Stock Reorder

Sage 300 Purchase Orders module can automatically create purchase orders from inventory, based on minimum reorder quantities.

TaiRox Stock Reorder greatly extends this functionality with the following features:

- An option to create purchase requisitions as well as purchase orders.
- The display of recommended items before creating the requisitions or purchase orders.
- The ability to edit and/or cherry-pick the recommended items in a grid.
- An option to save recommended items in a spreadsheet and load them at a later time.
- With Sage 300 2014 and 2016 (or later), the order minimum value will be used in calculations.
- With Sage 300 2014 and 2016 (or later), the preferred vendor option is available as a choice.

TaiRox Stock Reorder Process

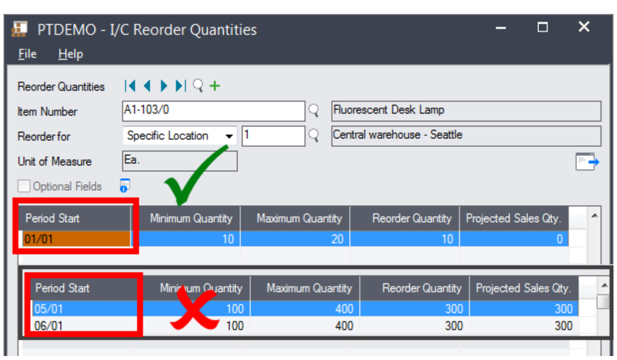
It's relatively rare in business to blindly produce purchase orders based on how inventory quantities compare with minimum reorder quantities. A more common practice is to:

- Produce a list of inventory items that are below minimum reorder quantity.
- Review that list, revise the quantities, and select alternate vendors.
- Create requisitions for approval (in many companies).
- Finally, create the purchase orders.

TaiRox Stock Reorder allows a full range of criteria to select inventory items for reorder and then creates a grid of those items.

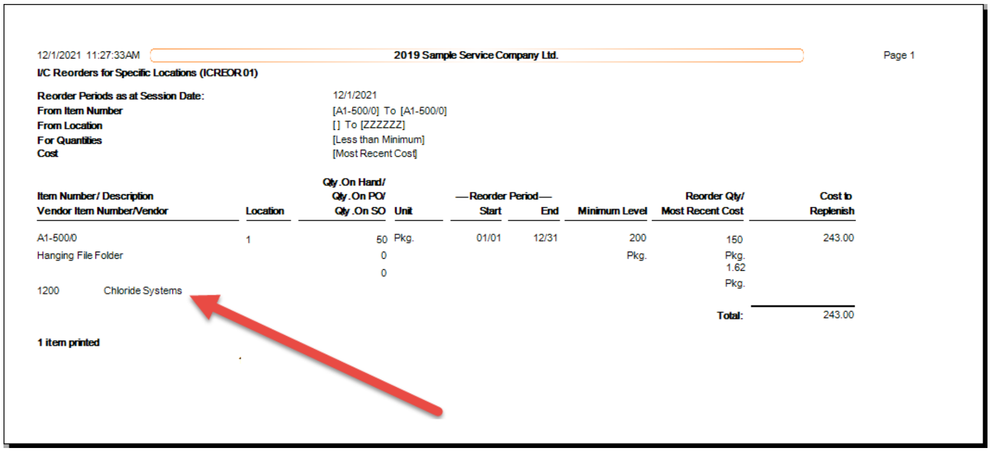
- If the list of items is small and your approval process simple, you can make a few simple edits and create purchase orders.
- If your approval process is more formal, you can create purchase requisitions first.
- If the list of items is large, you can save the selected items in a spreadsheet for more detailed analysis. As long as you do not change the basic structure of the spreadsheet, you can edit the data and load it back into the grid to continue the reorder process.

Note: Stock Reorder is for maintaining inventory levels at all times, and for that reason you only need to set up one 01/01 period record in the Sage I/C Reorder Quantities window – as below. Stock Reorder does not work with Seasonal Amounts – where you have different reorder quantities for different months.



Also note the following points:

- Stock Reorder cannot generate purchase orders or requisitions unless vendors have been set up for your inventory items. You can check for vendors – and reorder quantities – by printing the Sage 300 Reorder Report.

