

## Purchasing by Re-Order Level Trial Calculation Report

### Set Reorder Levels in Item Master

Use the document titled "Purchasing Reference Inventory Screen ROL and MIN ROL Fields" to set reorder levels. It is a one-page chart that briefly explains ordering by the reorder level.

For more information about how the system orders based on reorder level and min reorder level and how it rounds to package quantity, contact Mylee Customer Support.

- When using only the ROL field, it is both the trigger for "when" to buy and also determines "how much" to buy.
- Is it time to buy? If the qty-on-hand less what is reserved plus what is already on order with the vendor falls below the ROL, it is time to buy.
- How much to buy? Order a quantity to bring the stock level up to the ROL.

Example: ROL=24. The QOH less Reserved plus what is already on-order with the vendor = 8. The Qty of 8 is less than 24, so it is time to buy. The suggested quantity to order will be 16 because 24 minus 8 is 16.

- When using the MIN ROL and ROL fields, the MIN ROL is the trigger for "when" to buy and the ROL is used to determine "how much" to buy.

### Trial Calculation Report

The Trial Calculation Report allows you to review a report of suggested quantities to order BEFORE you actually create the purchase order. This document explains how to print a Trial Calculation Report using the ROL (Reorder Level) method of purchasing. This report prints items that qualify for purchasing based on ROL. Optionally, the report can print customer back order items. The "QTY" column on the report prints the suggested order quantity. If package quantities are loaded in the item master and the purchasing vendor master record is coded "Y" to "Round to Package Qty," the suggested order quantity is rounded to package quantity.

The report has an option to "Print Totals Only." This is helpful if you do not want to view detail, but simply want to know the total cost to determine if the vendor minimum is met.

After you have set up reorder levels for a vendor, print a trial calculation report as follows.

### **Steps to Run Trial Calculation Report**

1. Select Inventory Purchasing from Main Menu and then select **P.O. Status**.
2. **Vendor ID**: Enter the vendor ID for this report.
3. Press **[F3]=CREATE**.

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4. **Specify Output Device:** Enter the desired printer number.
5. **Run Trial Calculation:** Enter "Y" to print detail. Enter "T" to print Totals only.
6. **Enter Order Mode:** 1=ROL
7. **Inventory Stock Flag:** If your system's "Main Options – Purchasing" has a "Y" (yes) to "Use Stock Flag for Ordering," the cursor will stop at this field. This allows you to specify that the Trial Calculation based on ROL should look only at Stock items (S) or (SF) and not look at every item for that vendor.
8. **Enter Vendor Master:** This field will prefill with the vendor ID entered in Step 2.
9. **Process Backorders:** Enter "Y" to include customer backorders on this report. The report will include backorders and special ordered items. These items can be non-stock items and not-on-file items. (You may enter "D" if you want to qualify by Delivery Date.)
10. **Press Enter.** The cursor will bypass the remaining fields, print a Trial Calculation Report and return to the P.O. Status screen. A sample dialog screen is shown below.

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PURCHASE ORDER CREATE FOR MM/DD/YYYY

SPECIFY OUTPUT DEVICE  1  (PRINTER OR $ = FILE OR  N = NO REPORT)

RUN TRIAL CALCULATION  Y  (Y,N,Totals only or Vendor totals only)
ENTER ORDER MODE:      1  (1=ROL, 2=FORMULA, 3=ROL/FORMULA, 4=FORMULA/ROL
                          5=DAILY REPLENISH, 6=FORMULA/ROL/REPLENISH
                          7=SPECIAL/CBO ONLY)

INVENTORY STOCK FLAG   SF          (F, M, S, X, 0-9)
ENTER PURCHASE ORDER   _____
ENTER VENDOR MASTER    MSC
PROCESS BACKORDERS     Y          (Y, N, Delivery, Order)
DELIVERY DATE          _____
POS ORDER NUMBER       _____

ENTER TOTAL DAYS       _____
INCLUDE OTHER STORES   N  (Y OR N)
PRINT SUGGESTED ORDER  N  (Y OR N)
LINE FEED BETWEEN ITEMS N  (Y OR N)
PRINT ALTERNATE ITEMS  N  (Y OR N)
PRINT VENDOR CODE TOTALS N  (Y OR N)

RETURN POINT WHEN COMPLETE C  (O=inv/pO C=Create/edit)
    
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