

FOR YOUR IT TEAM OR ERP CONSULTANT

The data Narada needs

Every file, every column, what each one is used for and what it unlocks. First what your free reports need, then what Narada needs to run every day. Send your exports as they come out: we map and load them.

TIER 1 • FREE REPORTS

Four files, two years back

Parts list, sales lines, stock counts and purchase orders. Enough for the health report and the Digital Twin ROI report.

TIER 2 • EVERY DAY

The same files, nightly

Plus goods receipts, suppliers and branches. Narada then keeps your buy list, stock and findings current.

TIER 3 • SHARPENS IT

If you have them

Customers, returns, open invoices, batches. Each turns on its own set of checks.

As it comes out

Your column names, your layout. No renaming or reformatting: we map it

2 years

of history is best. 18 months is enough for the full report

No names

Codes are enough. Section 7 shows what to remove

Read only

Narada reads your exports. It never writes to your ERP

What happens after you send

We match your columns to ours by hand and check every match. Within the first week we tell you, in plain words, anything that is thin or missing. Then we run the reports.

1

You send

Your exports, as they come out, by a link from your own storage

2

We map and check

Within the first week, and tell you anything thin or missing

3

You get two reports

The health report and the Digital Twin ROI report, free

Every file and column here matches what Narada's importer reads today (October 2026).
Questions about a column: reply to the email this guide came with.

naradaos.com

IN THIS GUIDE

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1 • AT A GLANCE

Eleven files, in three tiers

Start with tier 1: four files are enough for both free reports. Tier 2 is what Narada needs to run every day. Tier 3 turns on extra checks. If a tier 3 file is easy to pull, send it now: it saves asking later.

FILE	TIER	HISTORY FOR THE REPORTS	THEN, EVERY DAY	WHAT NARADA DOES WITH IT
Parts list	TIER 1	Today's list, discontinued parts included	Weekly, or when it changes	Names every part, its cost and buying rules. A part missing here is left out of every other file
Sales lines	TIER 1	2 years back from the day you export (18 months at least)	Each night	Demand per part and branch: the forecast, dead stock, stockouts and the twin replay
Stock counts	TIER 1	2 years of dated counts, weekly is best	Each night: today's count	Stock value, what runs out, what is dead or too much; the twin checks itself against these
Purchase orders	TIER 1	2 years, open and closed	Each night	What is on order, real supplier delivery times, and your own buying, replayed in the twin
Goods receipts	TIER 2	2 years, if your PO file has no received date	Each night	Closes each order and records each partial delivery
Suppliers	TIER 2	Today's list	When it changes	Lead times, minimum order values, free-freight levels, return windows
Branches	TIER 2	Today's list	When it changes	Names your locations. Narada also learns them from the other files

FILE	TIER	HISTORY FOR THE REPORTS	THEN, EVERY DAY	WHAT NARADA DOES WITH IT
Customers	TIER 3	Today's list	When it changes	Segments and credit terms. Codes only, never names
Returns	TIER 3	2 years	Each night	Return rates and their cost, stock coming back to the shelf
Open invoices	TIER 3	What is owed today	Each night	Who owes what, overdue money and days to collect
Batches and lots	TIER 3	Batches on hand today	Each night	Only if you track expiry: stock nearing the end of its shelf life

Leave out of every file: voided invoices, transfers between your own branches (the stock counts show them) and drop-ships sent straight from supplier to customer.

2 · WHAT EACH FILE UNLOCKS

Each file turns on part of Narada

Narada runs every check your data supports and switches off the rest, saying why. This is the map: send a file and the checks in its row come on.

