

We are currently updating our site; thank you for your patience.

INVENTORY

AUTO ORDER

Application Requirements

The RSI_StatStock application needs to be installed and configured. This is an application that should be linked in the server's Windows Task Manager to execute every evening.

Company Configuration - Stock Management Configuration

The following needs to be configured in BPO:

- i. The <u>Usage Based</u> check box must be selected.
- ii. The Auto Generate check box must be selected.
- iii. The <u>Averaging Period</u> must be set to the number of periods (months) over which the system will calculate average values from the stock transactions.

Inventory Configuration - Stock Control

The following needs to be configured <u>per inventory item</u> that needs to be auto reordered:

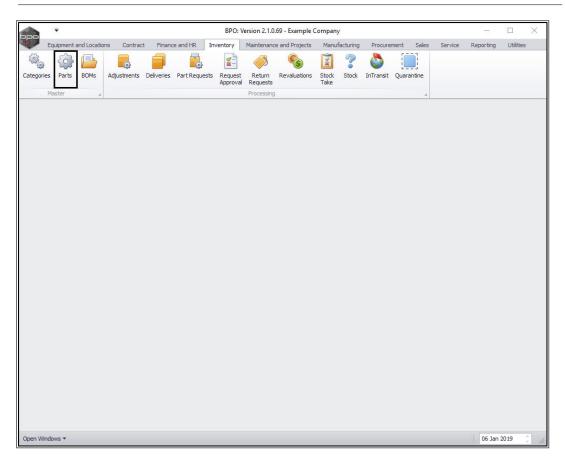
- i. The **Re-order Method** needs to be set-up as **min/max** and a min and max **stock quantity** needs to captured.
- ii. The Days in Stock field needs to be inputted with the number of days demand that the stock level is required to meet.
 i.e. if enough stock on hand is required for 10 days in advance then input a value of 10.



iii. The Auto Order field needs to be checked (ticked) if the stock item is to be auto reordered. If this is <u>un</u>checked the system will exclude this item when calculating reorder levels.

Each inventory item that needs to be **auto reordered** must be configured.

Ribbon Access: Inventory > Parts



The Part Listing screen will be displayed,

SELECT PART

• Select the **row** of the **Part** that you wish to configure.

Help v2024.5.0.7/1.0 - Pg 2 - Printed: 21/08/2024



SELECT STOCK CONTROL

🔁 💋 🗙 [ict Finance and HR Inven	itory Ma	aintenance a	nd Projects Ma	nufacturing	g Procu	ement S	ales Service	Reporting	Utilities	- 8
	2		RLSR	à 📫								
Add Edit Delete V	fiew Save Layout	Workspaces Refresh	Expo	ort Rep	orts							
		•										
Processing	Form	at 🖌 Current	J Print	_ Repo	rts 🦼							
inks a												
nter text to search A	PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	PeriodType	PeriodType
Functions	9											
		SP2020 Sprint Colour Mul	A	A	Hardware	5.2		SP2020	ea	5.00	YYYY	Years
Items Supplied	▶ E 2020-147K	Black toner SP2020	A	с	Toners	0.500			ka	24.00		Months
		SP 1919 Sprint Colour MFC	A	A	Hardware			1919	12	0.00	уууу	Years
	E SP19-147K	Black Toner SP1919	A	с	Toners					0.00		
Substitutes	E SP19-147C	Cyan Toner - SP 1919	A	с	Toners					0.00		
	E SP19-147Y	Yellow Toner - SP1919	A	с	Toners					0.00		
	E SP19-147M	Magenta toner - SP1919	A	с	Toners					0.00		
Documents	± 2020-147M	Magenta toner SP2020	A	с	Toners					0.00		
	± 2020-147C	Cyan toner SP2020	Α	С	Toners					0.00		
	CL-100-965	Cleaner	A	С	Stationery					0.00		
BOMs		Sprint copier	A	A	Hardware					0.00		
BOMS		K147 Kyocera Colour Co	A	A	Kyocera Mult			K147		0.00	m	Months
		K147 Black toner	Α	С	Toners					0.00		
	E KZN-122TFB	Kruger ZN Fax Machine	A	A	Hardware			ZN122		0.00		
Stock Control		ZN Paper	Α	С	Stationery					0.00		
		K147 Yellow Toner	Α	С	Toners					0.00		
		K147 Magenta Toner	Α	С	Toners					0.00		
	⊞ K147-888	K147 Cyan Toner	Α	С	Toners					0.00		
	E KM250MFP	Konica Minolta Colour Mu	A	A	Hardware					0.00		
Processing		Air Freshner	Α	С	Stationery					0.00		
	⊞ SP19-123	SP19-12 Colour Copier	Α	A	Hardware			SP 19-12		0.00		
Requisitions		SP19-12 Black Toner	A	С	Toners					0.00		
	± 2020-147L	SP2020 Clear Toner	Α	с	Toners					0.00		
		Network cable	Α	с	Spare Parts					0.00		
Purchase Orders		SP204 Colour Copier	A	A	Hardware			SP204		0.00		
	E 304 1474	SDOOA Plack Tenor	۸	^	Tanara					0.00		

