Investigate Low or Expired Stock

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Overview

This guide will help you identify low, expired, or near-expiry stock and assign an appropriate replenishment or control action.

Inventory exceptions have a defined operational response; the report itself does not execute that response.

Who can do this

You need access to Low Stock and Expired Stock report access plus relevant item/location scope.

Before you start

Confirm reorder thresholds, lead times, expiry policy, usable locations, batch dates, reservations, and pending supply.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Low Stock Report or Expired Stock Report.

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Step 1: Select company, location, and cutoff date

Step 2: Run the low-stock or expired-stock view

Step 3: Confirm item, batch, on-hand/available quantity, threshold, and expiry date

Step 4: Check pending purchase, transfer, requisition, sale, and production demand

Step 5: Classify each exception for replenish, transfer, quarantine, return, dispose, or

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Step 6: Record owner and due date outside the report if no

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Check your work

Re-run after approved transactions and confirm resolved exceptions disappear or show the intended status.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Validate batch dates and thresholds before acting.
- Do not sell or transfer expired stock contrary to policy.

Related guides

- Forecast Available and Bundled Stock

- Create a Purchase Order
- Transfer Stock Between Locations

What to do next

> **Forecast Available and Bundled Stock**.

Revision #0
Created 2026-09-04 09:20:18 UTC by Shah Rukh Saeed
Updated 2026-09-07 10:14:00 UTC by Shah Rukh Saeed