# Re-order Tutorial

Before doing anything, please verify that Use Cost (Tools -> ControlSetup) is set to AVERAGE!!!

Step One:

Vendors need to be consistent. You need to make sure that there are not two vendors that are actually one, but spelled differently in the database. So, to fix that, you will use Vendor Wizard as shown below. To get to Vendor Wizard, Click on the Inventory Tab, then click on the Vendor Wizards Button:
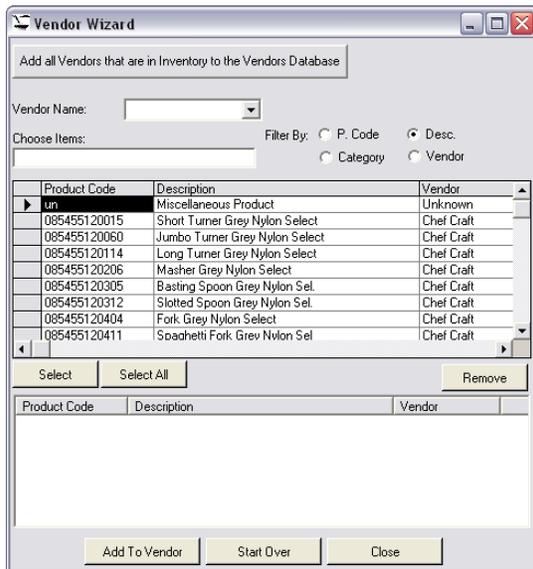
What you need to do is select from the Drop Down List (Vendor Name), the VENDOR YOU WANT TO USE. Once you have selected the Vendor you want to use, you need to filter for the Vendor YOU WANT TO ELIMINATE. To do so, click on the Vendor option button on the Filter By section. Then, type the Vendor Name EXACTLY as it appears in the database on the Choose Name Field Section. For example, say I have two vendors: Balloons and More, and balloons n more. I select that I want to use the vendor "Balloons and More" and want to eliminate "balloons n more." The screen, then, should look as follows:
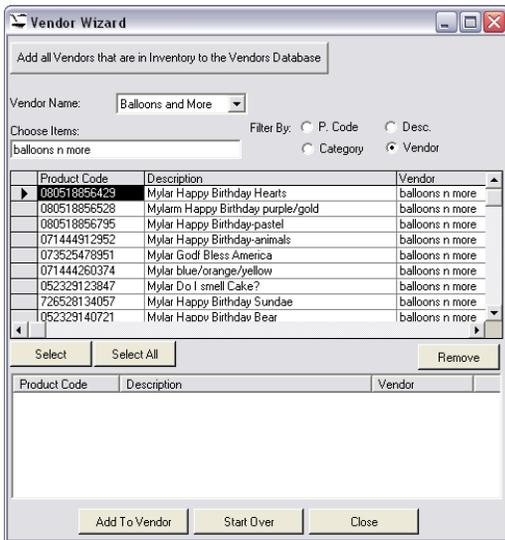
You are now ready to proceed with the transfer. Click on Select All button, and then the Add To Vendor Button. Afterwards, verify that NO items come up for the vendor to eliminate, in the case, balloons n more. To verify, simply retype that name on the filter, and make sure [vendor] is selected on the Filter By Section:
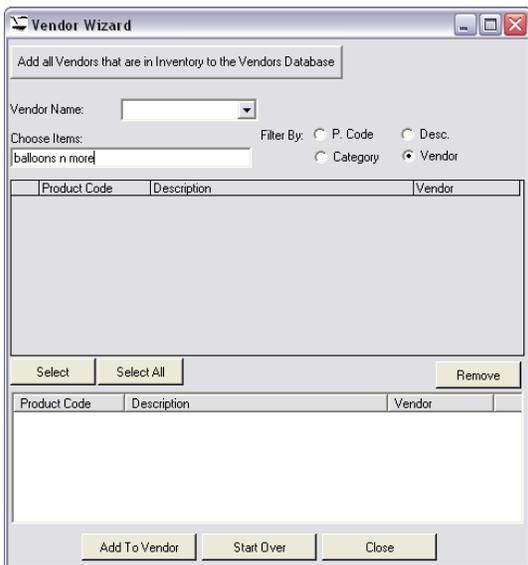
Important Note: IF YOU DO NOT SEE [VENDOR] AS A FILTER BY OPTION, YOU DO NOT HAVE THE LATEST VERSION…UPDATE BEFORE PROCEEDING.

