Reorder Guide

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Overview of Reorders

Utilizing FasTrax for reorders can same the end user time, and it can give a very detailed analysis of why specific quantities are being order. There are several order methods, which are described below:

List All Items From Vendor – This lists every available vendor part from the selected vendor on the order form

Reorder By Min/Max – This orders items based on a minimum/maximum threshold set by the user on each item

Reorder By Days Of Inventory – This orders to keep a specific number of days of inventory on hand based on historical sales data

Reorder By Items Sold (Replenishment) – This orders based on what was sold in a specified time frame

Reorder Using A Blank Order Form – This creates a blank order form that the user enters every item to be ordered

Reorder Using Hybrid Days / Replenishment – This orders items based on the days of inventory method except for newly created items, which use replenishment

List All Items From Vendor With Replenishment – This orders from a vendor and lists every item that is available from then utilizing the replenishment method

Basic Reorder Parameters

Settings

1. Store – Store selector to which the reorder will be generated against

2. Method – The method use to determine what is being reordered

3. Vendor – What vendor the order will be generated for

4. Filter – What filter of items are to be ordered

5. Refresh QOH Before Processing – Reaches out to the store and grabs the latest QOH

6. Check For Alternate Vendors – Checks for any alternative vendors when generating the order that the part is a lower price

7. Use Order Requirements – Makes the order follow consistent ordering requirements set by manufacturers

8. Create As Transfer From Store – Creates the order as a transfer from another store

9. Store Review Not Required – Finalizes order and assigns a purchase order number. Otherwise, creates a working order that the store adds input and sends back to corporate for approval

10. Require Multiples of – When checked, will add or subtract items from an order to get the total number of pieces ordered to be an even multiple of the user-configured value

11. Schedule Order – Allows the order to be scheduled and ran on a user specified schedule

Reorder Schedule

12. Schedule Name – An identifier for the scheduled order

13. Run Day – The day of the week the order is scheduled to run

14. Run Time – The time the order is scheduled to run

15. Date Offset – How many days back from the current date to look back at sales (Start Date on time filter)

16. Duration – How many days forward from the date offset to look at sales (End Date on time filter)

17. Auto Send EDI – Auto sends the purchase order to the vendor

18. Sent To Store – Automatically send the purchase order or working order to the store

19. Mergeable – Merges multiple orders from the same vendor for the same store if applicable

20. Use Min Qty – Forces the order to always order at least the minimum value that is set for the vendor part

21. Include Zero Items – Includes items on the order that had sales during the time period at a 0 quantity that had sales but doesn't have an order value (due to the order method)
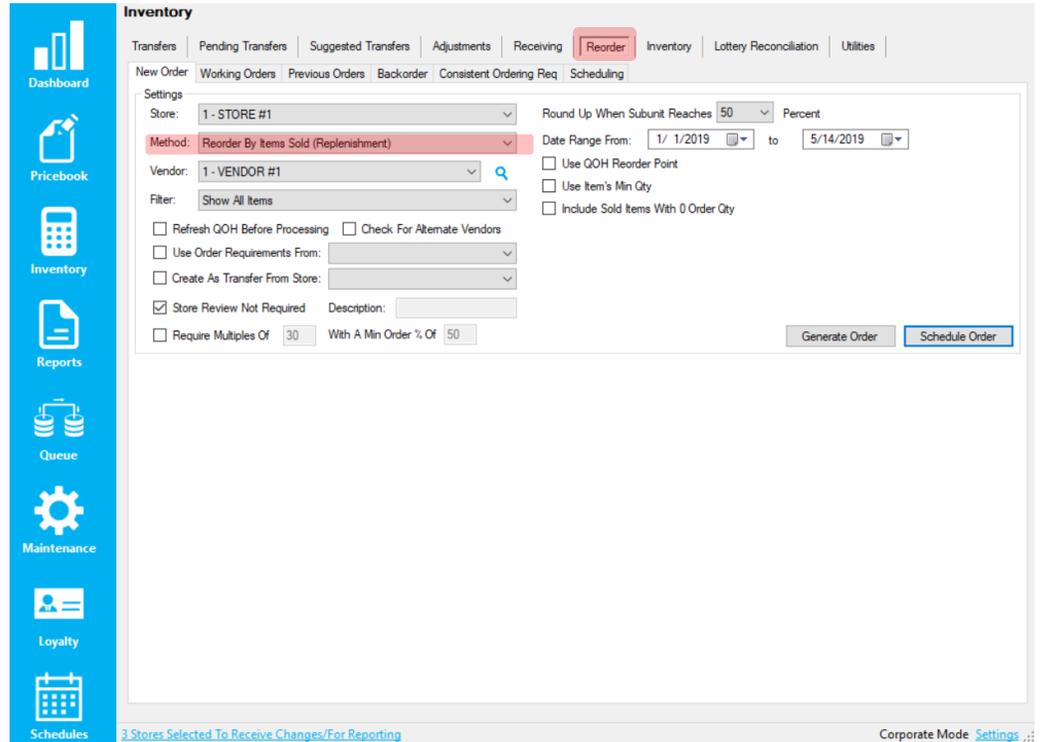
Generating a Replenishment Order

