📄 Reorder Point Requisitions and Purchase Orders

Overview

This process provides the end user the suggested order quantity for items, which are recommended to be reordered.

✏️ To have the system automatically calculate the Reorder Point (ROP), a minimum of twelve periods of history must exist in the Item History file. If there is not enough history, enter a reorder point in the "Reorder Point" field in the Item Branch Quantities screen. **If a value in the Reorder Point field exists, it will override the system calculated reorder point.**

- Reorder Point – A quantity for an item that specifies when replenishment occurs. Typically, this occurs when the total quantity on-hand plus the quantity on order equal or do not meet a specified quantity. You can enter this quantity or the system can calculate it if there is sufficient sales history.

- Reorder Quantity – The sum of the reorder quantity that is set up in the Branch Plant Quantities screen plus the reorder point that is set up in the Branch Plant Quantities screen minus the availability.

  (Reorder Quantity + Reorder Point – Availability = Suggested Quantity)

Prior System Setup Required Set-up must be complete before the orders can be generated.

- Populate the Buyer Number (if applicable) in Item Branch/Plant – Item/Branch Plant Info screen

- Stocking Type must be set to "P" in Item Branch/Plant – Item/Branch Plant Info screen

- If the item is not on contract, the Supplier Address Book number must be set to 999999 for all stock purchases in Item Branch/Plant – Item/Branch Plant Info screen that you will be using the reorder point process

- If the item is on contract, the Supplier Address Book number must be set to the "V" address book number for all contract stock purchases in Item Branch/Plant – Item/Branch Plant Info screen

- Item Branch/Plant Quantities must be defined

  See Re-Order Point and Re-Order Qty above

- Planning must be set to use Re-Order Point (From the Branch Plant > Row exit to Additional System Info > Plant Mfg Tab. Update the Order Policy Code to "0" Reorder Point.

- Update the Supplier Item Relationship and add lead time (Average) and it will auto update the Requested Date on the PO. (P43090) Inventory > Inventory Purchasing – Agencies > Stock Purchase Order > Supplier Item Information. This step is nice to have but not a half to have.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

REQUISITION FOR CORRECTIONS:

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PURCHASE ORDER FOR CORRECTIONS:

Dist & Mfg – Corrections > Dist – DCS Central Warehouse > Purchasing > Purchase Order > Reorder Point PO > Gen Reorder Point PO (ZP)

Dist & Mfg – Corrections > Dist – DCS Central Warehouse > Purchasing > Purchase Order > Reorder Point PO > Gen Reorder Point PO (ZG)

PURCHASE ORDER FOR STATE PRINT SHOP:

Inventory > Inventory Purchasing – Agencies > Inventory Purchase Planning > Gen Reorder Point PO (ZP) or Gen Reorder Point PO (ZG)

Inventory > Inventory Purchasing – Agencies > Stock Purchase Order > Reorder Point PO > Gen Reorder Point PO (ZP) or Gen Reorder Point PO (ZG)

Steps

Reorder Point

The example below is using Gen Reorder Point Req (ZR). All steps for other reorder point documents follow the same flow, just different navigation paths. Review the navigation paths above to identify which path you should take.

Start this instruction from the Gen Reorder Point Req (ZR) - Work with Stocked Item Reorder Point window

1. Enter the criteria for information you want to view in the appropriate field(s), including:

   - Branch/Plant – The Branch/Plant that you will be replenishing stock in

     - CW = 46020299

     - State Print Shop = 65050009

   🖉 This report can be run by either the Supplier Number or Buyer Number.

   - Supplier Numbers Currently Used

     - Non Contract = 999999

     - Contract = Vendor number from the ZC Contract

     - Example: Omaha Paper = 500895

             Lincoln Poultry = 500066

             Thompson Food = 507042

   - Buyer Number – Individual who is primarily responsible for purchasing inventory stock for a Branch/Plant (this has not been set up – do not use)

   - Select a radio button for either:

     - Reorder Point

     - All Items

2. Click **Find**.
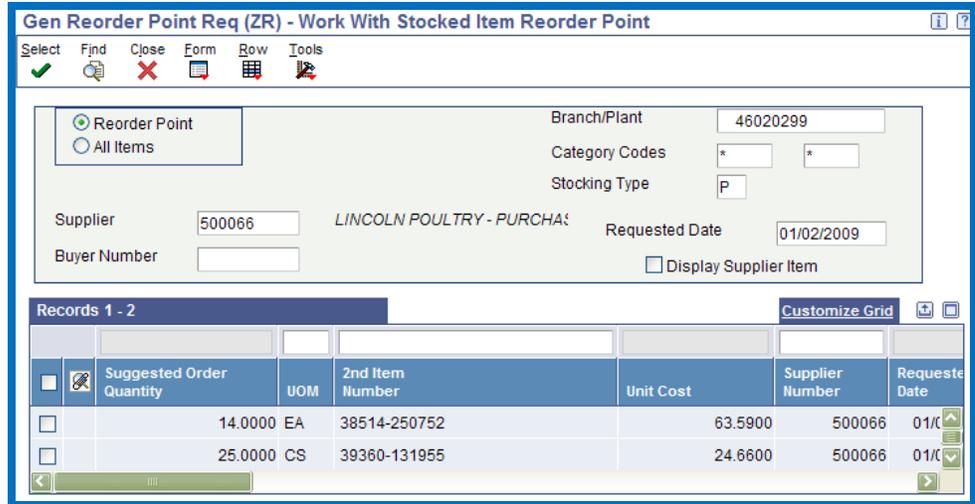
3. Review the items to be ordered and make determination on which items to create the purchasing document.

4. **Double Click** the row(s) or choose the row and click the select icon to get a green check mark then go to the Form > Generate Order(s).

   NOTE: A Green Check should populate the attachment field.
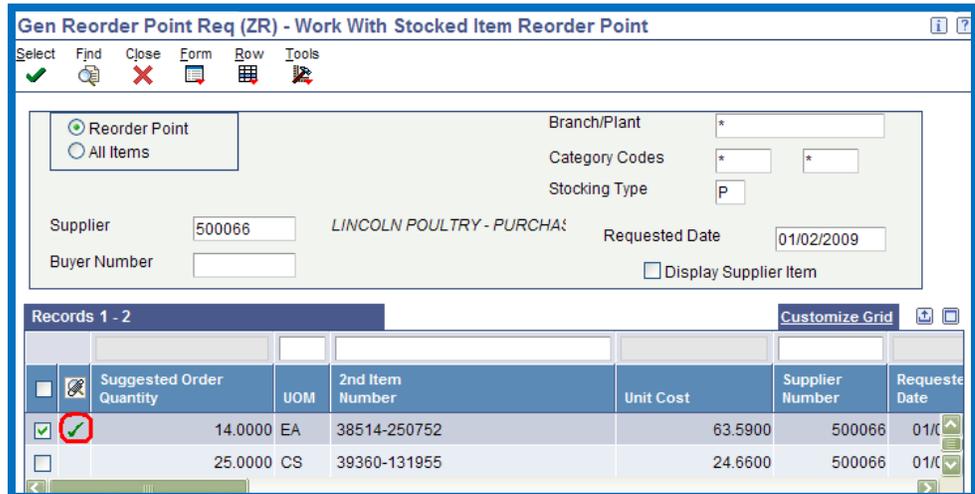
NOTE: If the system takes you to generate purchase orders screen you're OK, if the system takes you to the generate from contract screen, you must add quantity to the contract prior to completion of the above process.

5. The Gen Reorder Point Req (ZR) – Generated Purchase Orders window appears.

The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use.

From the screen above, you can Revise the Requisition or Purchase Order to increase or decrease quantity, change supplier, etc.

6. Choose the row and go to the ROW icon and click on Open Order Inquiry. The Gen Reorder Point Req (ZR) – Work With Order Details screen appears.

7. Choose the Row you want to revise and Click on ROW > Header Revision.

The Gen Reorder Point Req (ZR) – Order Header Screen appears

Update the following fields:

- **Buyer Number –** Populate with appropriate Buyer Number.

- **Send Invoice To** - delete the information from this field and press the tab key. The correct Send Invoice To address book number will default. This can be overridden with another address book number if needed.

- **Cancel Date** – Make sure Cancel Date is blank.

8. Click **Form, Header to Detail, Populate**.

> 🖎 **Changes to the Order Header do not automatically update on the Detail Lines. To populate ALL information from the Order Header to the Order Detail Lines, click Form, Header to Detail, Populate.   Please review the Detail lines to ensure the information is correct. Please note: the information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).**

9. Click **OK**. The Order Detail window appears.

Modify or add detail line(s) as required. Any change(s) will update the revision number on the purchasing document.
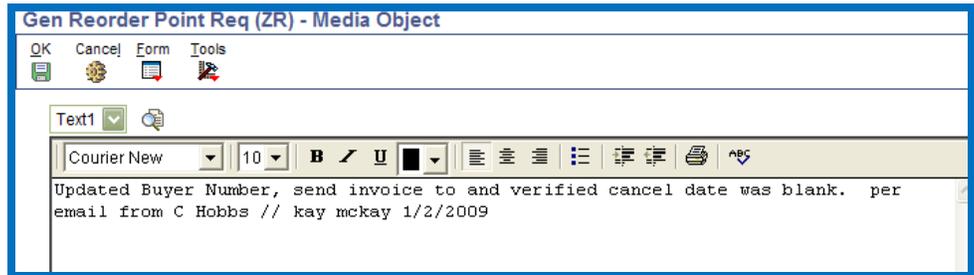
> 🖎 To cancel a line on the Purchase Order, choose the line you wish to cancel and click **Row, Cancel Line**. To cancel an entire Purchase Order, all lines on the Purchase Order must be cancelled in this manner.

> 🖎 To cancel all lines on a Purchase Order, click **Form, Cancel Order**

10. Click OK, the Gen Reorder Point Req (ZR) – Media Object screen appears.

11.   Enter details on the changes that you made to the document.

✎ Also include the date of the change and the initials of the person who made the change. (Ex. 1/2/2009 – A Walton)

Gen Reorder Point Req (ZR) - Media Object

OK   Cancel   Form   Tools

Text1

Courier New   10   **B** *I* <u>U</u>

Updated Buyer Number, send invoice to and verified cancel date was blank. per email from C Hobbs // kay mckay 1/2/2009

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12. Click **OK.** You will return to the Work with Order Headers window.

13. Click **Close**.

14. Click **Close**.

15. Click **Close**

NOTE: When creating a Requisition and click find on the reorder screen the stock item will still remain as a need to order. Once the Requisition is turned into a Purchase Order the item will no longer be visible from the need to order Requisition screen.

NOTE: If placing a Purchase Order from the reorder screen, when you click find the item will not remain as a need to order item.