Sheet (if applicable).
 - **Licence Type:** If applicable, notes any restricted license required to handle.
 - **Volume ML:** Measurement of liquid volume in millilitres, if relevant.
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Vet2Pet Tab Overview: **(Not too important)**

The **Vet2Pet** tab shows product details specifically related to the Vet2Pet platform, including online listing details and autoship options.

- **Product ID:** Unique ID for Vet2Pet system.
 - **Web Name:** How the product name appears on Vet2Pet.
 - **SKU ID:** Internal SKU identifier.
 - **Variant Types and Values:** Up to three types and values (e.g., size, flavour, etc.) — often only one is used (e.g., **Size: 1.58kg**).
 - **Supplier Barcode:** Barcode supplied by the vendor.
 - **Tags:** Searchable terms linked to the product for online store filtering (e.g., cat;cat-food;senior;hills science diet).
 - **Vet2Pet Multiples:** Used for pack quantities (often blank).
 - **Allow Autoship:** Tickbox to allow autoship for repeat orders.
 - **Autoship Discount %:** Shows the discount percentage for autoship customers (e.g., 10%).
-

Orders Tab Overview: **(Not too important)**

The **Orders** tab shows a full breakdown of any stock or customer orders linked to the product.

- **Purchase Orders:** Incoming stock from suppliers with order number, ordered quantity, remaining quantity, ETA, and supplier details.

- **Sales Orders:** Customer orders that have been placed but not yet fulfilled. Shows customer, required date, quantities, and status.
 - **Indents:** Special ordered stock from suppliers specifically for certain customers (shows **NO INDENT ORDERS** if none exist).
 - **Direct Orders:** Direct-to-customer orders bypassing standard warehouse allocation (shows **NO DIRECT ORDERS** if none exist).
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Promotions Tab Overview: (Not too important)

The **Promotions** tab displays any promotional deals or special pricing currently attached to the product.

- **Promotional Items Section:** Lists any active **Promotional Items** linked to the product (e.g., buy-one-get-one-free offers). If there are none, it will display **NO PROMOTIONAL ITEMS**.
- **Special Pricing Section:** Shows discounts applied for specific customers including:
 - Special Description
 - Discount Type (Percentage or Dollar)
 - Valid From and To dates
 - Minimum order quantities for discount
 - Discount value (Disc)
 - Warehouse scope
 - Customer name and ID



Sales by Transaction Tab Overview: (Not too important)

The **Sales by Transaction** tab shows sales performance based on warehouse transactions.

- **Left Side – Sales History by Branch:**
 - Displays sales data for each branch including Sales Quantity, Invoiced Value, Cost Value, and Margin Percentage.
- **Right Side – YTD Sales Summary Report:**

- A quick summary of total year-to-date sales performance across all branches.

Supervisor Tip: This tab is useful for understanding where most stock is selling, especially if stock needs to be prioritised or reviewed across branches.

Sales by Customer Tab Overview: (Not too important)

The **Sales by Customer** tab shows sales performance by customer.

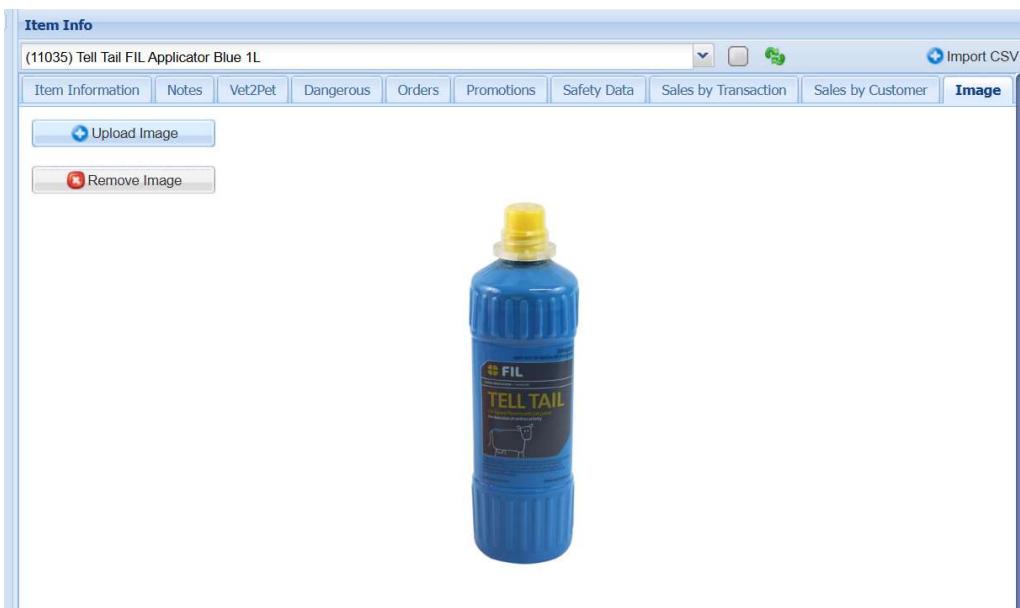
- **Sales History Table:** Lists all customers who have purchased the product, including their total quantity and spend.
- **Top 5 Buyers Table:** Highlights the top 5 customers by quantity sold.

