

Creating A Suggested Stock Order Based On Min Max

The following settings must be in place before the system can generate a Suggested Stock Order accurately.

- All items that you want included in the order must have a Minimum shelf level, a Maximum shelf level and a Minimum Purchase quantity. Minimum Purchase quantity is dictated by the supplier, in other words, they won't break a case in some instances. If that's true then the case quantity must be entered. Refer to the illustration found later in this manual.
- Auto Reorder must be Checked
- Quantity On-Hand must be correct.
- The flag for Auto reorder must be set to Use Min Max for Auto reorder

Flag Setting

Miscellaneous Flag Settings

Point Of Sale | Purchasing | Pole Displays | Miscellaneous

Purchase Order

- Hide Unit Price
- Display Purchase Unit Cost / Qty On Hand
- Default To Selling Unit
- Ask For Non-Stock Weights
- Create Hold Ticket
- Do Not Update Existing PO Line
- Round up Auto Reorder Qty
- Auto Reorder based on Min/Max

Save And Exit | Print Screen | Cancel and Exit

Check the Box that says Auto Reorder based on Min/Max

Setting up an Item to be included in the Auto Reorder Generator

The screenshot shows the 'Inventory Control' window in the CyberBOS 2005 Server 5.1.68 application. The window is titled 'Inventory Control' and has a 'History Menu' and 'Records' button. The 'Required Fields' section includes: Stock Number (MINFEEDER), Description (MINERAL FEEDER\SALT), Purchasing Unit (EA), Primary Selling Unit (EA), Multiplier (1), Retail Price (125.0000), and Cost Per Unit (99.9500). The 'Order/Vendor Info' tab is selected, showing a table with columns for Vendor, Vendor's Order Number, Last Cost, and Date. The table has three rows for Primary Vendor, 2nd Vendor, and 3rd Vendor, all with Last Cost of \$0.00. The 'Auto Reorder' checkbox is checked. Below the table, the 'Minimum Shelf Level' is set to 1, 'Maximum Shelf Level' is 12, and 'Minimum Purchase Qty' is 1. The status bar at the bottom indicates the current database is 'C:\CyberBOS2000\Database\SQL\Cyberbos2004.mdb' and the user is 'TOSHIBA'.

On the Order/Vendor Tab in Inventory Control, check the box that says Auto reorder.

Set the Minimum you want the shelf level to go to, the system will use this figure for its base.

Set the Maximum you want on the shelf.

Enter the Minimum Purchase Quantity this vendor allows you to order.

In this scenario, the Current Quantity On Hand is at zero, so the system is going to suggest you to order 12, to get it to it's max shelf level. This quantity can be adjusted to what ever you want to order because the Vendor allows you to order 1 at a time.

Setting up an item where the Vendor has a Minimum Order Requirement

CyberBOS 2005 Server 5.1.68 - Our Lumber and Supply, King

History Menu Records

Inventory Control

Required Fields

Stock Number: 6379846 Taxable Taxable Sales Dept: 32 AUTOMOTIVE

Description: 10008 WD-40 LUBRICANT 8OZ Sub Dept:

Purchasing Unit: EACH Update UOM Conversion Factor: 1 Cost Per Unit: 1.8100

Primary Selling Unit: Each Update UOM Multiplier: 1 Retail Price: 2.3900 GPM%: 24.2678

Primary UPC: Active Inactive Superseded

Superseded By: Weight: 0 Is A Kit Edit Kit Items

Primary Vendor: Orgill Serialized Update Serial

Vendor's Number: Locations: Standard Item: Item Type:

Notes Alt Selling Unit/UPC Sale Events Manufacturer Info Movement

Qty/Price Info **Order/Vendor Info** Quantity Break Quick Receive History

	Vendor's Order Number	Last Cost	Date
Primary Vendor: Orgill	<input type="text"/>	\$0.00	<input type="text"/>
2nd Vendor:	<input type="text"/>	\$0.00	<input type="text"/>
3rd Vendor:	<input type="text"/>	\$0.00	<input type="text"/>

Auto Reorder

Minimum Shelf Level: 4 Maximum Shelf Level: 12 Minimum Purchase Qty: 12

Cancel/Add New
Save/Add New
Save And Exit
Cancel and Exit
Clone Item
Print
Search
Delete

Current Database: C:\CyberBOS2000\Database\SQL\Cyberbos2004.mdb TOSHIBA BETA: Pay, POFit 02-09-2007 09:25:48

This vendor requires you to order 12 or 1 case at a time, i.e. will not break a case.

