

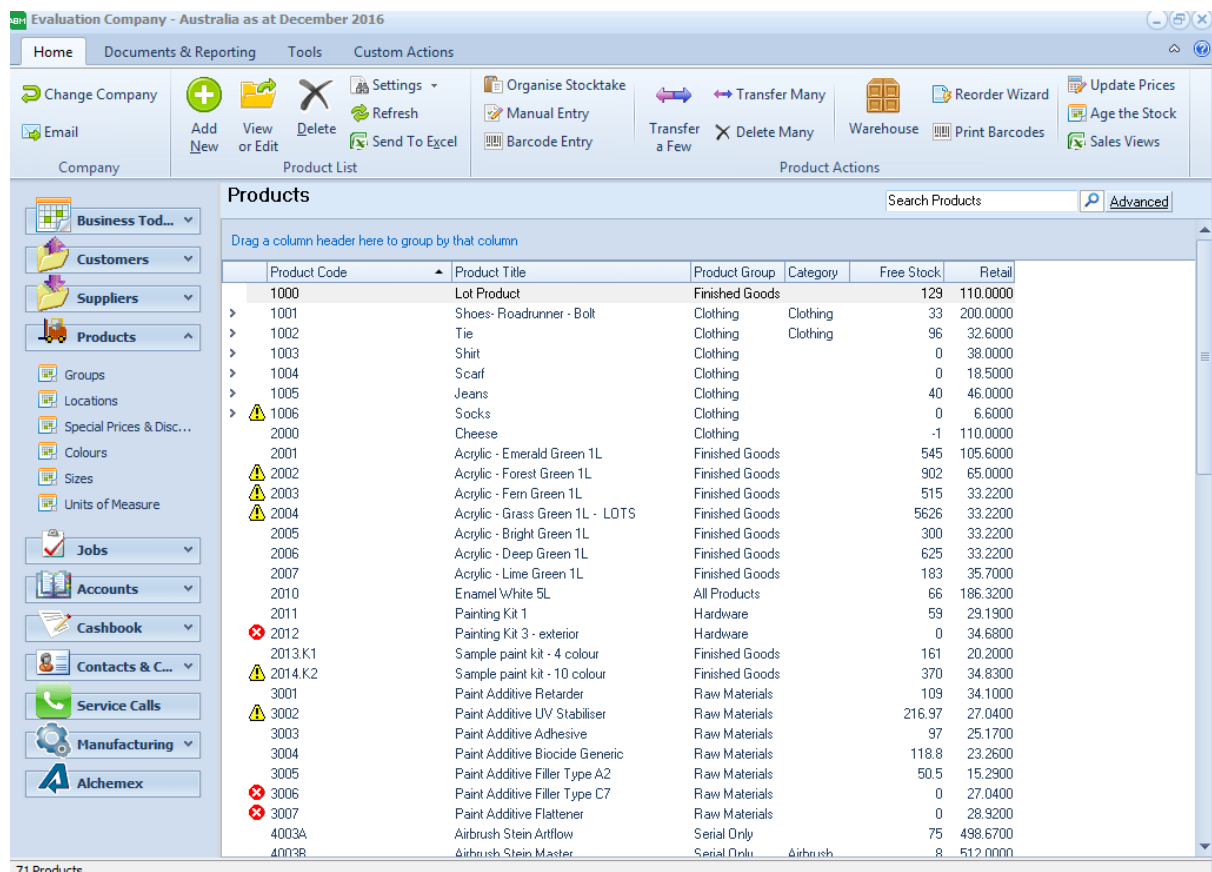
## ABM PRODUCT REORDER WIZARD

The ABM Product Reorder Wizard allows you to create a suggested list of products that need to be ordered from suppliers, based on the criteria you set. Once you select your criteria, you can view the suggested order requirements, and amend the quantities if required.

To run the reorder wizard:

Select Products in the Folders List, which displays the Products list:

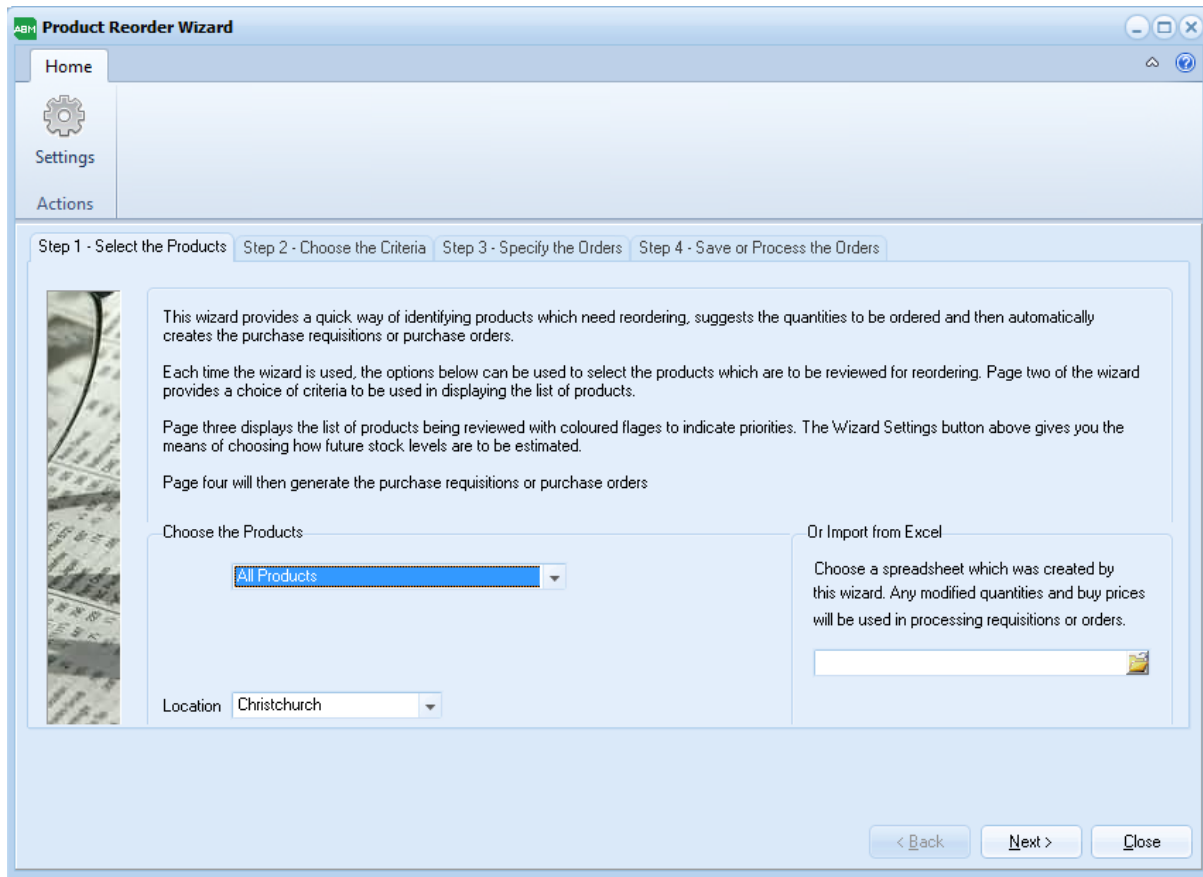
### Product List



Product Code	Product Title	Product Group	Category	Free Stock	Retail
1000	Lot Product	Finished Goods		129	110.0000
> 1001	Shoes- Roadrunner - Bolt	Clothing	Clothing	33	200.0000
> 1002	Tie	Clothing	Clothing	96	32.6000
> 1003	Shirt	Clothing		0	38.0000
> 1004	Scarf	Clothing		0	18.5000
> 1005	Jeans	Clothing		40	46.0000
> 1006	Socks	Clothing		0	6.6000
2000	Cheese	Clothing		-1	110.0000
2001	Acrylic - Emerald Green 1L	Finished Goods		545	105.6000
2002	Acrylic - Forest Green 1L	Finished Goods		902	65.0000
2003	Acrylic - Fern Green 1L	Finished Goods		515	33.2200
2004	Acrylic - Grass Green 1L - LOTS	Finished Goods		5626	33.2200
2005	Acrylic - Bright Green 1L	Finished Goods		300	33.2200
2006	Acrylic - Deep Green 1L	Finished Goods		625	33.2200
2007	Acrylic - Lime Green 1L	Finished Goods		183	35.7000
2010	Enamel White 5L	All Products		66	186.3200
2011	Painting Kit 1	Hardware		59	29.1900
2012	Painting Kit 3 - exterior	Hardware		0	34.6800
2013.K1	Sample paint kit - 4 colour	Finished Goods		161	20.2000
2014.K2	Sample paint kit - 10 colour	Finished Goods		370	34.8300
3001	Paint Additive Retarder	Raw Materials		109	34.1000
3002	Paint Additive UV Stabiliser	Raw Materials		216.97	27.0400
3003	Paint Additive Adhesive	Raw Materials		97	25.1700
3004	Paint Additive Biocide Generic	Raw Materials		118.8	23.2600
3005	Paint Additive Filler Type A2	Raw Materials		50.5	15.2900
3006	Paint Additive Filler Type C7	Raw Materials		0	27.0400
3007	Paint Additive Flattener	Raw Materials		0	28.9200
4003A	Airbrush Stein Artflow	Serial Only		75	498.6700
4003B	Airbrush Stein Master	Serial Only	Airbrush	8	512.0000