FILE	STOCK VALUE AND DEAD STOCK	STOCKOUTS AND WHAT TO ORDER	FORECAST AND SEASONS	DIGITAL TWIN REPLAY	SUPPLIERS: DELIVERY AND MINIMUMS	CUSTOMERS	CASH AND INVOICES	RETURNS AND EXPIRY
Parts list	●	●		●	○			○
Sales lines	●	●	●	●		●	○	○
Stock counts	●	●		●			○	
Purchase orders	○	●		●	●		○	
Goods receipts	○	○		○	○			
Suppliers		○		○	●		○	○
Customers						○	○	
Returns						○		●
Open invoices						○	●	
Batches and lots								●

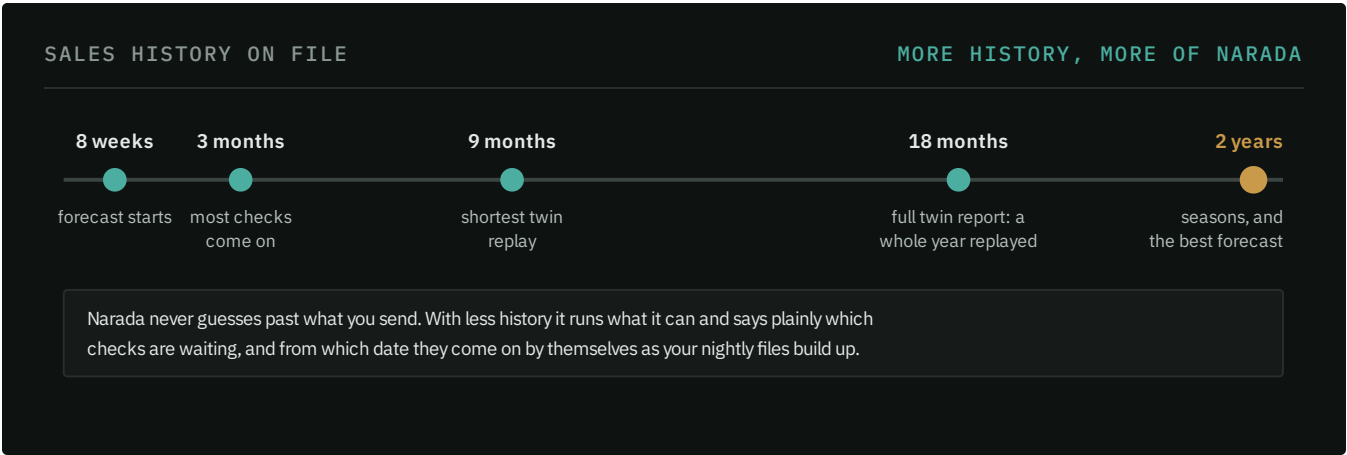
● needed for that part of Narada ○ makes it more accurate, or turns on extra checks

Two columns that unlock more than they look

Customer code on sales lines. Turns on the customer checks: who carries the business, customers quietly buying less, and which customers keep finding parts out of stock. A made-up code works just as well as a real one.

Quantity ordered on sales lines. Where your ERP records what the customer asked for as well as what shipped, Narada measures your real fill rate and links a customer's falling orders to stockouts.

How much history each part needs



The twin replays your last year week by week, seeing only the history up to each week. It needs about 6 months of history before the year it shows. Its settings are fixed before the replay starts.

