



App Number: 010003

Inventory Min Max Workbench



Last Updated 11th October 2013

Powered by:
Greentree
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Features

The **Inventory Min Max Workbench** provides a tool to review demand history on items and reset Minimum and Maximum stock levels used in inventory reordering.

- Review historic demand, and future commitments
- Select or modify the suggested Min Max quantity for some or all products
- Works with existing Min/Max and economic order quantity settings
- Filter to Min Max for a single supplier (e.g. ensure the container's always full)
- Try what-if scenarios and save the results to work on later
- Get funky and create “Min Max Strategies” that include complex calculations (e.g. to predict seasonal variations)

Other Requirements

Greentree Modules: Inventory

Associated Apps: 010002 Inventory Reorder Workbench

[010026 Inventory Location Transfers](#) (recommended)

Implementation Guide

Please refer to the Important Notes section above before installing and configuring this App

Installation

1. Log in to Greentree as the *Super* user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the **Inventory Min/Max Workbench** App



5. Click on the **Edit Users** button and select the users who will be configured to use the **Min/Max Workbench** App, and for which companies.



6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.

Configuration

Still within the Apps for Greentree Module Control, click the **Change** button beside the **Inventory Min/Max Workbench** App, which will launch the **IN Workbench Control** form below. NOTE: This is a shared control with App 010002 Inventory Reorder Workbench.

Inventory Reorder Workbench

Number of Months Cover

Number of Months Demand History to Display

Number of Months to Calculate Demand History

Show Weight and Volume Information

Default Reorder Quantity

Suggested

Suggested (Rounded To Economic Order Qty)

Zero

Include stock items with no suggested reorder

Include Stock Items with a backorder quantity

Include stock items with preferred supplier only

Include Indent Stock Items

Include Hold and Do not commit in Backorder

Include Location Transfers

Default All Locations

Show UDFs

Default PO Details Location to users Default

Default Reorder Method

Average Sale

Min/Max

Required Only

Include Forward Orders

Expand Locations

Force Save before Generating

Use Strategy Reordering

Demand History Months

Budget Months

Strategy Months

Lost Sales Status

Optimise script last run

Editing an existing IN Reorder Workbench Control

Number of Months Cover

Type in the number of months stock you want to have on hand at any time.

Number of Months Demand History to Display

Type in the number of months of demand history you want to display in the Min Max workbench.

Number of Months to Calculate Demand History

Type in the number of months historical demand you want to

use for calculating the Average Sales. This is not used when adjusting Min/Max levels.

Show Weight and Volume Information

Tick this box to have weight and volume displayed in the Min Max workbench.

Default Reorder Quantity

The workbench has columns for both Suggested Reorder and Reorder Quantity – the Reorder Quantity is not used by the Min/Max workbench.

Choose whether the Min Max Quantity should default to:

Default Reorder Method

Set this Min/Max to enable updating of minimum and maximum values via this workbench.

Include stock items with no suggested Reorder

In the workbench if you select by analysis code, ticking this option will result in all stock items for that analysis code being displayed even if you have plenty of stock.

Include Indent Stock Items

Indent items will be included in the workbench if they match other selection criteria. If Indent items are always linked to a Sales Order you would not want to include in the Min Max Workbench.

Include Forward Orders

If selected then forward orders will be included in the demand calculation.

Include Hold and Do not commit in Backorder

If selected then the calculation of demand will include any quantities on forward order even if the stock is not committed.

Include Backorders

If selected the calculation of demand will include all backorders
NB: this is recommended.

Default All Locations

If selected the workbench will default to calculating the Min Max across all locations. If each location is responsible for their own Min Maxing then do not select this option.

Show UDFs

If selected then the table in the Min Max workbench will include a column for all user defined fields specified against stock items.

Default PO Details Location to users default

if ticked the Min Max workbench will default in the Default Location from the Purchase Order button and Defaults tab of User Maintenance specified for the user running the workbench. This is not used by Min/Max updating.

