

# Creating a Reorder Analysis for Purchasing

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## Overview

Reorder Analysis is a tool in Order Time that analyzes data and determines what needs to be purchased. It allows you to identify the items that need to be purchased at a particular time, based on certain business rules, filtering and methodologies.

Depending on your business requirements, running a Reorder Analysis can be periodically or everyday.

## Creating and Running a Reorder Analysis

Reorder Analysis can be accessed from the **Purchasing** tab. Follow the steps below to create and run a Reorder Analysis.

1. Click the **Reorder Analysis** link.

The screenshot shows the Purchasing dashboard. On the left, there are navigation tabs: Home, Sales, Purchasing (active), Production, Rentals, Repairs, Warehouse, and Reports. Below the tabs are buttons for 'Create New' and 'Open Full List'. A 'Recent Records' list includes items like PC3001, 14, 213, and various PC assemblies. The main area contains two charts: a bar chart titled 'Net Receiving - Trailing 12 Months' showing data from Jan-22 to Dec-22, and a pie chart titled 'Net Receiving by Vendor - Trailing 12 Months' with a legend for 'PC Cases R US', 'PCs for All', and 'Other'. On the right, a 'Quick links' section lists various search and order management options, with 'Reorder Analysis' highlighted in a red box.

2. Click **+Purchasing**.

The screenshot shows the 'Reorder Analysis' form. At the top, there are navigation tabs: Purchasing (active), Production, Rentals, Repairs, Warehouse, and Reports. Below the tabs, there is a search bar and a '+Purchasing' button highlighted in a red box. The form has columns for ID, NAME, TYPE, LAST RUN ON, FINISHED ON, and ACTIONS.

3. **Demand Options** - Fill out the form in **Demand Options** tab.

- General
  - Name - Assign a name to your Reorder Analysis.
- Time Horizon - This allows you to project out a certain time range in months or weeks.
  - Select Interval - Choose either Month or Week
  - Number of periods - Enter a number for the number of periods you selected in Select Interval.

- Historical Data Basis - With the given value that you provided for the Time Horizon, this enables you to set up the basis for the historical data that you want to extract.
  - Rolling - If you select this, it means you want the system to give you an analysis immediately before the predetermined value given in the Time Horizon.
  - Comparative - It prompts the system to analyze data from the same time (i.e. value in Time Horizon) last year.
- Specific Locations - Select specific locations. Un-checking this means you are selecting *all* location.

Purchasing > Reorder Analysis > Reorder Analysis

### Reorder Analysis Purchasing

**Demand Options**   Item Filters   Custom

**General**

Name

**Time Horizon**

Select Interval

Number of periods

**Historical data basis**

Rolling

Comparative

**Specific Locations**

Specific locations

- Lead Time - This is a time span that measures the time it takes a supplier to deliver stock to your door. For example, if you placed a purchase order with your supplier on December 1 and received it December 15, the lead time is 14 days. **Note:** This includes weekends. This section asks you what kind of Lead Time you want to use.
  - Item Lead Time - This references the value that you entered in Items > Vendors tab > Lead Time shown in the Item Page Lead Time picture below.
  - Most Recent - This is the most recent purchase order for a specific item.
  - Average - This is the average quantity over the Time Horizon specified when setting up the scenario.
  - Default - This is a required field. The value entered in this field will be used by the system just in case you do not know what lead time to use, or the system cannot find the lead time or there is no data to use as basis.

## Lead time (days including weekends)

Item lead times

Most recent

Average

Default

- Item Page Lead Time
  - Go to Items > Vendors tab > Lead Time

Item - PC3000

ID	VENDOR	PART NO	VENDOR UPC	COST	MIN ORDER	ORDER INC	LEAD TIME	UOM	VENDOR UOM	ACTIONS
866	PC Cases R US	987654		5.00000			14	EA		🔍 🗑
888	PCs for All			7.00000				EA		🔍 🗑

4. **Item Filters** - Click the **Item Filters** tab and set your filters by selecting items to flag by. **Filtering** is a practical way to see only the data that you want displayed. The main filter is *Show items when 'Evaluation Quantity' is*.