Supervisor Tip: Good for identifying which key customers frequently order a product, useful for customer service checks.

Image Tab Overview:

The **Image Tab** displays the **product image** associated with the item. This is the same image shown on the **pick screens** of the tablets used by warehouse staff.

- The image helps confirm **visual product identification** during the picking process.
- If no image is set, the tablet pick screen will show a blank image area.



Section 3 – Warehouse Information Overview

The **Warehouse Information section** is located on the **right-hand side** of Inventory Maintenance and shows stock levels and batch data across all branches.

It is made up of **drop-down filters** and **five main tabs**:

- **Branch / Customer Filter:** Choose which branch or customer you are viewing.
- **Type Filter:** Lets you filter for **Stocked**, **Non-Stocked**, or **All** products.

Tabs within Warehouse Information:

- **Stock Holding** (most commonly used by supervisors)
- **Warehouse Information**
- **Stock Activity**
- **Non Stock Activity**
- **Stock Counts**

Supervisor Tip: You will mainly use **Stock Holding** and **Warehouse Information**, especially when troubleshooting picking issues or investigating stock discrepancies.

Stock Holding Tab Overview:

The **Stock Holding Tab** shows current stock availability for the product across all branches.

- **Branch Link:** Clicking the branch name will take you directly to the **Expiry Dashboard** for that branch.
- **Displayed Columns Include:**
 - **Qty:** Total stock on hand at the branch.
 - **Allocated:** Amount already allocated to customer orders.
 - **Back Order:** Customer orders on backorder.
 - **Future:** Stock incoming from suppliers.

- **Sell, Max, Min, On Order, Free:** Various warehouse controls and stock levels.

Warehouse Info										
HAMILTON		Filter by Customer			Filter by Type					
Stock Holding		Warehouse Information		Stock Activity		Non Stock Activity		Stock Counts		
Branch	Total SOH	Un-shelved	Allocated	Can Sell	Temp Adj	Backorder	Indent	P/Order		Expiries
CHCH	9	0	2	7	0	0	0	60	(9)	31/10/2026
EQPT	0	0	0	0	0	0	0	0	0	
HAMI	216	0	3	213	-2	0	0	0	(216)	31/10/2026
PNTH	53	0	0	53	0	0	0	0	(53)	31/10/2026

Warehouse Information Tab Overview:

The **Warehouse Information Tab** shows detailed stock and pricing information for the selected **branch** (chosen via the drop-down).

Key details shown include:

- **Location and Quantity:**
 - Shows locations and the amount of stock in each location.
- **Costing Information:**
 - **Standard Cost, Current Cost, Average Cost, Last Cost** are displayed to track pricing trends.
- **Supplier Information:**
 - Displays **Supplier ID, Supplier Name, SKU** (supplier's code), and default purchasing details.
- **Special Pricing and Promotions:**
 - Notes on special branch-specific pricing and any upcoming or pending cost changes.
- **Packaging Information:**

- Includes outer quantity, pallet quantity, and minimum order settings.

SUPPLIER SPECIALS

From	To	New Cost	Notes
NO SPECIALS			

SUPPLIER PROMOTIONS

Trigger	Promo Item	Promo Qty	Start Date	End Date	Warehouse	On PO
NO PROMOTIONS						

Stock Activity Tab Overview:

The **Stock Activity Tab** tracks stock movement history for the selected branch.

- Displayed Columns Include:**
 - Date** of movement
 - Type of movement** (e.g., sale, purchase, transfer)
 - Reference Document Number**
 - In/Out quantities**
 - Running balance**
- Double-Clicking on an Entry:**

- Opens related documents such as **Invoices** (for stock sent out), **Purchase Orders**, **Purchase Receipts**, **Packing Slips**, or **Short Dated Forms**.

