

Destock Diversion

24/10/2024 12:41 pm BST

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 (Utilities > 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 (Utilities > 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.
