Sage Evolution Knowledgebase Article



Article Outline	Inventory Optimisation Reorder Process screen not/partially populated with transaction rows/blank rows after selecting Reorder Template			
Article Date	2021/09/26			
Knowledge Type	Solving an error message			
Primary Module	Inventory Optimisation			
Secondary Module	Inventory Optimisation			
Knowledge Source	Incoming Customer Query			

Outline:

You may notice that the Inventory Optimisation Reorder Process screen is not populated, or only partially populated with the expected transaction lines

Inventory R												- 🗖 🗾
🔀 Close	📂 Open Te	mplate 🗄	Save Batch	📁 Open Batch	Process	Work Groups	💾 Save Grid	I 🎡 Analys	e Spike 🛛 📔 N	lotes		
Order Detail	s											
Supplier	Select a	Supplier					~	Order Date	09/09/202	1	~	
Warehouse	Select a	Warehouse					~	Due Date	09/09/202	1	>	
Project	Select a	Project					~	Delivery Date	09/09/202	1	~	
												_
Drag a column	header here t	o group by tha	t column									Select All
Ind	Item Code	Order Numb	er Order Da	ite SO Quant	ity Item Descriptio	n Description	Description_2	Usage Whse	PO Whse	Usage	Usage Per Day	Qty On H

after a Reorder Template has been selected on the Open Template screen.

Template								
😮 Close 🝵 Edit 🍺 Open 🛛 Reset Form Defaults								
Drag a column header here to group by that column								
Name Description Date Use For								
TEM0001	M0001 RE-ORDER PROCESS 13/11/2020 Reorder Process							
TEM0002	RE-ORDER 2 13/11/2020 Reorder Process							

Solution/Details

A. Logical Template Setups

First notice that the display / appearance of the expected transaction lines/rows are determined by multiple logical setups and factors.

These include, among others, the relationship between the current quantity levels of the specific inventory items that need to be ordered (as specified in the Re-order Processing template), and the rest of the filters on the Reorder Processing template selected above.

Such filters include, among others, the following two below.

Consider here that only items, as selected on the Reorder Process template, with current quantities adhering to the relevant selections made below should therefore result in transaction records to be calculated and display for them on the Inventory Optimisation | Transactions | Re-order Process screen.

E.g., if stock item AAA currently has 1000 units, with its Re-order Level = 20, then item AAA will not be displayed as a transaction line on the Reorder Process screen.

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uggested PO Quantity Formula The following screen displays the suggested formulas for and/or custom selections. To customise the formula, sel	or reorder calculation purposes based on the inventory reorder levels ect the Custom Formula option.	
) Minimum Level	Reorder Quantity	
Minimum Level, Economic Reorder Quantity	Sales Order Quantity	
Reorder Level	Custom Formula	
Reorder Level, Economic Reorder Quantity		
	Include Purchase Order Quantity	
uggested Quantity = Re-order Quantity		

You should therefore always carefully inspect the detailed setup of the selected IO Re-order Template to determine which settings in it may prevent item transaction rows to be populated.

B. Inventory Item Setups

Also consider the minimum setup guidelines that should be adhered to on the relevant Inventory Items for the IO Re-order Process screen to populate them as transaction lines above.

• Linked Supplier

All Inventory Items should be linked to at least one Supplier as can be seen below. If there is only one linked supplier, it automatically also becomes the Preferred Supplier.

Edit Inventory Item "AAA"	×
Item	Linked Supplier(s) Please note: There has to be at least one Preferred Supplier per Item and or Warehouse combination
Information	Supplier Name Preferred Varehouse Sup Inv Code Last G
Pricing	ALPHA ALPHA
Defaults	
Incident History	
Images	
Suppliers	
Warehouses	

• Warehouse Items – Linked Supplier

If using Warehouse items, notice that you should also setup the relationship between the Inventory Item – Warehouse – Linked Supplier, for all Item/warehouse combinations, as can be seen below

Edit Inventory Item "	AAA"				×	
Item	Linked Ware	nouses				
	Whse 🛆	Name	Known As	Branch	Master	
Information	DBN	Cape Town Durban		AllBranches		
Pricing	Mstr	Master Warehouse	Master Warehouse	AllBranches	V	
D-f-th-	Edit Inventory Iter	n "AAA" for warehouse "CP	Г"			×
Defaults	Whee Information	Linked Supplier(s)				
Incident History		Please note: The	e has to be at least one P	Preferred Supplier pe	er Item and or	Warehouse combination
Images	Pricing	Supplier 🛆 1	lame Preferred	Warehouse Sup 1	Inv Code	Last GRV Cost Date I
	Suppliers	ALPHA A	ALPHA 🔽	CPT		R0.00
Suppliers						
Warehouses						