



ICE Business System

Inventory - Auto Ordering

(Version 1.1)

Learning Unit Guide

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Table of Contents

I : INTRODUCTION	4
II : OBJECTIVES	4
III : TARGET AUDIENCE	4
IV : PREREQUISITES.....	4
V : SCENARIOS.....	5
V.1 : Auto Ordering - Standard.....	5
V.2 : Auto Ordering – Troubleshooting	12



I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

Creating Purchase Orders automatically to replenish stock levels by predetermined minimum stock quantities on hand.

III : Target Audience

Inventory controllers or administration staff responsible for maintaining inventory levels.

IV : Prerequisites

- Inventory Setup Activities
- Inventory Processing Activities

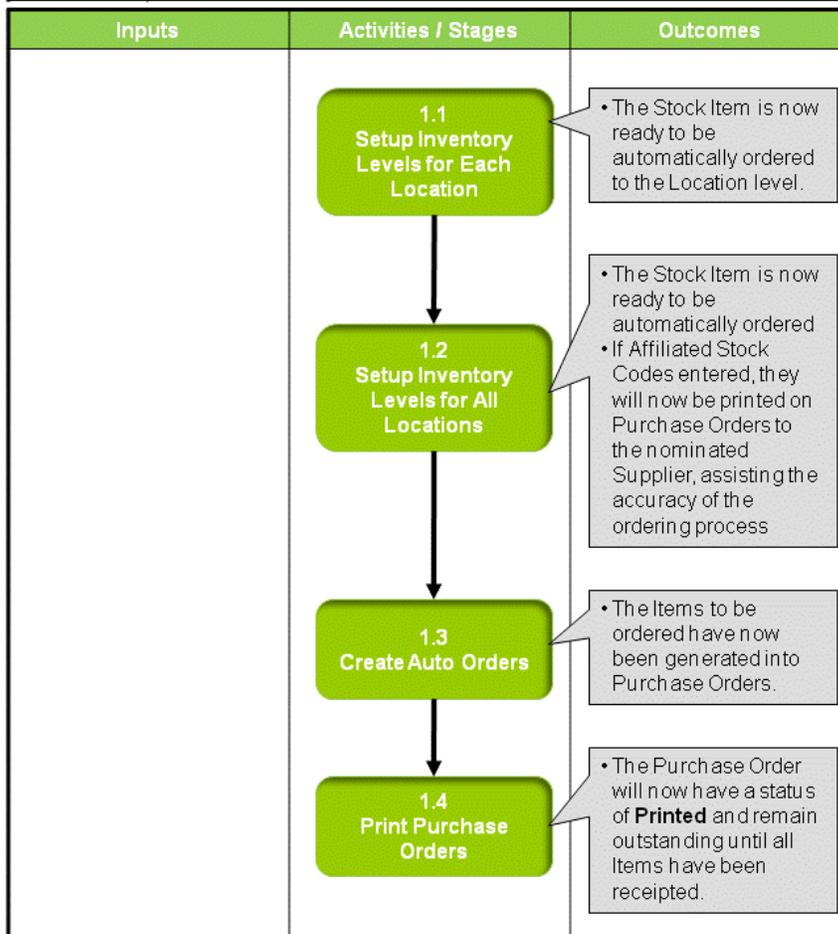
V : Scenarios

V.1 : Auto Ordering - Standard



Workflow

Workflow :	Auto Ordering – Standard
Scenario 1 :	Items routinely ordered on a regular basis, to maintain stock levels, are required to be setup so that they are automatically reordered. The required stock levels can either be for all locations or for greater inventory control. You can set required levels for each stock location .



Scenario 1: Auto Ordering - Standard

Items routinely ordered on a regular basis, to maintain stock levels, are required to be setup so that they are automatically reordered.

The required stock levels can either be for all locations or for greater inventory control.

You can set required levels for each stock location.



1.1: Setup Inventory Levels for Each Location

Objectives:
<ul style="list-style-type: none"> Set the required stock levels for each Inventory Location to be automatically ordered.
SLC Reference:
<ul style="list-style-type: none"> ICE Business Systems > Inventory > Setup Activities

Work Instructions

Screen: ICE Main
<ol style="list-style-type: none"> Access Inventory Locations. Select menu path: Admin > Setup > Inventory > Inventory Locations.
Screen: Inventory Location > Browse tab
<ol style="list-style-type: none"> Select the Inventory Location required. Select the Lines tab.
Screen: Inventory Location > Lines tab
<ol style="list-style-type: none"> Select the Stock Code field by placing the cursor there. Press F3 to search for the Stock Item requiring stock levels to be entered. Search for the Inventory Item required to be automatically ordered, by typing in either the Stock Code or Stock Description fields. Press F12 to retrieve the search results. Select the Lines Browse tab and select the required Item. Select the Lines Detail tab. Enter a Desired stock quantity on hand that the auto order is to replenish to. Enter the Minimum stock quantity allowed on hand before an automatic reorder is required. Enter a Budget stock quantity on hand to be used as the lowest quantity that the auto order is to replenish to. Select Apply, F10 or the Yellow “✓” speed button within the Lines tab to save the changes.



