



Fishbowl Inventory Review: Bringing Mini-ERP to the Masses

November 23, 2009 by sapplanningadmin



Open Source ERP?

There has been a lot of discussion regarding open source ERP. This movement is designed to rebel against the highly proprietary ERP software, which is currently implemented, and seeks to provide a more transparent solution in the ERP market. After having reviewed various open source ERP initiatives, I did not come away overly enthusiastic about any of them. While open source is a nice concept, it has led to relatively few real marketable solutions. Linux is the preeminent example, and Firefox is another. However, there are a number of browsers that compete with Firefox such as Chrome and Safari that while they do not have the developer community that Firefox does, are still great alternatives to Firefox (I use all three). However, it would seem that whether a solution is open source is less important than whether it is reasonably priced and highly functional. I have come across just such software for ERP. It is not an open source project, but is both reasonably priced and highly functional. It is called Fishbowl Inventory Management and it is billed as a way to integrate operations with QuickBooks. Fishbowl is not called ERP software on their website, however, to us that is what Fishbowl is emulating, but in a more simplified way. In our mind Fishbowl is mini-ERP. What immediately became apparent to us was how easy it was to use and how transparent the system was. Getting data on other ERP systems is a chore, compared to the ease of doing so with Fishbowl.

Becoming intrigued with Fishbowl, we decided to take some screenshots as we navigated the system, and we will discuss it here. Fishbowl has two software products (Inventory Management and Mobile Warehouse), and they also sell scanners for the warehouse and POS devices for the storefront that integrate with their software. We will just be looking at the Inventory Management software in this post.

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Dashboard

Before we go any further, we wanted to show the Dashboard. This is some of the most common transactions listed on one screen.

The screenshot shows the Fishbowl Inventory Dashboard with four main data panels:

- Open Sales Orders:** A table listing sales orders with columns for Number and Customer Name. Records include 50003 through 50019.
- Items to be Received:** A table listing items to be received with columns for Type, Number, and Status. Records include PO 10016 through 10028 and SO 50004 through 50029.
- Items to be Picked:** A table listing items to be picked with columns for Pick, Status, Priority, Scheduled, and Order. Records include T1 and P10028 through S50025.
- Items to be Shipped:** A table listing items to be shipped with columns for Type and Order Num. Records include SO 50003 through 50023.

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Reports

Fishbowl has a number of pre-configured reports. They appear to push out to a PDF or PDF type file. The reports are classified by areas such as "Purchase order" or "RMA," and can be selected from the series of folders on the left side of the screen.

**Bicycles Unl
ABC Rep**

Part Number	Current	Projected
A		
OV-LP001 - License Plate	N	A
SEA001 - Bike Horn Kit	N	A
SEA002 - Bike Bell Kit	N	A
KA001 - Bike Accessories Kit -	N	A
LP-B100 - Blank License Plate	N	A
LP001 - Bike License Plate	N	A
EA001 - Accessories - Bike Horn	N	A

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Product

The product view is for finished goods, while the “parts” view is for the subcomponents of the finished good. However, Fishbowl does not have to have a finished goods. That is every finished good would be stored as a product or as a part if the company does not perform any manufacturing.

The general view shows the product, its price, class and whether it is active and taxable. It also has a detail text area, and an ability to post a photo.

Product Details: P60 - Deluxe Bike Pack	
General	Details Substitute Pricing Memo Custom
Product:	P60
Part:	P60
Price:	\$25.00
Class:	(dropdown)
<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Show on SO Combo Box
<input checked="" type="checkbox"/> Taxable	

Product substitution is easy to setup by going to the substitution tab and simply setting up a new product.

Product Details: P60 - Deluxe Bike Pack	
General	Details Substitute Pricing Memo Custom
Product	
B201 - Heavy Duty Brake Cables	