The system will suggest that you order 12 because the on hand is at 3, below its minimum. If you're on hand was 4, it would NOT suggest any.

Note: You MUST be below your minimum before it suggests you to order any.

Creating an Auto Order

Auto Order can be generated as a report or in the Purchase Order screen.

If you create an Auto Order in the Purchase Order, you won't have to key in the order when manually, the Purchase Order can be printed, changes are noted on the print out, then manually make the changes on the Purchase Order, then Print, Fax or send to the vendor via EDI.

Create the Auto Order via a report, this is usually done when a Vendor rep request it while in your store, to give them an idea of how their merchandise is moving and give you suggestions on whether or not you should adjust the shelf levels for maximum returns on investment (ROI). This report should be accompanied with a sales and purchase report. Usually the "Item Activity By Vendor" report found in Inventory Reports Menu.

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Windows

Item Activity By Date
 Item Activity By Vendor
 Inventory History
 Inventory Details By Item Number
 Inventory Min/Max Report
 Inventory By Location
 Non-Taxable Items
 Quantity Break List
 Serial Number Inventory
 Custom Pricing By Customer
 Custom Pricing By Product

Inventory Count Sheets
 Department Margin Exception
 Inventory By Department
 Inventory By Primary Vendor
 Slow Moving Inventory
 Kits
 Kits - Where Items Used
 Items On Sale
 Activity By Vendor Number
 Department List
 Inventory Valuation

Date Range: 2 / 9 /2006 - 2 / 9 /2007

Department: All Departments

Primary Vendor: Fleming Wholesale

Cost: -

Retail: -

Qty Range: -

Item: Select Item

Location: All Locations

Show Detail
 Active Items
 Inactive Items
 All Companies
 Active Companies Only
 Active Departments Only
 Add Page Breaks
 Include Hold Ticket Quantities

Select All Clear All Save Run It Exit

Current Database: C:\Cyberbos2000\Database\SQL\Cyberbos2004.MDB TOSHIBA BETA: Pay, PDFit 02-09-2007 09:50:24

Here are the suggested Settings for this report. Notice I included 1 year of sales and purchase history in my criteria.

Creating a Suggested Order In A Purchase Order

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Commands

Purchase Order

Clerk	Description Of PO	Buying Dept	Terms	PO #	Tax Code
Bud	Stock Order	TREATED		832	Non-Tax Resale

Vendor: Fleming Wholesale
P.O. Box 147
Ramer AL 36069

1-800-624-4493

DropShip

Ship To: Our Lumber and Supply
2900 Industrial Rd
King, MD 66556

Customer PO Number
Date: 2/9/2007
Exp Rec Date: 2/16/2007

Item	Description	Qty Ord	Qty Shp	UOM	PU	Unit Cost	Extended	Retail Price	GPM	ONH	ORD	ROL
1	168M 16.8 Cattle Mineral	2	2	EA	10.15	10.1500	20.3000	12.9500	21.62	0	0	0
2	ANET 16% ALL NATURAL ENPROAL	5	5	EA	35.60	35.6000	178.0000	42.3000	15.84	0	0	0
3	BRT 20,000 ft. Round Bale Twine TS	2	2	EA	18.00	18.0000	36.0000	19.9500	9.77	0	0	0
4	BW1512R 15-1/2 ga. BARB WIRE RODEO	7	7	EA	26.80	26.8000	187.6000	32.9500	18.66	0	0	0
5	SWEETLIX SWEETLIX HI-MAG SALT	4	4	EA	7.400	7.4000	29.6000	8.9500	17.32	0	0	0
6												

F1 Post PO	F2 Add Memo	F3 Assign Entire PO	F4 Save / Add New	F5 EDI Export	F6 History	Sub-Total 451.50
F7 Auto Reorder	F8 Special Order Line	F9 Search Open PO's	F10 Special Order Info	F11 Print	F12 Assign To Customer	Sales Tax 0.00
[ESC] Cancel						Freight 0.00
Press <Ctrl><Delete> to delete item — Press <Ctrl> P to Print Grid						Discount 0.00
						TOTAL 451.50
						Total Weight: 0

Current Database: C:\Cyberbos2000\Database\SQL\Cyberbos2004.MDB TOSHIBA BETA: Pay, PDFrt 02-09-2007 15:51:26

Select the vendor you want to generate the Auto reorder for.

While on the first blank line on the PO, hit F7. The PO will automatically generate a suggested order with quantities.

Edit the PO if necessary. Then send the order to the vendor.