• Click on the **Stock Control** tile.

- The Stock Control for Part: [] screen will be displayed.
- Click on **Edit**.



Auto Order

	Ŧ									< - BPO: Version 2							- 22			×
	Home	Equipmer	-			t Finance	e and I		ry Mainten	ance and Projects	Man	nufacturing	Procuremen	t Sales	Service	Reporting	Utilities	-	8	х
Ð		×		2	~															
Add	Edit	Delete	Back	Save La		Workspace	es	Refresh												
-	Proces				Forma	t	A	Current									/			
1.00																	1		1	
Wareł	houseNar	ne Re	orderMeth	odDesc	MinSt	ockLevel	Max	xStockLevel	StockItem	TargetDaysInSt	ock	AutoOrder								_
Main \	Narehou	se Mi	n/Max			5	5	10	Yes		30	No								
Open Wi	indows 🕶	č.															06 Jan	2019	4 4	1.

EDIT STOCK CONTROL TO AUTO ORDER

The Edit Stock Control Definition screen will be displayed.

- 1. Re-order Method: Click on the drop-down arrow and select Min/Max.
- 2. **Min Stock Level:** Click in this text box and either type in or use the arrow indicators to select a **minimum** stock level quantity.
- 3. **Max Stock Level:** Click in this text box and either type in or use the arrow indicators to select a **maximum** stock level quantity.
- 4. Days in Stock: Click in this text box and either type in or use the arrow indicators to select the **number of days demand** that the stock level is required to meet.



- For Example: If enough stock on hand is required for **10** days in advance then input a value of **10**.
- 5. **Auto Order:** The auto order field needs to be **checked** (ticked) if the stock item is to be auto reordered.
 - (If this is <u>un</u>-checked, the system will <u>exclude</u> this item when calculating reorder levels

-		Edit Stock	Control De	finition - BPO: Version 2.1.).69 - Example C	Company						×
Home Equipme	nt and Locations Contr	act Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 x
Save Back												
Process a												
Description	Black toner SP2020											
Warehouse	Main Warehouse	* م										
Re-order Method	Min/Max	•										
Re-order Point	0 🗘											
Re-order Quantity	0 _											
Min Stock Level	5 🜲 🚽											
Max Stock Level	10 🗘 🚽		3									
Days in Stock	30 🗘 🚽			-4								
Stock Item	\checkmark											
Auto Order		- 5										
Date Last Received	1900/01/01 🔹											
Last Activity	1 Jan 1900 🔻											
Note : Changing the wa	rehouse will create a new	stock control definition										
Open Windows 🕶										06 Jan 2	2019	÷

SAVE CHANGES

• When you have finished editing these details, click on **Save**.



			Edit S	ock (Control De	finition - BPO: Version 2.1.	0.69 - Example C	ompany						×
Home Equipment	nt and Locations	Contract	Finance and	HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8
Save Back														
Process														
				- 18	1									
Description	Black toner SP2													
Warehouse	Main Warehous	se	م											
Re-order Method	Min/Max		+	*										
Re-order Point		D ()												
Re-order Quantity		0 🐥												
Min Stock Level		5 ‡												
Max Stock Level	10	0 ‡												
Days in Stock		0 ‡												
Stock Item	\checkmark													
Auto Order														
Date Last Received	1900/01/01	*												
Last Activity	1 Jan 1900	•												
Note : Changing the war	ehouse will creat	e a new stoo	ck control defin	tion										
Open Windows 🔻												06 Jan 3	2019	

VIEW STOCK CONTROL DETAILS

- 1. You will return to the **Stock Control for Part:** [] screen where you can now view the saved stock control details.
- 2. Click on **Back** to return to the **Part Listing** screen.