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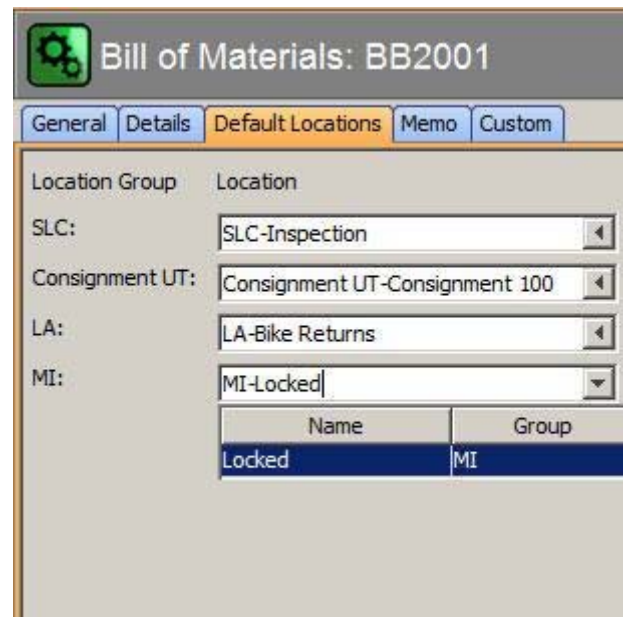
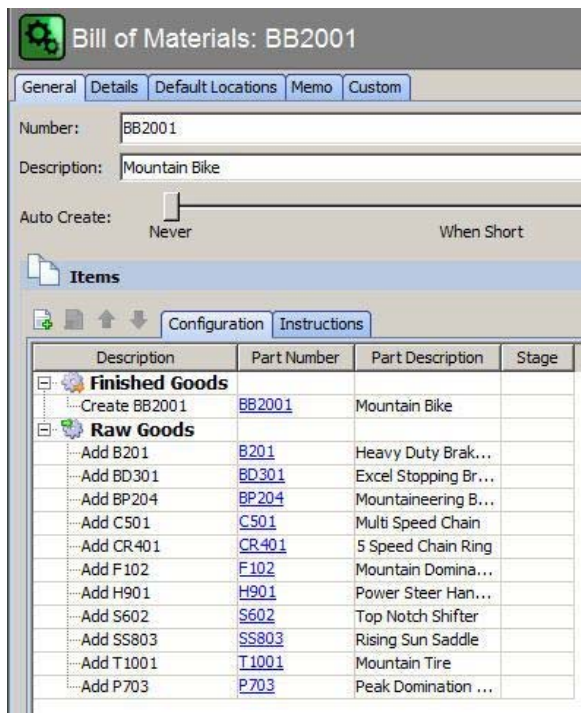


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BOM

Fishbowl has a very easy to understand BOM screen. It shows the finished good with one icon, and then below it the raw materials or parts with a different icon. Each of the parts can then be selected and you will be taken to the part record. This view is so simple that we wish ERP vendors would take a look at this and see how easy it is to make a logical BOM screen.



The default location tab shows details, such as what location group it belongs to. In this example, its location group is SLC—which stands for Salt Lake City (Fishbowl is based in Salt Lake City). Location group is used in the demo system to be the physical location while the location is the sub-area within the location (inspection, returns, etc.). So this shows that this material is set for the inspection in Salt Lake City, but for Returns in LA. It is not setup, or extended for Miami.

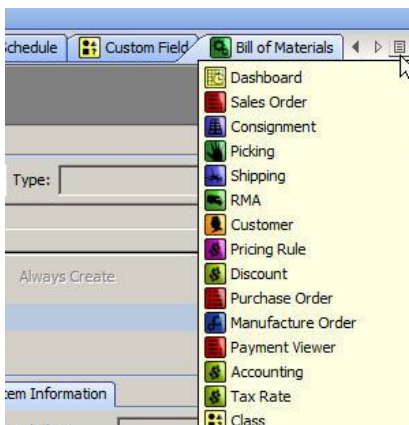
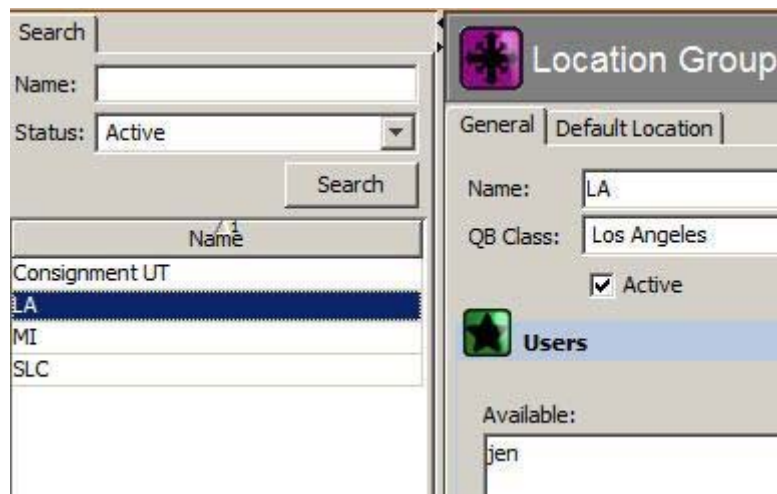
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The supply network that is in the demo model has three physical locations (called Location Groups): LA, Miami and Salt Lake City. You can see this easily by viewing the Location tab in the Setup screen (which is where much of the master data is entered). As with all the master data in Fishbowl, it is amazingly easy to setup.



This brings up the topic of navigation. Any opened view that is not closed is kept at the top of the screen in a tab. The tabs also can be viewed vertically by selecting the right top button next to the tabs. The following screen will open.

This allows you to keep tabs open and to switch back and forth between the tabs. However, the tabs can not be moved around (as with the tabs in Google Chrome) and two user interface instances can not be created (which is useful if the user has multiple screens). These would be nice things for Fishbowl to possibly build in the future. But the navigation with tabs that they currently have is still quite nice.

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Parts

Parts is also an area that is easy to create and easy to change. The part master has a large amount of information that is easy to reach.

