# Phase In / Out Data Dictionary

**Parts Purchases -> Setup -> Parts Purchase Setup -> General**

**Phase-In Recency of Sale** If the part has not sold within this time frame, it is not reviewed to determine if it meets the phase-in rules. Common values are 15D, 30D, and 90D, depending on how frequently you run the phase-in routine.

**Never Phase-in Interval** When a part is marked "Never Phase-in" (Item Card -> Ordering Tab), it is also marked with the date. After the "Never Phase-In Interval" expires, the "Never Phase-in" box is automatically unchecked during the Phase-in routines and the part is again eligible for phase-in. For example, this allows you to say "Never Phase-in" and have the part become eligible again after the new model year begins. Common values are 6M and 1Y.

**Default Source Code** When a part is sold or purchased and does not yet have a Source assigned, the Default Source Code is automatically assigned.

**Parts Purchases -> Setup -> Source Code Setup**

**Source No.** Identifying value for the Source. Alphanumeric, up to 4 characters.

**Source Description** Text value for ease of keeping track of which Source is which.

**Order Pad Code** Groups Sources together for use during the Create Stock Order routine.

**Skip on Stock Order** Causes parts in this Source to be skipped during the "Create Stock Order" routine.

**Skip Phase-In/Phase-Out** Causes parts in this Source to be skipped during the Phase-In routine (Parts Phase-In -> Functions -> Create List of Parts to Phase-In) and the Phase-Out routine (Parts Phase-Out -> Functions -> Create List of Parts to Phase-Out). Note Will not cause phased-in parts to be skipped during the Inventory Levels routine (Adjust Inventory Levels -> Functions -> Create Proposed Stock Levels).

**Phase-In Rule Code** Determines what criteria are applied to parts in this Source during the Phase-In routine.

**Phase-In Uses Costs** Determines whether or not this Source uses the Minimum Cost and Maximum Cost fields in the Phase-in Rules. The Cost fields allow you to apply different rules for parts in the same Source based on the cost.

**Phase-In Counts Lost Sales** Determines whether or not the phase-in for this Source counts lost sales in determining whether or not to phase-in a part.

**Phase-Out Rule Code** Determines what criteria are applied to parts in this Source during the Phase-Out routine.

**Inventory Level Rule Code** Determines what criteria are applied to parts in this Source during the Inventory Levels routine.

**Allow Zero Stock Level** By default, the system will force any Phased-In part to receive a Best Stock Level (BSL) of at least 1. Checking this box allows a part in this Source to receive a BSL of zero if that's how the average daily demand and days of supply rules work out.

**Lock Description** Causes parts in this source to not have their description overwritten during the parts master load routines.

**Lock Matrix Price** Causes parts in this source to not have their Matrix Price updated during the parts master load routines.

**Parts Purchases -> Setup -> Parts Phase-In Setup**

**Phase-In Rule Code** To which rule does this criterion apply. A rule can have more than one criteria.

**Minimum Cost** Based on Factory Cost, this field determines which rule gets applied. If you do not use cost as a part of the criteria for a Source that has this rule, you must have an entry with Minimum Cost and Maximum Cost set to 0.00. If you do use cost, you should have a series of rules with adjoining minimums and maximums (For example: 0.01 to 15.00, then another rule at 15.01 to 100.00, then 100.01 to 99999). Keep in mind that you can have multiple setups for the same rule for the same Cost Group.

**Maximum Cost** Based on Factory Cost, this field determines which rule gets applied. If you do not use cost as a part of the criteria for a Source that has this rule, you must have an entry with Minimum Cost and Maximum Cost set to 0.00.

**Minimum Sales To Phase-In** How many separate sales tickets are required (counter tickets or repair orders).

**Minimum Pieces To Phase-In** How many individual parts have to be sold on those tickets.

**Days Reviewed** Over what time period do these sales have to take place.

**Common values** are 3, 3, 270 (3 sales with 1 piece on each sales in the last 9 months), 3, 6, 270 (3 sales in the last 9 months, but average 2 pieces per sale), etc.

**Parts Purchases -> Setup -> Parts Phase-Out Setup**

**Phase-Out Rule Code** To which rule does this criterion apply. A rule can have more than one criteria.

**Minimum Sales To Keep** How many separate sales tickets are required (counter tickets or repair orders).

**Minimum Pieces To Keep** How many individual parts have to be sold on those tickets.

**Days Reviewed** Over what time period do these sales have to take place.

**Common values** are 1, 1, 90 (At least 1 sale in the last 3 months), 2, 2, 180 (at least two sales in the last six months), 2, 2, 270 (at least two sales in the last 9 months), etc.

**Parts Purchases -> Setup -> Inventory Rules Setup**

**Rule Code** Identifying value for the Rule. Up to 10 characters, alphanumeric.

**Minimum Days of Stock (BRP)** What's the minimum number of days of supply you want to keep on hand.

**Days of Supply to Stock (BSL)** What's the normal level you want to stock up to on your stock orders.

**Days of History to Review** Over what time period do you want to determine your average daily sales.

**Common values** are 14, 30, 180 (review the last 6 months, reorder when it gets down to two weeks supply, and order back up to a 30 day supply), 10, 21, 90 (review the last 3 months, reorder when you have just over a week's supply left, and reorder back to a three week supply), etc.