Contents

CONTENTS .................................................................................................................. 2

REORDER LEVEL MANAGEMENT .............................................................................. 3

1. USER DEFINED PROMPTS WINDOW ...................................................................... 4
   1.1 Setting Up User Defined Prompts ................................................................. 4

2. SMARTLIST - REORDER LEVEL MANAGEMENT .................................................... 5
   2.1 Exporting Stock Usage Figures to an Excel Spreadsheet .............................. 6
   2.2 Calculating Reorder Levels in Extracted Excel Spreadsheets ..................... 6

3. IMPORT ROL WINDOW ......................................................................................... 8
   3.1 Importing Reorder Level Management Quantities ....................................... 8

4. ROL UPDATE WINDOW ......................................................................................... 10
   4.1 Viewing and Updating Reorder and Maximum Stock Levels in the ROL Update window ................................................................. 10

5. ROL ITEM DETAILS WINDOW ............................................................................ 12
   5.1 Viewing, Amending and Setting in the ROL Item Details window ............... 12

6. ROL CSV PURGE WINDOW .................................................................................. 13
   6.1 Purging Imported CSV and XLS Files ........................................................... 13

APPENDIX A .............................................................................................................. 14

REORDER LEVEL MANAGEMENT – ACCESS TO WINDOWS .................................... 14

APPENDIX B .............................................................................................................. 15

ABOUT MYRIDAS .................................................................................................... 15

INDEX ......................................................................................................................... 16
Reorder Level Management

The m-hance Myridas Reorder Level Management module incorporates a number of features to assist with the management of inventory reorder levels. Stock reorder and maximum levels can be calculated in an external Excel spreadsheet exported from Microsoft Dynamics™ GP Smartlist.

These levels can be based on usage history and user-definable parameters, or can be manually inputted. Suggested order point and order up to quantities are calculated and can be used as a basis for the actual order point and order up to quantities. Alternatively the suggested levels can be overridden manually by preferred levels.

The main features of Reorder Level Management are:

- Additional user-defined fields at item/site level for use in reorder level calculation
- The facility to extract stock usage figures to an Excel spreadsheet via Microsoft Dynamics™ GP Smartlist information for use in reorder level calculation
- Re-import of suggested order point quantity and order up to quantity from Excel spreadsheet
- Review facility prior to updating the item's reorder quantities

The Order Point Quantity (or reorder level) is the quantity an item should be reordered at to maintain your preferred stock levels. The order point quantity that is set in the Microsoft Dynamics™ GP Item Resource Planning window is used to calculate the quantity to reorder when you print the Microsoft Dynamics™ GP Purchase Advice Report. It is also used by the Purchase Order Generator to calculate quantities to order. You can use the information in the ROL Item Details window to calculate the most appropriate level.

The Order Up To Quantity (or maximum stock level) is the greatest quantity of an item that you want to have on hand. The order up to quantity that is set in the Microsoft Dynamics™ GP Item Resource Planning window is used when you print the Microsoft Dynamics™ GP Purchase Advice Report. It is also used by the Purchase Order Generator to calculate quantities to order. You can use the information in the ROL Item Details window to calculate the most appropriate levels.
1. User Defined Prompts window

Use the User Defined Prompts window to:

- Set up specifically defined prompts for incorporating into reorder and maximum level calculations

<table>
<thead>
<tr>
<th>User Defined Currency Prompt 1</th>
<th>Order Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Defined Currency Prompt 2</td>
<td>Projected Growth</td>
</tr>
<tr>
<td>User Defined Currency Prompt 3</td>
<td>Safety Factor</td>
</tr>
<tr>
<td>User Defined Currency Prompt 4</td>
<td>User Def. Currency 4</td>
</tr>
<tr>
<td>User Defined Currency Prompt 5</td>
<td>User Def. Currency 5</td>
</tr>
<tr>
<td>User Defined Currency Prompt 6</td>
<td>User Def. Currency 6</td>
</tr>
<tr>
<td>User Defined String Prompt 1</td>
<td>Fast Moves</td>
</tr>
<tr>
<td>User Defined String Prompt 2</td>
<td>Seasonal</td>
</tr>
<tr>
<td>User Defined String Prompt 3</td>
<td>User Def. String 3</td>
</tr>
<tr>
<td>User Defined String Prompt 4</td>
<td>User Def. String 4</td>
</tr>
</tbody>
</table>

1.1 Setting Up User Defined Prompts

To set up user defined prompts in the User Defined Prompts window:

1. Enter text values as required into the User Defined Currency (numeric) and User Defined String (text) Prompt fields. These text values are the headers that will appear for the prompt fields in the ROL Item Details window.