Auto Order

-	Ŧ					Sto	ck C	Control for Par	t:2020-147	K - BPO: Version 2	.1.0.6	9 - Example	Company				-		ļ	×
	Home	Equipmen				t Finance	e and		ory Mainter	ance and Projects	Man	ufacturing	Procuremen	t Sales	Service	Reporting	Utilities	-	8	х
Add	Edit	Delete	Back	Envolu		Workspace		Refresh												
Add	Proces		DOLK	Save La	Forma	-	es	Current												
Drag a o			A to movin	by that co				Current	4								//			
	houseNa		orderMeth			tockLevel	Ma	axStockLevel	StockItem	TargetDaysInSt	ock	AutoOrder							/	
P Main	Warehou	ice Mir	n/Max		_	(1	5	10) Yes		30	Yes	-							
Piciti	warenou	130 111						10	/ 165		30	103								
		1																		
Open W	indows 🔻	6															06 Jan	2019	+ +	1.

SYSTEM CALCULATION FOR RE-ORDERING

How does the system calculate the reorder quantities?

The system takes the following factors into consideration when calculating the optimal reorder quantity:

- The current stock on hand.
- Average daily usage calculated over the averaging period.
- The lead time from order to delivery.
- Target days in stock required.

The following is an example:

Inventory Item ABC123:	
Averaging Period	6 periods



Current Date	1 June 2013
Lead time from supplier	5 days
Current Stock on Hand	320
Target days in stock	25
Transactions:	
Receipt - 1 Jan 2013	1000 items
Issue – 20 Jan 2013	200 items
Issue – 2 Feb 2013	100 items
Issue – 5 Apr 2013	380 items

From the above data the order quantity will be calculated as fol-

lows:

Average Usage per day	Total Qty (all issues, transfers and returns in averaging period / no. of days between the above transactions)	(680 /94)	7.23
Target Quant- ity	Target Days in stock x Average Usage per day	25 x 7	175
Current Days Stock Holding	Stock on Hand / Average Usage	320 / 7	45.71
Date which Min Stock Level will be Reached	Target Quantity / Average Usage (If no Target Quantity then uses Min Quantity)	175 / 7 = 25 days from now	26 June 2013
Delivery Date	Today plus Lead Time	1 June + 5 days	6 June 2013
Optimal Order Qty	Average Usage x (lead time + days difference between date min stock reached and delivery date)	7 x (5 + 20 days)	175

A purchase requisition will be created for 175 items.

Important Notes:

One purchase requisition is created **per warehouse** with multiple line items per part code. The purchase requisition can be amended and line items can be deleted or edited.



The supplier on the purchase requisition will be the **primary supplier**¹ on the inventory item.

When calculating the reorder quantity the system does <u>not</u> take into consideration existing purchase requisitions or purchase orders. It is important to check that a purchase requisition / order does not <u>already</u> exist for an item before approving a new requisition. (Make sure you run the stock obsolescence report to ensure **stock with no usage** is not ordered).

If there has been <u>no usage</u> on a specific item for the averaging period and the item is set to auto reorder and the quantity on hand is <u>less</u> than the minimum quantity a requisition will be created to replenish the item to the minimum quantity. It is therefore important <u>not</u> to set items that are not being used to auto reorder or change the minimum quantity to zero.

The system will also check that the order quantity is <u>not less</u> than the minimum order quantity with the supplier and amend the order quantity accordingly.

The system will also check the **units of purchase** from the supplier. If the optimal reorder quantity is **80** and the units of purchase from the supplier are **50** a requisition will be created for $2 \times 50 = 100$ items.

MNU.054.004

¹This will be the supplier that you regularly buy a particular part/item from. The primary supplier is linked to the part definition. Any purchase requisitions raised for this part definition will be created with the primary suppliers details linked. The purchase requisition can be edited to link an alternative supplier, if required.