Force Save before Generating -	If ticked, the Min Max Workbench will be saved before the minimum and Maximum values are Updated. The user will be required to enter a Reference for the Workbench if it has been left blank.
Use Strategy Reordering	If you wish to define your own Customised Re-Order Strategies then tick this option. The following four settings will then become visible. These settings define the Properties which will be available to create your strategies with, see Reorder Strategy Maintenance below.
Demand History Months	number of months demand history to make available when writing Strategy Calculations
Budget Months	Only relevant If IN Budgets are in use
Strategy Months	number of strategy months to make available when writing Strategy Calculations
Lost Sales Status	<p>Use this option if you wish to include the quantity of sales that were lost, when determining the quantity to re-order (i.e. for instance this could be orders that were cancelled because you did not have sufficient stock to supply).</p> <p>For this to work, all Lost Sales must be entered as a Sales Order which is then closed with this status when the Sales Order is cancelled.</p> <p>Note: see below for information on scheduling the system script "Optimise Reorder Workbench" to calculate and store Lost Sales data for use with this option.</p>

Re-Order Strategy Maintenance

The App allows you to set up a range of Re-Order Strategies which can be used to calculate predicted demand – this may affect the value you want to set as Minimum or Maximum.

1. select the menu item | System | Inventory | IN Min Max Strategy Maintenance |
2. Give each Strategy a Code and Description of your choice.
3. Then construct your Strategies using mathematical calculations and symbols, in conjunction with properties selected from the list on the right. (Double click on the Properties to add them into your calculation).

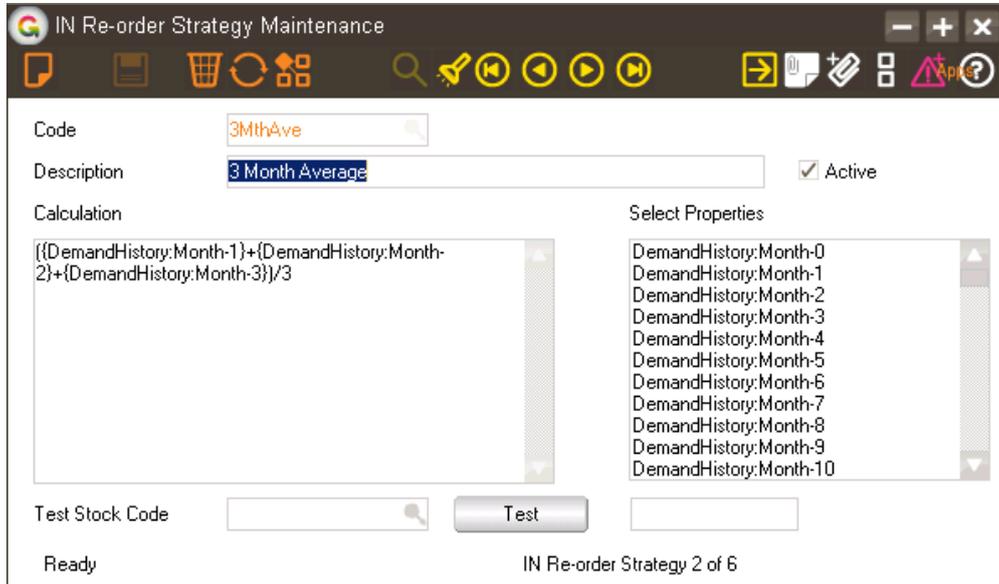
Notes:

- The number of months that will be available in this list is based on the numbers you entered within the IN Min Max Workbench Control form.
- Only Strategies ticked as Active will be used in the workbench.

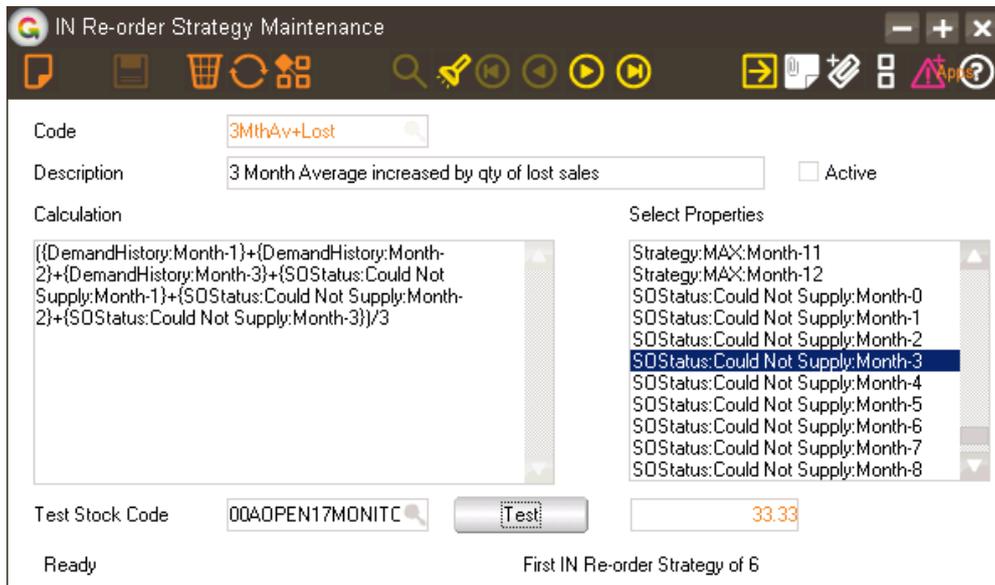
- You can test your calculation by selecting a stock code from the drop down box and clicking Test.