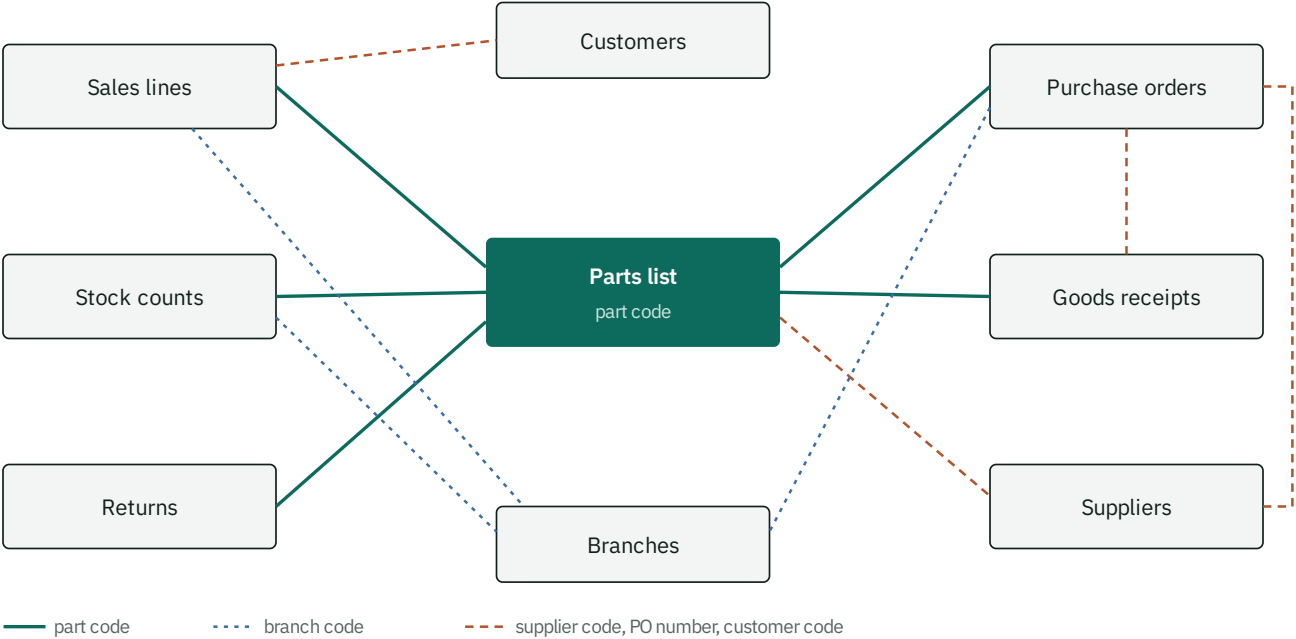
3 · HOW THE FILES FIT TOGETHER

Five codes tie everything together

Narada matches rows across files by their codes. A part code in the sales file must be written exactly as it is in the parts list, and the same for branch, supplier, PO and customer codes.

CODE	APPEARS IN	IF IT DOESN'T MATCH
Part code	Parts, sales, stock, POs, receipts, returns, batches	Rows for a part that is not on the parts list are left out and listed for you; a nightly file with unknown parts waits for us to check before it loads. So send the full parts list first, discontinued parts included
Branch code	Sales, stock, POs, receipts, returns, batches	Sales, stock and batches add a new branch on sight; a PO loads without it; receipts and returns for an unknown branch are left out. A one-branch business can tell us instead of sending the column
Supplier code	Parts, POs, suppliers	The order still loads, without its supplier, so Narada can't learn that supplier's delivery time from it
PO number	POs, receipts	A receipt without its PO number can't close its order

CODE	APPEARS IN	IF IT DOESN'T MATCH
Customer code	Sales, customers, returns, open invoices	Optional in sales, returns and invoices, but it turns on the customer checks, and credits in the sales file need it. It is the key of the customers file. A made-up code, used the same way in every file, works as well as a real one



Codes can be up to 50 characters. Keep them as text: Narada reads every column as text, so leading zeros survive, but Excel itself can turn `00123` into 123 or `1E5` into a number before the file is saved.

4 · FILE BY FILE

Every column, what it is for, what you may call it

The first column is our universal name. "You may know it as" lists names ERPs commonly use; yours may differ, and that's fine. Send your own columns: we match them. Must means the file can't load without it. Needed means a report figure is missing without it.

- One file per type, all branches together.** A branch column on each row is enough. Name the files anything; a zip of all of them is easiest. History counts back from the day you export.
- A small sample first, if you like.** A few hundred rows of each file lets us confirm every column before you run the two-year pull.