Once this is verified, you can now delete the vendor that you want to eliminate. To delete, go to the Vendors Tab, select the vendor, and click on the Delete button.
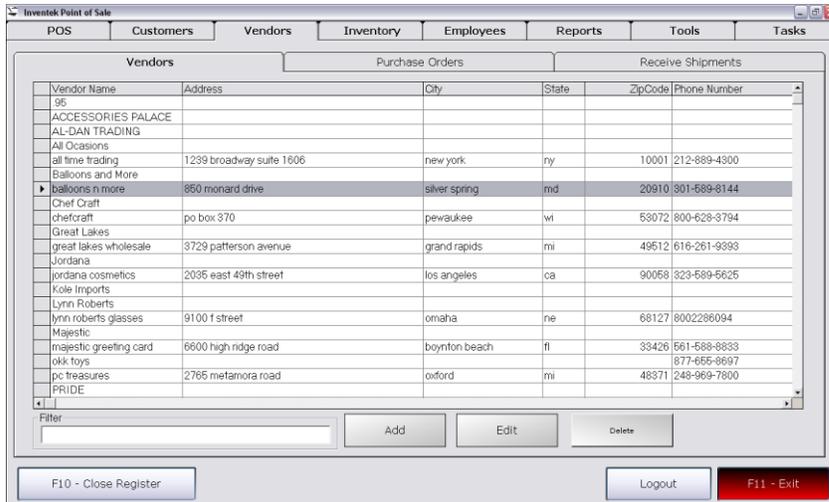
You need to repeat these steps FOR EVERY duplicated vendor that exists in the database.

Step Two:

When your vendor list is cleaned up, you now need to provide EACH VENDOR with the information required in order for the system to calculate Minimum Quantities. To do this, you will need to fill out three fields on the Vendor Screen: Transit Time, Minimum Order, and Reorder every X Days, as shown below:

Enter the desired amounts in the mentioned fields, and click OK.

Repeat these steps FOR EVERY VENDOR.

Step Three:

Run Store Analyzer in order to calculate what the Minimum Quantities should actually
be. To do this, click on Tools -> Store Analyzer, and the following screen appears:
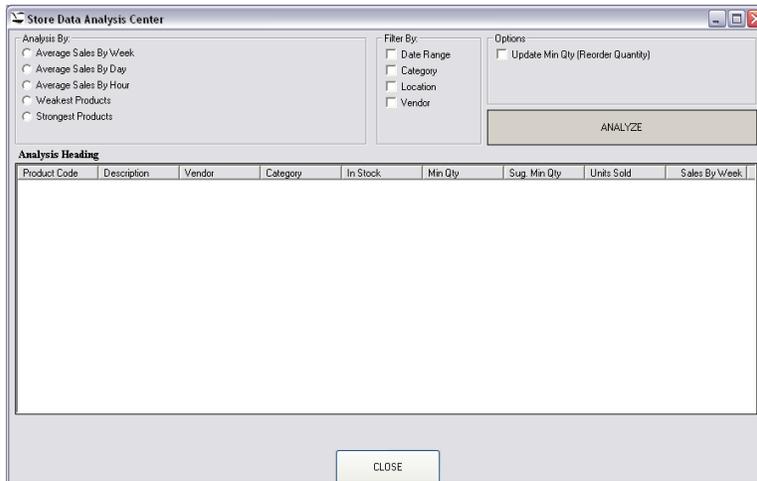
Click on the Average Sales By Week from the Analyze By Option. Next select Vendor
from the Filter by option (*Note: You can actually leave this off, meaning, do not filter by
any, so that the system calculated ALL products, not just the filtered ones. I am using a
filter to only show 1 vendor*).

Next, MAKE SURE that the option for UPDATE MIN QTY is CHECKED. This is what
will edit the minimum quantity to the RECOMMENDED minimum quantity, based on
the sales data that the system has. Please note, if you DO NOT have enough sales data in
your database, these minimum quantities will not make a lot of sense. Therefore, make
sure you run this tool monthly to update as you begin to store more data.
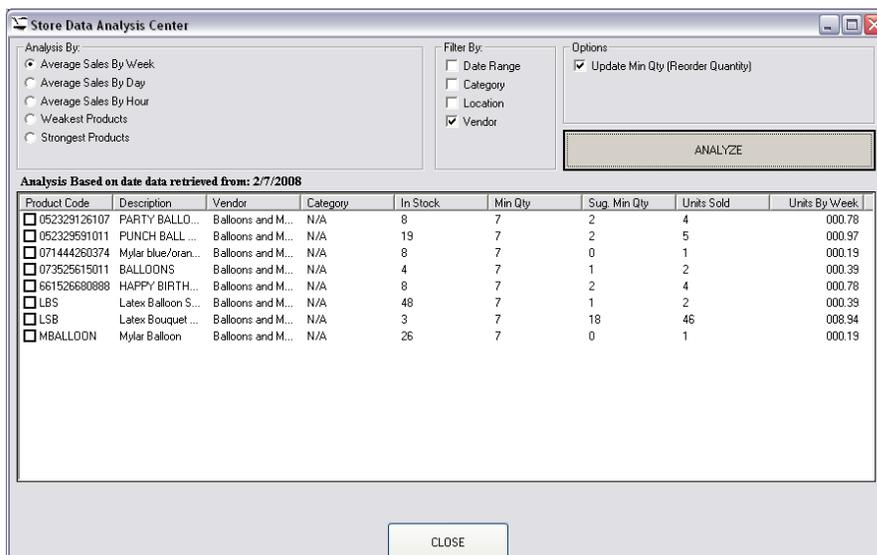
Notice that quantities have already been suggested for some products. These are products that have all been sold before. If a product was never sold, the system will ignore it as it will not have any data to analyze on.