Part Details: B201 - Heavy Duty Brake Cables

General | Details | Accounts | Inventory | Locations | Bill of Materials | Vendors | Memo

Part Number: UOM: Each (e

Description:

Active Taxable Pick in part UOM only

Details:

Part Details: B201 - Heavy Duty Brake Cables

General | Details | Accounts | Inventory | Locations | Bill of Materials | Vendors | Memo

Revision: Created: 11/03/2004

UPC Code: Last Changed: 02/07/2006

Standard Cost: Last User: admin

Size and Weight

Width: Height: Length: Foot (

Weight: Pound (lbs)

Tracking

Selected	Name	Abbr
<input checked="" type="checkbox"/>	Lot Number	Lot#
<input type="checkbox"/>	Revision Level	Rev #
<input type="checkbox"/>	Expiration Date	ExpDate
<input type="checkbox"/>	Serial Number	SN(s)

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The same inventory screen that we show in just a few screenshots and is available within the Inventory tab here. Fishbowl here is following a best practice of displaying the same information, but in different areas.

Part Details: B201 - Heavy Duty Brake Cables

General | Details | Accounts | **Inventory** | Locations | Bill of Materials

ABC Code:

Unit of Measurement: Each (ea)

Tag Label:

Inventory

On Hand: 130

Allocated: 14

Not Available: 0

Drop Ship: 0

Available: 116

The vendor tab shows who provides this part.

Part Details: B201 - Heavy Duty Brake Cables

General | Details | Accounts | Inventory | Locations | Bill of Materials | **Vendors** | Memo

Vendor	Number	Last Cost	UOM	Last Price
Brent's Bicycle Brakes	B1-7878	\$9.00	ea	
Mike's Bikes	PO-B201	\$10.00	ea	
A&B Distribution	B201	\$11.50	ea	

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Selecting this item brings up the vendor record.

Vendor Part Dialog

Vendor Part Details

Vendor Name: Brent's Bicycle Brakes
Part Num: 6201
Part Description: Heavy Duty Brake Cables
Vendor's Part Number: B1-7878
Last Cost: \$9.00
UOM: Each (ea)
Last Date: 02/07/2006
Lead Time: 0
 Default

OK Cancel

New Reorder Level

New Reorder Level:

Order Up to Level: 5
Reorder Point: 2

OK Cancel

Another very easy feature to use it setting the reorder point and the reorder quantity. This can be done by selecting the line item in the same Inventory tab.

Drop Ship: 0 Tag Count: 7
Available: 108 Back Ordered: 0

Reorder Information

Location Group	Order Up to Level
Company wide	5

If you select it a dialog box will open, and you can make any changes you see fit.

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Inventory

The inventory screen shows all that one needs to know about inventory. Including incoming , on order and committed inventory. Thus Fishbowl holds the concept of blocked stock, as well as the concept of allocated. (However, allocation is a sophisticated concept which can mean a couple of different things. We were unable to find the specific definition of allocated in the online manual for Fishbowl Inventory.)

It even shows where each of the inventory quantity is in all of the locations.

Inventory Details: BB2001

General

Part Description: Mountain Bike
 Part Number: **BB2001** Total Cost: \$9,770.40
 UOM: Each Average Cost: \$203.55

Inventory

On Hand: 48 On Order: 28
 Allocated: 3 Committed: 3
 Not Available: 0
 Drop Ship: 0 Tag Count: 6
 Available: 45 Back Ordered: 0

Tag Information

Tag Count: 6

Loc Group	Location	Tag #	Qty	Cmtd	Serial Number
LA	Bike Storage	46	2	1	SN(s): BB20...
SLC	Store Front	45	2	2	SN(s): BB20...
LA	Store Front	47	15	0	SN(s): BB20...
SLC	Stock 300	121	19	0	SN(s): BB20...
MI	Stock Room	119	4	0	SN(s): BB20...
MI	Store Front	120	6	0	SN(s): BB20...

Serial Numbers

Tracking For: BB2001

Serial Number
BB2001-10004
BB2001-LA10001
BB2001-LA10002
BB2001-LA10003
BB2001-LA10004
BB2001-SLC10002
BB2001-SLC10004
BB2001-SLC10006
BB2001-SLC10008
BB2001-SLC10010
BB2001-SLC10014
BB2001-SLC10021
BB2001-SLC10023
BB2001-SLC10025
BB2001-SLC10029

Double clicking any one of the line items shows the actual serial number.

This serialization would have to be supported by having bar code capable readers, and possibly by integrating with Fishbowl Mobile Warehouse (or at least we would think). Fishbowl offers out of the box integration with a series of readers that can be found on their website.

