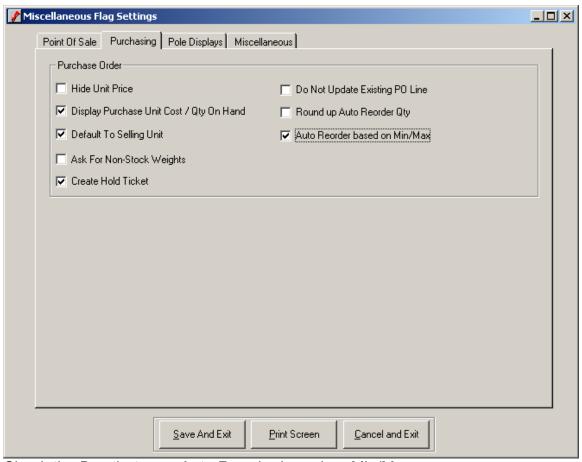
Creating A Suggested Stock Order Based On Min Max

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

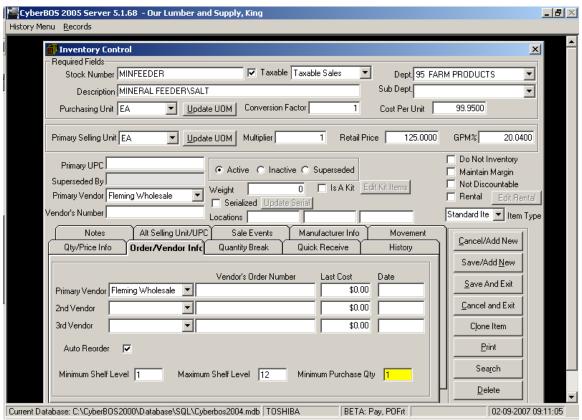
- All items that you want included in the order must have a Minimum shelf level, a Maximum shelf level and a Minimum Purchase quantity. Minimum Purchase quantity is dictated by the supplier, in other words, they won't break a case in some instances. If that's true then the case quantity must be entered. 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



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

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



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

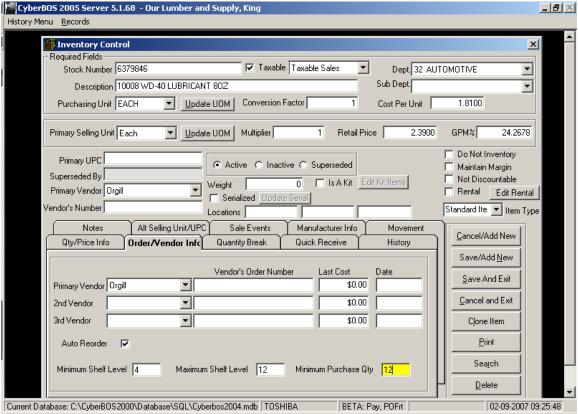
Set the Minimum you want the shelf level to go to, the system will use this figure for its base.

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



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 it's minimum. If you're on hand was 4, it would NOT suggest any.

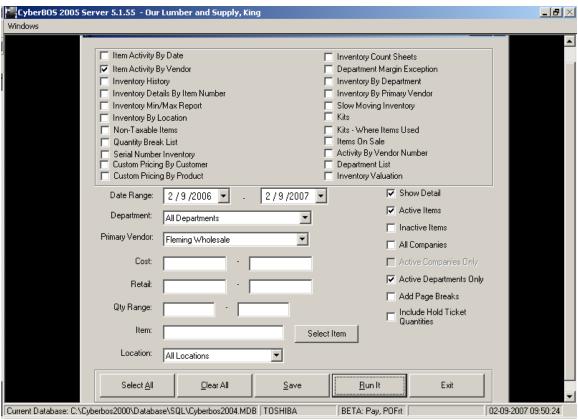
Note: You MUST is below your minimum before it suggests you to order any.

Creating an Auto Order

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

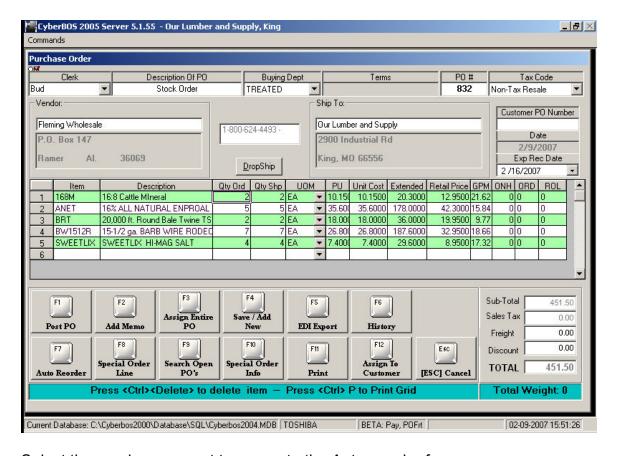
If you create an Auto Order in the Purchase Order, you won't have to key in the order when manually, the Purchase Order can be printed, changes are noted on the print out, then manually make the changes on the Purchase Order, then Print, Fax or send to the vendor via EDI.

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.



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



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.