Simple Stock Ordering

Specialised stock reordering add-on for Microsoft Dynamics 365 Business Central

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What is Simple Stock Ordering?

Simple Stock Ordering is an add-on for Microsoft Dynamics 365 Business Central that aims to simplify the process of reordering stock and keeping stock levels at the required level to prevent stockouts.

It puts all of the current stock and historical demand information in one place, allowing purchasers to make an informed judgement as to what needs to be ordered and when.

Why is this Needed?

Within the standard Dynamics 365 Business Central system, there is a lot of setup that needs to be done to set your reorder policies for each product.

Examples of these include:

- Lot-for-lot reordering
- Fixed reorder quantities
- Minimum and maximum reorder quantities
- Reorder points
- Safety stock lead times
- Reorder cycles

All of these must be set on a per-item and per-location basis, which can mean literally thousands of pieces of data that need to be entered into the system.

The aim of Simple Stock Ordering by Synergy Technology is to make it simple for people to do reordering, by giving them all of the information they need on current stock levels and historical demand, all in one place, so they can make informed decisions based on this information.

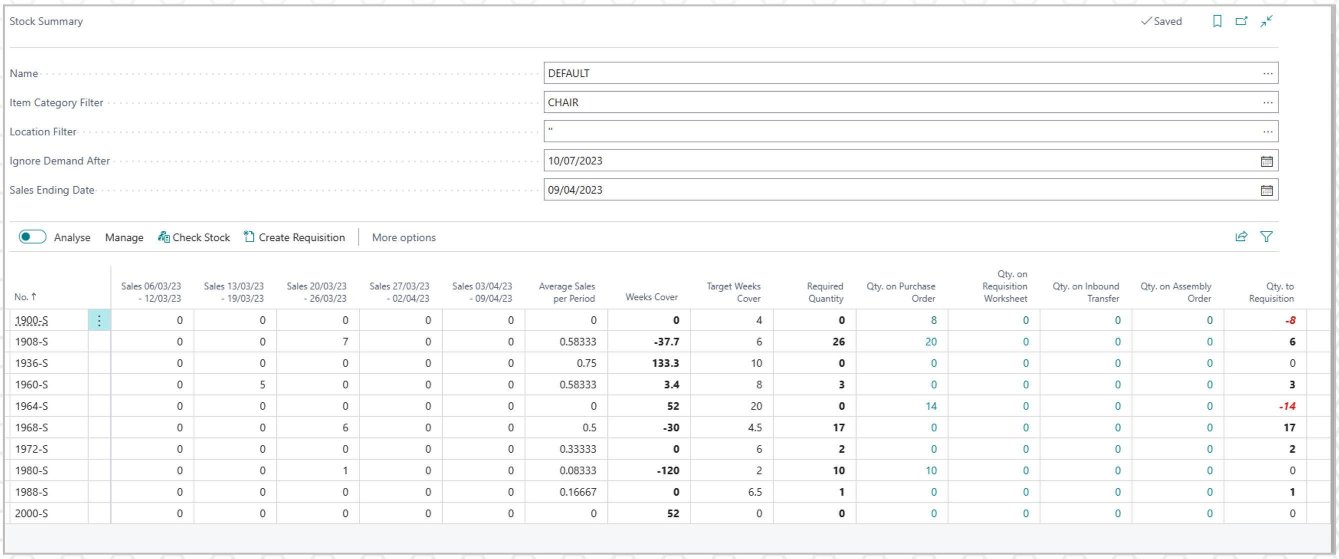
How does it work?

Simple Stock Ordering users a custom interface to display a variety of stock information all in one place. This interface tells users how many items are in stock, and also what's in demand, including the quantities on:

- Purchase Orders
- Requisition Worksheets
- Inbound Transfers
- Assembly Orders
- Exclude bins

It also gives the user a view of how many have been sold over previous months, as well as what the average sales per period have been.

Based on the amount in stock, the amount in demand, and the amount that have been sold in previous months, the system will work out how many weeks cover we have. In this case, cover means how many weeks it would take to sell all the stock we have, based on our typical sales levels over the previous months.


