

Setting Up Order Point Plans

Order points are used to automatically restock your inventory. They are vital variables in the suggested order process.

Order Point *Rules* determine how the order *points* are calculated.

Suggested Orders then use order points to recommend a *quantity to order*.

In this course, we will show you how to set up order point plans and order point rules.

Objectives

- Order Point Plans
- Order Point Rules
- Maintaining Rules and Plans

Order Point Plans

In an order point plan, you can include or exclude products based on suppliers, item categories, and tags.

The plan will only modify the filtered results.

From the main menu, select **Purchasing** and then **Automated Orders**.

Select **Order Points**.

Use the Search bar and the available filters to search for existing order point plans.

Click **Search**.

To add a new order point plan, click the **Add New** button.

Enter a unique name and description for plan.

Choose the suppliers to include in this *order point plan*.

Use the Filter icon to narrow your search results.

Or click **Search** to view all suppliers.

Select the suppliers using the checkboxes.

You can specify specific *Categories* using the **Filter** and **Search** icons.

Use the checkboxes to select the categories.

You can choose to include or exclude the selected categories using *this* toggle.

Similarly, include or exclude stores in the **Stores** section.

You can enter general tags to include or exclude *in these fields*.

Leave these fields blank *if you don't want to configure the plan based on tags.*

Note that you shouldn't add the *same* tags in both fields.

In *Additional Selections*, you can include or exclude *discontinued items*,

store closeout items,

special order items,

and *order point protected items*.

Order point protected items are products whose order points are protected from order point calculations and changes.

These toggles are disabled by default.

Click **Save**.

You can add rules for the order point plan in the **Order Point Form** screen.

The configured order point plan is displayed *here*.

To return to the **Order Points** screen and edit the order plan configuration, click **Edit Order Point Configuration**.

Order Point Rules

Each rule can use a different order calculation method and days of supply.

Rules can use Forecasting sales velocity to calculate order points.

Forecasting is the most used order method.

Note that it is important to configure your sales velocity before using this method.

You can also just increase or decrease order points by a set percentage.

You can set up a rule for each product rank.

You can also determine the processing order for the rules so that they perform the calculations in a specific order.

Click **Add Rule** to add a new rule.

Enter a unique name and description for the rule.

Select a method for the order point calculation.

If you select **Forecast**, enter the number of days of supply that you would like to have on hand.

You can set order points for items that cost more than a particular dollar amount.

In this case, order points on items that cost more than \$250 are set to 1.

Enter a minimum order point for items.

In this example, the order point will calculate to at least 2 regardless of other factors.

The **Percentage** option can be used to increase or decrease the order point by a set percentage.

For example, if you've increased your floor space for a particular vendor or a product, you can choose to increase the order points by that percentage.

Use the toggle to set the increase or decrease and enter the value in the **Percent to change Order Point** field.

Enter a minimum order point value.

In the **New Items** section, you can exclude order point calculations for items added to your inventory within a certain number of days. Since these items do not have sales history, you can add them to the plan at a later date.

Additionally, you can exclude items within a certain number of days from the date of first sale or receipt.

In the **Ranking** section, you can include items based on their rank code.

Each rule must have a max stock rule identified.

When the suggested order is run, the process will add enough product to the order to get the quantity up to the maximum level.

Click **Add**.

In the **Add Max Stock Rule** pop-up, enter a dollar limit for the rule or you may leave it as is.

From 0 to blank is considered zero to infinity which means all selected items are included.

In the **Method** drop-down menu,

you can choose to adjust the max stock level using the same number of units or percentage of units that was calculated for the new order point.

You can also clear the max stock value or leave it unchanged.

If you choose **Do not adjust the Max Stock**, another field appears with these options.

Choose to clear the max stock level, increase it to 1 more than the order point or reduce the order point to 1 less than the calculated max stock level.

If you select the **Multiple of Calculated Order Point** option, it displays an additional field.

Here, the multiple is two. So, the order point is multiplied by two and the result is the maximum stock level.

Click **Save** or **Save & Add More** to add another max stock rule.

Max stock is the maximum amount of a product that you would like to have in your inventory.

The max stock value acts as a limit for the suggested order calculation. It ensures that you don't order excess quantities.

You can choose an effective period for the rule.

You can use product tags in the **Tags** section.

Click this link to view the items that will be included in the rule.

Click **Save & Add More** to another rule.

Click **Save & Return** to save and return to the **Order Point Form** screen.

Maintaining Rules and Plans

To add a similar rule, select the rule and click **Copy Rule**.

In the **Copy Order Point Rule** pop-up, enter the rule name and description.

Enter the days of supply and choose the item ranks you want to include in this rule.

You can also identify product tags.

Click **Save & Edit** to continue to the **Edit Order Point Rule** screen to further customize the rule.

Click **Save** to save the rule.

In the **Order Point Form** screen, you can edit the **Days of Supply** column in the table. Remember to save the changes.

You can edit or delete a rule using the **Edit Rule** and **Delete Rule** buttons.

You can use the **Chain Rules** button to determine the processing order of the rules.

The order is displayed in the **Chain Order** column of the table.

You can schedule the order point plan to run on a particular date or run it now.

Each time the order point plan runs, it'll be shown in the **Order Point History** screen.

Select the order point plan using the checkbox and click **Order Point Detail** to view it.

The updated order points are displayed in the table.

You can also see which rule was applied to the item's order point calculation in the **Rule Name** column.

Export, edit, and copy order point plans in the **Order Points** screen.

You can delete an order point plan using the **Actions** drop-down menu in **Order Point Form**.

Recap

When following the recommended workflow, users create a **Sales Forecast Configuration** and then an **Order Point Plan**.

A scheduled **Suggested Order Plan** then uses the values from these functions to produce a purchase order based on customer activity and supplier guidelines.

In this course, we reviewed the process of setting up an order point plan.

We also added order point rules to the plan and reviewed the items' updated order points.

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