

# C.S. PACKAGES



## STOCK REORDERING

# PROCEDURES

## ➤ Overview – Stock Reordering

This module reads inventory details from the Vision database and creates suggested purchase orders container by container based on sales history plus stock on hand and existing purchase orders.

## ➤ Calculate Reorders

Each time the program starts, the calculate reorders screen will be displayed. You have the option to recalculate reorders or to show existing reorders. If you recalculate reorders all the figures for the container group selected will be recalculated and any manual changes you have made to quantities for this container will be overwritten. Customers that are locked will NOT be overwritten.

Reorders

Reorder Option:

Calculate Reorders  
 Show Reorders

Container Group: GBAGS

Show locked containers:  First container to show: [dropdown]

Continue Edit Growth Percentages

Container Parameters:

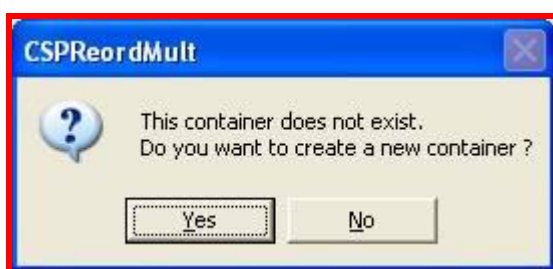
Container No: [dropdown]  
Description: [text box]  
Container Group: [dropdown] [folder icon]  
Sales From: 04/08/05 To: 04/08/05  
Calculate To: 04/08/05  
Container Units:  Weight  Volume Maximum: [text box]

Save New Delete Lock Unlock

There must be at least one container set up with the relevant parameters for the reorder run prior to continuing the calculation.

The calculation uses the date range to get average sales and adds the percent growth to the average sales to get the overall expected usage (See Edit Growth percentages). On each container you must specify a container group and the date to calculate us to for this run. The calculate to date is the last date for a reorder for this run. e.g. If the date is set to 31/8/05 then reorders will be calculated up to 31/8/05. There is no limit to the number of reorders that can be calculated.

The container group determines what product groups are included in this container. To update or add new container groups click on the open folder button to the right of container group and this will display the existing container groups.



**It is important that multiple container groups should not contain the same product groups. If they do it is possible that the same product could be reordered multiple times when it is not necessary.**

You must specify the Container unit to be used to determine how much product can fit into a container. This is specified as a Weight or Volume. The Maximum figure will change depending on your selection e.g. If you select Weight then the Maximum will be in Kilograms. If you select Volume the maximum will be in cubic metres.

➤ **Edit Growth Percentages**

You can attach an expected percentage growth for sales to each product. This will take the range of sales specified for the container group and multiply this by the percentage. The percentage can be positive or negative.

Group No	Group Title	Product Code	Product Title	Usage 2	Usage 1	Usage 0	Growth %
1	Btl Bags Poly	001B	Single Poly Bag White BULK	2	4	1	5.00
1	Btl Bags Poly	002B	Double Poly Bag White BULK	94	151	59	10.00
1	Btl Bags Poly	002B-BIO	Double Poly Bag White BULK -	24	1		4.00
1	Btl Bags Poly	003B	Treble Poly Bag White Bulk	95	179	75	6.00
1	Btl Bags Poly	003B-BIO	Treble Poly Bag White BULK -	23	10		2.32
1	Btl Bags Poly	004B	WHITE POLY CASK BAG	106	140	90	
1	Btl Bags Poly	004B-BIO	BIO-CASK WHITE POLY BAG	4	7		
1	Btl Bags Poly	004BJUM	Jumbo Singlet Bag White BULK	40	42	54	
1	Btl Bags Poly	004BJUM/CL	Jumbo Singlet Bag Clear BULK		2		
1	Btl Bags Poly	BOT002B	BOTTLE MART DOUBLE	6	28	5	
1	Btl Bags Poly	BOT003B	BOTTLE MART TREBLE	6	24	11	
1	Btl Bags Poly	BOT004B	BOTTLE MART CASK	9	27		
1	Btl Bags Poly	BWS002-BIO	BWS DOUBLE BOTTLE	69	97		
1	Btl Bags Poly	BWS003-BIO	BWS TREBLE BOTTLE	100	125	9	
1	Btl Bags Poly	BWS004-BIO	BWS CASK BAG-BIO	162	192	76	
1	Btl Bags Poly	CAX002B-5M	CAXTON DOUBLE BTL BAG				
1	Btl Bags Poly	CAX003B	CAXTON TREBLE BOTTLE				
1	Btl Bags Poly	CHAMP002B	CHAMPION POLY DOUBLE	20	21	11	
1	Btl Bags Poly	CHAMP003B	CHAMPION POLY TREBLE	18	16	10	
1	Btl Bags Poly	CHAMP004B	CHAMPION LARGE CASK BAG	18	21	13	
1	Btl Bags Poly	FISH002B	FISH LIQUOR DOUBLE				
1	Btl Bags Poly	FISH003B	FISH LIQUOR TREBLE BAGS -				
1	Btl Bags Poly	FISH004B	FISH LIQUOR CASK BAG - BIO				