Step Four:

Now that all the data has been set, the automated Reorder Wizard may be used. For this example, I will continue to demonstrate it with Balloons and More.

Click on the Inventory Tab -> Reorder Wizard. The following Screen appears:

I will start with an explanation of each option:

- Select Vendor: This is the vendor that you will be reordering from.
- Alert By: This is a filter that determines what products to look for. If you select [ALL], then it will list EVERY item that the vendor has. If you select [MINIMUM QUANTITY / REORDER POINT] it will select those products that have hit 0 or the reorder point specified. For the most part, the Minimum Quantity option should always be selected.
- Order Qty: This option calculated the amount of product you want to reorder. The mathematical operation that each does are as follows:
    - Min - Stock: Minimum Quantity – Qty in Stock
    - Max - Stock: Maximum Quantity – Qty in Stock
    - Min Reorder Qty: Minimum Reorder Quantity obtained from the database.
    - Max - Min: Maximum Quantity – Minimum Quantity
    - Qty Sold: This option analyzes the quantity sold from a given date range (If this is selected, you will be able to select the date range desired). This option is the best option since it will analyze the sales trends for the given date range.

- o Specific Qty: A pop up screen will appear where you can select what specific quantity you want to reorder. This amount will be used for every product.
- Filter: You may not necessarily want to reorder every item that the system displays. Therefore, you have a Filter section where you can look for the desired product, and filter the search by Product Code, Item Code (vendor code), or description. Then you can elect to add the item to the reorder by clicking on [F1 – Add to List]. Or, you can select every item displayed by clicking [Select All].
- [F3- Remove from List]: Removes a selected item from the reorder List.
- [F2 –Update Order Qty]: Allows user to modify the Reorder Quantity for the Selected Product.
- [F4 – Generate Purchase Order]: Creates a Purchase Order for the Vendor selected, with all the products and the respective quantities included on the Items to Order List.

As an example, I will again use the Balloons and More Vendor that has been used throughout this tutorial:

Click on Minimum Quantity, then select Balloons and More from the Vendor Drop Down List
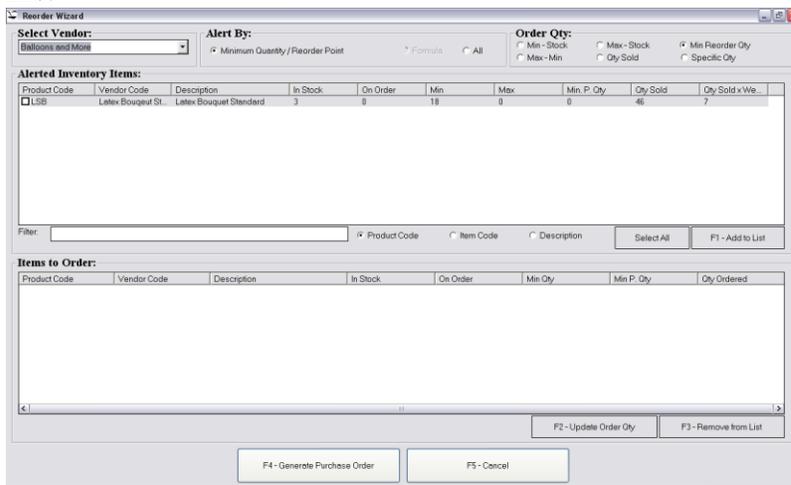
Click on Qty Sold, select the data range desired.

Returns back to the Main Screen for Reorder.

Click on F1-Add to List for The Selected Product.

Notice that 46 is entered for Qty Ordered.

Click on Generate Purchase Order, and verify that the Purchase Order was generated:

Notice that if I look up the product, 46 will be displayed as Qty On Order:

Step Five:

You are now ready to receive merchandise. To do so, click on Vendors -> Receive Merchandise. The following Screen will appear:

Select the desired Purchase Order to Receive:

Click on Receive All, and then click on [Receive] button.

You can now verify that the Qty On Order and Qty in Stock amounts have been updated in Inventory: