

HOW TO USE STOCK REORDER

The purpose of this document is to provide users with the basic understanding of the Stock Reorder process. The stock *Reorder* screen has two main functions:

- Creating new reorder batches and searching for reorder batches
- Generating purchase orders based on one of those batches

This document has been structured with a view to assist stock controllers, warehouse personnel and procurement personnel, when using the Stock Reorder process in Baseplan Enterprise.

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CREATING REORDER BATCHES

Note: For the Stock Reorder process to calculate meaningful recommendations, the following stock details must be configured:

- Preferred Item Suppliers: In order for the Reorder process to create purchase orders, supplier information for the stock items must be set up.
- Velocity Codes: Velocity codes are used to identify different 'Performance Groups' of stock items, i.e. how many stock items were sold over a specific period. Stock items are assigned a velocity code as part of the Stock Statistics process. This facilitates better visibility and reporting on items that are selling the most and items that should not be allowed to be out of stock.
- Stock Statistics: This procedure will update each stock item by calculating the average monthly sales (quantity and value), comparing it against the velocity thresholds and assigning a velocity code. It is recommended that this procedure be scheduled to run outside working hours or it can happen automatically when Stock End Of Month is processed if the parameter **Run Statistics after EOM** is enabled.

Creating Reorder Batches

1. From the Menu, select **Stock > Reorder**
2. Click ADD

This will open the *Create Stock Reorder Batch* screen.

3. Select a **Warehouse**

This will populate the **Branch** associated with the warehouse.

4. A range of product groups can be included in the reorder batch. Select the relevant product group range using the **Product Group From** and **Product Group To** drop down lists.
5. A range of velocity codes can be included in the reorder batch. Select the relevant code range from **the Velocity Code From** and **Velocity Code To** drop down lists.

A **Delivery Method** can be selected, if required.

For example: Pickup, Air Freight.

If existing purchase orders with an **ETA** greater than a specified date are not to be included, enter the date in the **Exclude Purchase Orders with ETA >** field.

This will check all the 'CONFIRMED' purchase orders in the system with an **ETA** beyond the date entered. The quantity of items on these orders will then be excluded from the reorder batch. The purpose of this function is to avoid ordering over the required quantity.

6. From the *Sub Warehouse Options* panel, check either the **Include Qty from Sub Warehouses** checkbox or the **Include direct transfers to Sub Warehouses** checkbox, if required

Different businesses have varied warehouse hierarchies. **For example:** A national warehouse may have sub warehouses for each State. Each State warehouse, in turn, may have respective vans or bins which act as sub warehouses. When creating a reorder batch, checking the **Include Qty from Sub Warehouses** checkbox will take into account the stock quantities in all the sub warehouses attached to the main **Warehouse** selected.

For example: The **Max. Stock** for warehouse '401' is 30 units, with an available stock of 28 units. 'Van 401' is configured as the sub warehouse, and has an available stock of 5 units. If a reorder batch is created (with the **Reorder** option checked; explained below) for warehouse '401' and the **Include Qty from Sub Warehouses** checkbox is checked, no reorder quantity will be recommended since the stock in the sub warehouse is sufficient to fulfil the maximum stock requirement of warehouse '401'.

If checked, the **Include direct transfers to Sub Warehouses** checkbox will create separate reorder batches for the selected warehouse and all its sub warehouses. Once the reorder batch is created, the batch details (for the selected warehouse) are displayed in the *Reorder* screen. Direct stock transfers can then be initiated from this screen using the CREATE TRANSFER button. Clicking the button will generate transfers from the selected warehouse to the sub warehouses and also from the main (national) warehouse to the selected warehouse in order to replenish stock.

For example: A national warehouse 'AUS' is configured with a State warehouse 'NSW'. Warehouse 'NSW' in turn, has a sub warehouse, 'Van 201'. When creating a reorder batch for warehouse 'NSW', if the **Include direct transfers to Sub Warehouses** checkbox is checked, a reorder batch will also be created for 'Van 201'. Clicking CREATE TRANSFER on the *Reorder* screen will then generate direct stock transfers for both warehouses 'NSW' and 'Van 201'.