Save Line

If a growth % is not entered a zero will be used. The usage 0,1 and 2 are the summary usage figures on each product for the current and 2 previous months.

The growth percentage will be saved when you move to the next line in the grid or click save line.

## ➤ Show Reorders

This allows existing reorders to be displayed and manually changed. When you select the show reorders option the parameters for container that is currently displayed are used, however the opening stock on hand figure for the calculations will still be recalculated. If you have made manual changes to reorder figures for this container they will NOT be over written automatically when you use the show reorder option. A container group must be selected before you can show existing reorders.

Reorders

Reorder Option:

Calculate Reorders  
 Show Reorders

Container Group: GBAGS

Show locked containers  First container to show:

Continue Edit Growth Percentages

Container Parameters:

Container No:

Description:

Container Group:

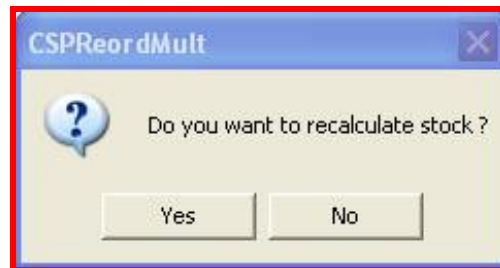
Sales From: 04/08/05 To: 04/08/05

Calculate To: 04/08/05

Container Units:  Weight  Volume Maximum:

Save New Delete Lock Unlock

You can go directly to a display of containers by clicking No and no recalculation will be done on stock figures. This should only be used if no movements have occurred in the stock and since you last saved containers. Generally you should select Yes.



## Lock / Unlock

If you want to keep previously calculated containers you MUST lock the container before doing a calculate reorders for a container group. If you Unlock a container and do a recalculate, this container (and any other unlocked customers with this container group) will be deleted.

## ➤ Reorders Screen

Once you have selected to continue from the lead-in screen, existing containers will be displayed with the highlighted container being the one selected on the initial screen. Product and supplier information will be displayed and these products are determined by the container group.

