



Warehouse management system for multichannel sellers

## TOOLKIT · PROCUREMENT AND INVENTORY

# The procurement data management toolkit

Practical tools to organize, clean and use purchasing data, so every reorder starts from numbers you can trust.

### WHAT'S INSIDE

- 12-point self-assessment of your data health
- Clean record standards for items and suppliers
- Feature checklist and a vendor scoring matrix
- Data ownership and audit worksheets
- Red flags and vendor questions
- 90-day improvement roadmap

# Contents

This toolkit turns the ideas from our guide to procurement data management into worksheets you can fill in. It is written for multichannel sellers and small purchasing teams who buy stock from several suppliers and sell it on several channels. Print it, share it with your buyers or work through it on screen.

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## HOW TO USE THIS TOOLKIT

Start with the self-assessment on page 3. Then fill in the ownership worksheet and the audit scorecard with the people who actually buy, receive and count stock. The feature checklist and scoring matrix matter only if you decide to change tools. Many teams get most of the benefit from rules and owners before they buy anything.

# 1 Executive summary

Why clean procurement data decides cost, stock and service

Procurement data management is not just collecting numbers. It is keeping item, supplier, price and stock data organized, current and in one place, so buyers can compare suppliers, negotiate with facts and reorder at the right time.

Bad data rarely looks dramatic. It shows up as a supplier listed twice, a lead time nobody has checked in a year, a case of 12 entered as one unit, or a reorder placed from a stock count that was wrong. Each one leads to rush orders, overstock or a stockout on a busy channel.

## The five decisions that matter most

1. **Name an owner for every data type.** Prices, lead times, supplier contacts, item specs and stock counts each need one person who keeps them correct. Shared ownership usually means no ownership.
2. **Define what "correct" means.** Write down naming rules, units of measure, required fields and the date each value was last confirmed. A rule that lives only in someone's head is not a rule.
3. **Pick one source of truth per data type.** Decide which system holds supplier records, which holds prices and which holds stock. Copies in side spreadsheets drift within weeks.
4. **Set a review rhythm.** Some fields change often (prices, stock), others rarely (specs). Match the review frequency to how fast each field goes stale.
5. **Make stock data part of procurement data.** Every reorder decision depends on how many units are really on the shelf. If counts are wrong, perfect supplier data still leads to wrong orders.

### QUICK WIN

Pick your 20 best-selling items. For each one, check the unit of measure, the current unit cost with its date, the lead time with its date and the on-hand count against the shelf. Fix what is wrong today. This small audit often shows where the bigger problems are.

## 2 Do you need better procurement data management?

A 12-point self-assessment of warning signs

Check every statement that is true for your business today. Each one is a warning sign, so more checked boxes mean a bigger need to act. Use the scoring guide below to set your priority.

### SELF-ASSESSMENT: CHECK ALL THAT APPLY

- ☐ The same supplier appears in our records under two or more names or IDs.
- ☐ Item names, units of measure or pack sizes differ between purchasing, the catalog and the warehouse.
- ☐ Nobody is named as the owner of supplier records or item records.
- ☐ Lead times in our records are guesses or have not been confirmed in the last six months.
- ☐ Buyers keep their own spreadsheets because they do not trust the shared data.
- ☐ We place reorders from stock counts that we know may be wrong.
- ☐ Finding the last price we paid for a top item takes more than five minutes.
- ☐ Supplier contacts, payment terms and minimum order quantities live in email threads.
- ☐ A data error caused a stockout, rush order or overstock in the last quarter.
- ☐ We do not track on-time and complete deliveries for each supplier.
- ☐ Anyone can create or edit supplier and item records without a review.
- ☐ We have never audited our records for duplicates and missing fields.

| Score      | Verdict           | What it means and what to do                                                                                               |
|------------|-------------------|----------------------------------------------------------------------------------------------------------------------------|
| 0-3 boxes  | <b>Healthy</b>    | Your foundation works. Keep a quarterly audit (page 8) and fix the few gaps you checked.                                   |
| 4-7 boxes  | <b>Needs work</b> | Data gaps already slow buyers down. Start with owners and record standards (pages 4 and 7) before you change any tools.    |
| 8-12 boxes | <b>Urgent</b>     | Data errors are likely costing you money in stockouts and excess stock. Start phase 1 of the roadmap (page 10) this month. |

### 3 Clean record standards for items and suppliers

The fields every record needs, and the rules that keep them consistent

Use these lists as your required fields. A record that misses one of them is incomplete. Add the date a value was last confirmed wherever it can go stale.