Warehouse Info										
HAMILTON			Filter by Customer				Filter by Type			
Stock Holding		Warehouse Information		Stock Activity		Non Stock Activity		Stock Counts		
#	Date	T...	Ref	Qty	SOH	Cost	Avg	Price	Desc	Name
6140	21/07/2025	SH	3459710	-1	218	29.0618		34.00	Packing Note: 2244594	Tauranga Veterinary Serv
6139	18/07/2025	SH	3458951	-1	219	29.0618		34.00	Packing Note: 2243736	Top Vets Ltd
6138	18/07/2025	SH	3458162	-4	220	28.4400	29.0618	32.64	Packing Note: 2242997	PETstock NZ Ltd
6137	18/07/2025	PR	240248	120	224	29.5800	29.0507		PO Rec: 455048	Hills Pet Nutrition (NZ) Lt
6136	16/07/2025	SH	3455297	-1	104	28.4400		32.64	Packing Note: 2241652	PETstock NZ Ltd
6135	16/07/2025	SH	3455289	-3	105	28.4400		32.64	Packing Note: 2241637	PETstock NZ Ltd
6134	16/07/2025	SH	3455281	-1	108	28.4400		32.64	Packing Note: 2241215	PETstock NZ Ltd
6133	16/07/2025	SH	3456703	-1	109	28.4400		34.00	Packing Note: 2241070	CareVets Hamilton Ltd - I
6132	16/07/2025	SH	3455296	-1	110	28.4400		32.64	Packing Note: 2240717	PETstock NZ Ltd
6131	15/07/2025	SH	3455284	-1	111	28.4400		32.64	Packing Note: 2240075	PETstock NZ Ltd
6130	15/07/2025	SH	3455498	-1	112	28.4400		34.00	Packing Note: 2239744	Northland Veterinary Gro
6129	15/07/2025	SH	3454773	-1	113	28.4400		34.00	Packing Note: 2239341	Tauranga Veterinary Serv
6128	15/07/2025	SH	3455549	-2	114	28.4400		34.00	Packing Note: 2239272	CareVets Hamilton Ltd - C
6127	14/07/2025	SH	3455229	-3	116	28.4400		34.00	Packing Note: 2238887	Bay Of Islands Veterinary

Non Stock Activity Tab Overview:

The **Non Stock Activity Tab** displays credit and invoice activity for non-stock adjustments.

- **Displayed Columns Include:**
 - **Date** of transaction
 - **Type** (Invoice or Credit)
 - **Reference Document Number**
 - **Quantity and Value** involved in each transaction
- **Double-Clicking on an Entry:**

- Opens the associated **Invoice** or **Credit Note** for further review.

Warehouse Info							
HAMILTON			Filter by Customer		Filter by Type		
Stock Holding		Warehouse Information	Stock Activity	Non Stock Activity		Stock Counts	
#	Date	T...	Ref	Qty	Cost	Price	Desc
1	11/06/2025	CR	3430787	1	0.0000	32.69	Sundry Credit
2	28/05/2025	CR	3421512	1	0.0000	31.38	Sundry Credit
3	26/05/2025	IN	3419710	-1	0.0000	31.38	Sundry Invoice
4	22/05/2025	CR	3416670	1	0.0000	31.38	Sundry Credit
5	12/03/2025	IN	3363836	-6	0.0000	31.38	Sundry Invoice
6	08/08/2024	IN	3207928	-24	28.4400	30.73	Sundry Invoice
7	01/03/2024	CR	3094553	6	0.0000	30.73	Sundry Credit
8	09/02/2024	CR	3080164	2	0.0000	28.39	Sundry Credit
9	24/01/2024	IN	3068667	-1	0.0000	32.69	Sundry Invoice
10	29/12/2023	CR	3049724	1	0.0000	28.44	Sundry Credit
11	20/09/2023	IN	2981037	-6	0.0000	28.44	Sundry Invoice

Stock Counts Tab Overview:

The **Stock Counts Tab** displays a **12-month history of stock counts** for the selected product and warehouse.

- **Displayed Columns Include:**

- **Date** of count
- **Counted Quantity, Expected Quantity, and Adjustment Quantity**
- **Document Number** linked to the count (e.g., count form, adjustment invoice)
- **Type of Count:** (e.g., Revolve Count, RBULK Count)
- **User** who performed the count