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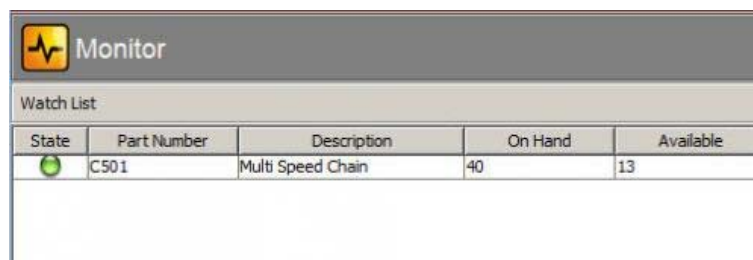
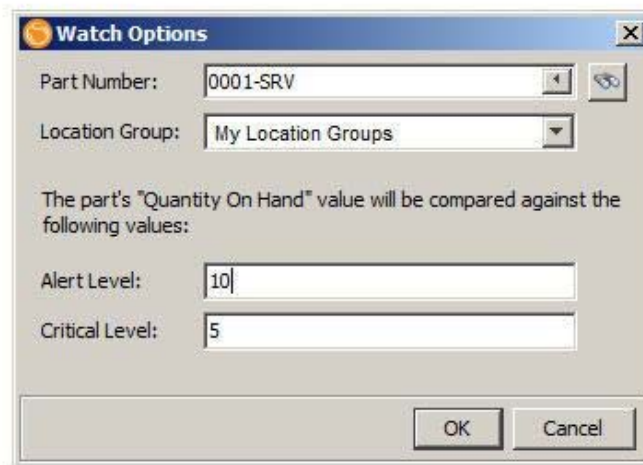
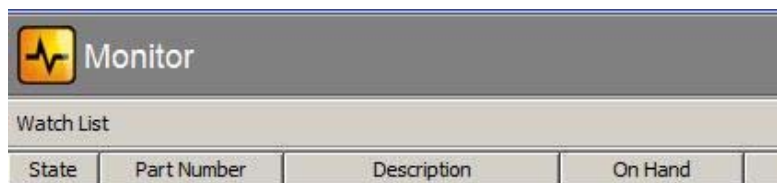
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Monitor

Any ERP application will have the ability to create alerts, and Fishbowl has this as well. Here in the Monitor view, we are creating an alert for the part number 0001-SRV, and we will be watching it for My Location Group, and the alert will initiate at an on hand of 10. Right now, it appears that only on hand levels can be monitored and create alerts from.



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Sales Order

The sales order is easy to create.

Sales Order: 50012

General | Details | Memo | Custom

Customer: Natalie Katerich

Fulfillment Date: 11/5/04

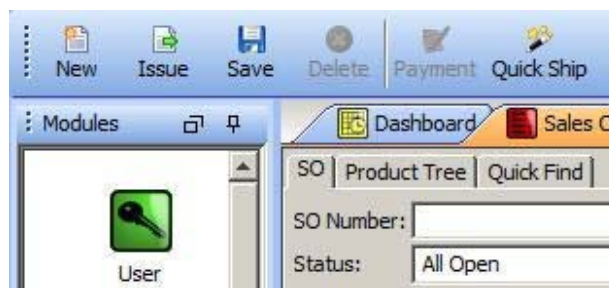
Bill To

Natalie Katerich
675 North 1400 West
Pasadena, CA 91107
UNITED STATES

Quantity: 1 Product:

Line	Number	Description	Qty
1	H902	Pro Range Handle Bars	1
2	P701	High Efficiency Pedals	1
3		Subtotal	1
4	\$10 Discount		1

All I have to do is select the “New” button in the upper left hand corner.



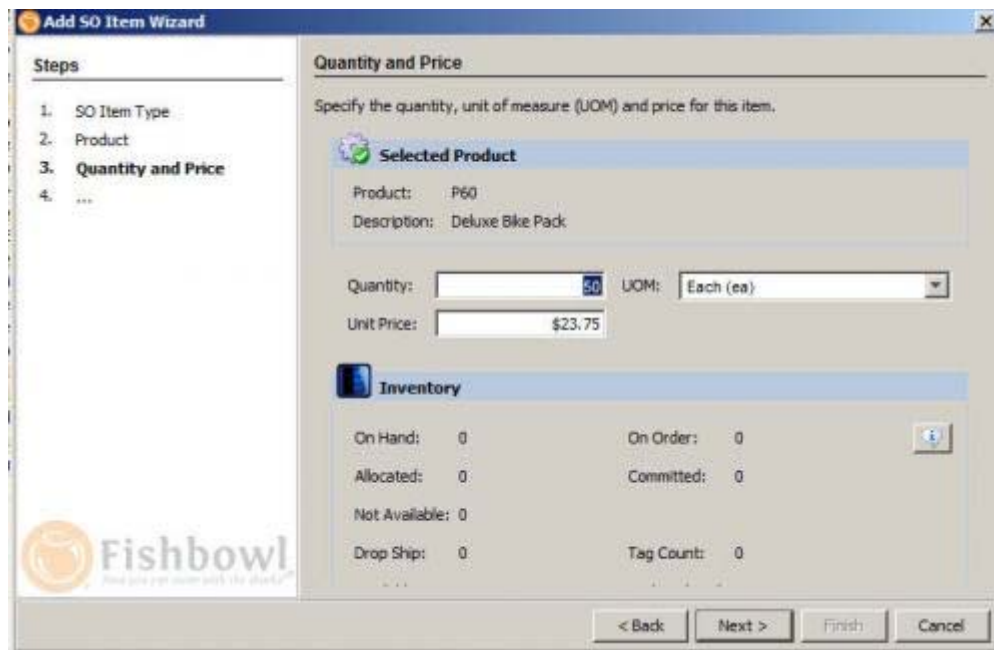
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You will be brought to this screen. You can then see the inventory as you are creating the sales order. Since there is not any on-hand inventory, if I create this order, I will end up creating a backorder.