Columns that are easy to mix up

IF YOUR ERP HAS	SEND IT AS
Available or Free stock	Narada wants on hand : everything on the shelf, before reservations. If "available" is on hand minus allocated, send on hand instead, and allocated as Reserved

IF YOUR ERP HAS	SEND IT AS
Price on a sales line	Tell us whether it is per unit or the line's total. If both columns exist, send both: we check one against the quantity
Location	The branch or warehouse, never a bin or shelf position
Stock	A quantity goes in On hand; a yes/no "stock item" flag goes in Stocking policy
Cost	On the parts list, today's unit cost. On a PO line, what that line cost
Blank PO status	A blank reads as open, so mark cancelled lines cancelled
Voids, transfers, drop-ships	Leave them out. If your export can't, keep the column that marks them and tell us its name

Parts list

TIER 1

TODAY'S LIST · WEEKLY AFTER

One row per part, discontinued and inactive parts included: last year's sales still name them.

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Part code	Your item number. Links every file	Item No, Item Code, SKU, Part Number, Stock Code, Material	HV-FIL-1620	MUST
Unit cost	What one unit costs you, as your ERP values stock. Every stock and money figure starts here; a part with no cost is listed as unpriced	Cost, Average Cost, Standard Cost, Cost Price	12.40	NEEDED
Landed cost	Cost with freight and duty. Used where unit cost is blank	Landed Unit Cost	13.10	OPTIONAL
Description	Part name, shown on every screen	Item Name, Product Name, Desc	Filter 16x20	HELPFUL
Category, Brand	How you group parts. Used for category views and seasons	Product Group, Manufacturer, Make	Filters	HELPFUL
List price	Standard selling price. Real prices come from sales lines	Selling Price, Price	19.95	OPTIONAL
Main supplier code	Who you usually buy it from. Groups the buy list per supplier	Vendor, Primary Vendor, Supplier	S-014	HELPFUL
Minimum order qty, Order multiple, Pack size	Supplier buying rules. Narada's orders respect them; the minimum-order checks need them	MOQ, Min Qty, Case Size, Carton Qty	24 / 12 / 12	HELPFUL
Unit of measure	The unit quantities are counted in. Narada does not convert units, so a part uses one unit in every file	UOM, Stocking Unit	EA	HELPFUL

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Status	Active or discontinued. Words Narada reads: active, current, stocked; discontinued, inactive, obsolete, superseded, blocked	Status, Active	Discontinued	HELPFUL
Stocking policy	Stocked, or bought only to order. Keeps special-order parts out of the buy list	Stock Item, Stocking Status, Non-Stock	Non-stock	HELPFUL
Supplier part number	The supplier's code, so a draft order reads in their terms	Vendor Part No, Mfr Part Number	FLT-16201	OPTIONAL
Lead time override (days)	A delivery time set on this part, where it differs from the supplier's	Lead Time Override	21	OPTIONAL
Shelf life (days)	For parts that expire. Used with batches	Shelf Life	365	OPTIONAL

Sales lines

TIER 1

2 YEARS • NIGHTLY AFTER

One row per invoice line. The heart of Narada: demand per part and branch, week by week.

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Part code	Matches the parts list	Item No, SKU, Part Number	HV-FIL-1620	MUST
Branch	The warehouse it shipped from. Demand is kept per branch. A one-branch business can tell us instead of sending it	Warehouse, Whse, Location, Site, Store	BR-01	MUST
Invoice number	Keeps each line counted once, even if a file is sent twice. Repeated lines of one part on one invoice are added together	Invoice No, Doc No, Document Number	INV-204118	MUST
Invoice date	When it was invoiced. Future-dated rows are set aside	Posting Date, Doc Date, Transaction Date	2025-03-14	MUST
Quantity	Units shipped. A credit is a negative quantity (see below)	Qty, Qty Shipped, Units	6	MUST
Unit price or Line total	What the customer paid, after discounts. Either one; if you send both, Narada uses the unit price and checks it against the total. Margin, revenue and every money figure need it	Price, Net Price, Ext Price, Net Amount	19.95	NEEDED
Customer code	Who bought it. Turns on the customer checks (section 2)	Customer No, Account, Sold To, Bill To	C-0412	HELPFUL
Order number	The customer's order the line came from	Sales Order, SO Number	SO-88120	OPTIONAL