In the Stock Transactions menu bar, select Reorder Wizard and a screen appears as below:

### Reorder Wizard Screen



**Settings:** Before you run the wizard for the first time you will need to check if the settings are correct for your company needs. Select the Settings button and from the drop down list select the following settings:

**Wizard Settings:** You can select the basis of the forward estimates and how the suggested quantities should appear in the suggested order screen.

**Note:** The reorder wizard calculates the quantities based on the following transactions:

Sales Invoices, generated from order or independent invoice, sales credits and products used in Kits and Components, but NOT parts used in a BOM in Manufacturing.

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## Forward Estimates

To be based on sales for ? months. If you wish the reorder wizard to base your requirements on the sales history of the past number of months into consideration, select the number of months that you wish to use, or,

You can select the sales to be based on the previous years sales or,

Calculate the requirements from existing sales orders. This will look at outstanding sales orders, and compare the total quantity per product with the quantity on hand for that product.

Calculated on the basis of: You can select to base the calculation on the sales for the chosen location, or on the sales for all locations

## Suggested Order Quantities

Leave as zero for manual entry: This will allow you to enter your own suggested quantity. You can enter the quantity based on the information supplied about each product such as Minimum Quantity, Maximum Quantity, Sales as per the criteria set, Free Stock and when stock is likely to run out.

Set the quantity required to achieve the maximum quantity for each product. This will suggest a quantity which will take into consideration your forward estimate criteria and bring the stock up to the maximum stock level.

Set the quantity required to achieve the free stock of ? turnover. This will suggest a quantity required so that your free stock will equal the number of months turnover set after taking other stock requirements into consideration based on the criteria set.

**Hide Products with no Reorder Quantity:** If you do not wish to see products that have a suggested order quantity equal to zero then you can hide these products. The products will not then appear on the suggested order screen.

**Show in Stock Control Units:** If you have different units of measure per product then you can decide to show the suggested quantity based on your Stocking Control Unit. Example you have units of measure set up for a product as each, box or carton and you stock control unit is each therefore, all quantities shown will be based on a unit of measure of each. Or,

**Show in Purchase Units.** If you wish to see the suggested quantities based on the highest purchase unit then select this option. Example you have units of measure of Each, Box (which has 10 units) and Carton (which has 100 units) therefore, if you select Purchase Units the suggested quantities will be per carton (a suggested quantity of 10 would be 10 cartons or 1000 of each product).

**Step 1 - Select the Products:** From the drop down list you can choose what range of products to be included for the calculation. You can select All Products, By Product Code range, Product Category range, Product Group or by specified supplier. You can also select the location required from the drop down list. Alternatively if you have saved a previous calculation to an Excel file then you can re-load this file (see step 4 Save or Process)

**Step 2 - Choose the Criteria:** You can select various criteria for the selection of the products as follows

List all products: You can list all your active products.

List products that are out of stock now: This will only select products where the free stock is zero or below.

List all products which currently have a free stock under their minimum: This will list all products where the free stock is lower than the minimum stock set for the product.

List all products which are likely to have their free stock fall below their specified minimum in the next month, 2 months or three months. You can select the number of months from the dropdown list. This will list products where the free stock is expected to fall below the minimum stock set for the product based on the projected sale of the product as per the criteria set.

List products which are due to run out in the next three months due to usage and long supplier lead times. This will list the products that expected to be out of stock based on the projected sales of the product and taking into consideration supplier lead times.

**Step 3 - Specify the Orders:** In step 3 the products will appear as per the criteria selected. You can amend the ordered quantity if required by selecting the field for the order quantity, and keying in the quantity required.

The wizard will display information which will help you in deciding on the quantity required. These columns are

**Minimum:** The minimum stock that needs to be held for the product.

**Minimum Buy:** Some suppliers may require you to purchase a minimum quantity on each order therefore you will need to take this quantity into consideration before finalising the order quantity

**Buy Price:** This is the price you would expect to pay the supplier listed for the product.. This price can be changed if necessary.