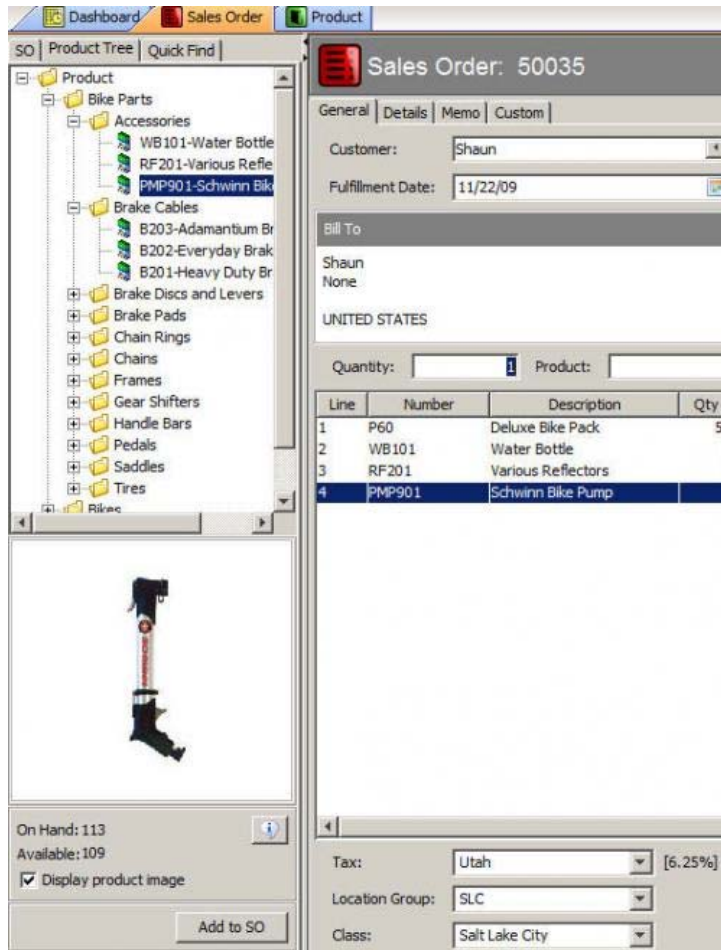


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The product tree can be viewed by selecting the “Product Tree” tab to the left of the screen. This shows all of the products that are in the Fishbowl database. This is a truly powerful view that I do not recall seeing in other software.

The ability to create multiple levels of nesting would allow a rep to provide many different alternatives to a customer, and would allow for them to navigate to them, and see the relationships all in a very small space.

On the bottom off the screen, if this product is desired, it can be easily added to the sales order by selecting the “Add to SO” button, or by simply double-clicking the item. I created this sales order below with all these items in just 15 second.

I can add discounts by selecting the button on the far right (out of screen shot view) and if it save it, and then issue it, I have created a sales order.

Line	Number	Description	Qty	UOM
1	P60	Deluxe Bike Pack	50	ea
2	WB101	Water Bottle	1	ea
3	RF201	Various Reflectors	1	ea
4	PMP901	Schwinn Bike Pump	1	ea
5	B203	Adamantium Brake Cables	1	ea
6	BP205	Rocky Road Brake Pads	1	ea
7	BP205	Rocky Road Brake Pads	1	ea
8	C502	Single Speed Chain	1	ea
9	H902	Pro Range Handle Bars	1	ea

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Customer

Customers can be easily added.

Customer Details: Baby Bikes

Account Info | Details | Address | Contact | Groups

Name:

Default Address

Name: Baby Bikes
2424 Baby Blvd.
Boise, ID 83709
UNITED STATES

Default Contact Information

Contact
Baby Bikes
Baby Bikes

Customer Details: Baby Bikes

Account Info | Details | Address | Contact | Groups

Credit Limit:

Status:

Default Terms:

Default Carrier:

Tax Rate:

Shipping Terms:

Salesperson:

Number:

Tax Exempt

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Pricing

Pricing is a particularly tricky feature in most ERP systems. However, Fishbowl simplifies it greatly. We were able to create a pricing rule ourselves in a just a minute or so. This pricing rule can be applied to everyone, or just to a specific customer or to a customer group. Likewise, it can be applied to a product, all products or a product tree. So this takes care of many of the scenarios for pricing that come up at companies.