Stock Summary

Name	DEFAULT
Item Category Filter	CHAIR
Location Filter	''
Ignore Demand After	10/07/2023
Sales Ending Date	09/04/2023

Analyse | Manage | Check Stock | Create Requisition | More options

No. ↑	Sales 06/03/23 - 12/03/23	Sales 13/03/23 - 19/03/23	Sales 20/03/23 - 26/03/23	Sales 27/03/23 - 02/04/23	Sales 03/04/23 - 09/04/23	Average Sales per Period	Weeks Cover	Target Weeks Cover	Required Quantity	Qty. on Purchase Order	Qty. on Requisition Worksheet	Qty. on Inbound Transfer	Qty. on Assembly Order	Qty. to Requisition
1900-S	0	0	0	0	0	0	0	4	0	8	0	0	0	-8
1908-S	0	0	7	0	0	0.58333	-37.7	6	26	20	0	0	0	6
1936-S	0	0	0	0	0	0.75	133.3	10	0	0	0	0	0	0
1960-S	0	5	0	0	0	0.58333	3.4	8	3	0	0	0	0	3
1964-S	0	0	0	0	0	0	52	20	0	14	0	0	0	-14
1968-S	0	0	6	0	0	0.5	-30	4.5	17	0	0	0	0	17
1972-S	0	0	0	0	0	0.33333	0	6	2	0	0	0	0	2
1980-S	0	0	1	0	0	0.08333	-120	2	10	10	0	0	0	0
1988-S	0	0	0	0	0	0.16667	0	6.5	1	0	0	0	0	1
2000-S	0	0	0	0	0	0	52	0	0	0	0	0	0	0

Simple Stock Ordering Interface

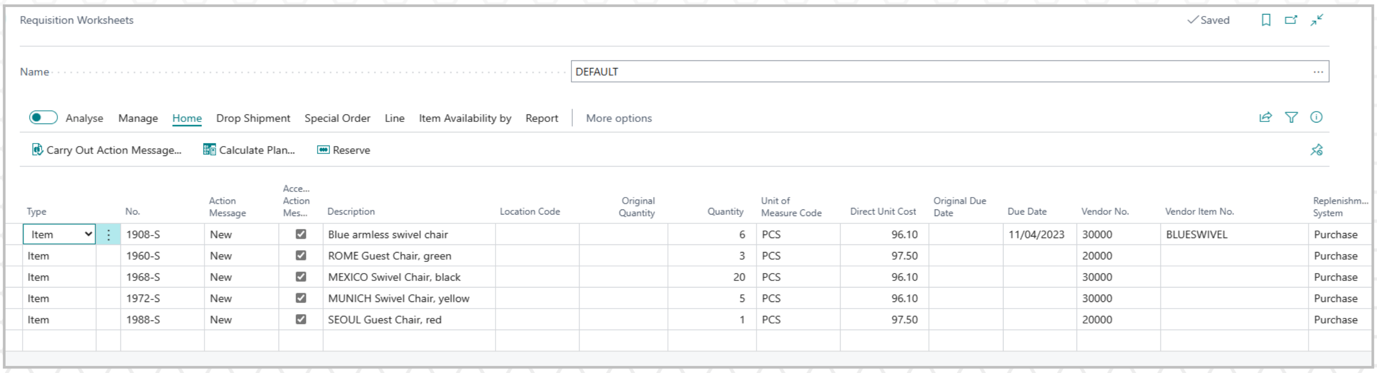
The user can set a target level of weeks cover stock for that item, and the system will then compare this to the level of weeks cover for that item and recommend the amount that needs to be ordered.

The target number of weeks cover can be set system-wide, or individually per stock item.

The system will even round up this figure to consider available pack sizes (e.g. if a product can only be ordered in packs of 5, 10, 20 etc.) and round up to the nearest full pack quantity.

