

Stock Items

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[Relates to version](#)

Tags: [10.1](#)

The Stock Items screen is the primary screen for managing inventory in MES. Here you can:

- Find all material items in the system, regardless of their status.
- Find each item's **Item Status** report, detailing information linking to that item in the system.
- Trigger a range of inventory transactions.

Every item has a **Status** which could be WIP, Available, Kitted, In Transit, Picked, Dispatched, Purged, Return to Vendor, Depleted and On-hold.

Every item has a **Validation Mode** which indicates the type of order the item has been made on and/or controls where it can be consumed. Validation modes are:

- **Virtual Test:** Items received in Virtual Test mode or made in Virtual Test orders cannot be consumed to anything other than virtual test items.
- **Pre-production:** Items made in Pre-production orders.
- **Production:** Items received in production mode or made in Production Orders.

In **Production** or **Pre-production** works order mode, items in production or pre-production mode can be consumed to the items being manufactured.

Note that items received through the **Receipt** UI will have the validation mode specified by the user in the UI.

Receive Stock

Stock can be received from Stock Items. For more information, see [Receive Stock](#).

Recently Received

This page displays a record of when the selected product was received, the quantity, location and who received it.

Click the **Recently Received** button and select how far back you want to report on.

Details

Click the **Details** button to open the Item Status screen for the selected item.

Dispatch

Allows you to record the dispatch of an item. This is usually managed through a [Dispatch Order](#) but you can manually record a miscellaneous dispatch of an item from **Stock Items**. To dispatch stock via **Stock Items**:

1. Navigate to **Stock Items** and click **Dispatch**.

Dispatch input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Serial Number:** Serial number of the material item. This field cannot be edited.
- **Quantity*:** Quantity to be dispatched.
- **UOM:** Unit of Measure.
- **Delivery Number:** Delivery number for this dispatch.
- **Comments:** Leave a comment.

Return To Vendor

Return To Vendor (RTV) type dispatch orders can manage this function but you can also manually record single RTV of items from **Stock Items**. To return a stock item to vendor via **Stock Items**:

1. Navigate to **Stock Items** and click **RTV**.

Dispatch input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Unique ID:** Unique ID of the item being returned. This field is not editable.
- **Barcode / Serial #:** Serial number of the item being returned. This field is not editable.
- **Reason Type:** Select a **Material Reason Type**. The **Reason** field below will be filtered by **Reason Type**.
- **Reason*:** Select the reason for the return. For more information, see [Material Reasons](#).
- **Comment*:** Leave a comment.

Hold

An important aspect of inventory management, especially from a quality assurance perspective, is placing items on hold that are pending checks or found to be, or are potentially, uncompliant. Examples of where items could be placed on hold are:

- If a pallet has been dropped so there needs to be additional checks.
- There has been an issue found on a open order that could potentially affect items already completed.
- Stock has been received from a supplier and is pending incoming checks.

Hold status prevents any of these items from being inadvertently used or shipped. Items on hold are indicated by a red border on the left hand side of the grid. Why an item is on hold can be found in item status.

An item is often placed on hold due to a related issue. Items processed on a pre-production works order or any workflow task ending in an **On Hold** end node are automatically placed on hold. An item is also automatically put on hold if it is linked to a hold issue in issue manager. To place an item on hold via **Stock Items**:

1. Navigate to **Stock Items** and click **Hold**.

Hold Item input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Unique ID:** Unique ID of the item being returned. This field is not editable.
- **Barcode / Serial #:** Serial number of the item being returned. This field is not editable.
- **Reason Type:** Select a **Material Reason Type**. The **Reason** field below will be filtered by **Reason Type**.
- **Reason*:** Select the reason for placing the item on hold. For more information, see [Material Reasons](#).
- **Comment*:** Leave a comment.

Release

The release transaction removes a manual hold on an item and returns it to available status. For example:

- Incoming stock received on hold has successfully completed release checks
- Stock produced has successfully completed post-production checks

To release an item on hold via **Stock Items**:

1. Navigate to **Stock Items** and click **Release**.

Release input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

The Unique ID and Bar Code / Serial # of the item is pre-configured and is not editable.

Reason Type: Select a **Material Reason Type**. The **Reason** field below will be filtered by **Reason Type**.

Reason*: Select a reason for releasing the item. For more information, see [Material Reasons](#).

Comments: Leave a comment.

Adjust

The adjust transaction updates the quantity for an item for example as part of a stock check. Note that you cannot adjust the WIP quantity from the **Stock Items** screen: this must be done from the workstation using the **Adjust WIP Qty** function button if available. To perform an item adjust via **Stock Items**:

1. Navigate to **Stock Items** and click **Adjust**.

Item Adjust input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Current Status

The current status of the material item. None of the fields are editable.