Product/Supplier					Container 18 18/07/2005			Container 18	
Product	Title	Remarks	Supplier Account	On Order	Estimated Sales	On Hand	Reorder	Estimated Sales	0
001B	Single Poly Bag White		LUENYICK	0	0.30	58.99		0.30	
002B	Double Poly Bag White		LUENYICK	732.98	111.60	490.26		111.60	
002B-BIO	Double Poly Bag White		LUENYICK	60	8.70	-0.29		8.70	
002SB	SINGLET BAG SMALL		HONDTAT	50	0.00	50.00		0.00	
002SW	SINGLET BAG SMALL		HONDTAT	50	0.00	50.00		0.00	
003B	Treble Poly Bag White		LUENYICK	778.69	123.00	436.59		123.00	
003B-BIO	Treble Poly Bag White		LUENYICK	40	11.40	0.62		11.40	
003SB	SINGLET BAG MEDIUM		HONDTAT	100	0.00	100.00		0.00	
003SG	SINGLET BAG MEDIUM		HONDTAT	100	0.00	100.00		0.00	
003SW	SINGLET BAG MEDIUM		HONDTAT	200	0.00	200.00		0.00	
004B	WHITE POLY CASK BAG		HONDTAT	450	111.90	663.80		111.90	
004B-BIO	BIO-CASK WHITE POLY		LUENYICK	0	3.60	60.88		3.60	
004BJUM	Jumbo Singlet Bag White		HONDTAT	200	45.30	-1.51		45.30	
004BJUM/CL	Jumbo Singlet Bag Clear		HONDTAT	0	0.60	57.98		0.60	
004SW	SINGLET BAG LARGE		HONDTAT	400	0.00	200.00		0.00	
005B	Medium Singlet Bag White		HONDTAT	174	0.00	80.00		0.00	
005SW	SINGLET BAGJUMBO		HONDTAT	50	0.00	50.00		0.00	
007L	ICE BAG 3.5 K.G. W/		LUENYICK	0	0.60	25.98		0.60	
5KGICE	ICE BAG 5 KG		LUENYICK	0	0.60	37.98		0.60	
BOT002B	BOTTLE MART DOUBLE		LUENYICK	0	12.90	-0.43		12.90	
BOT003B	BOTTLE MART TREBLE		LUENYICK	0	13.80	40.54		13.80	

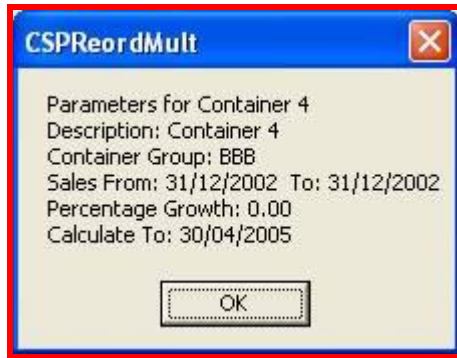
Change Supplier    Container for Orders:     Preview Order    Create Orders    Recalc Totals    Export    Ordered Container Full No Order Required

## General Notes on Maintaining Containers

If you want to override any automatically calculated stock quantities, click on the appropriate line in the Reorder column and change the quantity.

**Remember to Lock the container if you want to ensure these changes are not lost in the next Calculate Reorders.**

If at any point you wish to display the parameters used to set up a container, double click on the container heading e.g. Container 1 08/2/2005 and the parameters for the container will be displayed.



By default, all items calculated for reorder will be ticked to be reordered. If you untick any of these lines that product will not be included in the reorder.

There is a Volume and Weight total at the bottom of each container, this volume is the addition of the volume on the inventory file multiplied by the suggested reorder quantities. The weight is the total of the weight on each inventory items multiplied by the reorder quantity.

When the Maximum Weight or Volume is reached for a container, a new container is created. You can manually change any reorder figure as required. The On Hand column shows the quantity expected to be on hand for each inventory item based on the current quantity on hand less the average usage as calculated by the range of sales dates.

If you wish to change a supplier code from the default supplier on the inventory use the Change supplier button.

If you would like to move to view and edit an alternate container use the dropdown at the bottom of the screen "Container for orders" and this will take you directly to that container number.

If you wish to preview a suggested reorder click the preview order button, this will display the order as it currently stands. **This does not create an order in Vision.**

Once you have finalised your reorder figures and volumes click the create orders button and this will create a purchase order in Vision.

When you have completed your changes click the complete button at the bottom of the screen.

## ➤ Recalc Totals

When you update reorder figures, the total weight/volume for the container changes. To show the new value in the totals you must click Recalc Totals or exit the container grid and do a Show Reorders.

## ➤ Export

The export option allows you to send the details for these containers to an Excel spreadsheet. This is useful for printing the details or to save a snapshot of the grid.

## ➤ Grid Colour Coding



At the bottom right of the grid there is a legend that shows the meaning of each colour in the grid.

- Ordered = The quantity in this cell is to be ordered.
- Container Full = This item was skipped in this container because the container was full when this product was checked.
- No Order Required = This item is not required for reordering.

## ➤ Change Suppliers

If you want to change a default supplier to a new supplier click on change supplier and you can specify the new supplier. To set suppliers for any item that does not have a supplier, leave the Current box blank and fill in the new box.