#### ITEM RECORD: REQUIRED FIELDS

- ☐ Internal SKU that is unique, stable and never reused
- ☐ Barcode (for example UPC or EAN) where the product has one
- ☐ Item name that follows one naming rule
- ☐ Unit of measure and pack size (for example each, or case of 12)
- ☐ Supplier SKU mapped to the internal SKU, for each supplier
- ☐ Primary supplier and, for key items, a backup supplier
- ☐ Current unit cost, currency and the date it was confirmed
- ☐ Lead time in days and the date it was last checked
- ☐ Minimum order quantity, order multiple and reorder point

#### SUPPLIER RECORD: REQUIRED FIELDS

- ☐ One supplier ID and the legal name, with no duplicates
- ☐ Contact for orders and a contact for problems
- ☐ Payment terms, currency and shipping terms
- ☐ Price list or contract with its expiry date
- ☐ On-time and complete delivery rate, updated after each delivery
- ☐ Tax and compliance documents with their expiry dates

#### NAMING RULE EXAMPLE

Item name: Brand, product, variant, size. "Northfield mug, blue, 350 ml" instead of "blue mug big" or "MUG BLU". Write the rule down once and apply it to every new item.

## 4 Data management features checklist

What to look for in a procurement data tool, by priority

Use this list to screen tools, whether you look at an ERP module, a purchasing tool or a better spreadsheet setup. Most teams need every **must-have**, some **nice-to-have** items and only the **advanced** items that fit their scale.

### MUST-HAVE: BASELINE FOR ANY GROWING BUSINESS

- ☐ One central record per item and per supplier
- ☐ Required fields and checks for missing or out-of-range values
- ☐ Duplicate detection for suppliers and items
- ☐ Role-based access and a log of who changed what
- ☐ Import and export (CSV) plus an API to connect other systems

### NICE-TO-HAVE: ADD AS YOU SCALE

- ☐ Connection to your accounting tool or ERP
- ☐ Price and lead time history for each item and supplier
- ☐ Supplier scorecards (on-time, complete, quality)
- ☐ Approval step for new suppliers and new items
- ☐ Custom reports and dashboards on spend and supplier performance

### ADVANCED: LARGER OR SPECIALIZED OPERATIONS

- ☐ Master data management across several business units
- ☐ Demand forecasting and replenishment planning
- ☐ Multiple currencies, tax rules and supplier formats across regions
- ☐ EDI with suppliers and contract management

| Stage          | Rough size      | Priority practices                                                  |
|----------------|-----------------|---------------------------------------------------------------------|
| <b>Starter</b> | Under 500 SKUs  | One shared item list with required fields, one owner, monthly audit |
| <b>Growth</b>  | 500-5,000 SKUs  | Central tool with access roles, duplicate checks, accounting link   |
| <b>Scale</b>   | Over 5,000 SKUs | Price history, supplier scorecards, approvals, forecasting          |

## 5 Vendor scoring matrix

A weighted template for an objective comparison

Score each vendor from 1 (poor) to 5 (excellent) on every criterion, then multiply by the weight and add up the column. The weights below suit a typical growing seller. Adjust them to your priorities before you score, and keep the total of the weights in mind.