**Supplier:** The default supplier listed will be the Preferred Supplier for this product. However, you can change the supplier from the drop down list.

**Turnover:** The projected sales quantity based on the criteria set.

**Free Now:** The amount of stock available to sell now taking the quantity on hand less customer orders and adding on any existing supplier orders.

**1 Month, 2 months, 3 Months:** The projected free stock 1, 2 or 3 months from now. This will show the expected free stock for each of the three months based on the projected sales of the product over that period of time.

**Maximum:** The maximum quantity to be held for this product.

**Note:** You can sort on any column on this screen. Therefore, if you wish to see all products sorted by supplier then select the supplier column to sort on. You can also rearrange the columns by dragging the column to the left or right of the screen. Alternatively you can use the Column Chooser on the settings dropdown list to select which columns you wish to include and their position on the grid.

**Step 4 - Save or Process the Orders:** The final stage gives you the opportunity to either save the list to a spreadsheet for further evaluation or approval or produce requisitions or orders for each supplier.

Document Processing Options:

**Send the reorder list to Excel for approval:** This gives you the opportunity to save the recommended list to an Excel spreadsheet. You can then work on

this further, or compare it to a further output with different criteria, or use it to obtain approval to place the orders.

Produce purchase requisitions for each supplier. This will allow you to produce a requisition for each supplier and review the requisitions, or obtain approval before converting to an order. You can also specify the date to associate with the requisition.

Produce purchase orders for each supplier. If you are satisfied with the recommendations and any adjustments made then you can create the orders for each supplier. You can also specify the date to associate with the order.

#### Document Sorting Options:

Sort by supplier code: This will sort the output (either Excel or printed documents) into supplier code order.

Sort alphabetically by supplier title. This will sort the output (either Excel or printed documents) by supplier title in alphabetical order.

#### 3. Document Printing Options:

Print the documents as they are processed: If you have selected to process requisitions or orders then you can select to print them immediately on processing or,

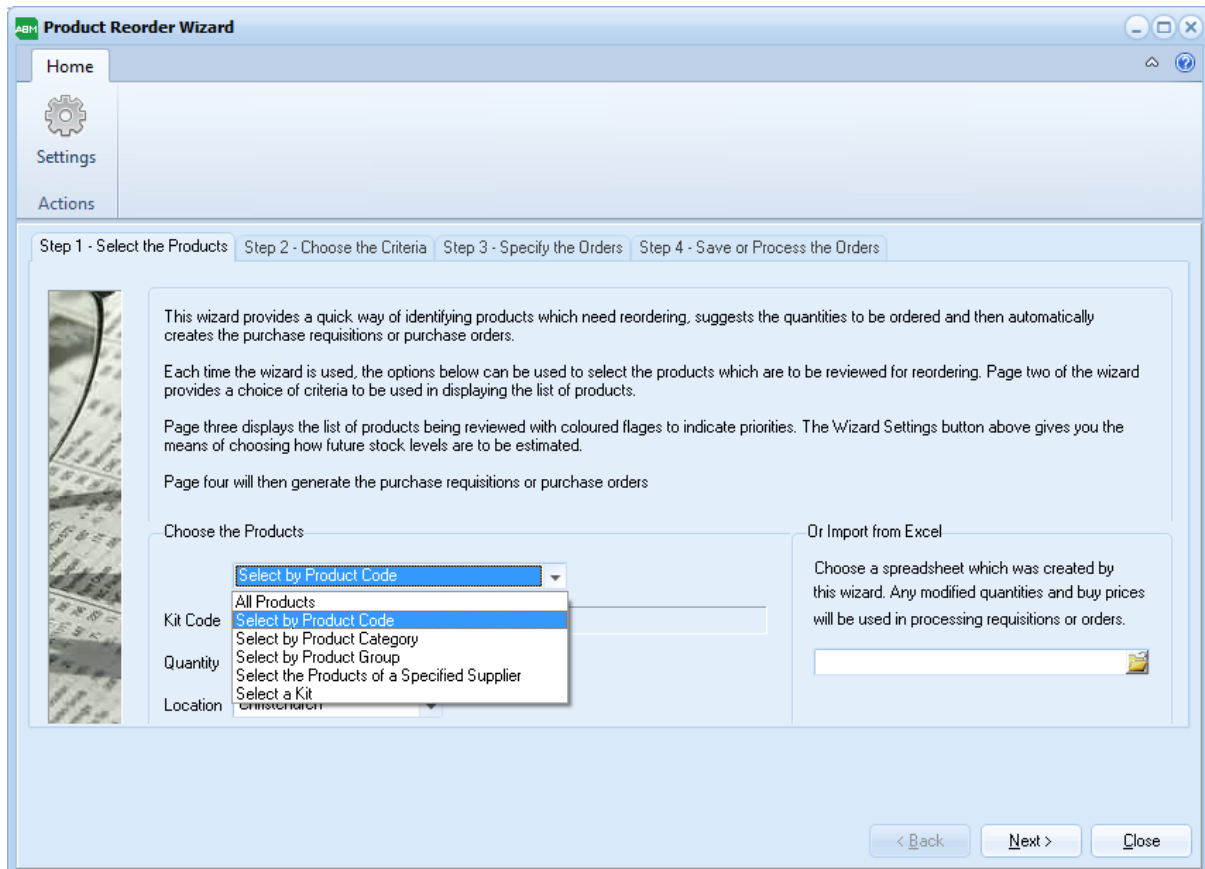
Process the documents but print them later. This will allow you to produce the orders or requisitions and print them out at a later time (from actions menu print/email/fax saved documents)