Reorder Strategy Examples

- This example shows a simple Strategy using the average of the last 3 months Demand History.



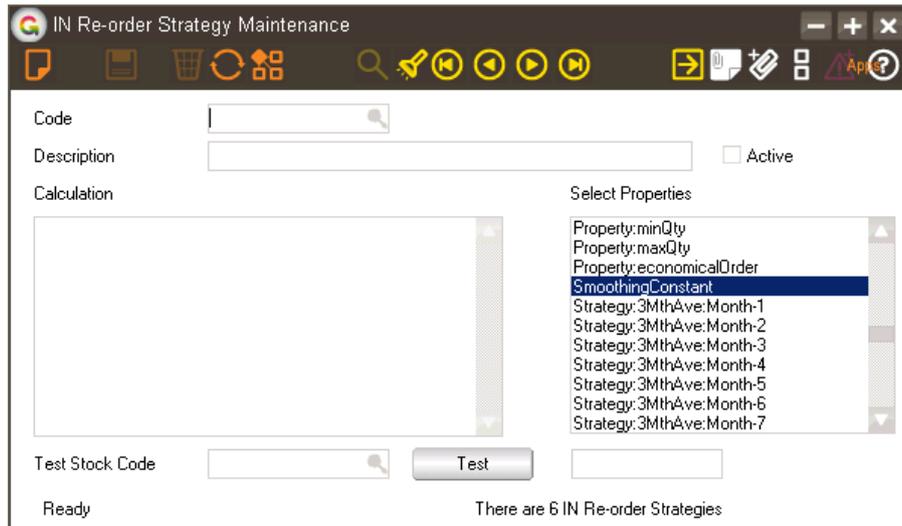
2. This example shows how the Qty of Lost Sales could be included in a Strategy to increase the 3 month Demand History calculation.



Re-Order Constants Maintenance

Select the Menu option | System | Inventory | IN Reorder Constant Maintenance |





System Script for Lost Sales

If you have enabled the **Lost Sales** option as part of the **Min Max Strategies** section in the App's Module Control, it is recommended that you schedule the system script **Optimise Reorder Workbench** to run weekly, through the Greentree task scheduler.

The App installs this system script which, when run, stores a summary of SO line Cancellation Reasons, at the period summary level. This allows the workbench to use an optimised search query rather than looking through every sales line at time of execution.

If the script hasn't been run within the last two weeks then the workbench will revert to the un-optimised approach of searching through all SO lines, which may cause delays or performance issues on very busy systems.

User Setup

There are no User Setups required for this App other than to select which users have access to it, via the Apps Module Control Screen.

User Guide

Using the Inventory Min Max Workbench

Select the Menu option [Process | Inventory | Inventory Min/Max Workbench](#)

Note. If the option to [Use Strategy Reordering](#) was not selected in the Apps Module Control, then the Reorder Strategy method indicated in red below would not be seen. Instead the [Average Sales](#) method would appear in its place.

For updating Min/Max levels this should be set to Min/Max.

The screenshot displays the 'Inventory Reorder WorkBench Min / Max Quantity Update' window. It is divided into several sections:

- Description:** Fields for 'Description' and 'Entered by'.
- Stock Item Selection:** Includes 'From' and 'To' fields for 'Inventory Code' (00ADPEN17MONITOR to ZSerialTest) and 'Analysis Code' (BUYIN to VIDED). It also has 'Location' (02) and 'Status' fields, along with radio buttons for 'All Suppliers', 'Select by Supplier', 'Select by Supplier Currency', and 'All Supplier Excluding'.
- Reorder Selection:** Contains input fields for 'Number of months cover' (2) and 'Number of months demand history to display' (4). It features a 'Suggested Reorder method' section with radio buttons for 'Suggested', 'Suggested (Rounded to Economical)', 'Zero', 'Reorder Strategy' (highlighted in red), 'Min/Max', 'Required Only', 'Inventory Current Period', and 'Selected Period'. There are also several checkboxes for including/excluding various stock items and location transfers.
- Min / Max Update:** Includes a checked 'Add Note' checkbox, 'Minimum Total' (0) and 'Maximum Total' (0) input fields, and an 'Update Min/Max' button.
- Table:** A table with columns: '+ Code/Location', 'Description', 'Analysis', 'UOM', 'Purchase UOM', 'On Hand', 'Committed', 'Available', and 'On Order'.
- Status Bar:** Shows 'Editing Min / Max Quantities ..' and 'There are 19 VApps\NReorderSelections'.

Inventory Code From and To

the process will default to all stock items in the system, if you want to narrow down the items being Min Maxed based on code then select the code range for Min Maxs here.

Analysis Code From and To

You can process a Min Max for a single Analysis Code by selecting it here or for a range. The default is all analysis codes.

Location	this will default to the Location specified in IN Module control unless the "All Locations" was ticked in the Control settings. If each location has its own Min/Max levels then the workbench should be run for a single location at a time.
Status	To select all stock items on a specific status, drop down and select the status otherwise all statuses are included.
Select by Branch	If ticked you are then able to select a branch. This will cause the Min Max calculation to be based on all locations for that branch.
Select by Supplier	If ticked you then get additional fields in order to allow you to select a specific supplier. The Min Max process will then only calculate for stock items where that supplier has been set up under Supplier Details on the stock item.
Code	Supplier code selection field
Alpha	Supplier alpha code selection field
Name	Supplier name selection field
Include only where preferred supplier	if ticked the stock item will only be included where the selected supplier is also flagged as the Preferred Supplier for the stock item.

Reorder Selection

Number of Months Cover	type in the number of months of stock you want to have on hand at any time. This is not used by the Min/Max workbench
Number of Months Demand History to Display	type in the number of months of demand history you want to display in the Min Max workbench.
Include stock items with no suggested Min Max	If you have entered a Stock Item Selection based on analysis code, ticking this option will result in all stock items for that analysis code being displayed even if you have plenty of stock.
Include stock items with preferred supplier only	Only selects items on which a preferred supplier has been set. If the Stock Item Selection option Include only where preferred supplier has been set, it will be unnecessary to also select this option.

Include Indent Stock Items	Indent items will be included if they match other selection criteria. If Indent items are always linked to a Sales Order you would not want to include them in the process.
Include Forward Orders	If selected then forward orders will be included in the demand calculation.
Include Hold and Do not commit in Backorder	If selected then the calculation of demand will include any quantities on forward order even if the stock is not committed.
Include Backorders	If selected the calculation of demand will include all backorders – this is recommended.
Include Location Transfers	If selected the calculation of demand will include all location transfers.
Expand Locations	Expands the results in the clever table to show all locations.
Include additional cover for Key Product Stock	If the optional App 010066 Key Product Category is installed, then selecting this option will add the pre-set additional cover for those products identified by the Key Product Category App.
Exclude on-order quantity from Balance	This is not used by the Min/Max workbench

Default Reorder Quantity

The workbench has columns for both Suggested Reorder and Reorder Quantity – these are not relevant to the Min/Max workbench.

Default Min Max Method

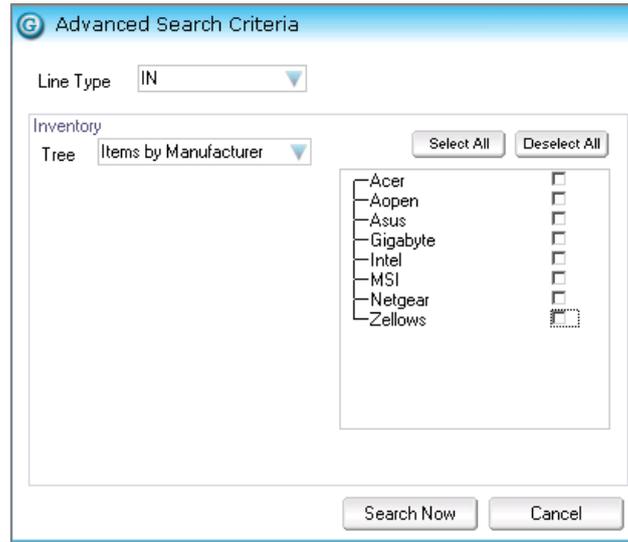
This needs to be set to Min/Max to allow updating of Minimum and Maximum stock levels via the workbench.