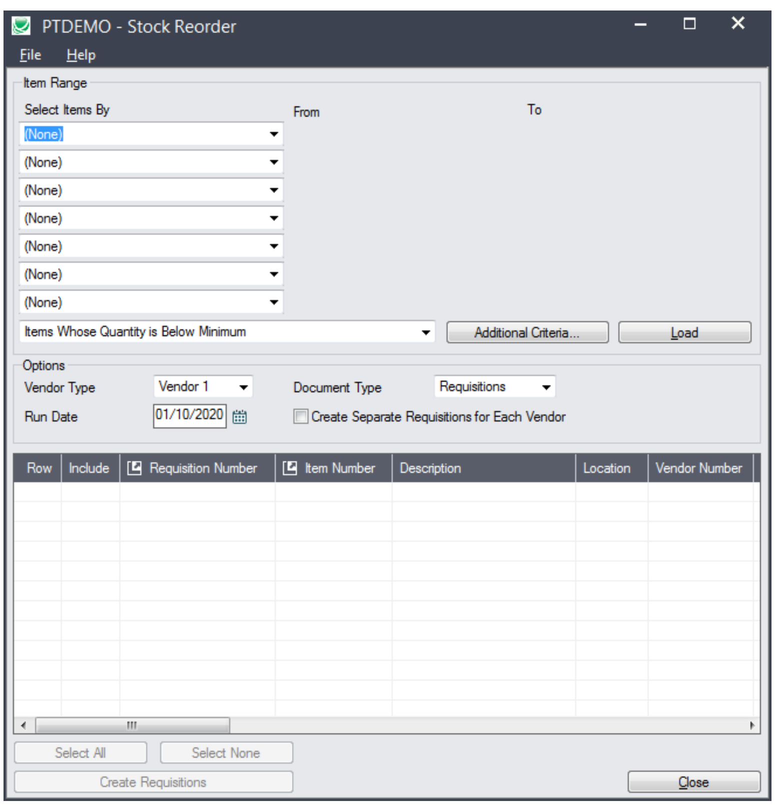


- You must choose the appropriate vendor type when you run the Stock Reorder program. For example, if vendor 1 (but not vendor 2) has been set up for an item, and you choose vendor 2 for reordering, the Stock Reorder program will not list the item.

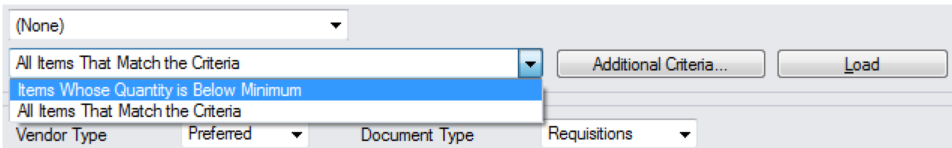
  Later versions of Sage allow you to set a preferred vendor – which you can also choose for reordering stock.

Running Stock Reorder

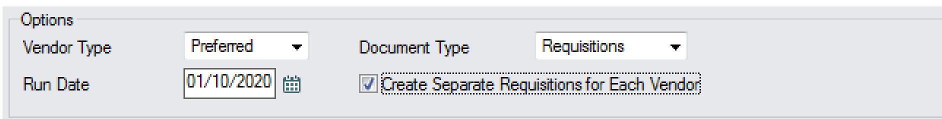
Stock Reorder displays the following screen for selecting items to reorder.