Pricing Rule: Bike Club 2

General | Advanced | Details

Name:

Description:

Apply To Customer(s)

Everyone

Customer:

Customer Group:

Apply To Product(s)

All Products

Product:

Product Tree:

Apply Price Adjustment

Markdown: relative to the

Pricing Rule: Bike Club 2

General | Advanced | Details

Apply Rounding

Round to nearest - (Minus)

Apply To Dates

Date Range: From

Apply To Quantities

Minimum Quantity: Maximum Quantity: (0)

Tiered Pricing Type

The Tier 1 price is always the price set on the product.

Tier 2 pricing rule

Tier 3 pricing rule

Apply this rule as products are added to a Sales Order

The advanced tab controls the dates and quantities for which the pricing rule should apply.

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Discount

In addition to all of the pricing functionality listed above, specific discounts can be set up in the discount view.

Discount			
Name	De...	Type	
10% Discount		Percentage	10%
50% Discount		Percentage	50%
25% Discount		Percentage	25%
Bike Club Coupon		Percentage	15%
\$10 Discount		Amount	\$10.00
\$20 Discount		Amount	\$20.00
\$5 Discount		Amount	\$5.00
\$50 Discount		Amount	\$50.00

Purchase Orders

To see the inbound material, one goes to the purchase order view. The purchase order easily shows the many line items on the PO. (The detail tab gives most of the rest of the specifics.)

The screenshot displays the Fishbowl Purchase Order interface for PO 10019. On the left, a list of vendors is shown with PO 10019 selected for A&B Distribution. The main window shows the 'Purchase Order: 10019' details, including the vendor 'A&B Distribution' and fulfillment date '2/7/06'. A table of line items is visible, with the first item being 'Shift Gears Shifter' (Line 1, Part S601). To the right, a 'Details' tab provides further information: Vendor (A&B Distribution), Type (Standard), Date Issued (02/07/2006), Date Created (2/7/06), Date Completed, Date Confirmed, Shipping Terms (Prepaid & Billed), Payment Terms (COD), FOB (Origin), Carrier (Will Call), and Total Weight (2,569.5 lbs).

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Manufacturing Order

Fishbowl has the ability to schedule manufacturing or production orders. This screen, the general tab, associates the sales order to the manufacturing order. Showing the direct “pegging” in this way is extremely convenient.

Manufacture Order: 7

Number: 7
Date Scheduled: 11/5/04
Location Group: SLC

Sales Order
SO Number: [50016](#)
Customer: Ashley Myers

Work Orders
Quantity: 1 BOM:

Status	BOM Number	Stage	V
Issued	BB2004	1	7:00

Manufacture Order: 7

General Details **Materials** WO Details Memo Custom

Description	Part Number	
BB2004 - Custom Bike		
... Create BB2004	BB2004	C
... F102 - Mountain Dominator...	F102	M
... C501 - Multi Speed Chain	C501	M
... S604 - Sky Cast Shifter	S604	SI
... H903 - Performance Handl...	H903	Pr
... PMP901 - Schwinn Bike Pump	PMP901	Si
... CR403 - 7 Speed Chain Ring	CR403	7
... SS801 - Comfort Saddle	SS801	C
... T1003 - Road Performance...	T1003	R
... B201 - Heavy Duty Brake ...	B201	H
... P703 - Peak Domination Pe...	P703	Pr
... BD301 - Excel Stopping Bra...	BD301	E:
... RF201 - Various Reflectors	RF201	V:
... BP204 - Mountaineering Br...	BP204	M
... LA101 - Bike Assembly	LA101	Bi

The materials tab of the manufacturing orders shows the bill of material, and provides a very easy way to get to the individual parts by simply selecting the parts hyperlink.

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Search

One of Fishbowl's strengths is the ability to search. The demo that we used did not have a need for this because there were not many items in it. However, in production, this would be of great use.

This search box is available in most of the views.

The screenshot shows a search window titled "Search". It contains three input fields: "Prod Number:", "Prod Desc:", and "Part Number:". Below these fields are two buttons: "Search" and "Advanced Search...". Below the buttons is a table with two columns: "Product Num" and "Part Num". The table contains the following data:

Product Num	Part Num
P50	P50
P60	P60
B200	B200
B201	B201
B202	B202
B203	B203
C501	C501
C502	C502

I now search for product F102 by simply typing it in.

The screenshot shows the same search window as above, but with "F102" entered in the "Prod Number:" field. The "Search" button is highlighted. The table below shows the results for the search:

Product Num	Part Num
F102	F102

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Making Changes in Fishbowl

One thing that we noticed was that the data was extremely easy to change. However, we were curious as to how data can be locked and how Fishbowl manages multi-users. Fishbowl allows the creation of new users and can limit their access by category. In the example below we have created a new user and only given them access to purchasing and receiving. Once again, it is amazingly easy to create users as with other new data in Fishbowl.

User Details:

General | Location Groups | Memo

First name: Last name:

User name: Initials:

User Groups

Available Groups:

- Accounting
- Reports
- Sales
- Shipping
- Warehouse

User belongs to:

- Purchasing
- Receiving

When we login under the username we just created, the things I could change were much more limited.

