Location Item Creation and Configuration

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Learn how to set up a location. In Tecsys Point of Use (POU/SMS), multiple locations can represent a single physical location with various types of inventories being managed.

CREATE LOCATION ITEMS

1. Launch the Location Items resource.
2. Select **Create**.
3. Name the location based on system approved naming conventions.
4. Select **Continue**.
5. Enter any required information, additional fields are explained below.

Location | **TEST_LOCATION**

SET THE GENERAL INFORMATION

1. Enter the **Bin Location** of the item.
2. Enter the **Bin Sequence**, used to determine the picking path during case picking.
3. Set **Active** as needed. 0 – No and 1 – Yes (default).
4. Determine the **Inventory Type**. It indicates whether the location item is an expense or an asset. Set to 0 – Asset (default) or 1 – Expense.
5. Usage UOM (default from Items resource).
6. Replenishment UOM (default from Items resource).

SET THE ITEM CHARACTERISTICS

1. Enter the **Bin Location** of the item.
2. Enter the **Bin Sequence**, used to determine the picking path during case picking.
3. Set **Active** as needed. 0 – No and 1 – Yes (default).
4. Determine the **Inventory Type**. It indicates whether the location item is an expense or an asset. Set to 0 – Asset (default) or 1 – Expense.
5. Usage UOM (default from Items resource).
6. Select if the item is a **Consignment item** or not.
7. Select the **Consignment Billing Type** if applicable.
8. If the Item is Lot/Expiry controlled, select the appropriate criteria (0 – None, 1 – Lot and Expiry Date,2 – Expiry Date).
9. If the item is serial tracked. Select the appropriate criteria (0 – None, 1 – Usage, 2 – Full Tracking).
10. Determine if the user can print delivery labels for the current location item record, select Yes or No (default).

11. Set the **Delivery Label UOM**.

SET THE ITEM COUNT FIELDS

1. Enter this information if an item is in a Par Location.
2. Count Frequency defaults to never which is typical. If you set it to interval or always, the system will not let the count be completed until those items are counted. If interval, it is based on the number of Interval days set, if always, then every time a count is performed.
3. Set the **Count Frequency** (0- Never, 1 – Interval, 2 – Always).
4. Set the **Default Count Quantity**. Depends on the value set in Count frequency field (0 – None, 1 – Zero, 2 – Maximum).

SET THE REORDER FIELDS

1. **Allow Reorder** defaults to Yes if Reorder group is listed. Defaults to No if no Reorder group is listed.
2. Set a **Reorder Group** to indicate which reorder group this location item belongs to.
3. Set the **Stock Type** (1 – Stock Item, 2 – Non-Stock Item). Non-stock is only used in Non-stock Location.
4. Set the **Minimum** and the **Maximum Quantity**. If Par Location, the quantities must match.
5. Determine the **Critical Quantity**. (This is not typically used.)
6. Set the **Standard Replenishment Location**. (This can be an internal replenishment Location or a Vendor.)
7. Set the **Critical Replenishment Location**. (This is not typically used.)
8. Set the **Vendor Replenishment Shipping Method** (0 - N/A, 1 - Drop Shipment).

Note: When the standard replenishment location is warehouse, then the default value is set to 0 – N/A. When the standard replenishment location is vendor, the default value is set to 1 – Drop Shipment.

9. Set the **Expected Lead Time**, as appropriate. (This is not typically used as ERP establishes expected lead time.)
10. Determine the **Desired Days on Hand**, as appropriate. (This is not typically used.)

SET THE ITEM STATISTICS FIELDS

1. If needed, enter the **Inventory Average Cost**.
2. Enter the **Replacement Cost**.

Note: This information does not need to be filled out as cost will interface over from Workday.

SUBMIT THE FORM

1. When all the required fields have been entered, select **Submit**.