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Quantity ordered	What the customer asked for. With it, Narada measures real fill rate. A line with 0 shipped and a quantity ordered is kept as an unfilled line, not a sale	Order Qty	10	HELPFUL
Description	Part name on the line. Used if the part is new	Line Description	Filter 16x20	OPTIONAL

Credits and returns. Send a credit either as a negative quantity here or in a returns file, never both. A negative line is set aside for review unless that customer bought the part before, so credits in the sales file need the customer code. Prices are never negative.

Stock counts

TIER 1

2 YEARS DATED · NIGHTLY AFTER

One row per part, per branch, per date. The file most often sent wrong: today's stock alone is not enough for the reports.

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Part code	Matches the parts list	Item No, SKU	HV-FIL-1620	MUST
Branch	Where the stock sits. A one-branch business can tell us instead	Warehouse, Location	BR-01	MUST
On hand	Units on the shelf that day. Negative counts are kept, and flagged for you to fix in your ERP	Qty On Hand, SOH, Stock On Hand, Balance	42	MUST
Count date	The day the quantity was true. If the file has no date column, we ask which day it was counted. Narada never guesses it	As Of, Stock Date, Inventory Date	2025-03-16	MUST
Reserved	Units promised to customers, not yet shipped	Committed, Reserved Qty	4	OPTIONAL
On order	Units on open purchase orders	Qty On Order	24	OPTIONAL

WHY DATED COUNTS MATTER

WEEKLY IS BEST, MONTHLY AT THE LEAST

A sales file can't show demand you couldn't fill: when the shelf was empty, nothing sold, and the row looks the same as "nobody asked". Dated counts show which weeks a part was out, so Narada can estimate the sales you missed and check its replay against your real stock.

If your ERP can print stock on a past date, export it for each week's end. If it can't, it can usually be rebuilt from the stock transaction log. It's often the biggest job on this list, and the one that matters most. With today's count only, the reports can't value your past stock, and say so.

Purchase orders

TIER 1

2 YEARS · NIGHTLY AFTER

One row per PO line, open and closed, cancelled lines marked cancelled. Narada learns real delivery times from these, and the twin replays your own buying.

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
PO number	Your purchase order number	PO No, Purchase Order, Document Number	PO-30551	MUST
Part code	Matches the parts list	Item No, SKU	HV-FIL-1620	MUST
Order date	When the PO was placed. Future-dated rows are set aside	PO Date, Raised On	2025-02-03	MUST
Quantity ordered	Units on the line, in the part's one unit	Qty Ordered, PO Qty	48	MUST
Branch	Where it was delivered, so the order matches the stock it refilled	Warehouse, Ship To Location	BR-01	NEEDED
Supplier code	Who it was ordered from: each supplier's delivery time is measured from these	Vendor, Vendor Code	S-014	NEEDED
Promised date	The delivery date the supplier gave. Lateness is measured against it	ETA, Due Date, Expected Date	2025-02-17	NEEDED
Received date	When it fully arrived. For partial deliveries, send goods receipts	Date Received, Arrival Date	2025-02-24	NEEDED
Status	Open, closed or cancelled. Words Narada reads: received, complete, delivered (closed); cancelled, void (cancelled); sent, confirmed, partial (open). Blank reads as open	PO Status, Line Status	Received	NEEDED
Quantity received, Unit cost	What arrived, and what it cost. Without goods receipts, quantity received is needed for partial deliveries	Qty Received, Cost	48 / 12.40	HELPFUL
Customer order reference	For special orders: the customer order it was bought for. Keeps one-off orders out of shelf demand	Sales Order No, SO Number, Linked Sales Order	SO-88120	OPTIONAL
Supplier order number	The supplier's or ERP's own reference, so receipts and Narada's drafts match back	Vendor Order No, Your Reference, Memo	VO-55120	OPTIONAL

Goods receipts

TIER 2

2 YEARS · NIGHTLY AFTER

One row per delivery. Closes orders and records partial deliveries. Not needed for the free reports if your PO file carries received dates and quantities.