| Criterion                                                 | Weight      | Vendor 1 | Vendor 2 | Vendor 3 | Vendor 4 |
|-----------------------------------------------------------|-------------|----------|----------|----------|----------|
| Data quality controls (required fields, duplicate checks) | x 3.0       |          |          |          |          |
| Integration with accounting, ERP and inventory systems    | x 3.0       |          |          |          |          |
| Ease of use for buyers and staff                          | x 2.5       |          |          |          |          |
| Data security and access control                          | x 2.5       |          |          |          |          |
| Total 3-year cost (lower is better)                       | x 2.5       |          |          |          |          |
| Reporting on spend and supplier performance               | x 2.0       |          |          |          |          |
| Support quality and training                              | x 2.0       |          |          |          |          |
| Scalability (SKUs, suppliers, sites)                      | x 1.5       |          |          |          |          |
| Implementation time and data migration effort             | x 1.0       |          |          |          |          |
| <b>Weighted total</b>                                     | <b>20.0</b> |          |          |          |          |

### HOW TO READ THE SCORE

The weights add up to 20, so the maximum score is 100 (20 x 5) and the minimum is 20 (20 x 1). A vendor under 60 is unlikely to fit your setup, whatever its feature list. Aim for your top choice to score at least 75. If you change the weights, recalculate the maximum the same way.

### TEST WITH YOUR OWN DATA

Before you score, load 50 of your real items and 10 real suppliers into each trial. Score what you saw with your data, not what the product tour showed.

## 6 Data ownership worksheet

Who keeps each data type correct, where it lives and how often it is checked

Fill in one row per data type. The first rows show an example; replace them with your own. Every row needs one named person, not a team.

| Data type       | Owner          | Source of truth     | Review every                        | "Correct" means                                 |
|-----------------|----------------|---------------------|-------------------------------------|-------------------------------------------------|
| Unit cost       | Buyer          | Supplier price list | Each change, at least quarterly     | Matches the last confirmed quote, with its date |
| Lead time       | Buyer          | Supplier record     | Quarterly                           | Based on the last three deliveries              |
| On-hand stock   | Warehouse lead | Inventory system    | Daily by scans, cycle counts weekly | System count matches the shelf count            |
| Payment details | Finance        | Accounting tool     | On every change                     | Checked by a second person                      |
| Item specs      | Product owner  | Item list           | On every change                     | Matches the supplier spec sheet                 |
|                 |                |                     |                                     |                                                 |
|                 |                |                     |                                     |                                                 |

### Check your reorder point inputs

A simple reorder point uses three of the fields above:

#### REORDER POINT

**Average daily sales x lead time in days + safety stock.** Example: 12 units a day x 14 days + 40 units of safety stock = 208 units. When on-hand stock drops to 208, it is time to reorder.

Each input is a data field with an owner. If the lead time is really 21 days, the right reorder point is  $12 \times 21 + 40 = 292$ , and the order above comes a week late. If the on-hand count shows 208 but only 150 are on the shelf, the order is late too, even with a correct lead time.

## 7 Data quality audit scorecard

Measure where you start, set a target and check again after 90 days

Run this audit on your active items and suppliers. For stock accuracy, pick 50 active SKUs at random and count them on the shelf. The targets are rules of thumb; set your own if your business needs them.

| Check                          | How to measure                                        | Baseline | Target      | Day 90 |
|--------------------------------|-------------------------------------------------------|----------|-------------|--------|
| Duplicate supplier records     | Count suppliers with more than one record             |          | 0           |        |
| Items missing a required field | % of active SKUs (see page 4)                         |          | Under 2%    |        |
| Stale lead times               | % of active SKUs not checked in 6 months              |          | Under 10%   |        |
| Unit of measure mismatches     | SKUs where units differ between systems               |          | 0           |        |
| Prices without a date          | % of cost records with no confirmed date              |          | 0%          |        |
| Stock accuracy                 | % of the 50 counted SKUs where system and shelf match |          | 98% or more |        |
| Supplier delivery tracked      | % of active suppliers with an on-time rate            |          | 100%        |        |

### When you find an error

- **Fix the record now** and note the date and the owner.
- **Find the cause.** Was it a missing rule, a manual copy between systems, or a step nobody owns?
- **Fix the cause,** for example a required field, a controlled list or one less copy.