   Individual Item Number values for these prompts can be set in the ROL Item Details window or in the exported Excel file.

   The fields can then be used to apply additional calculations to the reorder level management values calculated in the exported Excel spreadsheet.

2. Click OK to apply your prompts to the ROL Item Details window.

   Note that you can click Cancel at any point to close the window.
2. Smartlist - Reorder Level Management

Click to display the Microsoft Dynamics™ GP Smartlist

Microsoft Dynamics™ GP Smartlist combines inquiry and reporting capabilities to provide easier access to Microsoft Dynamics™ GP business objects, such as creditors, accounts, transactions and items.

Smartlist has been given extended functionality with the Reorder Level Management module with two new reports, the ROL Management - Calendar Usage and the ROL Management - Fiscal Usage reports.

The usage figures in the ROL Management - Calendar Usage report are based on monthly usage figures. The usage figures in the ROL Management - Fiscal Usage are based on usage figures in your defined Fiscal period. In both cases Usage 1 will be defined as the current usage period, Usage 2 as the previous Usage period, etc. Usage 1 will take account of transactions that have been posted.

Use these Smartlist reorder level management reports to:

- View Item details, usage quantities and stock management quantities
- Extract stock usage figures to an Excel spreadsheet for use in reorder level calculation

The Smartlist window

Note that further details of the full functionality available in Microsoft Dynamics™ GP Smartlist can be found in the Microsoft Dynamics™ GP Online Help system.
2.1 Exporting Stock Usage Figures to an Excel Spreadsheet

To export stock usage figures to an Excel spreadsheet from the Reorder Level Management reports in Microsoft Dynamics™ GP Smartlist:

1. Click on the ROL Management report that you want to display.
   Note that you will be asked if you want to update the history. Click Yes. If you click No then any transactions posted since the last report was produced will not be included.

2. The report will be displayed in the scrolling window with the following fields:

<table>
<thead>
<tr>
<th>Item Number</th>
<th>Item Description</th>
<th>Location ID</th>
<th>Last Order Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Order Qty</td>
<td>Last Receipt Date</td>
<td>Last Receipt Qty</td>
<td>Last Creditor</td>
</tr>
<tr>
<td>Qty On Hand</td>
<td>Qty Allocated</td>
<td>Qty Back Ordered</td>
<td>Qty On Order</td>
</tr>
<tr>
<td>Order Point Qty</td>
<td>Order Up To Qty</td>
<td>Suggested Order Point Qty</td>
<td>Suggested Order Up To</td>
</tr>
<tr>
<td>Last Review Date</td>
<td>Usage 1 to Usage 24</td>
<td>Minimum Weeks Stock</td>
<td>Max Weeks Stock</td>
</tr>
<tr>
<td>User Defined Currency 1 to 6</td>
<td>User Defined String 1 to 4</td>
<td>Purchasing U of M</td>
<td>Qty in Base U of M</td>
</tr>
</tbody>
</table>

All Inventory Item Numbers will be displayed with associated details displayed for each Site ID to which they are assigned.

3. If you want to refine the report you can use click the Search button to display the report specific Search window. Use the Microsoft Dynamics™ GP Online Help system to learn more about refining reports.
   The Item Number column must always be the first column and the Location the third column for imports back into Microsoft Dynamics™ GP to be successfully performed.

4. When you have the required Item Number range displayed in the scrolling window click the Excel button. The fields for your selected range will automatically be exported to an Excel spreadsheet.
   Note that you can click the Stop button at any point to stop generating a report at the point you click Stop.

2.2 Calculating Reorder Levels in Extracted Excel Spreadsheets

To calculate reorder levels in extracted Excel spreadsheets:

1. When you have followed 2.1, Excel will automatically open with all information that has been extracted from the Reorder Level Management report displayed in a spreadsheet.
2. The exported spreadsheet can be manipulated as required. You can use formulas to calculate appropriate quantities for the above fields or you can enter the quantities manually. The way in which quantities are calculated is down to user requirements.