COLUMN	WHAT IT MEANS, AND WHAT IT IS USED FOR	YOU MAY KNOW IT AS	EXAMPLE	NEED
Part code	Matches the parts list	Item No, SKU	HV-FIL-1620	MUST
Branch	Where it was received. Must already be a known branch	Warehouse, Location	BR-01	MUST
Quantity received	Units in, above zero	Qty Received, GRN Qty	24	MUST
Receipt date	The day it arrived	GRN Date, Received Date	2025-02-20	MUST
PO number	Lets the receipt close its order line	PO No, Purchase Order	PO-30551	NEEDED

Suppliers

TIER 2

COLUMN	USED FOR	NEED
Supplier code	Matches parts and POs	MUST
Lead time (days)	The delivery time set in your ERP; Narada compares it with the real one	HELPFUL
Minimum order value	Smallest order they accept, applied to the buy list	HELPFUL
Free freight level	Order value for free delivery	OPTIONAL
Payment terms	Days to pay: the cash cycle	OPTIONAL
Return window (days)	Turns on "dead stock you can still send back"	OPTIONAL
Currency, Supplier name	For reference: all money is read as US dollars. A name is optional	OPTIONAL

Returns

TIER 3

COLUMN	USED FOR	NEED
Return number	Keeps each return counted once	MUST
Part code, Branch, Date	What came back, where, when	MUST
Quantity	Units back, as a positive number	MUST

Branches

TIER 2

COLUMN	USED FOR	NEED
Branch code	As used in every file	MUST
Branch name	Shown on reports. "Branch 1" is fine	OPTIONAL

Customers

TIER 3

COLUMN	USED FOR	NEED
Customer code	Matches sales. A made-up code is fine	MUST
Segment, Region	Contractor, fleet; state	OPTIONAL
Credit limit, Payment terms	Cash and credit checks	OPTIONAL
Active	Yes or no	OPTIONAL

Batches and lots

TIER 3

Only if you track expiry. One row per batch on hand.

COLUMN	USED FOR	NEED
Batch or lot number	Your batch reference	MUST
Part code, Branch	Which part, where	MUST
Receipt date	When the batch arrived	MUST

COLUMN	USED FOR	NEED
Customer code, Reason, Unit value	Who, why, the credit per unit: return rate and its cost	OPTIONAL

COLUMN	USED FOR	NEED
Expiry date	After the receipt date. Flags stock that won't sell before it expires	MUST
Quantity	Units left, above zero	MUST

Open invoices TIER 3

COLUMN	USED FOR	NEED
Invoice number, Invoice date	Each open invoice once	MUST
Due date	What is overdue, and by how long	MUST
Amount outstanding	What is still unpaid (0 reads as paid)	MUST
Customer code	Who owes it	HELPFUL

5 · RUNNING NARADA EVERY DAY

What to send each night

Once Narada runs for you, the same files arrive each night and every screen updates by morning. A sales line, receipt or return sent again changes nothing, and a purchase order line or stock count sent again updates to its newest values. So overlapping a few days is safe and catches anything missed.

