

TaiRox Productivity Tools User Guide

Summary - Stock Reorder

The Sage 300 Purchase Orders module has an ability to automatically create purchase orders from inventory, based on minimum reorder quantities. Stock Reorder greatly extends this functionality. The key extensions are:

- 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, the order minimum value will be used in calculations
- With Sage 300 2014 and 2016, the preferred vendor option is available as a choice

Overview - Stock Reorder

It is a relatively rare business practice to blindly produce purchase orders based on how inventory quantities compare with minimum reorder quantities. A more common practice would be to produce a list of inventory items that are below minimum reorder quantity, review that list, revise the quantities, and select alternate vendors. In many situations the business process would then include the creation of a requisition for approval. Once all these steps are complete, then the purchase orders would be created.

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 the approval process simple, a few simple edits can be made and the purchase orders created. If the approval process is more formal, then purchase requisitions can be created. If the list of items is large, the items can be saved in a spreadsheet for more detailed analysis. As long as the basic structure of the spreadsheet is not changed, the data can be edited in the spreadsheet and loaded back into the grid.

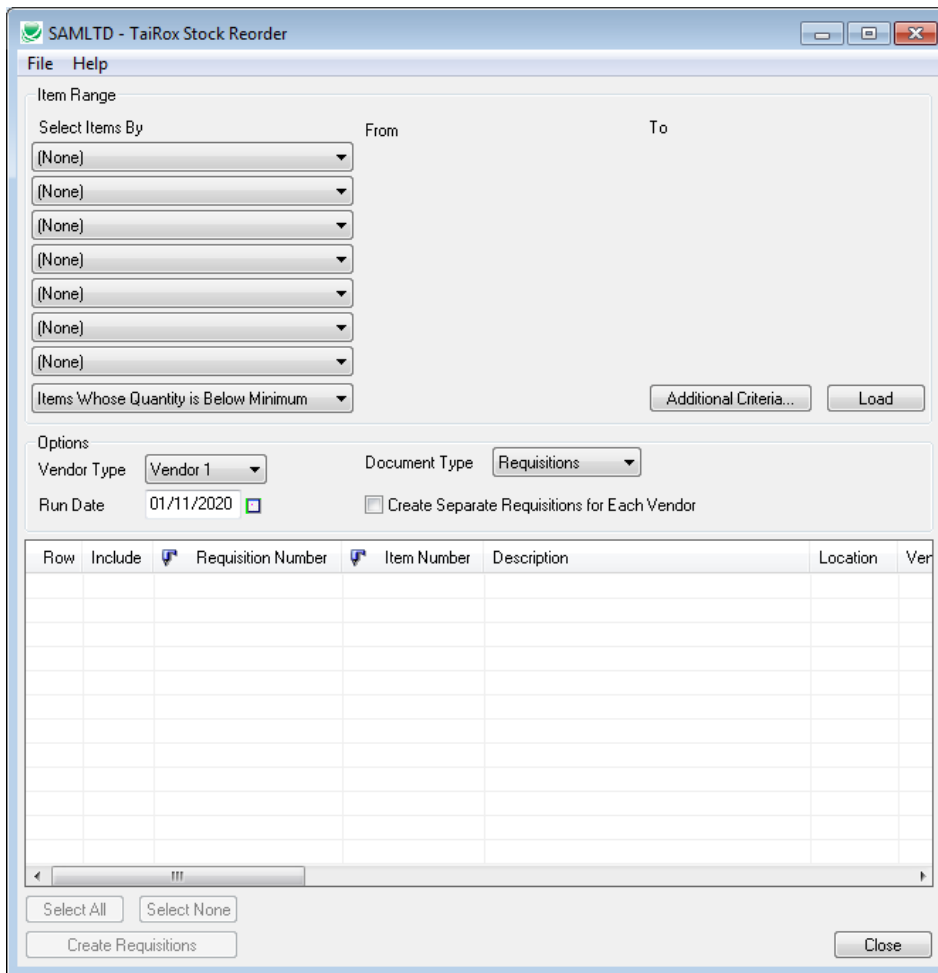
Running Stock Reorder

Once the TaiRox Productivity Tools are installed and activated, the User Management icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