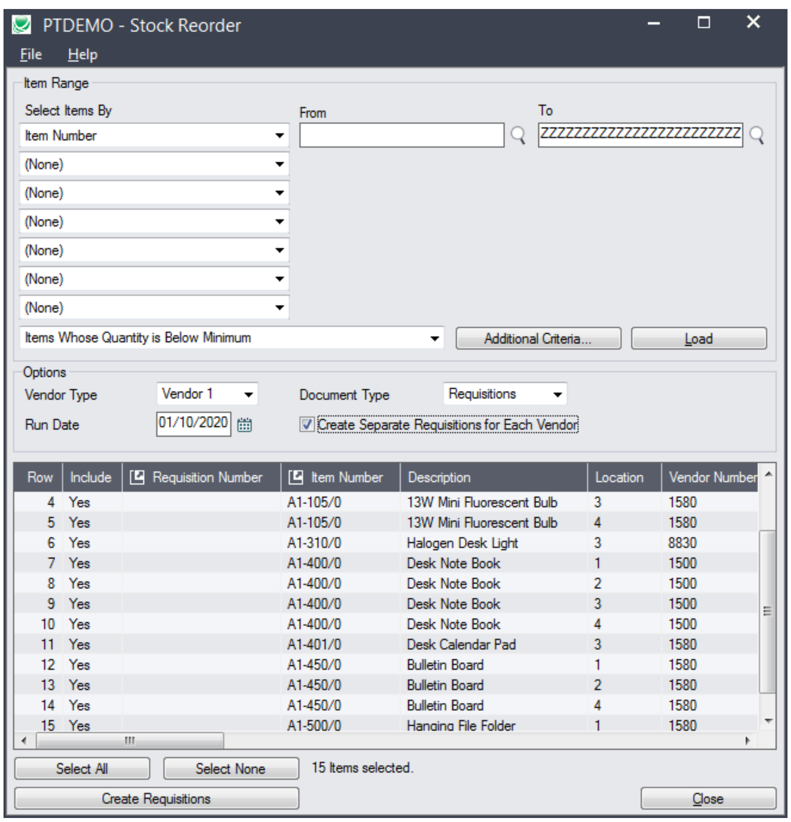
- Use the Item range fields to specify the primary item selection criteria for items. You can select items using ranges of the following fields:
  - Item Number, Category, Account Set Code, Location, Vendor Number, Item Color, Dangerous Item, Extended Warranty Available, Item Type, Item Lead Time, Manufacturer, Manufacturer Number, New Item, Price, Item Procurement, Item Size, Item Volume, Warranty, or Warranty Period.
- Specify whether you want to choose from all items meeting the range criteria, or just items that are below minimum quantity.



- Choose Additional Criteria – such as "Is Item a BOM Component" or "Kitting Item"?
- Choose the Vendor Type (Preferred or Vendor 1, 2, etc.), the Document Type (Requisitions or Purchase Orders), the Run Date, and whether to create separate requisitions for each vendor.

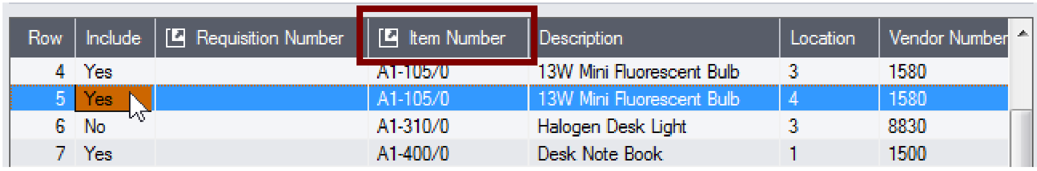


  - "Preferred" is available as a vendor choice with Sage 300 2014 or 2016 (or later).
- Click the Load button to display the selected items in the grid at the bottom of the screen.



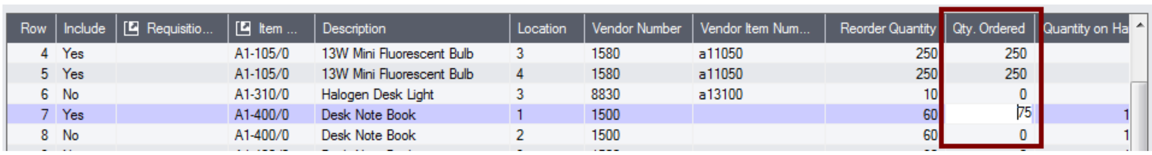
- Items can be edited in the grid.
  - Click the Item Number column heading to display item details using the TaiRox Extended Inventory Items screen.

- Click the Select All and Select None buttons to include all or none of the items in the previous purchase order.
- Double-click the Include column to select individual lines (the Include column displays Yes).



Row	Include	Requisition Number	Item Number	Description	Location	Vendor Number
4	Yes		A1-105/0	13W Mini Fluorescent Bulb	3	1580
5	Yes		A1-105/0	13W Mini Fluorescent Bulb	4	1580
6	No		A1-310/0	Halogen Desk Light	3	8830
7	Yes		A1-400/0	Desk Note Book	1	1500

- Edit the **Qty. Ordered** column to specify the quantities for the new requisition/purchase order that you are creating.