3. When you have calculated the required quantities the spreadsheet should be saved as a .csv or .xls file. The file can be imported into Microsoft Dynamics™ GP via the Import ROL window. Calculated quantities can be viewed in the ROL Item Details window and the ROL Update window.
3. Import ROL window

*Tools >> Routines >> m-hance >> ReOrder Lvl Management >> Import*

Use the Import ROL window to:

- Import reorder level management quantities in Excel spreadsheets

### 3.1 Importing Reorder Level Management Quantities

**To import reorder level management quantities in the Import ROL window:**

1. If you currently have a file open in Excel this will be detected by the Import ROL window. If you do not currently have a file open, or want to select a different file, enter the Excel file that you want to open or select one using the lookup.

   Note that you cannot just enter the name of the file, you must also enter the system path to the file, for example, C:\TEMP\rol_update_info.xls. You can only import .csv and .xls file types.

2. The Active Workbooks lists or the files currently open in Excel. Active Worksheets lists all the worksheets in the currently selected workbook.

   The Active Workbooks and Worksheets fields, and the Field Mapping fields, are automatically filled based on the data currently displayed. You can select alternative data by using the drop-down menus.

   The Field Mapping relates to the data that you will import, and is based on the column headings in the selected worksheet. All columns in the selected worksheet are available to be selected from the drop-down menus.

3. To close down workbooks after use select Close All Workbooks on exit.
4. Click Import to import the selected details for use in the ROL Update window. Note that if you select to import an invalid file then the import will still be attempted.
4. ROL Update window

Tools >> Routines >> m-hance >> ReOrder Lvl Management >> Update

Use the ROL Update window to:

- View current Order Point and Order Up To Quantities
- Update suggested Order Point and Order Up To Quantities

4.1 Viewing and Updating Reorder and Maximum Stock Levels in the ROL Update window

To view and update maximum stock levels in the ROL Update window:

1. Under Use Previously Imported CSV Content you can select an imported file. Selecting a file will allow you to view information from a selected file only.

   Note that you can remove this file after updating reorder levels by clicking the Clear CSV Xref on update check box.

   Also note that if you select Use Previously Imported CSV content then all other range options will be disabled and you should proceed to step 8.

2. View All Item Numbers or click From and enter From and To values, using the lookups if required.

3. View All Site ID's or click From and enter From and To values, using the lookups if required.
4. View All Generic Descriptions or click From and enter From and To values, using the lookups if required.

5. View All Class ID's or click From and enter From and To values, using the lookups if required.

6. You can enter a quantity in ROL Variance Greater Than. If entered, only Item Numbers with a variance between the actual Order Point Qty and the Suggested Order Point Qty greater than the entered quantity will be displayed.

7. Click to select whether the displayed reorder and maximum stock levels will be displayed in the Base or the Purchasing Unit of Measure.

8. Click Redisplay. All Item Numbers within the selected range will be displayed in the scrolling window with actual and suggested Order Point Qty and Order Up To Qty for each displayed Site ID.

9. If required you can amend the Suggested Order Point Qty and the Suggested Order Up To Qty, by entering new values into the fields.

When any required changes have been made there are three options available:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Command</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Alert]</td>
<td>Do Nothing</td>
<td>Items will not have amendment made when the Update Reorder Levels button is selected</td>
</tr>
<tr>
<td>![Error]</td>
<td>Reset Suggested</td>
<td>Amendments made to the Suggested Order Point Qty and Suggested Order Up To Qty will revert to the displayed current quantities</td>
</tr>
<tr>
<td>![Info]</td>
<td>Update All</td>
<td>Items will be updated with amendments made</td>
</tr>
</tbody>
</table>

Each Item line contains the Do Nothing icon. You can click the icon to change it to another command icon. Alternatively you can click the Mark All button to display the Update Mark All window where you can select a command icon to assign to all displayed items.

10. If you have entered new values click Update Reorder Levels. The new values will be assigned to the specified Items. This will be visible in the Microsoft Dynamics™ GP Item Quantities window.

Note that you can click Cancel at any point to close the window.
5. ROL Item Details window

*Cards >> m-hance >> ReOrder Lvl Management >> Items*

Use the ROL Item Details window to:

- View reorder level management quantity levels
- Amend minimum and maximum weeks stock levels
- Set User Defined Prompts values

Note that the ROL Item Details window is also available as an Additional option from the Item Quantities Maintenance window.

The Suggested Order Point Qty, Suggested Order Up to and Last Review Date are all updated from the imported Excel spreadsheet.

The Order Point Qty and Order Up To Qty can be updated from the ROL Update window.

