

Addendum: Sample Stock Request Form Instructions

This form can accommodate five part numbers. (Use more forms if necessary.)

Section I is to be completed by the requester. Enter a list of part numbers (1). For each item, include expected unit sales price (2), and forecasted sales covering the next three months and subsequent three quarters (3). Enter total forecasted sales quantity and sales volume for each item (4) and the total forecasted sales of all items on the form (5). Enter the name of the company expected to purchase these items (6) and check the appropriate boxes in the "Risk Assessment" section (7). Add any additional comments that might help in the evaluation of your stock request (8). Sign and date the completed form (9). Have your supervisor sign and date the completed form (10). Then submit the form to the appropriate inventory control specialist/manager.

Section II is to be completed by an inventory control specialist/manager. For each item listed, determine the expected unit cost (1), the forecasted twelve-month cost of goods to be sold (2) and the expected lead time, in weeks (3). Assign a purchase class/category (4), an inventory management method (such as min-max or Up-To) (5) and initial values for the selected inventory management method (such as minimum stock level, maximum stock level, safety stock days, SSD) (6, 7, 8). Add any notes appropriate to your analysis (9). Meet with the requester to review your proposed inventory stocking plans. Once agreed to, sign and date the form (10) and implement the proposed stock plans. Attach a blank "Stock Request Quarterly Review Form" to this form and file appropriately, such as in a "Reminder Binder", for subsequent reviews every three months.

Stock Request Form

Section I. To be completed by Requester
Instructions: Complete and sign the section below. Have a Sales Manager sign below. Then submit the completed form to Inventory Control Manager.

Section II. To be completed by Inventory Control Staff
Instructions: Review the submitted request. Meet with requester to review the request and your proposed stock plans. When completed, sign and file the document and schedule the first quarterly review.

Part Number	Unit Sales Price	Forecast by Month & Quarter (# of units to be sold)						12 Month Forecast	
		1st month	2nd month	3rd month	2nd quarter	3rd quarter	4th quarter	Total Qty	Total \$Sales
1									
2									
3									
4									
5									

Requested for: _____ Total Forecasted Annualized Sales: _____

Customer Name / Location _____

Risk Assessment

YES NO

Will the sales of these items replace sales of currently stocked items?

Will customer commit to a stock liability agreement?

Will the customer provide regular usage forecasts for these items?

Will the customer place scheduled purchase orders for these items?

Will the customer place a blanket purchase order for these items?

Comments: _____

Requested by: _____

Print _____

Sign _____

Date _____

Approved by Sales Manager: _____

Print _____

Sign _____

Date _____

Initial Inventory Stock Plan Parameters							
Unit Cost	\$ACOGS	Lead Time	Purch Class	Method	MIN/OP	MAX/OQ	SSD
1	2	3	4	5	6	7	8

Notes: _____

Inventory Plan Analysis/Implementation Completed by: _____

Print _____

Sign _____

Date _____

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