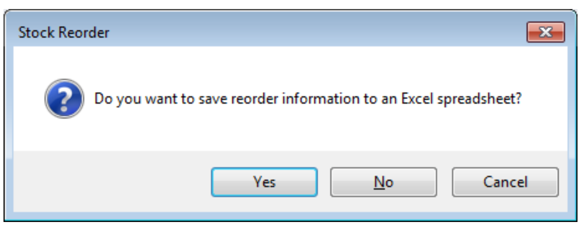
Row	Include	Requisitio...	Item ...	Description	Location	Vendor Number	Vendor Item Num...	Reorder Quantity	Qty. Ordered	Quantity on Ha
4	Yes		A1-105/0	13W Mini Fluorescent Bulb	3	1580	a11050	250	250	
5	Yes		A1-105/0	13W Mini Fluorescent Bulb	4	1580	a11050	250	250	
6	No		A1-310/0	Halogen Desk Light	3	8830	a13100	10	0	
7	Yes		A1-400/0	Desk Note Book	1	1500		60	75	1
8	No		A1-400/0	Desk Note Book	2	1500		60	0	1

Note: ***Move the Qty. Ordered column in the grid to make it easier to enter quantities.***

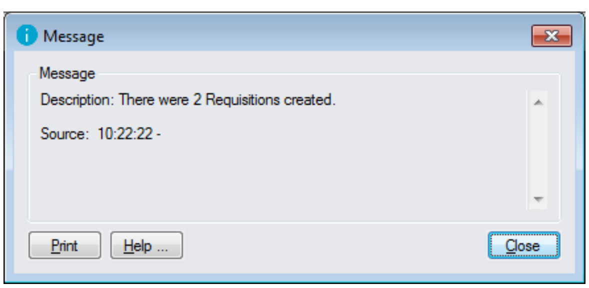
In this case, the Qty. Ordered and Reorder Quantity columns have been dragged over so you can see them beside the Include column, Item Number, Item Description, and Location columns.

Order Minimum is displayed with Sage 300 2014 or 2016 (or later) and is used in calculating order quantities.

- Click the Create Requisitions button (or Create Purchase Orders button) when you have finished selecting items and editing quantities.
- If the Stock Reorder settings include “Save Reorder Information to Excel”, you will see the following message:



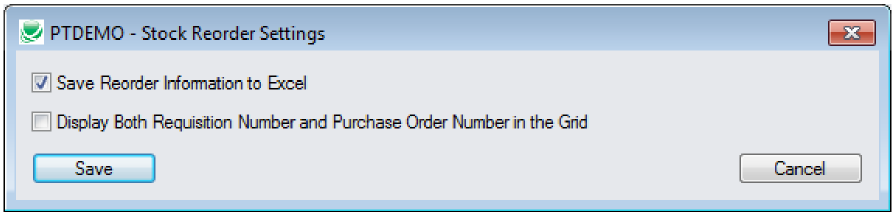
You will also see a message indicating how many requisitions or purchase orders were created:



Change Settings for Running Stock Reorder

The File menu allows you to control grid options and to save the grid into an Excel spreadsheet.

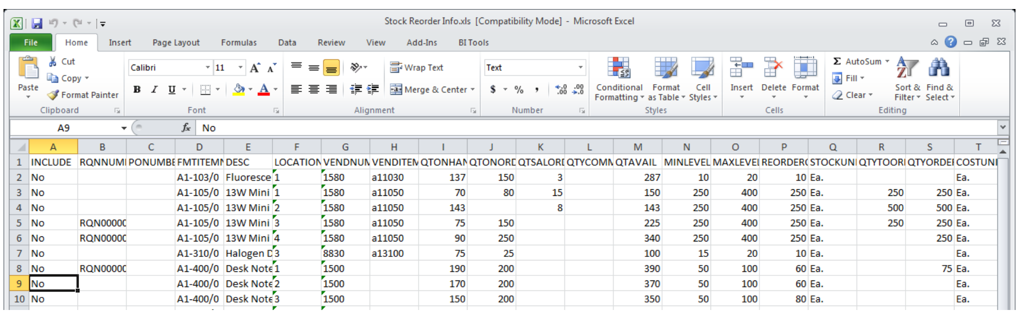
- Select the **File > Settings** from the menu on the Stock Reorder screen.



- Select the checkboxes if you want a prompt to save the reorder information and if you want to display requisition numbers and PO numbers in the grid.
  - Requisition numbers are displayed in the grid after you create requisitions, and purchase order numbers are displayed after you create POs. This setting displays the requisition numbers for each item after you create POs.

Saving Reorder Information to Excel and Loading It

You can also select **File > Save** from the menu on the Stock Reorder screen to save the reorder information to an Excel spreadsheet.



The Include column is set to No in the saved spreadsheet.

You can edit the Include column – change values to “Yes” – and you can edit the Qty. Ordered, then load the edited spreadsheet.

Select **File > Open** from the menu on the Stock Reorder screen to load the saved reorder information in the Reorder Grid.

Note: All data in the grid is immediately deleted when you select File > Open.