Configuring Inventory Replenishment for Purchased Items

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This guide explains two aspects of configuring automatic inventory replenishment. It is intended for both general users and system administrators.

You can keep your stock at just the right levels using aACE's robust automation features, including automatic updates to existing purchase orders (POs). After you <u>understand how to</u> <u>work with the inventory replenishment (https://aace6.knowledgeowl.com/help/understanding-inventory-replenishment-for-</u> purchased-items) tools, implementing this feature involves two stages:

- 1. General users set the replenishment fields on each line item code (LIC).
- 2. System administrators configure the automation schedule.

1. General Users – Set the Replenishment Fields for LICs

For inventoried LICs that you need to consistently re-stock, you can enter parameters that tell aACE how to keep your inventory levels just where you need them. You can specify these levels for each <u>office location (https://aace6.knowledgeowl.com/help/overview-of-offices)</u> where you store inventory for a given LIC.

- 1. Navigate from Main Menu > Inventory > Line Item Codes.
- 2. Locate the desired LIC using the <u>Quick Search bar (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u>.
- 3. At the detail view, click the Inventory Management tab, then click Edit.
- 4. For each office that needs automated replenishment, enter the parameters:
 - Target Quantity you want to have on the shelf
 - Replenish Quantity that will trigger an automated purchase order
 - Method How the inventory should be replenished
 - From The vendor to be used for procurement or office location for transfers

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5. Click Save.

Tips

Footer Shortcut to Display Needed Replenishment

At the LIC list view, click the footer shortcut link 'Find Items Requiring Replenishment'. aACE displays inventoried and inventoried-assembly items that have an Available quantity less than the Target quantity.

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Jump to Related Modules

At an LIC's Inventory Balances tab, click the quantity number links to quickly display relevant records in other modules:

- On Hand Inventory Transactions module
- Demand Orders module
- On Order Purchase Orders module

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2. System Administrators — Configure the Automation Schedule

The second part of preparing the inventory replenishment automation is for the system administrator to specify when aACE should check for items that need to be re-ordered.

Navigate from Main Menu > System Admin > System Preferences > Automation Schedules tab. On the Schedule Setup tab, mark the flag to Generate Inventory Replenishment.

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•	8602	Auto-Generate Progress Billing Invoices					8	1	Days	SMTWTFS	4:00 AM	6:00 AM	ж
•	4465	Auto-Generate Recurring Transactions					8	1	Days	SMTWTFS	3:00 AM	11:59 PM	ж
0	4669	Auto-Generate Daily	Timesheets			В	8	1	Days	SMTWTFS	12:00 AM	11:59 PM	×
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8	7844	Archive Data				A	8	1	Days	SMTWTFS	12:00 AM	5:00 AM	ж
9	4902	Credit Card Expiratio	on Notifications			В		30	Days	SMTWTFS	12:00 AM	11:59 PM	ж
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We recommend that this process run only once a day. If needed, you can configure it to run multiple times per day; however, it should *not* run more than every few hours. Make sure the settings you specify here align with your organization's policies. (Read more about <u>configuring automation schedules (https://aace6.knowledgeowl.com/help/configuring-automation-schedules)</u>.)