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Conclusion

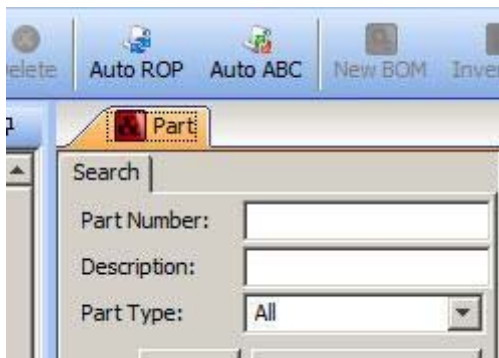
Fishbowl is both highly functional and actually fun to use. It is a perfect solution for small and medium business. In fact, I would recommend that clients that are planning to implement standard ERP such as SAP or Oracle, first try to implement on Fishbowl. This could be done for a segment of the business, and used in more of a testing phase. It is a fantastic way to explain the concepts of ERP in a much more approachable way. It is also incredibly easy to use compared to traditional ERP. Considering the exorbitant pricing of most major ERP systems, the fact that their interface is so less functional than Fishbowl Inventory should really make them ashamed of themselves. I have personally trained people on ERP implementations and seen how poor interface design severely reduces the ability of users to both do their job, and understand what they are doing. This is one of the reasons for the company's name — that using their software provides such visibility that it is like looking at your company through a fishbowl. After using the software, I would have to agree.

There is really no reason the other ERP firms could not create an interface that is this logical and usable. According to the Fishbowl website, an installation averages \$50,000, which is a pittance on a typical ERP project and can definitely be justified as a user training. Just the software for 20 users would run roughly \$25,000, but Fishbowl can be used by as few as 2 users, which brings the price down to under \$5,000. These are one time figures, not yearly charges, although I would assume that in the future there are upgrade charges, but I was not able to determine that from their website.

Fishbowl Inventory and Auto Reorder Point Functionality (Follow up article Nov 23, 2009)

We thought we had finished our Fishbowl review, but we found something of interest that we wanted to highlight separately because it is important functionality. This is the Auto Reorder Point which is available within the part view of Fishbowl Inventory software (for an introduction to Fishbowl, please see the previous post).

You can get to Auto ROP by selecting the part view and then selecting the button in the upper left part of the screen.



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This brings up the selection to run the Auto ROP for all the parts, or for just some of the parts. We will select all of the parts.



Date Range

Next we want to select a period of time for which the ROP will base its calculation.



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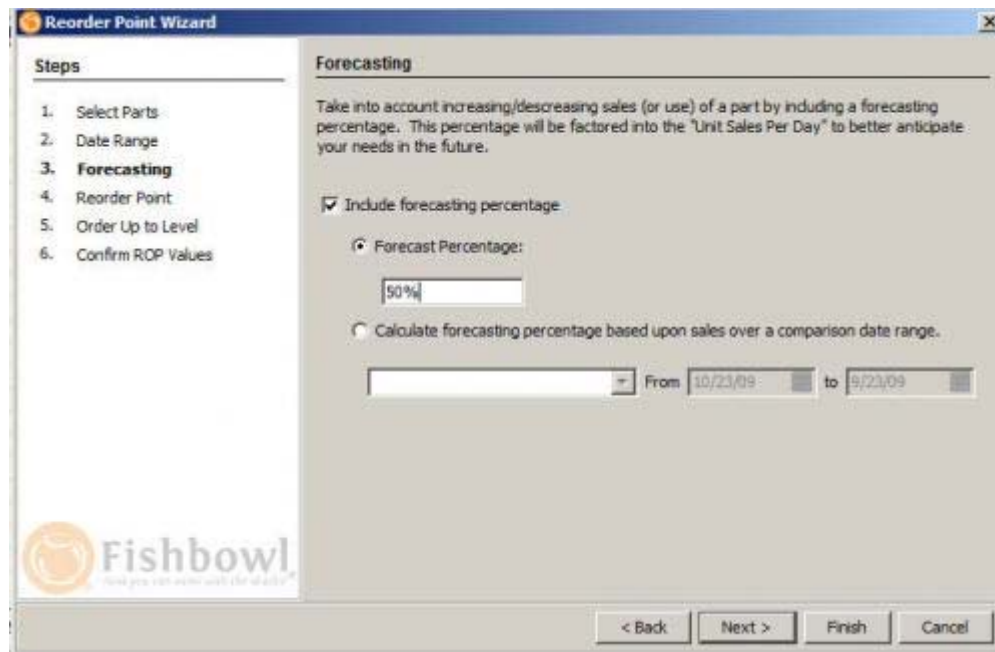
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Weighing History vs. the Forecast

Now we can choose whether to considering increasing or decreasing sales by forecasting percentage. This selection comes down to how heavily we want to weigh the past vs. the future. We will choose a Forecast Percentage of 50%, so that we weigh the past and future expected values evenly.