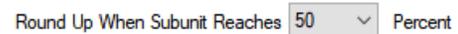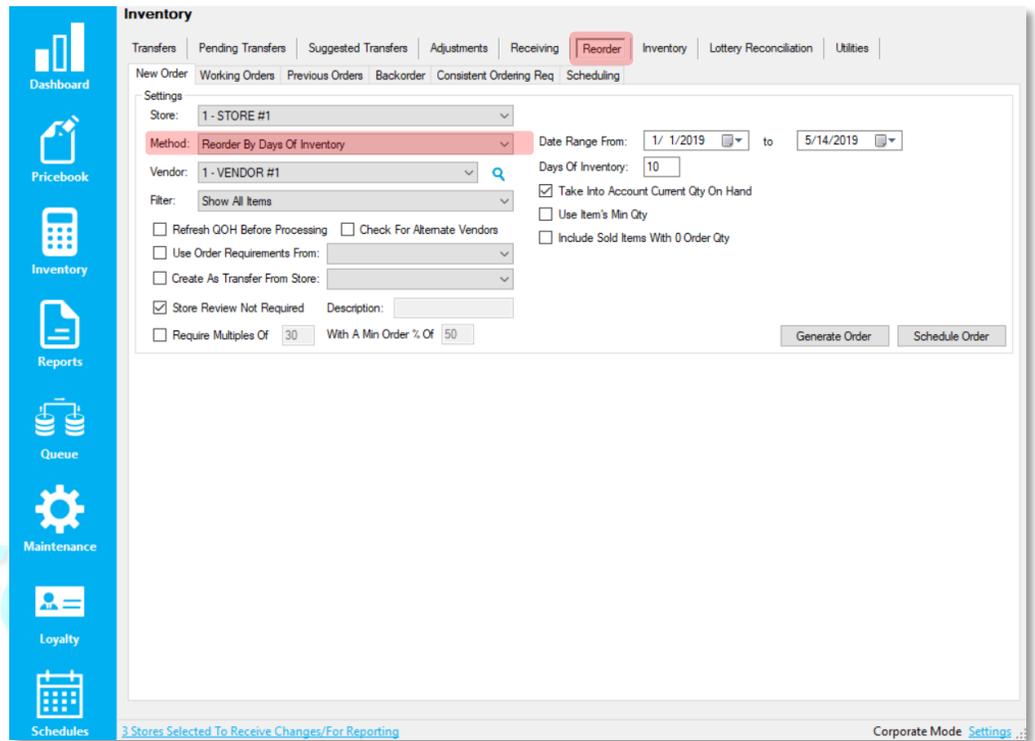1 – After opening Director, choose the Inventory Module

2 – Next, choose the reorder tab on the navigation ribbon
And the Reorder By Items Sold (Replenishment) in the
Method dropdown

3 – Choose the date range from which to analyze sales
and order based on those sales

4 – Choose the value for rounding subunits in Round Up When
Subunit Reaches X Percent

Round up when subunit reaches X percent rolls the subunit level of an item up to a purchase unit and orders based on this percentage. An example would be 50%; when 5 packs are sold, it would order 1 carton. Another would be 80%; when 8 packs are sold, it would order 1 carton.

Generating a Days of Inventory Order
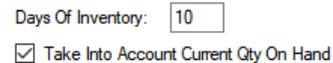
1 – After opening Director, choose the Inventory Module

2 – Next, choose the Reorder tab on the navigation ribbon and the Reorder By Days Of Inventory in the Method dropdown

3 – Choose the date range from which to analyze sales and order based on those sales weighted average per day

4 – Choose the number of days to keep inventory for and to take current QOH

> If utilizing days of inventory as a reorder method, you first have to keep an accurate on hand inventory at the store(s). If the average sales per day of an item is 1 the QOH is currently 2, and you're keeping 10 days inventory, this would order 8 to bring the QOH up to 10 for 10 days on hand.