FILE	EACH NIGHT, SEND	WHY
Sales lines	The last 7 days of invoice lines	Overlap is safe; a late-posted invoice still arrives
Stock counts	Today's on hand, every part and branch	From then on, each night adds one dated count. The reports still need the past counts sent once
Purchase orders	Every open line, plus lines closed or cancelled in the last 7 days	A line that stops appearing would otherwise look open forever
Goods receipts	The last 7 days	Closes orders and records partial deliveries
Open invoices (if sent)	Today's full open list	What is owed and overdue, as of today
Parts, suppliers, customers, branches	Weekly, or whenever they change	New parts, costs, minimums and lead times

How it gets to us. Most ERPs can email a saved report on a timer. We give you a private address for each file. If your ERP saves to a shared folder instead (OneDrive, SharePoint, Google Drive or Dropbox), we collect from there.

If your ERP has no timer. We help your IT or consultant automate the export another way, for example a scheduled task on an office computer. Nobody on your team should export by hand each night.

A file much smaller than usual is held, not loaded. If tonight's file has under 30% of the rows recent files had, Narada holds it for us to check, so a half-finished export never replaces good data. The same file sent twice is recognised and not loaded again.

6 • SEND IT AS IT COMES OUT

What we handle, and the few rules that matter

You don't need to clean, rename or reorder anything. These are the things Narada already copes with, and the short list that it can't fix for you.

Narada handles

- Your own column names, in any order. Extra columns are fine
- CSV, Excel (.xlsx), tab-separated text or flat XML; files in a zip
- A title or logo above the header row (it finds the header in the first 20 rows)
- Commas, semicolons, tabs or pipes between columns
- Dates in any common format, mixed in one column. If your dates put the day first (14/03/2025), tell us at setup
- \$1,234.50 , (500) , 500- , 1.234,56 ; in number columns, blank, n/a and - read as empty
- Many branches in one file; the same file sent again on a later night
- Large files: a sales CSV up to 2 GB; other files up to 200 MB; up to 50 files in a zip

Please make sure

- **One table per file.** In Excel, every sheet in the workbook is read and joined, so leave summary or notes sheets out
- **Codes match across files** and stay as text, 50 characters or fewer
- **No future dates** on sales, orders, receipts or returns: those rows are set aside
- **Each line once.** Inside one file, repeated lines for the same part on one invoice are added together, so export each line only once
- **Status words Narada knows** (listed with parts and purchase orders above). An unknown word sets that row aside
- **One unit per part** in every file; **all money in US dollars**
- **No conflicting repeats:** the same part, branch and date with two different stock counts is set aside
- **Save .xls as .xlsx** first: older Excel files aren't read

What happens to a bad row

One bad row is set aside with its reason ("future date", "part not on your parts list yet"). Every other row still loads, and you get the list to fix.

A number column mostly unreadable (more than 1 in 10 values) stops that file, and we show you examples. Below that, a row with an unreadable required value is set aside and listed; an unreadable optional value is left blank. A date that can't be read sets its row aside.

7 • REMOVING PERSONAL DETAILS

Narada needs codes, never people

Nothing Narada does needs a person's name or a street address, and contact emails are optional. Remove those before the files leave your building. We recommend replacing customer codes too, since many ERPs build them from the name (SMITHHEAT).

REMOVE	REPLACE, THE SAME WAY IN EVERY FILE	NEVER CHANGE
Customer and contact names	Customer codes → C-0001 (recommended)	Dates
Email addresses, phone numbers	Supplier codes and names → S-001	Quantities
Street addresses	(optional)	Prices and costs
Salesperson and buyer names	Branch names → Branch 1 (optional)	Status words
Free-text notes and memos		Which code belongs to which row

FILE	DROP THESE COLUMNS BEFORE SENDING
Sales lines	Ship-to name and address, contact, salesperson, customer PO or job name, notes
Customers	Name, contacts, emails, phone numbers, addresses
Purchase orders	Buyer name, supplier contact, notes
Suppliers	Contacts, emails, phone numbers (names optional)
Returns	Notes (keep the reason code)
Parts list	Nothing, but check descriptions: special-order parts sometimes carry a customer's name

One lookup table, every file. A customer who is C-0412 in sales and C-0977 in returns looks like two customers. The lookup table stays with you: Narada never needs it.