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Input Data

This next screen really showcases Fishbowl's strength, transparency and education. Fishbowl asks for inputs for lead time, safety stock and basic stock, which will allow the system to perform the necessary calculations. The safety stock and basic stock are asked for in terms of days instead of in terms of units. This allows the system to decide what the units should be. However, where this screen excels is in explaining what the system is doing to the user. This level of transparency is unheard of in SAP or Oracle. Instead, different inbuilt help must be used, but in neither system is the help as easy to find, nor are the instructions as straightforward as what is listed here in Fishbowl. If the user knows this already, then they can breeze past it, but its there for new users, or for users who have not seen this transactions for a while or just need a refresher on what the system is doing.

Reorder Point Wizard

Steps

1. Select Parts
2. Date Range
3. Forecasting
- 4. Reorder Point**
5. Order Up to Level
6. Confirm ROP Values

Reorder Point

The Reorder Point determines when the part will show up on the Reorder Report. When the quantity available is less than or equal to the ROP, the part will start showing up on the Reorder Report. The Reorder Point (ROP) will be calculated as follows:

$$ROP = (\text{Lead Time} + \text{safety Stock} + \text{Basic Stock}) * \text{Unit Sales Per Day}$$

where:

Lead Time = The number of days between Issuing a PO and receiving it.
Safety Stock = The number of days of stock to cover emergency situations from your vendors.
Basic Stock = The number of days of inventory you want to keep on hand.
Unit Sales Per Day = This value will be calculated on a per part basis over the date range specified.

Lead Time: in days.
Safety Stock: in days.
Basic Stock: in days.

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Order Up to Level

Now the system asks for the order interval. Now this could have been placed on the previous screen and saved space, however, then there would not have been room for the explanations. The explanations on this screen very clearly state what the Order Up to Level is composed of, and then asks for the user to enter the order interval, so how frequently the company is interested in placing an order for this item. This is important because this is the practical constraint. Consistent order frequency helps with supplier management (everyone likes consistency), and with order management. In this way different classes of suppliers can be placed on different intervals. The interval can stay the same, but the quantity can change. For very low order quantity suppliers, the interval can be lengthened in order to keep transportation costs low, and as a percentage more inventory should be carried on average. (Please don't email me about how inventory is "bad." This is not a blog on JIT, Lean or other topics that interest people or strategy consultants who have no background in inventory management.)



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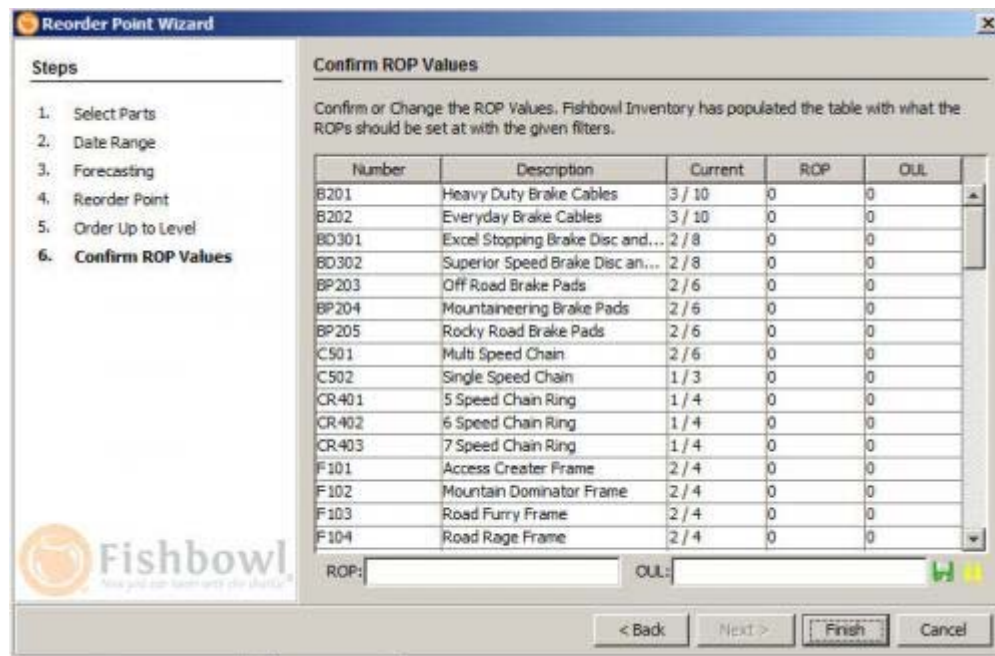
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ROP Results

Next we move to the recommendations. Fishbowl has created the calculations and provided the ROP recommendations for the entire part database.



Conclusion

Its hard not to be impressed with this functionality. Calculating ROP values is very important. The fact the Fishbowl makes it so easy means the ROPs can be frequently updated with very little effort. We also liked the fact that Fishbowl explains what is happening throughout the input process, rather than treating it as a black box.