Generating a Hybrid Days of Inventory / Replenishment Order

1 – After opening Director, choose the Inventory Module

2 – Next, choose the Reorder tab on the navigation ribbon and the Reorder Using Hybrid Days / Replenishment in the Method dropdown

3 – Choose the new item days and to include today in date range for the replenishment side of the order

4 – Choose the department(s) (or major categories if filtering differently), number of days to analyze sales data, and days to order

Order	Dept #	Department	Days History	Days To Order
☑	1	CIGARETTES	45	10

This order type combines the previous two offerings, allowing new items to be reordered based on replenishment since they won't have the sales history as older items, while all older items utilize the Days of Inventory method.
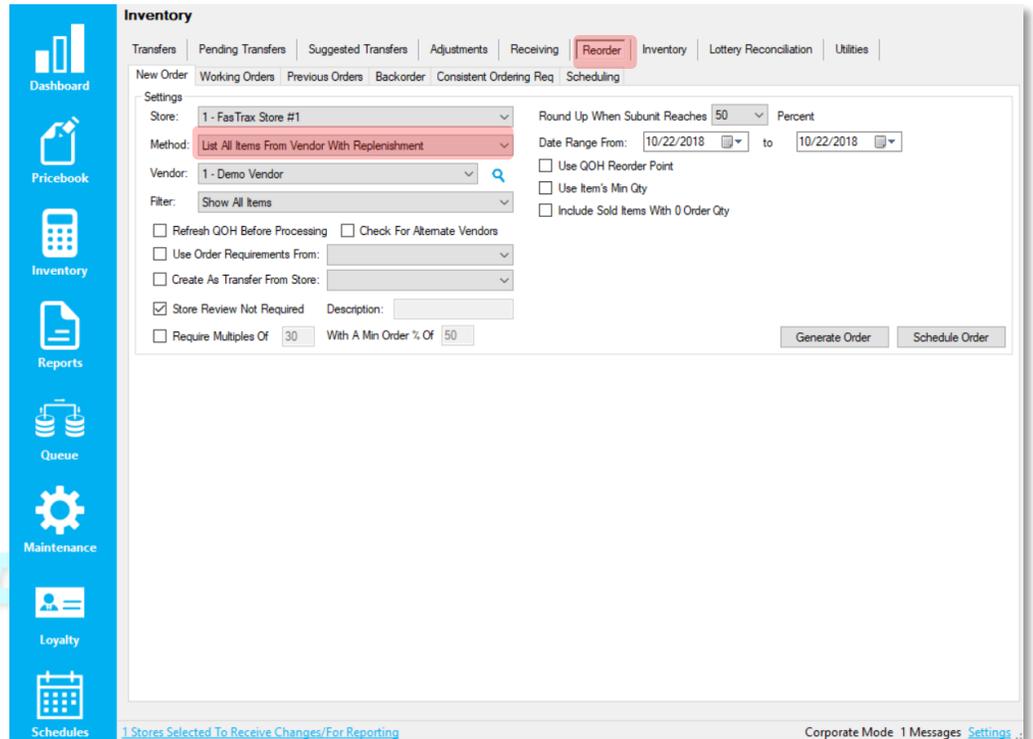
Generating a List All Items From Vendor With Replenishment Order

1. After opening Director, choose the Inventory Module

2. Next, choose the Reorder tab on the navigation ribbon and the List All Items From Vendor With Replenishment in the Method dropdown

3. Choose the date range and other applicable settings and choose Generate Order

Reorder Worksheets

1. Order Qty – How many vendor parts are to be ordered

2. Add/Update – Allows additions / changes to the selected vendor part on the order

3. Delete Item – Delete's the item from the order

4. Remove 0 Qty – Removes all items with an order quantity of 0

5. Print Order – Prints the order form

6. Print Guide – Prints the 52 High/Low with historical sales data on each item

7. Refresh QOH – Refreshes the QOH for items on the order

8. Adjust Qty – Adjusts the selected row's quantity, adding a percentage

9. Send EDI – Sends the order to the vendor electronically if EDI is set up

10. Calculate OOS – Calculates the number of days items have been out of stock in this order period

> If there is a red highlighting on an item's QOH, that means that the item has a purchase unit that is out of stock.