5.1 Viewing, Amending and Setting in the ROL Item Details window

**To view, amend and set in the ROL Item Details window:**

1. Enter the Item Number you want to view or select it using the lookup.
   - Note that if you have opened the window from the Item Quantities Maintenance window the Item Number selected in that window will be displayed by default.
2. Use the Browse buttons or the lookup to select a Site ID.
3. Amend the Maximum Weeks Stock, Minimum Weeks Stock and User Defined Prompt fields as required.
4. Click Save to save any changes you have made.
5. Click Delete to delete the details displayed in the window. Note that you can click Clear at any point to clear details displayed in the window. Also Note that it is the Order Point Qty and Order Up To Qty quantities displayed in the Item Quantities window that are used when printing the Purchase Advice Report. The quantities displayed in the ROL Item Details window are useful for viewing prior to updating details in the Item Quantities window.

### 6. ROL CSV Purge window

*Tools >> Routines >> m-hance >> ReOrder Lvl Management >> Purge CSV’s*

Use the ROL CSV Purge window to:

- Purge imported CSV and XLS files

**6.1 Purging Imported CSV and XLS Files**

To purge imported .csv and .xls files in the ROL CSV Purge window:

1. Enter the date that you want to purge all imported csv and xls files up until.
   Note that the current date will be displayed by default.

2. When you have selected the required date click Purge. All imported ROL .csv and .xls files imported prior to the selected date will be purged.
   Note that you can click Cancel at any point to close the window.
# Appendix A

## Reorder Level Management – Access to Windows

<table>
<thead>
<tr>
<th>Window Name</th>
<th>📑 Menu Access</th>
<th>📑 Other Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Defined Prompts</td>
<td>Tools &gt;&gt; Setup &gt;&gt; m-hance &gt;&gt; ReOrder Lvl Management &gt;&gt; Setup</td>
<td></td>
</tr>
<tr>
<td>Import ROL</td>
<td>Tools &gt;&gt; Routines &gt;&gt; m-hance &gt;&gt; ReOrder Lvl Management &gt;&gt; Import</td>
<td></td>
</tr>
<tr>
<td>ROL Update</td>
<td>Tools &gt;&gt; Routines &gt;&gt; m-hance &gt;&gt; ReOrder Lvl Management &gt;&gt; Update</td>
<td></td>
</tr>
<tr>
<td>ROL Item Details</td>
<td>Cards &gt;&gt; m-hance &gt;&gt; ReOrder Lvl Management &gt;&gt; Items</td>
<td>Cards &gt;&gt; Inventory &gt;&gt; Quantities/Sites &gt;&gt; Additional &gt;&gt; ROL Management</td>
</tr>
<tr>
<td>ROL CSV Purge</td>
<td>Tools &gt;&gt; Routines &gt;&gt; m-hance &gt;&gt; ReOrder Lvl Management &gt;&gt; Purge CSV’s</td>
<td></td>
</tr>
</tbody>
</table>
Appendix B

About Myridas

Help >> About Microsoft Dynamics GP >> Additional >> About m-hance Myridas Suite

Use the About m-hance Myridas Suite window to check your registration information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.
# Index

**A**  
Amending  
ROL item details .................................. 12  

**C**  
Calculating  
reorder levels in extracted excel  
spreadsheets .......................................... 6  

**D**  
Deleting  
ROL item details ...................................... 13  

**E**  
Exporting  
stock usage figures to an excel  
spreadsheet ............................................. 6  

**I**  
Import ROL window ................................. 8  
Importing  
rol management quantities ......................... 8  

**M**  
Maximum Stock Levels ............................. 3  
Minimum Stock Levels .............................. 3  

**P**  
Purging  
imported csv and xls files .......................... 13  

**R**  
Reorder Level Management ....................... 3  
Reorder Levels ........................................ 3  
ROL CSV Purge window .............................. 13  
ROL Item Details window ............................ 12  
ROL Management ...................................... 3  
calendar usage ......................................... 5  
fiscal usage .......................................... 5  
ROL Update window .................................... 10  

**S**  
Setting  
ROL item details ....................................... 12  
Setting Up  
user defined prompts .................................. 4  
Smartlist Reorder Level Management ............... 5  

**U**  
Updating  
maximum levels ........................................ 10  
reorder levels ......................................... 10  
User Defined Prompts window ....................... 4  

**V**  
Viewing  
maximum levels ........................................ 10  
reorder levels ......................................... 10  
ROL item details ....................................... 12