Based on all the information they have available, the purchaser can either accept the advised amount, or change it if they judge that the advised amount is incorrect for whatever reason.

When the user is happy with the quantities to be purchased, the lines that have a positive quantity are transferred to a specified requisition worksheet. When the lines have been added to this sheet, standard Business Central functionality is then used to create purchase orders from this screen.



Type	No.	Action Message	Acce... Action Mes...	Description	Location Code	Original Quantity	Quantity	Unit of Measure Code	Direct Unit Cost	Original Due Date	Due Date	Vendor No.	Vendor Item No.	Replenishm... System
Item	1908-S	New	☑	Blue armless swivel chair			6	PCS	96.10		11/04/2023	30000	BLUESWIVEL	Purchase
Item	1960-S	New	☑	ROME Guest Chair, green			3	PCS	97.50			20000		Purchase
Item	1968-S	New	☑	MEXICO Swivel Chair, black			20	PCS	96.10			30000		Purchase
Item	1972-S	New	☑	MUNICH Swivel Chair, yellow			5	PCS	96.10			30000		Purchase
Item	1988-S	New	☑	SEOUL Guest Chair, red			1	PCS	97.50			20000		Purchase

Requisition Worksheet

Experts by Your Side

You don't need to be an expert to get a fantastic solution up and running within your business, but you do need to hire the best support.

Consulting a systems integrator is a valuable step when considering the implementation of a software solution, especially for complex projects. Synergy Technology have over 25 years' experience in designing and implementing solutions for businesses of all sizes, so we are well placed to help and advise you throughout your ERP journey.

Here are several reasons why you should consider working with Synergy Technology:

- **Expertise and Experience:** Synergy Technology has specialised knowledge and over 25 years of experience in designing, implementing, and managing complex IT solutions. We are well-versed in integrating different technologies to meet specific business needs.
- **Customisation and Tailoring:** Synergy Technology can help customise software solutions to fit your organisation's unique requirements. We can adapt existing software or integrate multiple solutions to create a seamless workflow.
- **End-to-End Solution Design:** We can design a comprehensive solution that addresses not only the software itself but also the hardware, network, security, and other components necessary for a complete and functional system.

- **Risk Mitigation:** We can help identify and mitigate potential risks associated with software implementation, such as compatibility issues, data migration challenges, and security concerns.
- **Project Management Expertise:** Synergy Technology have years of project management experience, and robust, proven systems to help plan, execute, and monitor the implementation process, ensuring that the project stays on track and within budget.
- **Integration Testing and Validation:** We perform rigorous testing to ensure that all components of the solution work together seamlessly and meet performance and reliability requirements.
- **Support and Maintenance:** Our application support service, SynergyCare, is designed around the clients and their individual users. Our consultants deliver a full range of tailored support coupled with exceptional responsiveness and accountability. By dealing with issues and queries quickly and efficiently, we will save you time and money, ensuring that your business applications run at optimal levels of performance at all times.
- **Scalability and Future-Proofing:** We can design solutions with scalability in mind, allowing for future growth and expansion without major disruptions or costly reconfigurations.
- **Compliance and Security Considerations:** We are knowledgeable about industry-specific compliance requirements and can help ensure that the implemented solution meets all necessary security and regulatory standards.

When engaging a systems integrator, it's important to clearly define your objectives, requirements, and expectations. Open communication and collaboration with the systems integrator are key to a successful implementation. Additionally, be sure to select a reputable and experienced systems integration partner with a proven track record of successful projects in your industry.

Why Choose Synergy Technology?

We seek a long-term partnership with our clients and work alongside them to help them get the best use of their solutions, to help attract, win and retain clients.

Since 1997, we have implemented hundreds of ERP and CRM solutions of differing complexity that have helped improve business performance by identifying opportunities for improvement and growth.

We have the scalability, knowledge and experience to offer the most relevant software solutions for your business needs and our highly responsive technical helpdesk works pro-actively to ensure any queries you have are resolved efficiently and effectively.

Give us a call today, and we can discuss how we can collaborate and share success together.

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