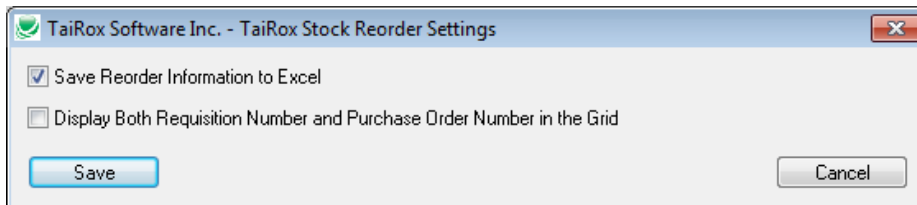
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Running Stock Reorder (continued)

When Stock Reorder starts, a window will be displayed so that reorder criteria can be selected.



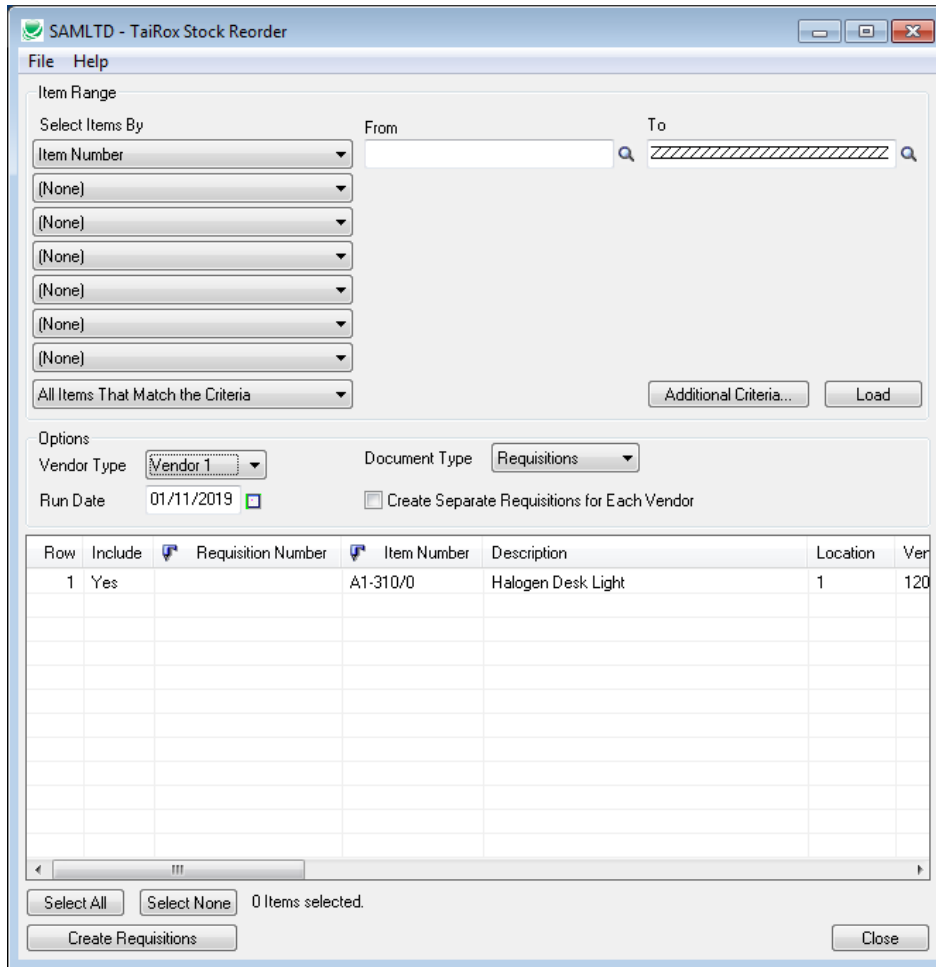
The File menu allows you to control grid options and to save the grid into an Excel spreadsheet.



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Running Stock Reorder (continued)

When the Load button is pressed items matching the criteria and options will be displayed:



Items can be edited in the grid. Finders and drill-down is supported. Documents can be created for items selected / de-selected on an individual basis (“cherry-picked”). Pressing the Create Requisitions or Create Purchase Orders button will create the Requisitions or Purchase Orders. The button displayed will depend on the Document Type selected from the drop-down list.

Note the new features available when used with Sage 300 2014 or 2016: Preferred is available as a vendor choice and Order Minimum is displayed and used in calculating order quantities.

