Configuring Inventory Replenishment for Manufactured Items

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This guide explains how to manage inventory replenishment for manufactured items. It is intended for general users.

You can keep made-to-stock inventory items that you manufacture at just the right levels using aACE's robust automation features. Once you <u>understand how to work with the</u> <u>inventory replenishment (https://aace6.knowledgeowl.com/help/understanding-inventory-replenishment-for-purchased-items)</u> tools, implementing the feature for inventory assembly items involves three stages:

- 1. Set the replenishment fields on your line item codes (LICs)
- 2. Configure the automation schedule in your system preferences (requires System Admin user group)
- 3. Configure the company records

1. Set the Replenishment Fields for LICs

For the inventoried assembly items 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 the levels for each <u>office location (https://aace6.knowledgeowl.com/help/overview-of-offices)</u> where you store inventory for a LIC.

- 1. Navigate from Main Menu > Inventory > Line Item Codes.
- 2. Use the <u>Quick Search bar (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> to locate the desired inventoried assembly LIC.
- 3. Click the **Replenishment** tab, then click **Edit**.

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Inv Assembly I	tem Setup)							Notices 😣	Tasks 💟 🛛 B	Emails 🔛 🛛 🛛	Docs 6
General Info			Unit Inf	o				Defau	It Value for Order	Item Addt'l Ir	nfo	
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		2,499.00					Each					
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nventory Replenis	hment for Indepe	endently Managed B	ins						Inventory Set	up		
9 Bin	On Hand	Available Tota	I % of Target	t Target	Replenis	h Method	From	^	Cycle	Next Se	erial	
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- 4. For each office that needs automated replenishment, enter the three parameters:
 - Target The quantity you would like to have in stock
 - Replenish Balance The quantity that will trigger an automated replenishment production
 - Method How the item will be replenished
- 5. Click Save.

Tips for Setting Replenishment Fields

Display Items that Need Inventory Replenishment

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

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> Misc	SHIP	Shipping	EXP	FedEx	0	0	0			ACTIVE		- 5
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Display Related Records

You can jump from the current LIC to related inventory transactions, production / sales orders, and purchase orders. This can help you get a better sense of how your inventory is moving.

From an LIC's Inventory Balances tab, click the highlighted number in the On Hand, Demand, or On Order columns. aACE displays the related module.

Inv Assembly Item	Setup									1 Notice 🔒	Tasks 🔽	Emails 🔀	Docs
General Info			Unit Info						Default Va	lue for Orde	er Item Addt	'l Info	
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Textbook	397.46	596.19	3.1		11	8 5.	2	6.99		4 Shakespean 6 Shakespean			
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2. Configure the Automation Process

System administrators must complete this task.

Automation schedules tell aACE when to check for items that need to be re-ordered. Navigate from Main Menu > System Admin > System Preferences > Automation Schedules > Schedule Setup. Mark the flag to Generate Inventory Replenishment, then <u>configure the</u> <u>automation schedule (https://aace6.knowledgeowl.com/help/configuring-automation-schedules)</u>. We recommend that this process run only once a day. If needed, this process can be configured to run multiple times per day, although it should *not* run more than every few hours. Make sure the settings specified here align with your organization's policies.

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77	4430	Update Current Period/Fiscal Year							Days	SMTWTFS	12:00 AM	12:00 AM	36
8 🗸	8602	Auto-Generate Progress Billing	Invoices			в		1	Days	SMTWTFS	4:00 AM	6:00 AM	ж
9 🗸	4465	Auto-Generate Recurring Trans	sactions			Α		1	Days	SMTWTFS	3:00 AM	11:59 PM	ж
0	4669	Auto-Generate Daily Timeshee	ts			В	8	1	Days	SMTWTFS	12:00 AM	11:59 PM	ж
1	4621	Send Important Date Notificati	ons			С	8	1	Days	SMTWTFS	12:00 AM	11:59 PM	ж
2 🗸	4662	Auto-Reverse GJ Entries				Α	8	1	Days	SMTWTFS	3:00 AM	4:00 AM	ж
3	11038	Update GL Budget Actuals				A	8	1	Days	SMTWTFS	4:00 AM	6:00 AM	ж
4	8402	Update Commissions				С	8	1	Days	-MTWTF-	6:00 AM	7:00 AM	ж
5 🗸	4432	Generate Inventory Replenishn	nent			С	8	-	Hours	-MTWTF-	9:00 AM	6:00 PM	×
16	4408	Generate COGS Reconciliation				٨	8	1	Days	S	6:00 PM	11:59 PM	ж
7	4408	Generate COGS Reconciliation				В	8		Last Day of	SMTWTFS	10:00 PM	11:59 PM	ж
18	7844	Archive Data				A	8	1	Days	SMTWTFS	12:00 AM	5:00 AM	ж
19	4902	Credit Card Expiration Notificat	tions			В	8	30	Days	SMTWTFS	12:00 AM	11:59 PM	ж
•	4357	Send Pending Notices				в	8	1	Every Cycle	SMTWTFS	12:00 AM	11:59 PM	ж
1	9250	Auto-Send Remittance Advice				G	8	1	Days	-MTWTF-	6:00 PM	7:00 PM	ж

3. Configure Internal Company Records

Your own organization is the 'vendor' for your made-to-stock inventory. To ensure the replenishment automation works correctly, office records must be linked to company records that have specific settings.

These settings are automatically entered when you create a company record from the Offices module (i.e. click Actions > Create Related Company). However, if you create a company from the Companies module, or if you link to an existing company record, you must enter these settings manually.

• Company Details: Type – Must be set to Internal

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Company Info 📋	•		Contact Info		Other Info					
Туре			Phone	Alt Phone	Group	Su	ubgroup			
INTERNAL			(555) 418-9777							
Lead			Fax	Phone / Fax Format	Parent Compa	ny >				
Customer Vendor			(555) 418-9778	(###) ###-####				c		
Internal			Email		Referral Comp	any >				
Partner			info@aacme.com	2	1			c		
Other	Other Customer / Vendor				Referral Conta	ict >				
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Country Postal Format			Email Format (using "John	Q Public") 😮	Referral Team	Member > Of	ther Referral			
United States	American		john.public@aacme.co	m		۹				
Contacts (3)	Locations (2)	Linked Contacts	Linked Companies	Lists						
 Contact Name 		1	Title			Phone	Default	Status 📌		
> Gerry Middleton		(Office Manager			(555) 418-9777	2	- 7		
		5	Sales Manager			(555) 418-9777	¥	死 🔴		
> Mark Jennings										

• Customer Details: Discount – Must be set to 100%

This prevents the system from generating billing transactions to your own company.

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