7. From the *Use Price From* panel, select the purchase price to be used when creating the purchase orders

This will reflect in the **Price** field on the *Reorder Batch Details* tab of the *Reorder* screen.

8. From the *Reorder Options* panel, select the sources that are to be taken into account when creating the reorder batch
 - **Equipment Parts Issue** – Checking this checkbox will include all the parts issues with Status 'BACKORDER' within the selected criteria, in the reorder quantity
 - **Sales Orders** – Checking this checkbox will include all the sales orders with Status 'BACKORDER' within the selected criteria, in the reorder quantity

- **Reorder** – Checking this checkbox will take into account the **Max. Stock** and **Min. Stock** values (depending on the parameter, **Use Minimum Stock in Creation of Reorder Batch**) on the Stock Master record, to derive the reorder quantity

The *Include Reorder Quantity* panel is only relevant if the combination of at least one backorder option (either **Equipment Parts Issue** or **Sales Orders**) and **Reorder** is checked in the *Reorder Options* panel.

If **Add to Back Order Qty** is selected, the total reorder quantity will be a sum of the quantities from **Equipment Parts Issues, Sales Orders** and **Reorder**.

If **Take Back Order Qty Off** is selected, the total reorder quantity calculated from the backorders will be subtracted from the quantity calculated for **Reorder**. This is done so that items which do not fit the **Reorder** criteria can still be ordered to fulfil the backorders.

9. Click CREATE BATCH

Info: “Operation Successful.”

10. Click OK

The batch details will appear in the *Reorder Batch Details* panel of the *Reorder* screen.

Quantity to Order Calculation

Based on the reorder batch created, a recommended order quantity is displayed in the **Qty to Order** field on the *Reorder* screen.

Note: The quantities included in these calculations depend on the options selected on the *Create Reorder Batch* screen.

Reorder

Qty to Order = Max. Stock – [(Quantity – Qty Allocated) - Unreceived quantity on POs where the **ETA is blank or has a date before the value in the **Exclude Purchase Orders with ETA >** field - Stock available in sub warehouses - Quantities on stock transfers that have been sent but are yet to be received]**

Equipment Parts Issue

Qty to Order = Parts issues in 'BACKORDER' Status – Quantity on 'CONFIRMED' POs for these backordered parts

Note: Backordered parts issues already listed on existing reorder batches will not be included.

Sales Orders

Qty to Order = Sales orders in 'BACKORDER' Status - Quantity on 'CONFIRMED' POs for these backordered items

Note: Backordered sales orders already listed on existing reorder batches will not be included.

Selecting and Editing Detail Lines

A reorder batch contains backordered stock items and/or items that need to be ordered (for a certain warehouse, branch, product group, velocity code) in order to get the quantity of each item back to the maximum stock or minimum stock level depending on the value of the parameter, **Use Minimum Stock in Creation of Reorder Batch**.

Once the batch has been created, the *Reorder* screen refreshes with all the details of the created batch displayed on the *Reorder Batch Details* panel.

If a batch was created and purchase orders were not immediately created, the batch can be searched from the *Search Criteria* panel. Batches can be searched by:

- Batch Status
- Batch Number
- Supplier
- Warehouse
- Branch

Once the relevant batch is displayed, the **Qty to Order**, **Supplier**, **Price** and **Description** can be changed by editing the lines.

1. Double click a detail line

This will open the line for editing in the *Edit Stock Reorders (Alt E)* tab.

2. Once the required changes have been made, click SAVE in the *Edit Stock Reorders (Alt E)* tab to save the edited detail line

Clicking DELETE will delete the detail line.

Once all the changes have been saved, purchase orders can be created.

3. Click SELECT ALL if all the lines displayed are to be ordered
4. Alternatively, if some of the detail lines are to be ordered, the relevant lines can be selected individually by checking the **Select** checkbox

Missing Supplier Report

Purchase orders can only be created for stock items if they have the supplier information configured. To check that all stock items in a batch have the necessary supplier information configured, the Missing Suppliers report can be generated.