Purchasing > Reorder Analysis > Reorder Analysis

Reorder Analysis - Reorder Analysis Today Purchasing

Demand Options **Item Filters** Custom

Show items when 'Evaluation Quantity' is :

## Evaluation Quantity

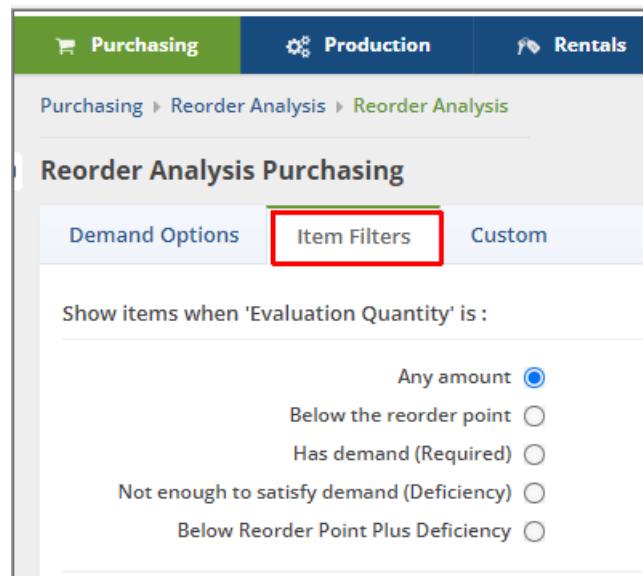
- Evaluation Quantity is what you have available today plus what you have on Purchase Order
  - You can see this on each Item by going to the Item > Inventory tab and viewing the Available quantity for each Location.

Inventory	Custom	On Order Detail	Required Detail	Transactions	Vendors	Related Items
HQ	Default					512
Edwards Computers - In house Storage	Default					10
HQ	Bin No. 1					-9
Consignment ABC	Default					18

- The quantity listed in the On Order row of the Summary section is the quantity on open Purchase Orders.

Home > Items > Item	
Item - PC3000 <span>EDIT</span> <span>Print Label</span>	
<b>General</b> Description MINI ITX WHITE Type Part Group Parts Group <a href="#">Change group</a> UOM EA Price 40.12 Std. Cost 5.00	<b>Summary</b> Available 480 Required 29 Net Available 451 On hand 566 Committed 79 In Transit 51 On order 28 TA-8/19/2022

- The Evaluation Quantity setting tells Order Time how you wish to determine when an item qualifies for reorder. There are different ways to filter out possible reorder candidates:
  - Any Amount - This means that you want the system to show you all items in every amount.
  - Below the Reorder point - This references the reorder point specified on the Item > Purchasing tab > Reorder Point field see **Reorder Point** below
  - Has demand (Required) - The 'Required' amount is the total number of the item on open Sales Orders plus unallocated components on Work Orders that are in 'waiting' or 'ready' status.
  - Not enough to satisfy demand (Deficiency) - This means that the quantity in stock is lower than the quantity specified in the Sales Order.
  - Below Reorder Point Plus Deficiency - Combines the Below the Reorder Point and Not enough to satisfy demand quantities.



- **Reorder Point** – You can find the Reorder point by going to Item > Edit Item > Purchasing tab.

The reorder point (ROP) is the level of inventory which triggers an action to replenish that particular item. It is a minimum amount of an item which a firm holds in stock, such that, when stock falls to this amount, the item must be reordered.

Home ▶ Items ▶ Item

**Item - PC3000**

**General**

Group Parts Group

Name PC3000

UOM Set EA-1

**General** **Purchasing** Notes Custom

**Purchase Description**

MINI ITX WHITE

Std. Cost 15.00

**Reorder Point** 200

Reorder Amount 500

Max Qty 700

You can also filter data and find what is likely to be of interest and useful to you by any of the following:

- Class - This references the Class specified on the: Item > General tab > Class field see **Find the Class** below
- Group - This references the Group specified on the: Item > Group see **Find the Group** below
- Vendors - This references the Vendor specified on the: Item > Inventory tab > Vendor column see **Find the Vendor** below

Class

Group

Vendors

All Vendors

Specific Vendor

Vendor

**Find the Class** - You can find the Class by going to Item > Edit the Item > the General tab

Home > Items > Item

Item - PC3000

General

Group Parts Group  
Name PC3000  
UOM Set EA-1

Other

Active

General Purchasing Notes Custom

Description  
MINI ITX WHITE

Price 40.12  
Weight  
Volume

Income Account Sales [Income]  
COGS Account Cost Of Goods [Cost of Goods]  
Asset Account Inventory [Other Current Asset]  
Bin Default  
Track lots or serial numbers   
Tax Code Tax  
**Class**  
Category Category