14. Repeat steps 4 – 13 for each Item required to be reordered.

Outcomes:

- The Stock Item is now ready to be automatically ordered to the Location level.

Notes:

- An Inventory Item must have a Preferred Supplier to be Auto Ordered.



1.2: Setup Inventory Levels for All Locations

Objectives:

- Set the required stock levels for the Inventory Items to be automatically ordered.

SLC Reference:

- ICE Business Systems > Inventory > Setup Activities



Work Instructions

Screen: ICE Main

1. Access **Inventory Masterfile**.

Select menu path:
Admin > Inventory.

Screen: Inventory Items Master File

2. Search for the **Inventory Item** required to be automatically ordered, by typing in any of the searchable fields.
3. Press **F12** to retrieve the search results.
4. Select the **Browse** tab.

Screen: Inventory Items Master File > Browse tab

5. Select the Inventory Item required.
6. Select the **Details** tab.

Screen: Inventory Items Master File > Details tab

7. Select **“Yes”** for Automatic Re-order.
8. Enter the **Minimum** stock quantity allowed on hand before an automatic reorder is required.
9. Enter a **Desired** stock quantity on hand the auto order is to replenish to.
10. Enter a **Budget** stock quantity on hand to be used as the lowest quantity the auto order is to replenish to.
11. Select **OK, Apply, F10** or the **Yellow “✓”** speed button to save the changes.
12. Select the **Affiliation & Ordering** tab.

Screen: Inventory Items Master File > Affiliation & Ordering tab

13. Select the **Affiliated Browse** tab.

Note:

Each Inventory Item requiring Auto Ordering must have a default Supplier for the Item to be ordered with.

Screen: Inventory Items Master File > Affiliation & Ordering tab > Affiliated Browse tab

14. If the required **Supplier** already exists, select the **Supplier**

OR

If the required **Suppliers** does not exist, select the **Green “+”** speed button within the Affiliation & Ordering tab, to insert a new affiliated Supplier.

15. If known, confirm the **Affiliated Stock Code** is the Code used by the Supplier for the Item.

16. Select whether this is the **Master Affiliated Item**.

Note:

The preferred Supplier for the Item should be selected as the Master Affiliated Item. Only one Supplier can be selected as the Master Affiliated Item.

17. Select the required Supplier as the **Preferred Supplier**.

18. Enter the GST exclusive price as the **Ex Tax Standard Cost Price** for the Item.

Note:

The Tax field for the Standard Cost Price refers to Sales Tax. An amount should only be entered, if the item is subject to Sales Tax. The GST Amount for the Item should not be entered here.

19. Enter the **Quantity** the Item is to be ordered in.

20. Press **F10** or select the **Green “✓”** speed button within the Affiliation & Ordering tab to save the Affiliated Item.

21. If an Item can be ordered from multiple Suppliers, repeat steps 14 – 20 until all Suppliers have been added.

**Outcomes:**

- *The Stock Item is now ready to be automatically ordered*
- *If Affiliated Stock Codes entered, they will now be printed on Purchase Orders to the nominated Supplier, assisting the accuracy of the ordering process*

Notes:

- *An Inventory Item must have a Preferred Supplier to be Auto Ordered*



1.3: Create Auto Orders

Objectives:

- To successfully create Automatic Orders that select Inventory Items required to be replenished for nominated Suppliers based on minimum stock quantities on hand.

SLC Reference:

- ICE Business Systems > Inventory > Processing Activities

Work Instructions

Screen: ICE Main

1. Access **Auto Orders**.

Select menu path:

Operations > Inventory > Ordering > Auto Order.

Screen: Auto Re-order Facility

2. Insert a new **Auto Order**.

Press **F9** or the **Green “+”** speed button to insert a new Auto Order.

3. Enter a **Reference** for the Auto Order.
4. Select the **Date** of the Auto Order.
5. Select the **Supplier search arrow**.