#### STOCK DATA IS PROCUREMENT DATA

Buyers often trust supplier data more than stock data, yet the on-hand count drives every reorder. Counts stay accurate when every unit has a bin, every move is scanned and all sales channels draw from one stock pool. A warehouse management system such as Fiftify covers this stock side. Purchase orders and supplier workflows stay in your purchasing or accounting tool.

## 8 Red flags and vendor questions

Spot trouble before it turns into months of cleanup

### Red flags in your own process

- **"The real numbers are in my spreadsheet."** If buyers keep private copies, the shared data has lost trust. Find out which fields they fix by hand.
- **New suppliers are added by whoever needs them.** Without one approval step, duplicates and wrong payment details follow.
- **Lead times never change.** Real lead times move with seasons and suppliers. A value that has not changed in a year has probably not been checked.
- **Stock is counted only once a year.** Small regular cycle counts keep the reorder inputs honest.

### Red flags when you compare tools

- **The product tour uses sample data only.** Ask to see your own items and suppliers in the system.
- **"Yes, we integrate with that" without details.** Ask which fields sync, in which direction and how often.
- **No clear way to export your data.** You should be able to take every record out in a standard format.

### Questions to ask every vendor on the shortlist

- How does the system stop duplicate suppliers and items from being created?
- Which fields can we make required, and can we add our own validation rules?
- Which data syncs with our accounting tool and our inventory system, and how often?
- Can we see a change log for prices, lead times and payment details?
- How do we import our current records, and who cleans them up?
- What happens to our data if we cancel? Format, timeline and cost.

## 9 90-day improvement roadmap

A realistic schedule for a small purchasing team

Rules and owners come first, tools second. This plan works whether you keep your current tools or switch to a new one in phase 2.

### PHASE 1

#### Days 0-21

- Run the audit scorecard for a baseline
- Name owners for each data type
- Agree naming rules and required fields
- List every system and spreadsheet that holds data

### PHASE 2

#### Days 22-45

- Merge duplicate suppliers
- Fill gaps for top-selling items first
- Choose or set up the tool
- Train the data owners

### PHASE 3

#### Days 46-70

- Pilot with one supplier group or category
- Weekly review of new errors
- Adjust rules and fields
- Start regular cycle counts

### PHASE 4

#### Days 71-90

- Roll out to all categories
- Retire side spreadsheets
- Run the scorecard again
- Set a quarterly review

### PILOT FIRST, NOT ALL AT ONCE

Start with one supplier group or product category. A few weeks of real orders in a pilot show which rules work and which slow buyers down, before you apply them everywhere.

### KPIs to measure before and after

- Share of active SKUs with complete records
- Number of duplicate supplier records
- Stock accuracy (system count against shelf count)
- Stockouts and rush orders caused by data errors, per month
- Supplier on-time and complete delivery rate
- Time for a buyer to find the last price and lead time for an item

## 10 About Fiftify

A warehouse management system built for multichannel sellers

Fiftify is a warehouse management system built for multichannel sellers. Inventory, orders and warehouse work run in one simple system across Shopify, Amazon, eBay, Etsy, retail stores and other sales channels. Every channel draws from one stock pool, so a unit sold in one place is counted everywhere.

### One stock pool for every channel

Real-time stock sync across your sales channels helps prevent overselling. Listing quantities update once per packed shipment, so a store never shows half-picked counts.

### Bins and storage locations

Every unit has a place. The team sees what is on the shelf and where it is.

### Barcode scanning

Scans at picking and packing catch the wrong item before the parcel leaves.

### Pick, pack and ship

Paid orders turn into pick tasks, then packing and shipping with tracking sent back to the channel.

### Mobile app on Android and iOS

Warehouse staff pick and pack with a phone instead of a desktop.

### Every plan includes

Unlimited SKUs, sales channels, warehouses and suppliers. Starter is free for up to 100 orders a month.

Receiving and purchase orders are on the roadmap. Fiftify does not run 3PL operations.

## Try Fiftify on your own orders

Start on the free Starter plan or take the 7-day full trial, no credit card needed. Support is by chat, and guided onboarding can be booked after sign-up.

**Start free**

[app.fiftify.com](https://app.fiftify.com)

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