Period to Base Average Sales on

Inventory Current Period	if selected then the current month will be included in calculated average sales. This should be used if you are nearing the end of the month.
Selected Period	If selected you can then enter a date to base the average sales on. This works with the Number of months cover – the system will calculate Average sales based on this month plus the number of months specified.
Clear	will clear any changes to selections and put them back to the default values.

Advanced

pops up and additional window to allow for Stock Item selection based on a tree.



Select the tree and branches to be used for the Min Max process – all stock items belonging to that tree and branches will be calculated.

Search Now

the system will perform the Min Max calculations based on selections and display the demand and current Min Maxs in the table below.

Min Max Table

Code/Location	Description	Analysis	UOM	On Hand	Committed	Available	On Order	On Ship	Backorder	Feb	Jan	Dec	Nov	Avg Sales	Min Qty	Max Qty	Sugg Qty	Reorder Qty	Balance	Preferred Sug
MF-SDRAM2	SDRAM - 2GB	MEMORY	EA	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	
MF-CPU-1.6	CPU - 1.6GHz	CPU	EA	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	
KINGMAX512MBDDR	Kingmax 512GB RAM Card	MEMORY	EA	0	0	0	0	0	0	0	0	0	0	0	50	350	350	350	0	Direct Memor
HDS5A630GB	Seagate 60GB Hard Disk Drive	STORAG	EA	984	0	984	0	0	0	0	0	0	0	0	2000	3000	2016	2016	984	Allied Petrole
HDI8M120GB	IBM 120 Desktop System	STORAG	EA	0	0	0	0	0	0	0	0	0	0	0	1000	2000	2000	2000	0	Allied Petrole
DQTUS28K	Panasonic DQTUS28K Black Toner	CONSUM	EA	28	0	28	0	40	0	0	0	0	0	0	5	200	0	0	68	Paramount S.
DQTUS20Y	Panasonic DQTUS20Y Yellow Toner	CONSUM	EA	67	0	67	8	20	0	0	0	0	0	0	0	0	0	0	95	Paramount S.

The table displays information that might be relevant when reviewing suggested Min Max quantities.

The number of months displayed will be that selected.

The Min Max Qty columns are editable. The current Minimum and Maximum are displayed. To update these, overtype with the new level.

If there is a Preferred Supplier specified for the stock Item their name will be displayed.

Min Max Update

Min / Max Update

Add Note

Minimum Total Maximum Total

+ Code/Location	On Order	On Ship	Backorder	Feb	Jan	Dec	Nov	Avg Sales	Min Qty	Max Qty	Sugg Qty	Reorder Qty	Balanc
MF-SDRAM2	0	0	0	0	0	0	0	0	0	0	0	0	
MF-CPU-1.6	0	0	0	0	0	0	0	0	0	0	0	0	
+ KINGMAX512MBDDR	0	0	0	0	0	0	0	0	50	350	350	350	
+ HDSEAG60GB	0	0	0	0	0	0	0	0	2000	3000	2016	2016	98
+ HDIBM120GB	0	0	0	0	0	0	0	0	1000	2000	2000	2000	
DQTUS28K	0	40	0	0	0	0	0	0	5	200	0	0	6
DQTUS20Y	8	20	0	0	0	0	0	0	0	0	0	0	9

Once you are satisfied with the min and Max Quantities, you can use the workbench to update the stock item reorder details master.

Add Note

Tick the box to create a note stating that the Min/Max have been updated

Minimum Total

this gives the value of inventory you would have on hand if you had the minimum quantity of all displayed items

Maximum Total

this gives the value of inventory you would have on hand if you had the maximum quantity of all displayed items

Update Min/Max

click this button to have the system update minimum and maximum levels per the table.

The results table will clear when the update is complete.

Inventory Item Notes Update

IN Inventory Item Maintenance

Code Description

Main Defaults Transactions Custom **Notes** Sales History Related Analysis

14-Feb-2014 SUPER : Minimum Reorder Qty updated from 0.0000 to 10.0000 in 02

A note will be added to the Notes tab of Inventory item maintenance if the option was ticked.