



**CRAWFORD**  
SOFTWARE

# Negative Inventory in Epicor ERP

# How to Allow Negative Inventory with Standard Epicor ERP

- In the part class definition, you define the action taken if a transaction for a part will result in negative inventory. You define the action by selecting the indicator next to the picklist of Warn, Stop or None. The settings you specify here are for all parts assigned to this part class.

# Navigate to the Part Class Maintenance Screen

Navigate to the Part Class Maintenance Screen

Material Management > Inventory Management > Setup > Part Class

The screenshot shows the 'Part Class Maintenance' window. The 'Part Class' is set to 'Raw Materials'. The 'Description' is 'Raw Materials' and the 'Buyer' is 'Crawford Software'. The 'Negative Quantity Action' is set to 'None'. The 'Purchase Type Code' is empty. The 'Deferred Expense' is unchecked. The 'Amortization Code' is empty. The 'Calculate Min/Max/Safety Values' section has 'Include in Calculation', 'Include Sales History', and 'Include Job Materials' all unchecked. The 'History Window' is 0, 'Safety Factor' is 0, 'Max Factor' is 0, and 'Default Part Lead Time' is 0.

**Warn** – The user will get a popup message that they must click OK to acknowledge that the transaction they are about to post will result in a negative on-hand inventory quantity.

**Stop** – The user will see a popup message that they must click “OK” to acknowledge that the transaction they are about to post will negatively affect on-hand inventory quantity. The transaction gets canceled after the message is accepted.

**None** – The inventory transaction is posted and results in a negative on-hand inventory.

The screenshot shows the 'Part Maintenance' window for 'CRAWFORD-SOFTWARE'. The 'Part' is 'CRAWFORD-SOFTWARE'. The 'Site' is 'Main' and the 'Primary Warehouse' is 'Main'. The 'Costing Method' is 'Std' and the 'Costing Lot Size' is 0.00. The 'UOM' is 'BR'. The 'Negative Quantity Action' is set to 'None'. The 'Type Detail' is 'Sales Kit'. The 'Inventory' section has 'Min On-Hand', 'Max On-Hand', and 'Safety Stock' all set to 0.00. The 'Manufacturing' section has 'Backflush', 'Limit Production Yield Recalc', 'Raw Material', and 'Machine MES' all unchecked. The 'Purchasing' section has 'Buyer' set to 'Crawford Software', 'Min Order Qty' set to 0.00, 'Lead Time' set to 0, 'Forecast Time' set to 0, and 'Supplier' set to 'Crawford Software'. The 'Urgent Planning' section has 'Min Order Qty' set to 0.00, 'Lead Time' set to 0, and 'Mul Order Qty' set to 0.00.

# How to Use Crawford Software's Negative Inventory Extension to Achieve Better Inventory Control and Accuracy

- The Crawford Software Epicor extension allows you to control the action that Epicor will take when an inventory transaction results in a negative inventory. You can set the flag at the central part level or the site level.
- This extension provides more flexibility and control for inventory management, allowing you to maintain inventory accuracy better and improve your cycle and physical counts. Stop high-value parts from going negative in inventory without flagging the entire part class.

## Maintaining the Negative Inventory Allowed Flag at the Part Central Level

When the indicator is set here, the same value applies to all sites in the Epicor ERP installation.

The screenshot displays the 'Part Maintenance' window in Epicor ERP. The 'Part' tab is active, showing details for 'CRAWFORD-SOFTWARE'. The 'Description' is 'Crawford Software Raw Bar Stock'. The 'Type' is 'Purchased' and the 'UOM Class' is 'Bar Stock'. The 'Primary UOMs' are 'BR', 'FT', and 'FT'. The 'Sales Unit Price' and 'Internal Price' are both 0.00000. The 'Group' is 'Component Parts' and the 'Class' is 'Bar Stock'. The 'Negative Quantity Action' dropdown is open, showing options: 'None', 'Warn', and 'Stop'. The 'None' option is selected. Other settings include 'Global Lock' (Global), 'Search' (Crawford), 'Hold' (0), 'Run Out' (checked), 'Web Saleable' (checked), 'Use Part Rev' (checked), 'Constrained Material' (checked), 'Track Lots' (checked), 'Package Control Specific UOMs' (checked), 'Track Multiple UOMs' (checked), 'Track Serial Numbers' (checked), 'Consolidated Purchasing' (checked), 'Receipt Docs Required' (checked), 'Shipping Docs Required' (checked), 'Sub Level Code' (0), 'Service' (checked), 'Costing Method' (Std), 'Link to Contract' (checked), 'Non-Stock Item' (checked), 'Buy To Order' (checked), 'Quantity Bearing' (checked), 'Drop Ship' (checked), 'Phantom BOM' (checked), 'MDPV' (0), and 'Returnable Container' (checked).

# Maintaining the Negative Inventory Allowed Flag at the Part Site Level

- When you set the indicator here, the action defined is unique for the site and can be unique for all sites in the Epicor ERP system.

# Transactions Updated

- To ensure the Crawford Software extension supports all business process, the following transactions are updated to use the new functionality:
- Part, Customer Shipment Entry, Transfer Order Entry Transfer Order Shipment Entry, Inventory Transfer, Issue Assembly, Issue Miscellaneous Material, Issue Material, Quantity Adjustment, Mass Issue to Manufacturing, Receipt Entry.
- Use the form below or call (603) 537-9630 to contact Crawford Software for a demonstration of our Negative Inventory Epicor Extension. Learn how you can improve your Epicor Inventory Control, Management, and Accuracy. With more than 10 years of experience as an Epicor consulting partner, our consulting team can help with any requirement, implementation, new functionality, customizations, development, business process consulting, performance tuning, technical consulting, help desk, and hosting.