- **Unique ID**: Unique ID of the item being adjusted
- **Barcode / Serial #**: Serial number of the item being adjusted.
- **Location**: Location of the item.
- **Current Qty**: Quantity of the item.
- **Current State**: Current stat of the item.

New Status

- **Qty Adjust***: Quantity of the material item to be adjusted.
- **UOM***: Unit of measure.
- **Reason Type***: Select a **Material Reason Type**. The **Reason** field below will be filtered by **Reason Type**.
- **Reason***: Select a reason. Note that reasons that appear are only reasons that are assigned to the product type and adjust transaction. For more information, see [Material Reasons](#).
- **Comments***: Leave a comment.

Scrap

Scrap refers to production output that has been deemed defective or unusable and is permanently removed from the production flow. It represents quantity that cannot be reworked or used as finished goods.

Scrap can be managed from Stock Items if the item is not in WIP status, e.g., in case of warehouse stock damage issues. For WIP items it is commonly managed from the workstation for 'Scrap WIP quantity' or 'Remove and Scrap' for faulty component items. To scrap an item on via **Stock Items**:

1. Navigate to **Stock Items** and click **Scrap**.

Hold Item input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Qty scrapped**: Quantity of the material item to be scrapped and UOM.
- **Reason Type***: Select a **Material Reason Type**. The **Reason** field below will be filtered by **Reason Type**.
- **Reason***: Select a reason. For more information, see [Material Reasons](#).
- **Comments***: Leave a comment.

Edit

Allows you to edit the item (most commonly used for serial number change, Cost per Unit for volatile pricing of materials). Note that this can also be done from the workstation if an action has been configured to update the item (e.g., change serial number). You can edit the Batch Number, Version, Ownership Type, Nominal Qty, Unique ID, Expiry Date, Visual Serial # and Cost Per Unit.

Move

Move is a material transaction that transfers a material item (serial/batch) from one inventory location to another within the system. Note that locations are restricted to those locations assigned to the product (this prevents stock being stored in the wrong place e.g. hazardous materials may only be allowed to be stored in a controlled warehouse or on ground floor locations).

Manual moves can be triggered from Stock Items as part of warehouse management. Moves can also be managed from the workstation and can be automated to match the work centre location if configured in the action.

To move a material item, click **Move** in **Stock Items** and provide the new location with an optional comment.

Split

Split Item is a material transaction that divides a single material item (serial or batch) into two or more separate child items, each with their own identity, quantity, and traceability record.

Manual splits can be triggered from Stock Items, for example, if a pallet is being split in two in the warehouse. There are also multiple ways that this can be triggered from the workstation (including split WIP function button for manual splits and action configuration for automatic splits on partial complete). For more information, see [Splitting](#).

To split an item via **Stock Items**:

1. Navigate to **Stock Items**, select the material item and click **Split**.

Split Item input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Barcode / Serial #**: Serial number of the item being split. This field is not editable.
- **Current Actual Qty**: The quantity in stock and UOM. This field is not editable.

New Item Details

- **Barcode / Serial #**: Serial number of the new item. You can leave it blank for the serial number to auto generate based on configured logic for the product, or you can input a serial number. For more information, see [Serial Numbers](#).
- **Location***: Where the split quantity will be located.
- **Quantity***: Quantity to be split off and UOM.
- **Comments***: Leave a comment.

Bill Of Materials

A BOM is a structured list of requirements (BOM slots) to manufacture a finished product, where each requirement defines one or more interchangeable components, raw materials, or sub-assemblies that can fulfil it.

The BOM button opens a shortcut to the Item Status, Bill of Materials screen.

Name	Product	Required Qty	Fitted Qty	Unit Of Measure	Status	Built %
DS_BOM_002	DS_BOM_Product		4	KG		
First Slot		40	50	EA	Slot Satisfied	125
DS_BOM_005	Dnyaneshwar Product		6	EA		
DS_BOM_005_001	Dnyaneshwar Product		4	EA		
DS_BOM_006	Dnyaneshwar Product		40	EA		
Second Slot		40	50	AK Unit	Slot Satisfied	125
DS_BOM_003	Dnyaneshwar Location Product		10	AK Unit		
DS_BOM_003_001	Dnyaneshwar Location Product		40	AK Unit		
Third Slot		40	50	as Unit	Slot Satisfied	125
DS_BOM_002_001	Dnyaneshwar_07july2025		50	as Unit		

Print

Allows you to manually print labels from stock items (e.g. for replacement of damaged labels). Primary management of label printing is done from the designated workstation label print actions / buttons or via receipt. To print a label via Stock Items:

1. Navigate to **Stock Items**, select the material item and click **Print**.

Print Label input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Label Type**: Filters the Label Design field below by the selected Label Type.
- **Label Design***: Select a Label Design.
- **Printer***: Select a printer.
- **Device**: Select a device that the printer is linked to.
- **Qty of Labels***: Number of labels to print.
- **Print Type**: Select a Print Type. Options: Print, Save to File, Print and Save to File, Extract Fields.