1. From the Menu, select **Stock > Reorder**
2. Display the relevant reorder batch
3. Click MISSING SUPPLIERS REPORT

This will display the Stock Items – Missing Supplier Configuration report.

The report can then be reviewed

If supplier information is missing, return to the Stock Master and enter the supplier details from the *Preferred Item Suppliers* screen. Only the supplier can be edited from within the reorder batch by editing the relevant detail line.

Creating Stock Transfers

Prior to creating purchase orders, stock can be transferred from another warehouse to fill the reorder rather than ordering the items from a supplier, this usually happens where one warehouse is overstocked and another is under stocked.

1. From the Menu, select **Stock > Reorder**
2. Display the relevant reorder batch
3. Select the items to be transferred by checking the **Select** option or clicking SELECT ALL if all items are to be transferred
4. Click CREATE TRANSFER

Info: "Please select the warehouse you wish to transfer from."

5. Select the warehouse from the drop down list
6. Click OK

An error message will display if there is insufficient stock to transfer. Otherwise, the following message is displayed:

Info: "Transfer was created successfully, do you wish to go to the Transfer screen?"

7. Click YES to view the transfer in the *Stock Transfers* screen

The transfer will be created in 'OPEN' **Status** and the relevant reorder details will be removed from the reorder batch.

Creating Purchase Orders

When the items recommended on the reorder have been selected, purchase orders can be created to the suppliers for stock replenishment. All selected items must have a valid **Supplier** and **Price**.

Note: If no **Supplier** is selected and the stock item has multiple preferred item suppliers configured, then the supplier with **Sort Order** '1' in the *Preferred Item Suppliers* screen will be selected. If the parameter **Only Order from Suppliers in Warehouse Branch** is enabled, then the system will check the **Warehouse** on the PO to limit the suppliers by branch. Thus, selection of the supplier will be based on first, the **Sort Order** and then lowest price.

1. From the Menu, select **Stock > Reorder**
2. Display the relevant reorder batch
3. Click CREATE POS
4. Select the branch that the purchase order is to be created for, from the drop down list

The purchase order will use the delivery address from the selected branch as configured in **Purchase Orders > Configuration > Branches**.

5. Click OK

Info: "Operation Successful."

6. Click OK

This will return to the *Reorder* screen.

If all items on the reorder were selected and purchase orders were created for each detail line, the *Reorder Batch Details* panel will be empty.

To view the completed reorder batch, search using 'POSTED' in the **Status** drop down list as the reorder batch has now been posted.

The **Status** of each detail will be updated to 'POSTED'.

The **User Updated** field of each detail line will be updated with the user name of the user who created the purchase orders.

The **Date Updated** field will be updated with the date the purchase orders were created.

The **PO Number** field will display the purchase order number created for the detail line.

Please refer to the 'How to Process Purchase Orders' guide for more information.

Note: All purchase orders created from the Reorder process have a status of 'OPEN'. They must be authorised, confirmed and sent to the suppliers.

The **Ref** in the purchase order will be the reorder batch number.

The **Request By** field will be 'AUTO'.

Back Orders

When a reorder batch is created, the lines that are added to fill backordered transactions are linked in the background to their original transaction. This occurs for both equipment parts issue and sales orders. When the receipt for the purchase orders is processed, the stock items are automatically allocated to the sales order and parts issues. The parts issue is automatically posted too.

Purge Batches

Reorder batches can be purged after a period of time in order to keep the reorder history clean and manageable.

1. From the Menu, select **Stock > Reorder**
2. Select **Actions > Purge Batches**

Batches can be purged by the following ranges:

- Date
 - Branch
 - Batch
 - Status
3. Select the relevant range
 4. Click PURGE

Info: "Are you sure you want to purge stock reorders in the selected range?"

5. Click YES

Info: "Operation successful: [nn] rows were deleted."

6. Click OK

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