Leave the numbers alone. Prices and costs stay real: the reports price stock and missed sales in your dollars. Rounding or shifting dates changes the answer.

Columns Narada doesn't use are ignored, but they stay in the file until it is deleted 30 days after it arrives, so remove personal columns rather than relying on us to skip them. Storage and access: naradaos.com/legal/security.

From storage you already trust

You don't log in to anything or upload through our app, and Narada never connects to your ERP: it reads only the files you send. The first send is one zip. Every night after that, each file goes to its own private address or to a shared folder (section 5).

OPTION	HOW	GOOD TO KNOW
1. A link from your storage BEST	OneDrive, SharePoint, Google Drive, Dropbox or Box. Share the zip with the address we give you; set the link to expire after a week if you like	Your IT controls who opens it and for how long. No attachment sits in an inbox
2. Email	Attach the zip, send it to the private address we give you	Fine for small files: attachments stop at about 20 MB
3. What your IT prefers	Tell us. We fit around your policy	For example a password-protected zip, the password sent by phone

If you have them, send these too

IF YOU HAVE	WHY IT HELPS
A lost-sales report	Some ERPs record sales the counter couldn't fill (Prophet 21's lost-sales codes, Infor's Lost Business report). It shows your real walk-away rate instead of an estimate. Even a partial one helps
A list of critical parts	Parts you must never run out of, whatever they cost. We check Narada's plan for each of them by hand
A list of special-order customers or parts	If your PO export doesn't link special orders to the customer order, a list keeps one-off orders out of shelf demand

What only you can tell us

No file needed: we ask these on a call or by email. "Not sure" is fine: we show you the usual range and you can answer later.

QUESTION	WHAT IT CHANGES
What does holding stock cost you a year?	How lean Narada runs. Published studies put most distributors at 20% to 30% of stock value
When a part is out, how many customers go elsewhere?	Whether holding more stock pays, per class of part (A, B, C)
What does placing one purchase order cost you?	Fewer, bigger orders or more, smaller ones
How often do you check stock and order?	Stock to cover the days between checks

QUESTION	WHAT IT CHANGES
Do suppliers offer early-payment discounts or rebates?	Not in most exports. So Narada doesn't cost you a discount or a rebate level without warning
Which months do your sales peak?	Seasons for the forecast, until two years of history shows them
How full do you want the shelf, and how much stock overall?	The lowest fill you'll accept for A, B and C parts, and your stock budget
When is stock dead, or too much?	Days without a sale, and days of cover, before a part is flagged
How large an order needs your OK?	Narada asks before any order above it

9 • BEFORE YOU SEND

The checklist

TIER 1 For the free reports

- ☐ **Parts list:** every part, discontinued included, with unit cost and unit of measure
- ☐ **Sales lines:** 2 years (18 months at least): part code, branch, invoice number, date, quantity, net price
- ☐ **Stock counts:** part code, branch, on hand and count date, for each week's end over 2 years (monthly at least)
- ☐ **Purchase orders:** 2 years, open and closed: PO number, part code, order date, quantity ordered, branch, supplier, promised and received dates, quantity received, status (cancelled lines marked)

TIER 2 For every day

- ☐ **Goods receipts** with PO numbers
- ☐ **Suppliers** with lead times and minimums; **branches**
- ☐ A nightly schedule agreed (section 5)

Every file

- ☐ Codes match across files, kept as text, 50 characters or fewer
- ☐ One table per file or workbook; no future dates
- ☐ One unit per part; all money in US dollars
- ☐ Personal columns removed; customer codes replaced the same way everywhere
- ☐ Voided invoices, branch transfers and drop-ships left out

TIER 3 If easy

- ☐ Customers, returns, open invoices, batches
- ☐ A lost-sales report, a critical-parts list, a special-orders list

Send

- ☐ Everything in one zip, shared by a link from your own storage (or emailed if small)