Assign Job

Assign to Job is a material transaction that links a specific inventory material item (identified by serial number or batch) to an active work order. This creates a formal kitting record that ties the physical material to a specific BOM slot on the job, enabling full material traceability through production.



Note

Kitting in MES differs from consumption (**Use** transaction). A **Use** transaction creates a direct link between a component item and a parent item - the component becomes part of the parent item. Kitting creates a link between a component item and a job (which could have many items) - this reserves the item to the job, preventing it from being consumed elsewhere.

You can kit items to a job through a kitting action in a workflow or enable it in the warehouse by using the **Assign Job** UI from Stock Items. The result is the same, regardless of whether the item is kitted in Stock Items or in a workflow kitting action.

To assign items to a job via **Stock Items**:

1. Navigate to **Stock Items**, select the material item and click Assign Job.

Assign job input screen

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Order Number***: The Order Number the selected stock item will be assigned to. Use the search above this field to filter the Order Number field.
- **Slot***: To facilitate the kit completion measure, it is important to link the item you are kitting to a specific BOM requirement on the job.
- **Qty***: Quantity to be assigned to the job.

Convert Item

This allows you to convert an item into a different item (if conversion profile is configured for the item). For example, convert 1 tonne of high-grade materials into 1 tonne of low-grade materials if incoming checks for high grade fail or convert a shipping case of product down into individual packs. Note that conversions are often controlled via specifically configured workflows. Only items in an **Available** status can be converted. To convert an item via Stock Items:

1. Configure **Conversions** in the Products screen for the source product and the destination product.
2. Navigate to **Stock Items**, select the material item and click Convert Item. The pop-up provides a list of products the selected product can be converted into.
3. Select the destination product and click Convert.

The example below shows the screens for converting a box of 10 dental implants into 10 individual implants.

Stock Items

Product

Enter a product here ...

Product Group

Product Type

State

3 Item(s) selected

Expiry From

Expiry To

Serial No

dental

Serial No. Partial Match

Off

Search

Receive Stock

Recently Received

Details

Dispatch

Hold

Rtv

Adjust

Scrap

Edit

Move

Split

Split Advanced

Bom

Print

Assign Job

Convert Item

Merge Into

Documents

Product	Serial Number	Batch Number	Status	Qty	Wip Qty	UOM	Order No	Location	Expiry Date	Kitted To Order...	Validation...
box of 10 dental implants	dental		Available	1	0	Box of 10		! DW Locn1			Production

Page Size

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Current Page

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Prev

Next

Convert Item

i

?

x

From	To	Ratio
box of 10 dental implants	Dental Caps	1:10
box of 10 dental implants	Dental Implant	1:10

Close

Stock Items

Product

Product Group

Product Type

State
3 item(s) selected

Expiry From

Expiry To

Serial No
Serial No. Partial Match
☐ Off

Receive Stock

Recently Received

Product	Serial Number	Batch Number	Status	Qty	Wip Qty	UOM	Order No	Location	Expiry Date	Kitted To Order...	Validation...
Dental Implant	dental		Available	10	0	EA		1 DW-Loctn1			Production

Page Size
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Current Page
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Merge Into

It is good practice in a warehouse environment to merge items where valid to maximise space usage or efficiency. This can be done by using the Merge Into function. In this function the item selected is merged into the target candidate specified or the older of the two items if **Preserve Oldest** is turned on.

Note that this is also automatically triggered when two otherwise identical items are moved into the same location. To merge material items in **Stock Items**:

1. Navigate to **Stock Items**, select the material item and click **Merge Into**.

Merge Material Item input screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

The Source Location, Source Serial No. and Unique ID fields are pre-configured with the selected item's information and is not editable.

- **Allow moving before merge***: Two items need to be in the same location before they can be merged. If this option is **Yes** then the item selected will be automatically moved into the target's (or oldest item if selected) location before the merge is transacted.
- **Preserve Oldest***: A high proportion of operations operate on a FIFO/FEFO basis, i.e., they will always want to use up older stock before using newer stock to keep inventory turning over. This could be especially important where expiry control is part of the item quality requirements.

If you merge two items of different ages, you may want to ensure that the system reflects the older of the two items being merged, to ensure you do not inadvertently use a partial batch that is out of date sometime later. If **Preserve Oldest** is selected the system will use the older of the two items as primary source of truth for the resulting merged item.

Documents

Shortcut to item documents. Also available from multiple locations in the system.