Screen: Supplier Search

6. Search for the **Supplier**, the Auto Order is for, by typing in any of the searchable fields.
7. Press **F12** to retrieve the search results.
8. Select the **Supplier** required.
9. Press **OK**, to select the Supplier and close the Supplier search

Screen: Auto Re-order Facility

10. Select the **Branch search arrow**.

Screen: Branch Search

11. Search for the **Branch**, the Auto Order is for, by typing in any of the searchable fields.
12. Press **F12** to retrieve the search results.
13. Select the **Branch** required.
14. Press **OK**, to select the **Branch** and close the Branch search.

Screen: Auto Re-order Facility

15. If ordering for one location only, select the **Location search arrow**.

Note:

The Location field should be left blank, if ordering for all Locations.

Screen: Location Search

16. Search for the **Location**, the Auto Order is for, by typing in any of the searchable fields
17. Press **F12** to retrieve the search results.
18. Select the **Location** required.
19. Press **OK**, to select the **Location** and close the Location search.

Screen: Auto Re-order Facility

20. If required, select a **Stock Type** to be Auto Ordered.
- Note:**
Stock Type should be left blank, if all Inventory Items for this Supplier are to be Auto Ordered.
21. If applicable enter a **Comment**
 22. Press **F10, Apply** or the **Green “✓”** speed button to save the Order

- Note:**
The Items required to be ordered for this Supplier, based on the minimum quantities entered in the Inventory Masterfile, will be added to the Auto Order.
23. If required changes can be made to the Items identified to be ordered, by selecting the Item to be modified.
 24. To modify the quantity to be ordered, select the auto created **Qty Reqd** and enter the new quantity, press **F10** to save the changes.
 25. To remove an Item from being ordered, press **F4**, to delete the Item and **F10** to confirm the deletion.
 26. Select **Append to Open Orders**, if Items listed are to be added to an already existing open Purchase Order for this Supplier.
 27. Select the **Create Purchase Orders** button.



Outcomes:

- *The Items to be ordered have now been generated into Purchase Orders.*

Notes:

- *N/A*



1.4: Print Purchase Orders

Objectives:

- *To successfully submit the created Purchase Orders to Suppliers for replenishment*

SLC Reference:

- *ICE Business Systems > Inventory > Processing Activities*



Work Instructions

Screen: ICE Main

1. Access **Standard Purchase Orders**.

Select menu path:
Operations > Inventory > Ordering > Standard.

Screen: Purchase Orders > Browse tab

2. View the **Purchase Orders** created.

On the **Browse** tab, select the newly created Purchase Order.

3. Select the **Details** tab.

Screen: Purchase Orders > Details tab

4. **Confirm** the details of the Order.
5. Select the required **Order Method**.
6. To **Print** the Order, right-click on the blue title bar and select **Reports > Print Purchase Order**.

Outcomes:

- *The Purchase Order will now have a status of **Printed** and remain outstanding until all Items have been receipted.*

Notes:

- *No modification can be made to the Purchase Order, unless it is first modified to a status of **Open**.*





V.2 : Auto Ordering – Troubleshooting

Workflow

Workflow :	Auto Ordering – Troubleshooting
Scenario 2:	Common questions relating to the use of auto ordering are addressed.

Inputs	Activities / Stages	Outcomes
	<div style="border: 1px solid black; background-color: #92d050; border-radius: 10px; padding: 5px; display: inline-block;"> 1.1 Troubleshooting </div>	<div style="border: 1px solid gray; background-color: #e0e0e0; padding: 5px;"> <ul style="list-style-type: none"> • The common questions relating to the use of auto ordering have been addressed. </div>

Scenario 2: Auto Ordering – Troubleshooting

Common questions relating to the use of auto ordering are addressed.

2.1: Troubleshooting



Objectives:

- Outline the common questions and answers relating to the use of the sales report.

SLC Reference:

- ICE Business Systems > Inventory > Processing Activities

Work Instructions

Screen: ICE Main

1. What **methods are available** for auto ordering?

An auto order can be generated, based on a certain **Stock Type** or where the required quantities have been entered at the Inventory Location level, based on a certain Inventory Location.

Where no Location is entered, the order is generated, based on system wide required quantities set within the Inventory Master File.

The auto order will generate a new purchase order, however ticking **“Append to Open Orders”**, will add the items from the auto order to an existing open purchase order for the Supplier.

2. What if an **order has been created in error**?

When the auto order is created into a Purchase Order, the auto order is given the status of **“Processed to order”** and no longer displayed as a default in the auto ordering screen.

Although the auto order can be viewed by selecting **“Display All”**, deleting the auto order will not cancel or delete the Purchase Order that was created from the auto order.

To delete the stock ordered, the Purchase Order itself must be deleted from within the Standard Order screen.

There is no need to delete the auto order, instead create a new auto order as is required.

Outcomes:

- The common questions relating to the use of auto ordering have been addressed.

Notes:

- N/A