Warehouse Info																					
HAMILTON			Filter by Customer		Filter by Type																
Stock Holding		Warehouse Information	Stock Activity	Non Stock Activity		Stock Counts															
Stock Counts for item 1120 in HAMI																					
(12 months activity)																					
Count Date	Type	Doc	#	Location	P/B	Expected	Counted	Adjusted	Posted	Status	Counted By										
18/07/2025 16:54:27	REVOLVE	1580	4071	F08B03	P	9	7	-2	N	ACTIVE	Sam Watts										
09/04/2025 14:05:33	REVOLVE	1539	4180	F08B03	P	43	37	-6	P	Accepted	Sam Watts										
07/04/2025 09:20:31	REVOLVE	1539	4179	F08B03	P	27	21	-6	N	Inactive	Connor Buckman										
28/01/2025 16:48:07	REVOLVE	1470	4285	F08B03	P	14	14	0	N	Inactive	Sam Watts										
31/10/2024 09:00:55	REVOLVE	1445	4305	F08B03	P	11	11	0	N	Inactive	Sam Watts										
21/10/2024 14:13:06	MANUAL	1439	5	F08B03	P	6	2	-4	P	Accepted	Sam Watts										
16/10/2024 10:32:04	MANUAL	1439	3	F08B03	P	11	7	-4	N	Inactive	Sam Watts										
16/10/2024 10:31:25	MANUAL	1439	2	F06D01	S	150	150	0	N	Inactive	Sam Watts										
19/08/2024 13:10:09	REVOLVE	1399	4571	F08B03	P	30	32	2	P	Accepted	Sam Watts										
19/08/2024 11:23:59	REVOLVE	1399	4496	F08B03	P	30	32	2	N	Inactive	Sharleen Wilkie										
19/08/2024 09:15:23	REVOLVE	1399	4495	F08B03	P	31	33	2	N	Inactive	Sam Watts										

Expiry Dashboard Overview:

The **Expiry Dashboard** allows you to view and update expiry dates for products within each warehouse.

- After **searching for an item**, it will display:
 - **Locations** where the stock is stored (Primary or Secondary).
 - **Expiry Date** of the stock in each location.
 - **Quantity (Qty)** currently held in each location.
 - **Batch Number** (shown only for **3PL locations**).
- **Total Quantity:**
 - Shows the **sum of all quantities entered** across the listed locations. This automatically updates if you adjust the expiry date quantities.
- **Current SOH (Stock on Hand):**
 - Shows the **actual current stock on hand** in the system. **This value doesn't change** if you update expiry details.

Important: The **Total Quantity (after changes)** and the **Current SOH** should always **match** before pressing **Process Changes** to avoid errors.

Expiry Date Modification Dashboard

Expiry Batch Processing
Report run on Monday 21st July 2025 - 4:00pm

HAMI Item: (1120) Hills Feline Adult 11+ 1.58kg

Location	Expiry Date	Qty <input type="checkbox"/>	Batch Number	+
Secondary: F05E01	31/10/2026	90		+
Primary: F08B03	31/10/2026	6		+
Secondary: F08D02	31/10/2026	120		+
		Total:	216	
		Current SOH:	216	

 **Process Changes**

--- End of Report (2.28 seconds) ---

● How to Make Changes in the Expiry Dashboard

You can **edit expiry quantities** to reflect stock movements between locations or correct expiry records.

Example Scenario (Moving Stock Between Locations):

If you are **moving 90 units** from **Secondary F05E01 (expiry 31/10/26)** to **Primary F08B03 (expiry 31/10/26)**:

- Set the **Secondary location quantity** (F05E01) to **0**.
- Increase the **Primary location quantity** (F08B03) by **90 units**.
- The **total quantity** will automatically update.
- Click **Process Changes** to apply the adjustment.

Important Rule About Expiry Dates:

- If the **expiry dates are different** between locations:
 - Press the  **plus button** beside the destination location (e.g., Primary).
 - **Add a new expiry row** with the correct **expiry date** and **quantity**.

- **Do not mix different expiry dates into a single line**, they must remain separate.

! Common Issue – Negative Stock or 00/00/0000 Date:

- Sometimes, an item becomes **lot controlled incorrectly** causing picking errors.
- In Expiry Dashboard, this shows as **negative stock and blank or as (00/00/0000) expiry dates.**
- Fix: You **cannot fix this yourself** — it requires submitting a **support ticket** to IT.

Supervisor Tip: Always double-check that the **Total Qty = Current SOH** before processing changes. If they don't match, your changes won't save properly.

You can access the Expiry Dashboard by clicking the expiry date section for the specific warehouse you want to edit.

Branch	Total SOH	Un-shelved	Allocated	Can Sell	Temp Adj	Backorder	Indent	P/Order	Expires
CHCH	9	0	2	7	0	0	0	60	(9) 31/10/2026
EQPT	0	0	0	0	0	0	0	0	
HAMI	216	0	3	213	-2	0	0	0	(216) 31/10/2026
PNTH	53	0	0	53	0	0	0	0	(53) 31/10/2026