Process the documents without printing: this will allow you to process the orders or requisitions without sending them to the printer. Note: They can be individually printer later by editing the order or requisition and processing with the appropriate print option.

#### **Purchasing of Kit Components**

If you are using Kits you can run the reorder wizard to reorder components required to manufacture a Kit.

**Step 1:** when the reorder wizard screen appears select the option Select a Kit from the drop down list Choose the Products. You can then select the required Kit and enter the quantity that you wish to assemble and the location you wish to take the components from.



Reorder Wizard with drop down list option.

**Product Reorder Wizard**

Home

Settings

Actions

Step 1 - Select the Products Step 2 - Choose the Criteria Step 3 - Specify the Orders Step 4 - Save or Process the Orders

This wizard provides a quick way of identifying products which need reordering, suggests the quantities to be ordered and then automatically creates the purchase requisitions or purchase orders.

Each time the wizard is used, the options below can be used to select the products which are to be reviewed for reordering. Page two of the wizard provides a choice of criteria to be used in displaying the list of products.

Page three displays the list of products being reviewed with coloured flages to indicate priorities. The Wizard Settings button above gives you the means of choosing how future stock levels are to be estimated.

Page four will then generate the purchase requisitions or purchase orders

Choose the Products

Select a Kit

Kit Code

Quantity 0

Location Christchurch

Or Import from Excel

Choose a spreadsheet which was created by this wizard. Any modified quantities and buy prices will be used in processing requisitions or orders.

< Back Next > Close

**Step 2: Choose the criteria** from either of the two options.

Assume existing stocks of components are to be used where available. This option will calculate the quantity to be ordered based on the quantity required less stock on hand.

Assume that the entire quantities needed to make the specified number of kits will be purchased. This option will order all components required irrespective on any stock on hand.

**Step 3 - Specify the Orders:** In step 3 the products will appear as per the criteria selected. You can amend the ordered quantity if required by selecting the field for the order quantity, and keying in the quantity required. The wizard will display information which will help you in deciding on the quantity required. These columns are

Minimum: The minimum stock that needs to be held for the product.



**Minimum Buy:** Some suppliers may require you to purchase a minimum quantity on each order therefore you will need to take this quantity into consideration before finalising the order quantity

**Buy Price:** This is the price you would expect to pay the supplier listed for the product.. This price can be changed if necessary.

**Supplier:** The default supplier listed will be the Preferred Supplier for this product. However, you can change the supplier from the drop down list.

**Turnover:** The projected sales quantity based on the criteria set.

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**1 Month, 2 months, 3 Months:** The projected free stock 1, 2 or 3 months from now. This will show the expected free stock for each of the three months based on the projected sales of the product over that period of time.

**Maximum:** The maximum quantity to be held for this product.

**Note:** You can sort on any column on this screen. Therefore, if you wish to see all products sorted by supplier then select the supplier column to sort on. You can also rearrange the columns by dragging the column to the left or right of the screen. Alternatively you can use the Column Chooser on the settings dropdown list to select which columns you wish to include and their position on the grid.

**Step 4 - Save or Process the Orders:** The final stage gives you the opportunity to either save the list to a spreadsheet for further evaluation or approval or produce requisitions or orders for each supplier.

**Document Processing Options:**

**Send the reorder list to Excel for approval:** This gives you the opportunity to save the recommended list to an Excel spreadsheet. You can then work on this further, or compare it to a further output with different criteria, or use it to obtain approval to place the orders.

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