**Find the Group** - You can find the group by going to the Item page and looking in the General section

Home > Items > Item

Item - PC3000 [EDIT](#) [Print Label](#)

General

Description MINI ITX WHITE  
Type Part  
**Group Parts Group** [Change group](#)  
UOM EA  
Price 40.12  
Std. Cost 15.00

- You can find the Vendor by going to the Item page and clicking the Vendors tab

Home > Items > Item Created By Edward McDowell 4/4/2022

**Item - PC3000** EDIT Print Label

General		Summary	
Description	MINI ITX WHITE	Available	518
Type	Part	Required	31
Group	Parts Group <a href="#">Change group</a>	Net Available	487
UOM	EA	On hand	605
Price	40.12	Committed	80
Std. Cost	15.00	In Transit	33
		On order	0

Note Edit

Inventory Custom On Order Detail Required Detail Transactions **Vendors** Related Items Customer Aliases Item Image Attachments

ID	VENDOR	PART NO	VENDOR UPC	COST	MIN ORDER	ORDER INC	LEAD TIME	UOM
866	PC Cases R US	987654		15.00000			14	EA
888	PCs for All			7.00000				EA

1. **Include in Required** – This setting will tell Order Time to only include the selected order type in the Has demand (Required) filter shown above. If none are selected, all order types will be included in the Has demand (Required) filter

**Include in Required (if unselected, then all types are included)**

- Work Order
- Sales Order
- Repair Order

1. **Custom** – The Custom tab allows you to create and use custom fields on the Reorder Analysis
  - o To learn more about creating custom fields, you can visit this web page <https://help.ordertime.com/help/custom-fields>



## Reorder Analysis Purchasing

Demand Options

Item Filters

Custom

RA Custom Field

7. Click **Save**. Once saved, the Reorder Analysis runs. After the Finished On column shows a date and time then you can click the name to open the Reorder Analysis.

Purchasing > Reorder Analysis

Reorder Analysis

Name  Search

[Purchasing](#) [Production](#)

ID	NAME	TYPE	LAST RUN ON	FINISHED ON	ACTIONS
18	Reorder Analysis Today	Purchase Order	1/17/2023 05:38 PM	1/17/2023 05:38 PM	

Here is an example of what the Reorder Analysis will look like

Purchasing > Reorder Analysis > Reorder Analysis

Reorder Analysis - 18 [EDIT](#) [RE-RUN](#) [START ORDERING](#) [RECALCULATE REORDER POINTS](#)

General	Demand Options	Item Filters
Id 18 Type Purchase Order Name Reorder Analysis Today Start Date/Time 1/17/2023 05:38 PM Finished On 1/17/2023 05:38 PM	Select Interval Month Number of periods 1 Historical data Rolling basis Lead times (days including weekends) Item Default 14	Show Items when Any amount Evaluation Quantity is Group Class Vendor

ITEM	DESCRIPTION	UOM	AVAILABLE	ON ORDER	REQUIRED	HISTORICAL	VENDOR	COST	SUGGESTED	ETA	SAFETY STOCK DAYS	ACTIONS
BR0814	Jasper Bead 7.5 inch	EA	26	1	0	0	PC Cases R US	10.00	0	1/17/2023		
BR0825	Lace Bead 7.5 inch	EA	4	9	1	0	PC Cases R US	10.00	0	1/17/2023		
PC3201	ATX BLACK	EA	182	0	0	0	PC Cases R US	20.00	0	1/17/2023		
PC3200	White ATX Case	EA	10	20	8	0	PC Cases R US	10.00	20	1/17/2023		
PC3001	Mini ATX Case Black	EA	574	0	12	10	PC Cases R US	0.00	0	1/17/2023		
PC3000	MINI ITX WHITE	EA	551	0	26	24	PC Cases R US	15.00	500	1/17/2023		
PC3100	MICRO ATX WHITE	HR	98	20	0	0	PC Cases R US	8.00	0	1/17/2023		
PC3101	MICRO ATX BLACK	EA	479	0	0	0		8.00	0	1/17/2023		
PC3300	EATX WHITE	EA	40	0	0	1	PC Cases R US	45.00	0	1/17/2023		



You do not have to re-create your Reorder Analysis every time, all you have to do is **Re-Run** it to get fresh results.



**Attention:** On the Reorder Analysis if you click on Recalculate Reorder Points, the calculations will not run if you have removed the Daily Avg. or Safety Stock Days columns.

**Next:** *Using Reorder Analysis*